

SWAN



Plot your course

2023 Annual Conference

Welcome to SWAN Expo's 6th year



Access to WiFi:

Connect to: **MVConferenceCenter**
Passcode: **RegisterNow1**



How to access the event
schedule:

Visit
support.swanlibraries.net/swanexpo



What's for lunch?

Visit
support.swanlibraries.net/swanexpo



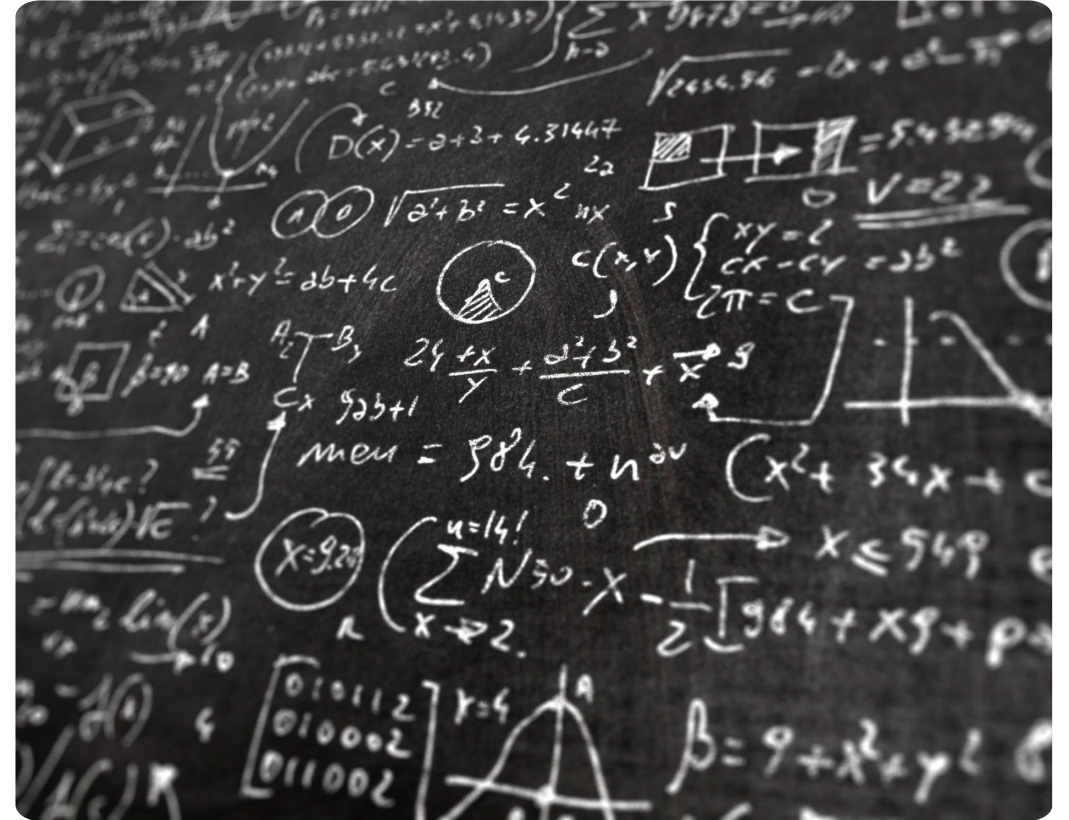
Hold on to your raffle ticket until the end of the event



Reminder: MVCC is a smoke-free campus

State of SWAN


SWAN Expo 2023



A large, solid orange circle is positioned on the left side of the slide, partially overlapping the white background. It contains the title text in white.

The Purpose and Vision of SWAN Expo

To create a gathering for the SWAN Membership and friends sharing expertise and big ideas, striving to bring best practices back to our colleagues

A decorative graphic consisting of four thick, yellow, curved dashes arranged in a curved path from the bottom right towards the center of the slide.

