



Joint Automation Project Manager's Report

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Since our May Council Meeting, Joint Automation has continued to make progress across several key initiatives. Hardware procurement and deployment remain a major focus, with the 2025 year-end order nearly complete and the first 2026 group order arriving on schedule.

The team has also completed extensive testing of OverDrive eContent integration with Vega Discover and is preparing recommendations for the Operations Committee. Based on initial findings, maintaining eContent records within Polaris appears to provide the best balance of staff workflow, patron discovery, and statistical reporting while Clarivate continues addressing Showcase-related issues.

Preparation is underway for a Polaris 8.1 upgrade, which will bring significant enhancements to Leap and other staff tools. In addition, JA continues to support long-term strategic initiatives, including Vega Mobile implementation planning, website migrations from the legacy GoDaddy platform, router replacements, technology education efforts, and member library planning initiatives.

Cybersecurity remains a priority area. Recent efforts included deployment of ThreatDown phishing protection to staff workstations, successful mitigation of a malicious email campaign, ongoing KnowBe4 security awareness training, and member outreach regarding emerging scams affecting libraries and businesses.

Overall, the team remains focused on improving infrastructure reliability, enhancing library technology services, strengthening security, and advancing strategic projects that support our member libraries.

Hardware Procurement & Deployment

2025 End-of-Year Hardware Order

The 2025 year-end hardware order is nearing completion. Our vendor has successfully corrected warranty configurations for all received equipment and, as part of that process, upgraded all eight laptops to five-year warranties at the original three-year warranty pricing. This resulted in approximately **\$1,600 in savings** for participating libraries.

The vendor also located and shipped a replacement for Middleburgh's missing Small Form Factor PC. The replacement has since been imaged and ready to be placed into service.

Jim Baker completed equipment installations at The Richards Library in Warrensburg in preparation for its reopening. With that project completed, only Middleburgh's installation remains outstanding from the 2025 order. Joint Automation is currently working with the vendor to finalize invoicing and warranty-related payments.

2026 Group Hardware Order

The first group hardware order of 2026 continues to progress smoothly. All Apple devices have been received, along with 26 HP Small Form Factor PCs and one HP laptop.

HP notified us that the originally quoted All-in-One model was no longer available. Working with our HP representative, the order was recreated using an upgraded model at a lower price, generating an additional **\$190 savings per unit** across the 11 All-in-One systems ordered.

Dave MacFarland and Jim Baker are currently imaging equipment and coordinating installation schedules with participating libraries.

Strategic Initiatives & Innovation

Vega Discover eContent Evaluation

Throughout June, Jason Thomson and I worked closely with Jill Ryder, Sharon O'Brien, and Clarivate to evaluate OverDrive eContent integration with Vega Discover. Using a test environment connected to the Polaris training system, the team focused on:

- Assessing patron and staff experiences
- Comparing Discover integration benefits against the current Polaris workflow
- Identifying opportunities to improve resource discovery

As testing concludes, we are compiling findings and preparing a recommendation for the Operations Committee.

Based on the evaluation conducted thus far, our preliminary recommendation is to continue maintaining OverDrive eContent records within Polaris while preserving the existing integration. This approach allows staff to search physical and electronic materials through a single system and keeps circulation statistics centralized within Polaris.

While moving OverDrive records to Vega Discover would address some current Showcase limitations, similar issues exist with Hoopla content. Clarivate currently requires ingestion of Hoopla's entire catalog of more than one million titles, making implementation impractical until a proposed enhancement allowing selective title imports becomes available.

To support this evaluation, Joint Automation distributed a member-library survey to gather feedback from both staff and patrons. The responses provided valuable insight and have been incorporated into a feedback document that is being shared with Clarivate's product team.

Vega Mobile

Planning for Vega Mobile remains on hold pending completion of the Polaris upgrade. Once Polaris 8.1 is implemented, Joint Automation will begin work on the mobile app deployment.

