**AUTOMATION AND TECHNICAL SERVICES
(ATS) OPERATIONS COMMITTEE AGENDA
August 4, 2021– 10:00 a.m.
Video Webinar – ATS Ops**

https://blackgold.webex.com/blackgold/j.php?MTID=mc6c00e9d264a125f0788425caca2d8a3

Meeting number: 625 911 376

Join by phone
1-650-479-3208 Call-in toll number (US/Canada)
Access code: 625 911 376

* Item accompanies the agenda

1) **10:00 A.M. CALL TO ORDER** Kim Hunter, Chair, Presiding
   Recorder; Kristina Uvalle (BG)

2) **ADOPT AGENDA** —

3) ***APPROVE MINUTES** — July 7, 2021, by Kristina Uvalle (BG)

4) **CIRCULATION** –

   a) Circ Manual review - 07.28.21 Update

   b) Item Moratorium Update

   c) *eCard verbiage

   d) *Reading History verbiage

5) **ILL –**

6) **TECHNICAL** —

   a) Discuss/Review Aspen installation

   b) Training upgrade date August 27th - (Polaris 7.0)

7) **ONGOING DISCUSSION ITEMS**
   a) What Technology vendor(s) are you in discussions with for your library? ─
   b) Are any new installs of technology hardware planned? ─
   c) PCI Informational Minute

8) **BLACK GOLD UPDATE**

9) **ROUNDTABLE**

10) **ITEMS TO BE FORWARDED** — (To Council or other committees)

11) **AGENDA BUILDING**

12) **NEXT MEETING** — 10:00 a.m., Wednesday, September 1, 2021 – Webinar

13) **ADJOURNMENT**

Distribution — email notice of web-posted agenda packet (available at www.ats.blackgold.org): Karen Christiansen, PR; Marci Cunningham, SLO; Selena Fierro, SM; Joanne Britton SM; Dominic Keen, Donn Adolfo, Jonathon Cardenas, LM; Alain Dussert, Molly Wetta, SB; Marie Crusinberry GO; Justin Formanek SP; Kim Hunter, ATS; Matt Duhon, ATS; Glynis Fitzgerald, BG; Directors [File Copy];

BLACK GOLD
COOPERATIVE LIBRARY SYSTEM

**AUTOMATION AND TECHNICAL SERVICES
(ATS) OPERATIONS COMMITTEE MEETING
July 7, 2021– 10:00 a.m.
Video Webinar – ATS Ops**

Attending: Karen Christiansen, PR; Steve Kinsey, SLO; Selena Fierro, SM; Dominic Keen, LM; Alain Dussert, SB; Marie Crusinberry, GV; Brent Field, GV; Justin Formanek, SP; Kim Hunter, ATS; Matt Duhon, ATS; Glynis Fitzgerald, BG; Teresa Van Doren, BG; Kristina Uvalle, BG.
* Item accompanies the agenda

1) **10:03 A.M. CALL TO ORDER** Kim Hunter, Chair, Presiding
   Recorder; Kristina Uvalle (BG)

2) **ADOPT AGENDA** — 1St SF (SM) 2nd KC (PR) Approved.

3) ***APPROVE MINUTES** — May 5, 2021, by Kristina Uvalle (BG) 1St KC (PR) 2nd SF (SM) Approved.

4) **CIRCULATION** –

   a) *New patron Type "Welcome" (BA)

   AD (BA) reviewed his request to create a new patron type, "Welcome". Committee members viewed the prospective change positively but questioned whether the existing "Temporary" patron type could be used instead. When asked, KH (BG) stated the change would require a good deal of work on the SA end as it would require changing tables at each library. KC (PR) stated that if a SB patron wanted to check-out materials using the "Welcome" card, she would simply reissue them a temporary PR card. GF (BG) reminded everyone that State guidelines ensures that every patron have access to materials at any library within a cooperative. AD (SB) reported that both his library board and advisory council were asking for the "Welcome" designation on the card. A decision to change the existing "Temporary" patron name to "Welcome".