Special thanks to presenters

Amanda Musacchio

Christy Eyre

Gail Smith

Jenny Cuevas

Jessica Frazier

Josephine Tucci

Joy Anhalt

Julie M Milavec

Kathryn O'Connor

Laura Folliard

Lauren Maxwell

Meghan Moran

Melissa Siddiqui

Michelle Kurczak

Rebecca Bartlett

Sandra Leyva

Sarai Barrios

Susan Reynders

Stacey Peterson

College of DuPage

Linda Sokol Francis Brookfield Library

Warrenville Public Library District

Addison Public Library

Bloomington Public Library

Batavia Public Library District

Tinley Park Public Library

Downers Grove Public Library

HR Source

Westmont Public Library

Geneva Public Library

Oak Lawn Public Library

Oak Brook Public Library

Messenger Public Library of North Aurora

LaGrange Public Library

Alsip-Merrionette Park Public Library District

Eisenhower Public Library District

Mt Prospect Public Library

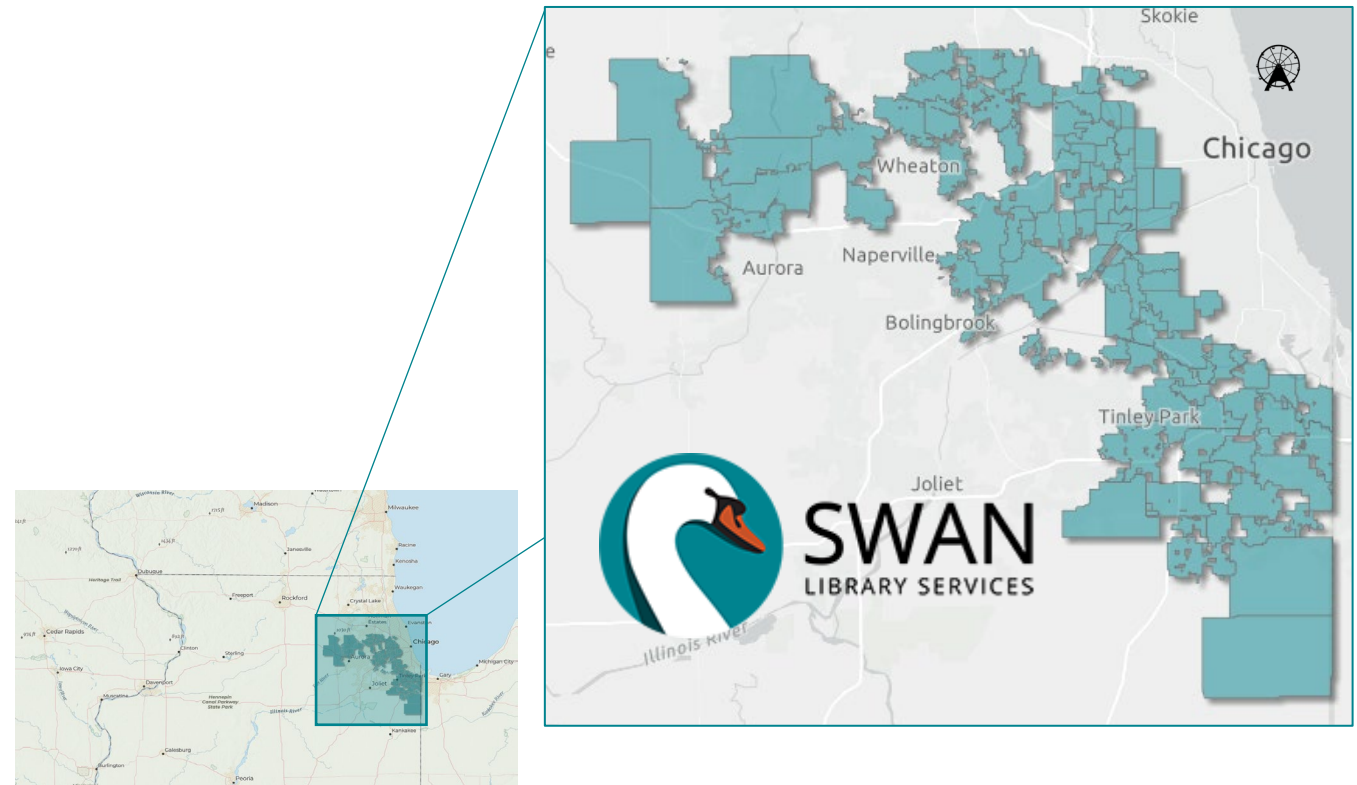
Batavia Public Library District

SWAN Consortium

Who We Are

Today 101 libraries of all types

- 96 Public Libraries
 - 2 Academic
 - 2 Special
 - 1 School
-
- 1.5 million titles
 - 8.3 million items
 - 1 million users
 - 13 million annual circulation
-
- 1.3 million ILL (FY23)
 - 900,000 reciprocal borrowing (FY23)
 - 240,000 reciprocal borrowing transactions outside of the library membership



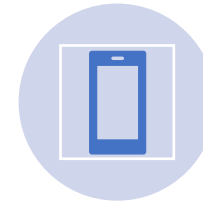
SWAN Membership includes



Library Services Platform

- Aspen Discovery
- BLUEcloud Analytics
- BLUEcloud Commerce
- BLUEcloud Mobile
- BLUEcloud Staff
- BLUEcloud Staff
- EBSCO Discovery Service
- eResource Central
- MobileStaff
- EBSCO Novelist Select
- Eduserv OpenAthens
- OCLC WorldCat Discovery, ILL
- SirsiDynix Symphony Web Services
- SirsiDynix Symphony WorkFlows
- Unique Management MessageBee
- Virtual Private Network

SWAN Provided Services



CENTRALIZED NOTIFICATION



CENTRALIZED BILLING



CENTRALIZED CATALOGING



CENTRALIZED E-COMMERCE



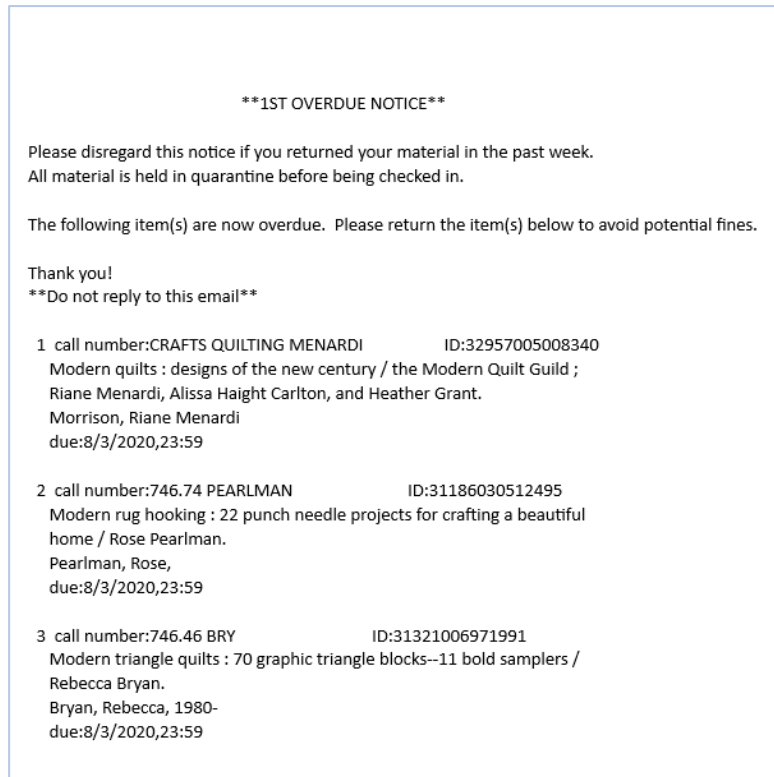
CENTRALIZED OCLC CONFIGURATIONS



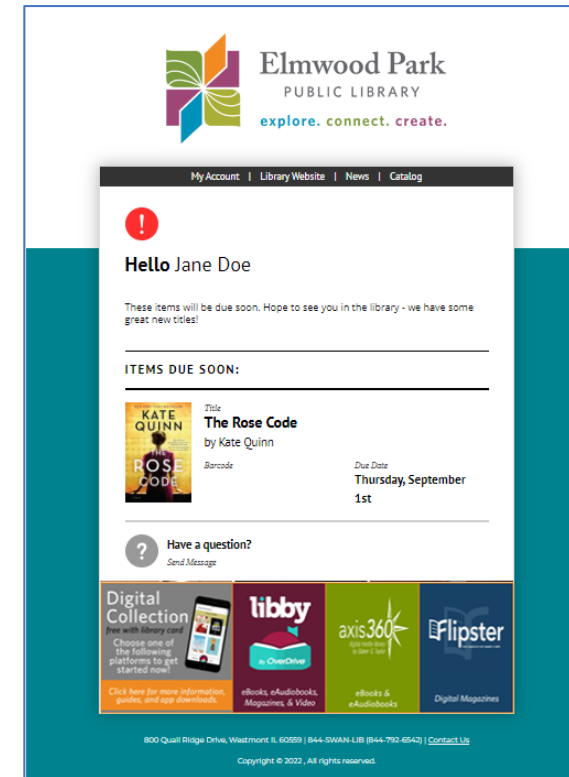
TRAINING & SUPPORT

Improved User Experience: MessageBee email notices debuted 2023

Old email notice



New! MessageBee email



MessageBee added language options for all member libraries

Email & SMS

- English
 - Spanish
 - Polish
- You have overdue library items.
 - Tiene artículos de la biblioteca vencidos.
 - Masz zaległe materiały w bibliotece.