Polaris & System Development

Jason Thomson is currently coordinating with Clarivate Support to schedule our upgrade to **Polaris 8.1**.

This upgrade will provide numerous enhancements and workflow improvements, particularly within Leap. With our Discover testing wrapping up, we intend to upgrade the training environment as quickly as possible so staff can begin:

- Evaluating new features
- Testing workflows
- Developing training materials
- Reviewing potential configuration changes with the Operations Committee

Additionally, I was selected to serve on the **Polaris Working Group** through the Innovative Users Group (IUG) Member Exclusive Enhancement Process.

The Working Group assists with evaluating enhancement requests submitted by Polaris users and helps determine which proposals advance to community voting. Enhancements selected through this process are generally scheduled for implementation within 12 months. Participation provides us with

greater visibility into future product development and an opportunity to help influence the direction of Polaris.

Planning & Member Engagement

I was invited to participate in four rounds of SALS strategic planning meetings. These discussions provided valuable feedback regarding member library needs and highlighted several opportunities where Joint Automation may be able to expand services and support in the future.

Web & Systems Modernization

Jason Thomson continues migrating library websites from the legacy GoDaddy hosting platform. At this point, only sites utilizing custom domains remain to be migrated.

Operations & Member Support

Between ongoing project work and daily support operations, the Joint Automation team continues to provide technical assistance across the system.

Recent project accomplishments include:

Annual Reports

Jason successfully configured and monitored the June and July annual report processes for libraries whose fiscal years concluded during those reporting periods.

Router Refresh Project

Chris Mundell continues deploying new router hardware throughout the system and has now completed more than half of the planned installations.

Loaner Mac Mini Program

Dave MacFarland is leading a new initiative that will allow member libraries to borrow and evaluate a Mac Mini prior to making purchasing decisions. An announcement regarding availability will be distributed to member libraries next week.

Tech Blast Program

To provide more proactive technology education, Dave is expanding the Tech Blast quick-help series from periodic releases to a monthly schedule.

The most recent Tech Blast focused on OneDrive folder colors and how they can be used to improve organization and workflow efficiency. Future topics will continue to be developed based on common support requests and member feedback.

Security & Risk Management

ThreatDown Web Protection

Joint Automation recently enabled ThreatDown phishing protection across all staff workstations. The enhancement helps protect users from:

- Malicious phishing websites
- Search URL hijacking attempts
- Online scams and fraudulent content
- Advertising-based threats
- Tracking scripts and other unwanted web activity

This additional layer of protection strengthens the organization's cybersecurity posture and helps ensure a safer browsing experience for staff.

Malicious Email Campaign Prevention

In June, Chris identified an email containing a malicious SVG attachment and immediately blocked the sender's IP address. Users who received the message were promptly notified and instructed to delete it.

Following the incident, SVG attachments were blocked at the Barracuda email gateway. During the subsequent weekend, a significant number of similar malicious messages were successfully intercepted before reaching user inboxes.

Joint Automation would like to thank staff who continue to report suspicious messages through the Phish Alert button, helping improve filtering effectiveness across the organization.

KnowBe4 Security Awareness Training

Chris reports that **more than 90% of staff members** have already completed the current KnowBe4 cybersecurity awareness training.

Reminder notices will be sent to library directors next week for any staff members who have not yet completed the training requirements.

Relay Wire Fax Scam Awareness

A member library recently reported receiving a suspicious fax. After review, Chris identified the document as a fraudulent business-to-business invoice scam associated with an organization calling itself **Relay Wire**.

These invoices typically request payment of approximately **\$389** for a fictitious fax infrastructure service and are designed to resemble legitimate business invoices.

Joint Automation has advised libraries to:

- Not submit payment
- Report incidents through the BBB Scam Tracker
- Avoid contacting the sender
- Block the originating fax number and securely dispose of the document

Prompt reporting by library staff allowed Joint Automation to notify member libraries and raise awareness of the scam before others could be affected.