   b) *Branch specific homebound patron category for SBPL

   After discussing various scenarios, it was determined that SB would use the existing "Homebound" patron type. SB can ask to revisit later if problems occur.

   c) *UDF Field Changes/approval

   KH (BG) reviewed UDF field changes. Bay Scan cannot mask partial fields, staff would have to remove manually. Ops agreed to leave the field completely blank, and staff would fill in manually. KH (BG) will notify everyone once the change is complete.

   d) *UDF Field Circ Manual

   KC (PR) requested the lower-case x's be changed to all upper case. Ops approved circ manual change with the upper-case X in place.

   e) Circulation Manual review (Click here for most recent version)

   Additional changes: SF (SM) on page 19 – number allowed is 5. MC(GV) sent notes earlier in the day. Change to Goleta Valley Library. AD (SB) change student cards to 3 items. KC (PR) will submit a new replacement cost list. Circ Manual will be reviewed again at the August meeting for final approval.

   f) *New Item Moratorium – Discussion (sample included of SB procedure) (BG)

   GF (BG) reported that the Admin Council voted to restrict new publications for a 6-month period. AD (SB) reported that SB is in the process of setting up its templates. Currently they have gone back 90-days, but plan to go back 6-months. KC (PR) reported no retro changes but starting with new purchases in July. Not enough staff to work backward. SK (SLO) reviewed instructions

provided by Marci at SLO. BF (GV) – no retro changes. DK (LM) – Completed back 6 months. SF (SM) – working on it but no retro changes. JF (SP) - doing new orders.

5) **ILL –** N/A

6) **TECHNICAL** —

   a) *Discuss/Review Aspen installation

   KH (BG) reviewed current updates for Aspen. Kanopy records have been added but will need to update on quarterly basis. Testing needs to be done on item level holds; book covers for Library of Things can be customized but everyone needs to check copyright for any images used. Send images to Kim and/or Teresa and they can add them. The discussion turned to the current privacy policy. Ops reviewed the two examples provided in the packet. It was decided that KC (PR) would revise both the reading history and privacy policy for review. It was decided to change the fact "Reading Level" to "Audience". Format changes include Pre-loaded Audio to Launchpad, VOX books to Read Along. Novelist is not accessible until Aspen moves to Production. Search results numbers are getting more and more accurate. We are planning to move to Production on Friday. This means the database will reflect what is on the live site but does not mean that Aspen will be live.

7) **ONGOING DISCUSSION ITEMS**
   a) What Technology vendor(s) are you in discussions with for your library? ─ N/A
   b) Are any new installs of technology hardware planned? ─ N/A
   c) PCI Informational Minute – MD (BG) cautioned everyone to be aware of suspicious emails, phone calls and downloads. Contact your IT department if you suspect suspicious material. There has been an increase of ransomware and cyber-attacks lately.

8) **BLACK GOLD UPDATE**

   MD (BG) reported that Cenic is continuing to work on the installs for Los Alamos and Cuyama. GF (BG) reported that work continues Aspen, and delivery has started. KH (BG) reported she is working on year end changes, monthly reports, and semi-annual reports.

9) **ROUNDTABLE – N/A**

10) **ITEMS TO BE FORWARDED** — (To Council or other committees) – 4f

11) **AGENDA BUILDING** – Circ Manual

12) **NEXT MEETING** — 10:00 a.m., Wednesday, August 4, 2021 – Webinar

13) **ADJOURNMENT** at 1:08 pm. 1St MC (GV) 2nd AD (SB) Approved.