See “MessageBee in Practice in Libraries”
session 1 p.m.

NEW: Spanish Translations in Aspen Discovery

- Shoutout to Val at Villa Park!
- Working on a long-term project to improve Spanish translations and add Polish translations
- Interface terms: Item statuses, formats, calls-to-action



The screenshot shows a library catalog entry for the book "Mil veces hasta siempre" by John Green. The book cover is displayed on the left, featuring the title in large, stylized letters and the author's name "JOHN GREEN" below it. Below the cover are five stars. To the right of the cover, the title "2) Mil veces hasta siempre" is shown in a blue font. Below the title, the author "Green, John" and language "Español" are listed. A table of contents or format options is shown with a "Libro" button highlighted in orange and "Otras ediciones" in a dark blue button. A "Disponibile en otra biblioteca" button is also present, along with a link to "¿Dónde está?". A "Solicitar Título" button is located below these options. A synopsis in Spanish follows, starting with "Aza nunca tuvo intención de investigar el misterio del multimillonario fugitivo Russell Pickett. Pero hay una recompensa de cien mil dólares en juego, y su mejor y más atrevida amiga, Daisy, no está dispuesta a dejarla escapar. Juntas, Aza y Daisy recorrerán la corta distancia y las enormes diferencias que les separan del hijo de Russell Pickett, Davis. Aza lo está intentando. Trata de ser una buena hija, una buena amiga, una buena estudiante...". At the bottom, there are buttons for "Más Información" and "Agregar a la Lista", a "CONTAR" button, and social media icons for email, Twitter, Facebook, and Pinterest.

2) Mil veces hasta siempre

Autor Green, John
Lenguaje Español

Libro **Disponibile en otra biblioteca**
Otras ediciones ¿Dónde está?

Solicitar Título

"Aza nunca tuvo intención de investigar el misterio del multimillonario fugitivo Russell Pickett. Pero hay una recompensa de cien mil dólares en juego, y su mejor y más atrevida amiga, Daisy, no está dispuesta a dejarla escapar. Juntas, Aza y Daisy recorrerán la corta distancia y las enormes diferencias que les separan del hijo de Russell Pickett, Davis. Aza lo está intentando. Trata de ser una buena hija, una buena amiga, una buena estudiante..."

Más Información Agregar a la Lista

CONTAR    

Aspen development highlights past year: 15 of 24 features originated from SWAN

63%

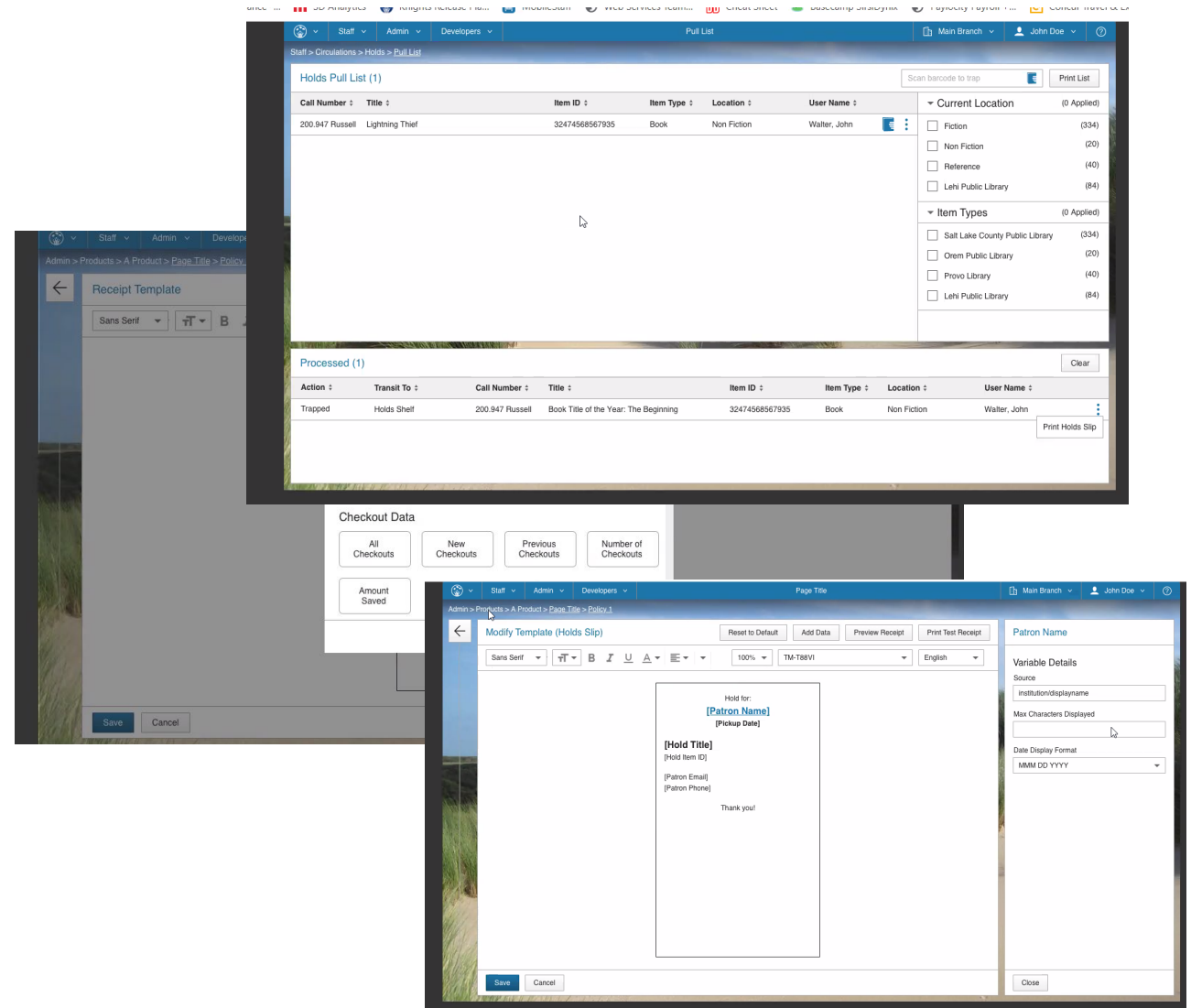
- Format improvements
 - 590 field as a fallback*
 - New video game formats*
 - Additional Playaway formats*
 - Board and popup book formats
- Separate grouped works for language
- Accessibility improvements
 - New closed caption icon*
 - Color contrast validation*
- Search improvements
 - Better handling of special characters in terms*
 - Better handling of stop words*
 - Case insensitive searches*
 - Search the 901 field for title control numbers*
 - Search deprecated subject headings in the 903 field*
 - Ability to hide subject terms*
- Masquerade mode vs. Patron placed hold tracking*
- Integration improvements
 - Optional exclude Hoopa records with copies from Overdrive
 - LibCal and LibraryCalendar integration
- Customization & layout
 - Browse categories masonry or grid view
 - Shadows on cover images
 - Full-width header and footer
 - Display of multiple editions for mobile devices*
 - My account menu improvements*
- "New" flag for titles added in the last week
- Display preferred name in Aspen*
- Linked account improvements

*SWAN request

See "Aspen for Power Users" session 2 p.m.

BLUEcloud Circulation - in development

- Replacement interface for WorkFlows
- 2022 – 2023 features include
- Holds Pull List actions
- Checking out item without checking in behavior
- SWAN BLUEcloud R&D
- Circulation Advisory



BLUEcloud Circulation development recap

20%

- SMS Information
- Edit Pin
- Delete Patron
- Larger font Transit label
- Holds Pull List
- **Adding Bills***
- Modifying Due Date
- Copy Patron
- Save Patron Search
- Style update for patron alert modals
- OK button renamed to “Acknowledge”
- **Check for Duplicates***
- Marking Items Claims Returned
- Trap holds within Holds Pull List
- **Filter Holds Pull List by pickup library***

*SWAN request

TRAINING: SWAN Webinars



94 Webinars total

Topic	Count
Acquisitions	1
Aspen Discovery admin	6
Aspen Discovery: collection	5
Billing	2
BLUEcloud Staff: collection	3
Cataloging	3
Circulation	9
E-Resources	3
ILL Bootcamp	7
Interlibrary Loan	6
Membership Updates	11
Migration Training	11
Panels & Presentations	2
Reports & Stats	6
Search & Discovery	2
Serials	3
SWAN101	11
Technology	3

Training: Online Learning Management System

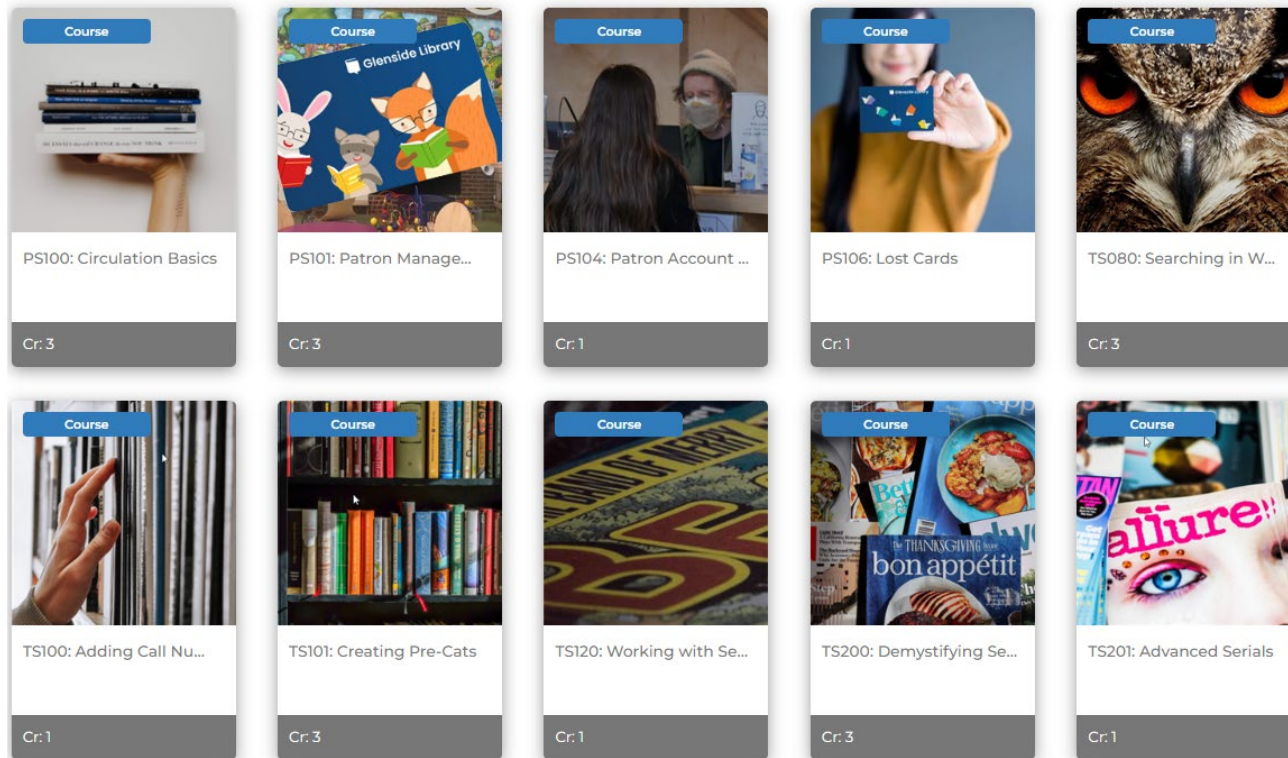
The screenshot shows a course page titled "PATRON ACCOUNT BLOCKS & NOTES" by Crystal Vela. The main heading is "Patron Account Blocks & Notes" with buttons for "RESUME COURSE" and "DETAILS". Below the heading is a description: "This course will acquaint staff with the patron blocks and notes including processing special notes." A table of contents is listed at the bottom:

Introduction	✓
Patron Blocks	✓
Patron Notes	✓
Summary	✓

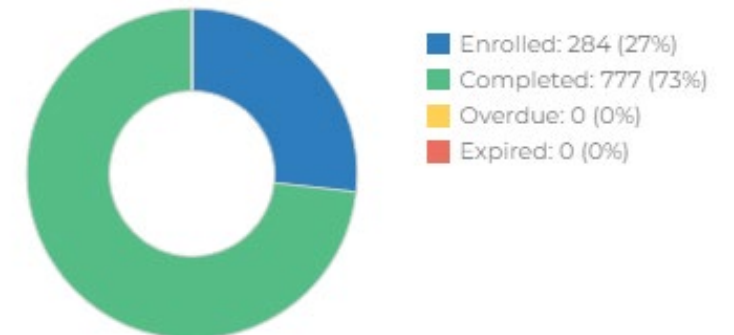
The screenshot shows the SWAN Library Services home page. The header includes "CATALOG" and "SIGN IN" with a notification badge showing "2". The main content area features the text "100 Libraries Learning together" and the SWAN logo. A prominent button says "1 New? Create an account". Below this are three main navigation buttons: "Connect with Colleagues", "View the Online Course Catalog", and "SWAN Recorded Training Sessions".