TOPIC:	eCard verbiage to be revised	PRIORITY LEVEL: (1-Low 3 – High)	☐ 1 ☐ 2 ☒ 3
SUBMITTED BY:			
TYPE OF ITEM:	☐ For Discussion ☒ For Recommendation ☐ Other: _____		

BACKGROUND STATEMENT

| BACKGROUND: *Describe why you are bringing this item before the committee. What problem are you trying to solve?* | We have discussed revising the verbiage on the eCard registration page in Aspen. We can keep the verbiage as it currently is (#1) or change it—version #2 has been suggested:

#1
Residents of the Black Gold Cooperative member libraries service area can now get immediate 24/7 access to online services without having to visit a library. Your eCard will allow access to:
- Bestselling eBooks and eAudiobooks from OverDrive and hoopla
- Music, television programs and movies from hoopla
- eBooks from Enki

Complete the online application to get your eCard number now. If you already have a public library card from Blanchard Community Library, Santa Barbara Public Library, Goleta Valley Library, Lompoc Public Library, Santa Maria Public Library, San Luis Obispo County Library or Paso Robles City Library, you do not need an eCard. Your current library card number can be used to access online resources and place holds. If you live outside the Black Gold Cooperative member libraries service area but are a resident of California, you will have to visit a member library to obtain a card.

If you would like to check out physical materials from your public library, go to the nearest branch with a photo ID and present your eCard number to a staff member to be issued a library card with checkout privileges. If you have any problems getting an eCard with this form, please visit your nearest branch with a photo ID to obtain a library card.

Please be aware that if you change your eCard to a regular library card and you use OverDrive, you will need to merge your accounts to retain access to your holds and borrowed items. To merge your accounts, contact Overdrive via their support form with both card numbers. If you do not have both card numbers, contact Library Staff.

#2

Residents of the Black Gold Cooperative Library System service area can now get eCard access to library services! (Residency is determined by zip code for these library jurisdictions: Blanchard Community Library, Santa Barbara Public Library, Goleta Valley Library, Lompoc Public Library System, Santa Maria Public Library, County of San Luis Obispo Public Libraries, and Paso Robles City Library). Downloadable eBooks, audiobooks, music, and movies, and access to informational and educational resources are available for eCard users. Holds can be placed on materials throughout Black Gold; once they arrive at your local library, simply bring a picture ID with you to change your eCard into a library card with full privileges. To take advantage of eCard benefits today, fill out the form below. If you have questions or concerns, please call your nearest Black Gold library for assistance. |

	OUTCOME(S)
DESIRED OUTCOME(S): *Describe your desired outcome(s)*	Review and discuss both versions and decide on a final version to be put in Aspen. Version #1 is the current version we have in the PAC. If we keep this version, the Spanish translation will appear in a link as it currently is in the PAC. Version #2 is an alternate version coming in at less than 1000 characters. Mark at ByWater explained that in order for the Aspen software to translate this for us and show in Spanish when we click on "Espanol", the statement should be less than 1000 characters.
OTHER COMMENTS:	

TOPIC:	Reading History verbiage to be revised	PRIORITY LEVEL: (1-Low 3 – High)	☐ 1 ☐ 2 ☒ 3
SUBMITTED BY:	Glynis Fitzgerald		
TYPE OF ITEM:	☐ For Discussion ☒ For Recommendation ☐ Other: _____		

BACKGROUND STATEMENT

BACKGROUND: *Describe why you are bringing this item before the committee. What problem are you trying to solve?*	We've had suggestions that we change the verbiage of "My Reading History" in Aspen. The two versions are below: #1 The library takes the privacy of your library records seriously. We do not keep track of what you borrow after you return it unless you choose to enable "My Reading History." This feature allows you to track items you check out. You may start or stop using it at any time, as well as delete any or all entries in your reading history. Library staff does not have access to your reading history without your permission. However, it is subject to all applicable local, state, and federal laws, and under those laws could be examined by law enforcement authorities without your permission. If you wish to enable "My Reading History" please click the button below. #2 By choosing to enable "My Reading History," you are able to access a list of items that you have checked out – even after you have returned them – allowing you to keep track of titles you are following in series or items you may be using in research that you want to access in the future. Each item may be kept or deleted from the list, and My Reading History may be turned on and off as you desire (the list restarts from the point where it is reactivated). The library takes your privacy seriously; staff will not access your reading history without your permission unless required by a court order.

OUTCOME(S)

DESIRED OUTCOME(S): *Describe your desired outcome(s)*	Review and discuss both versions and decide on a final version to be put in Aspen.
OTHER COMMENTS:	