Online Learning: growing steadily

Now has 16 courses (6 added past year)
Past year registered users grew from 170 to 405



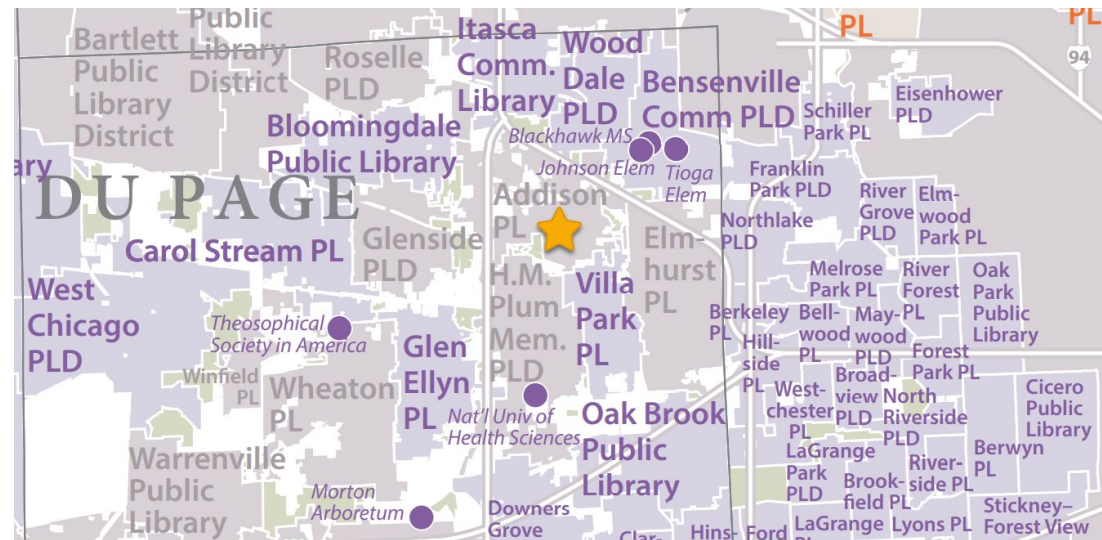
COURSE ENROLLMENTS (1,061)



SWAN Growth: Addison Public Library becomes 101st member library



Go-live November 2023!



Updated SWAN support site: News, Events, Support, Topics, Get Involved

The screenshot shows the top navigation bar with links for Catalog, L2 Calendar, and Log in. The SWAN Library Services logo is in the top left. Below the logo is a search bar and a navigation menu with links for News, Members, Meetings & Trainings, Documentation, Help, and About. A teal banner reads "Welcome to SWAN Support" with a link to "Log in to view help, trainings, and more. New to SWAN? Get started." Below this is a "Featured" section with buttons for "SWAN Expo 2023" and "MessageBee". The "News" section lists several articles with dates and times. The "Events" section lists upcoming events with dates and times. A "Full Calendar" link is at the bottom.

NEWS

EVENTS

The screenshot shows the "Contact SWAN Support" section with a yellow background and a "SUPPORT" arrow. Below it is the "Topics" section with a "DOCS" arrow. The topics are arranged in a grid:

- Accounts & Logins**: Login and access WorkFlows, BLUEcloud, and more.
- Acquisitions**: SWAN supports two Acquisitions products: BLUEcloud Acquisitions and Symphony Acquisitions.
- Cataloging**: Create pre-cats, find local cataloging practices and policies, and learn about the scripts and processes running on our shared catalog.
- Circulation**: Learn about daily circulation duties and functions, including patron management, checkin and checkout functions, holds, mobile and offline circulation, and the Outreach module.
- Discovery & User Experience**: Learn about the SWAN online catalog, mobile app, and patron-facing services.
- E-Resources**: Find information about databases, authentication, and electronic resource integration in the catalog, including eBook and streaming platforms.
- ILS Configuration**: SWAN uses SirsiDynix' Symphony Integrated Library System (ILS). Learn about configuration settings, how they impact your library and support your circulation policies, and configuration files to help identify your library's settings.
- Interlibrary Loan (ILL)**: Over 99% of SWAN libraries' loan requests are handled between SWAN libraries. The other, less than 1%, can be processed through several methods, including OCLC WorldShare ILL.
- Reports & Statistics**: Download monthly statistics and learn about BLUEcloud Analytics and on-demand reports in Symphony Workflows.
- Research & Pilot Services**: SWAN engages in a variety of research and discovery projects, with a goal of identifying new tools and services that will benefit our membership.
- Serials**: Review SWAN practices for managing serials and learn how to use the Serials module.
- Technology & IT**: Download software, find recommended hardware, and determine supported third-party vendor integrations.

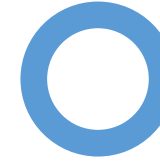
The screenshot shows the "Get Involved" section with a "CONNECT" arrow. It features four colored boxes:

- Forums** (blue): Sign up for the SWAN Community Forums to network with your colleagues.
- User Groups** (orange): Join a SWAN User Group to share ideas and influence decisions in the consortium.
- Newsletter** (purple): Sign up for the SWAN monthly newsletter to stay informed.

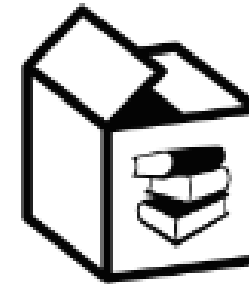
Below these is a "Find a Library" section with a "Library Lookup" input field and a "Find Library" button. The footer contains the SWAN Library Services logo, contact information (800 Quail Ridge Drive, Westmont, IL 60559, 844-SWAN-LIB, https://www.swanlibraries.net), and a list of navigation links: News, Members, Meetings & Trainings, Documentation, Help, About, Joining SWAN, Member Directory, Patron Privacy Policy, and Accessibility Statement.

Strengthen the collective identity: SWAN Community Forums

- Launched 2019 to connect library staff
- 552 staff now registered
- Peer to peer networking
- User group discussions, agenda building



 **Acquisitions**



E-Resources

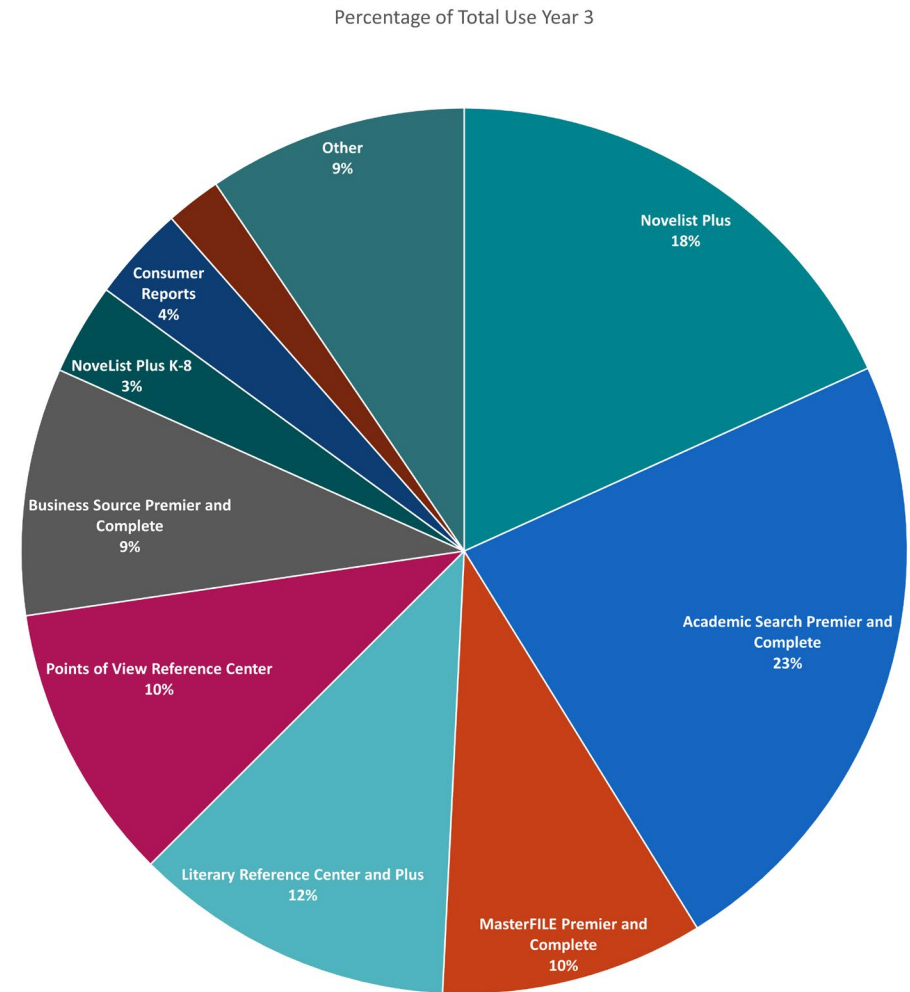


Cataloging



Group-purchase: EBSCO Database Usage

- 84 public libraries participating
- Database usage saw a 32% increase in Year 3
 - Year 2 saw a 54% increase from year1
- Academic Search databases saw most usage in Year 3
- "Big deal" allows access to more databases for about the cost of Novelist, Consumer Reports



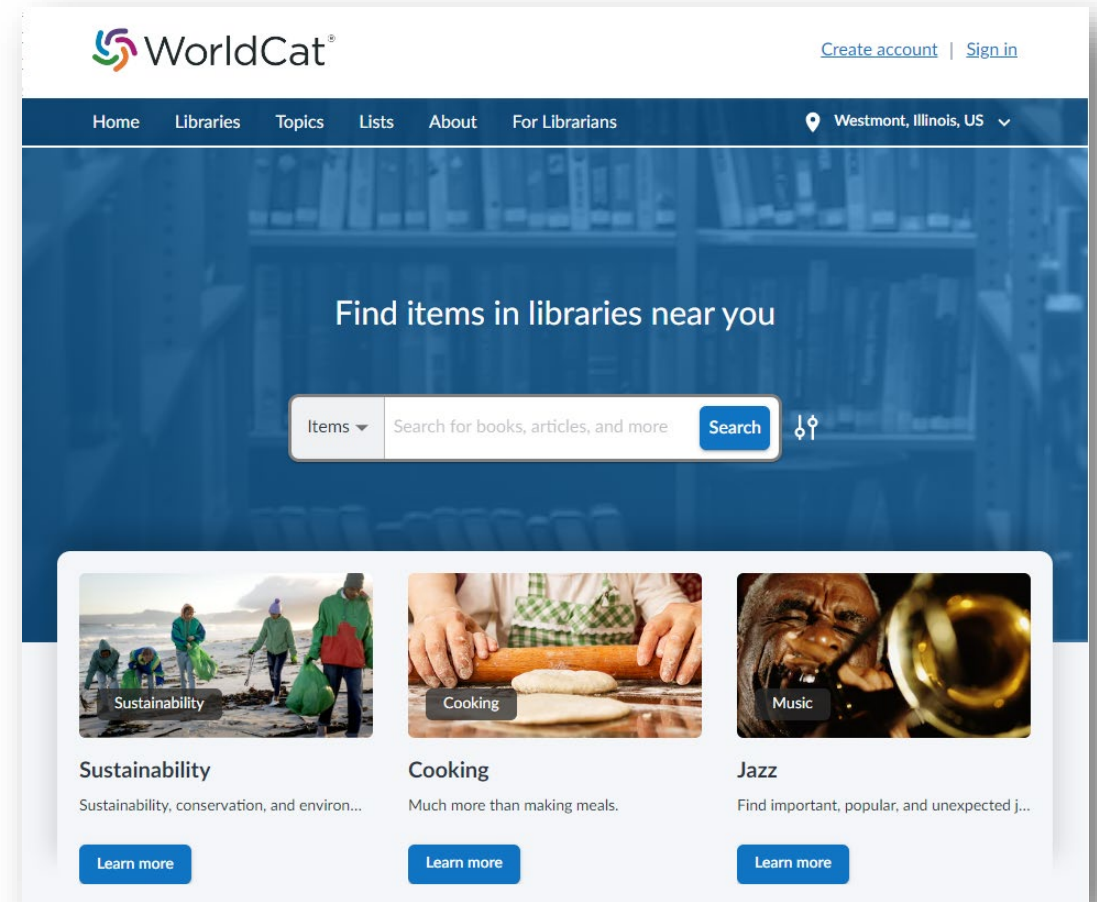
Better User Experience: Statewide Catalog

Reset of all library holdings in WorldCat in 2022

New WorldCat 2022 launched: gateway for ILL requests with links to our Aspen Discovery

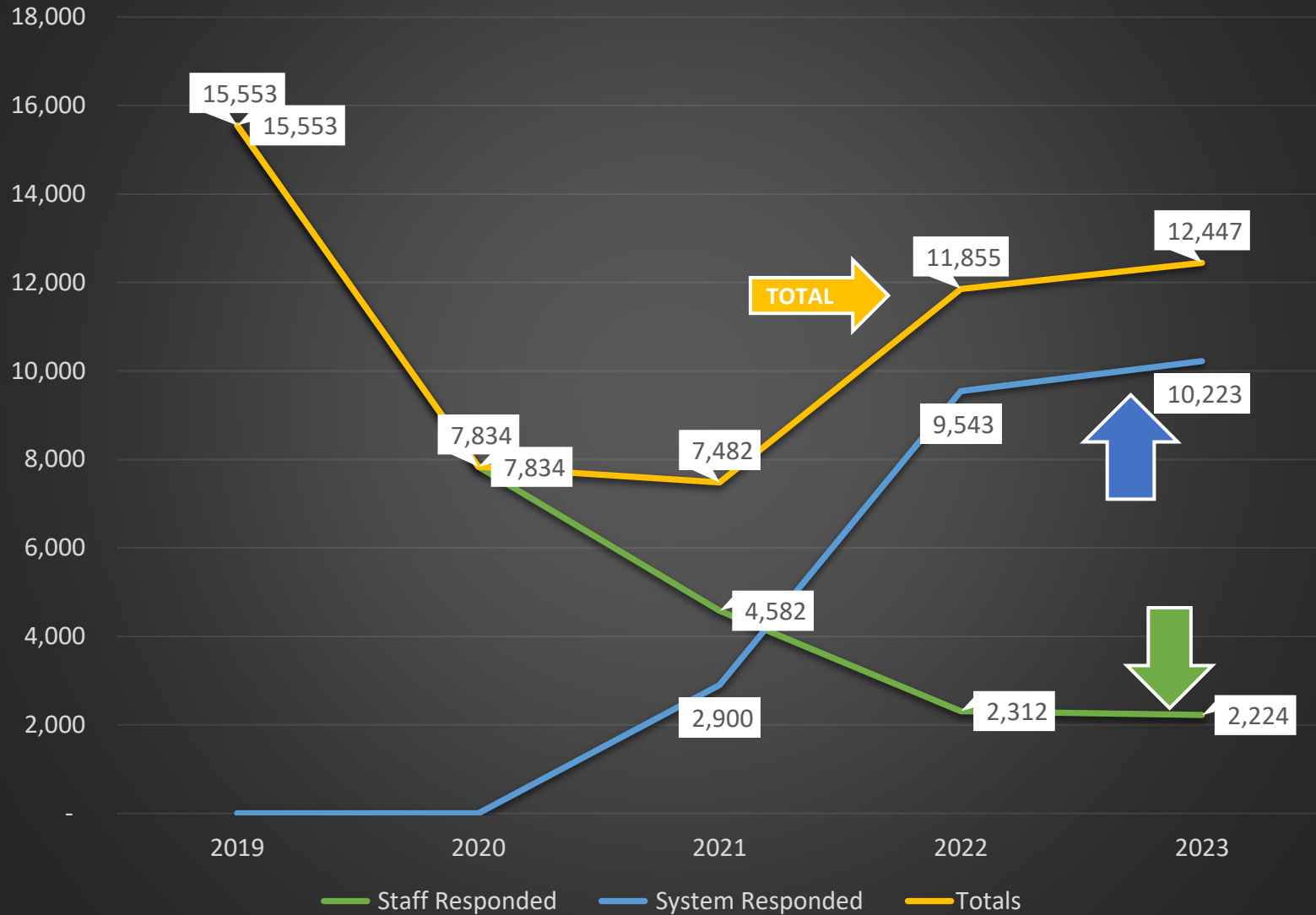
SWAN training on WorldShare ILL, WorldCat Discovery & WorldCat.org

“OHM” updates 25 million WorldCat records



Saving You Precious Time:
Implemented WorldShare
Real-time Availability

Loans declined with "No" Staff Responded vs. System Responded



Quality Control: Symphony Item Type Consolidation Update

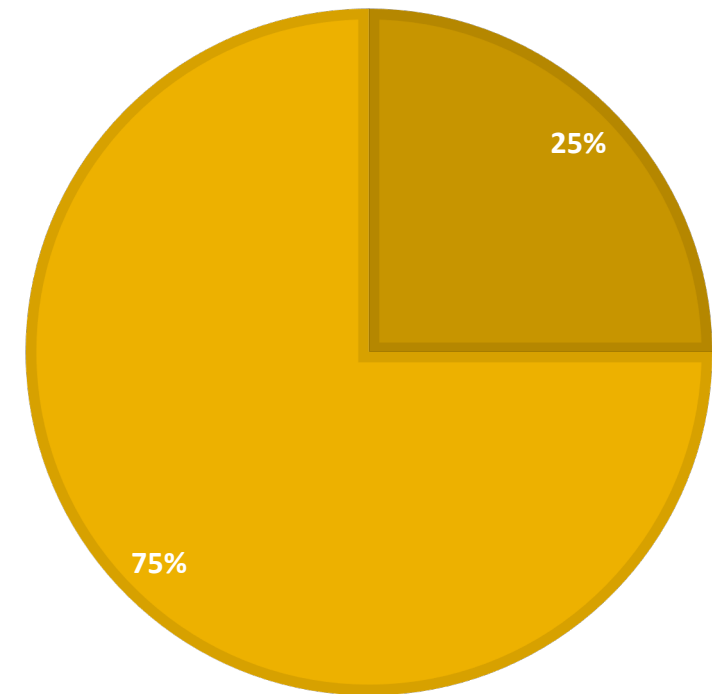
All SWAN Item Types consolidate into 5 format groups:

1. Print
2. Video
3. Audio
4. Equipment/Device
5. Library of Things

Send a ticket to help@swanlibraries.net to request a consultation!

LIBRARY CONSOLIDATION STATUS

■ Consolidated ■ Not Yet Consolidated



Quality Control: Serials Cleanup

- Audit of serials call numbers in 2022 & 2023
- Analysis of each library serials items
- After analysis, SWAN reached out with a report of items that can be discarded



- 21 libraries contacted
- 4,000 serials issues discarded from catalog
- Obsolete MARC Holdings and serials controls have been removed

DEI in Metadata Working Group update

New documentation available!

The group's goal is to respond to and change terminology in our catalog that relates to minority and marginalized groups and is either offensive, outdated, or otherwise failing to ideally serve our diverse patrons.

We aim to make our catalog and discovery services respectful to all people while enhancing discoverability of SWAN materials by promoting modern language and tailoring metadata to the language and search practices used by our patrons.

Documentation > Cataloging >

> Diversity, Equity, and Inclusion

[DEI in Metadata Overview](#)

[Immigration Headings](#)

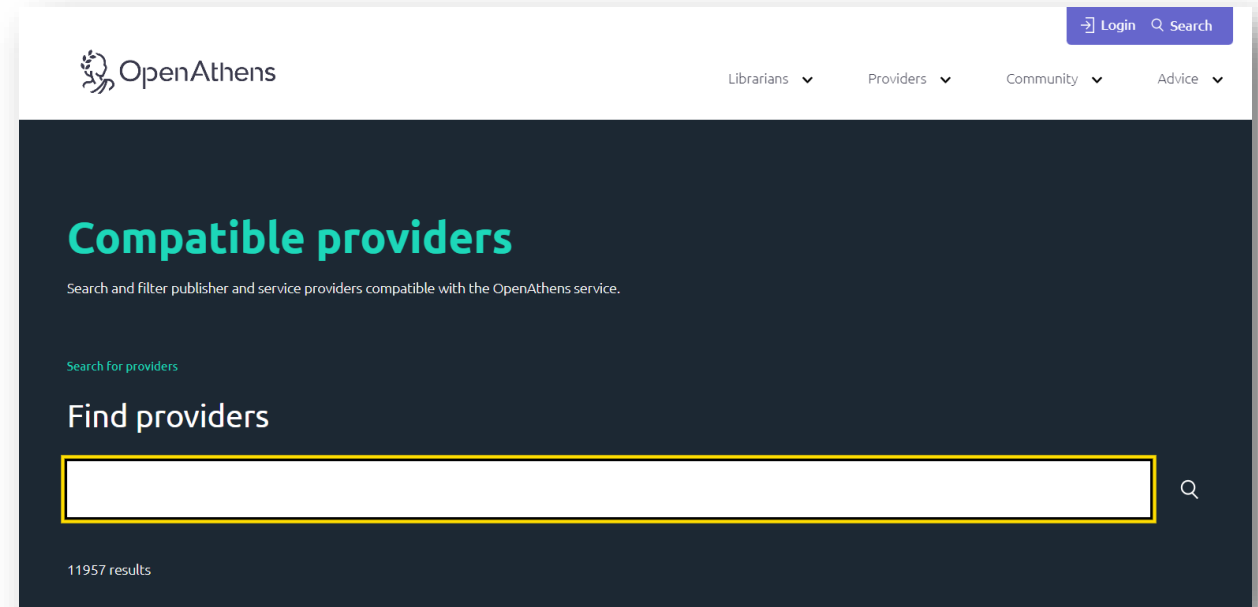
[LGBTQ+ Headings](#)

[DEI Automation](#)

Quality Control: Open Athens Link Audit

E-Resources Consultant Olivia Montolin

- Completed a review of library website links for electronic databases
- Ensures OpenAthens is being used where it can



Securing Your Data: Overdrive & Hoopla Authentication Encrypted



Completed 2022

Securing Your Data: WorkFlows Passwords Audit



- Five-minute phone call
- Send an email to help@swanlibraries.net to schedule a phone call – do not send passwords in the email
- Always change when offboarding staff

See “Information Security in Libraries” session
11:00 a.m.



Trends

2021 - 2023

TRENDS: Library Staff Turnover 2021-2023

- 41 library director changes
- Departure of many library staff

SWAN response

- Emphasis on online learning
- Onboarding & Offboarding
- Orientation for new directors
- Office hours/Coffee hour

Staff Changes: Onboarding & Offboarding

Follow these steps for staff changes in your library. Managers can complete the onboarding form below for new staff, or you can fill it out for yourself if you are a new staff member. Someone at your library should complete the [offboarding checklist](#) when a staff member leaves the library as soon as possible.

Onboarding

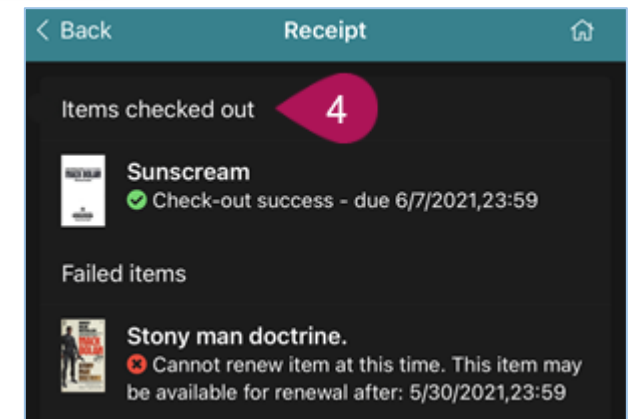
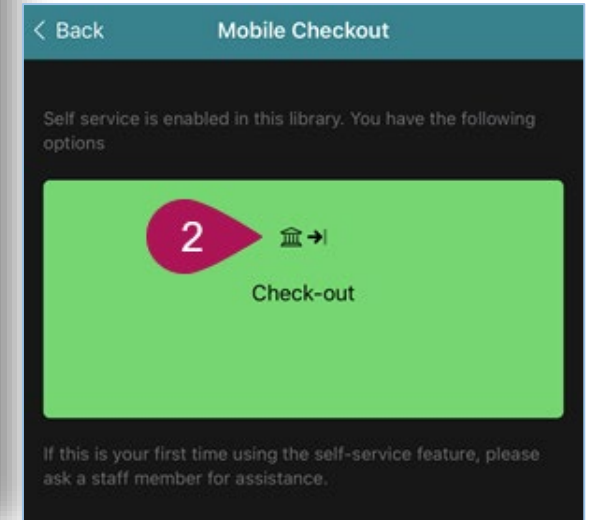
Name *

Library *

Job Title *

TRENDS: Mobile checkout

- Introduced 2021
- 15 libraries have now enabled in BLUEcloud Mobile app
- Uses geo-location
- No additional cost



Trends: Library lockers & Drive-up windows

Library renovations & innovative approaches to 24-hour service
SWAN implemented “pseudo libraries”

Lockers

- Downers Grove
- Matteson
- North Riverside
- Oak Park
- Stickney
- Villa Park

Drive-up Window

- Glen Ellyn
- Geneva
- Indian Prairie
- St Charles
- La Grange
- Park Forest (coming)



Luxer One Lockers at Villa Park Public Library

Our Next Year



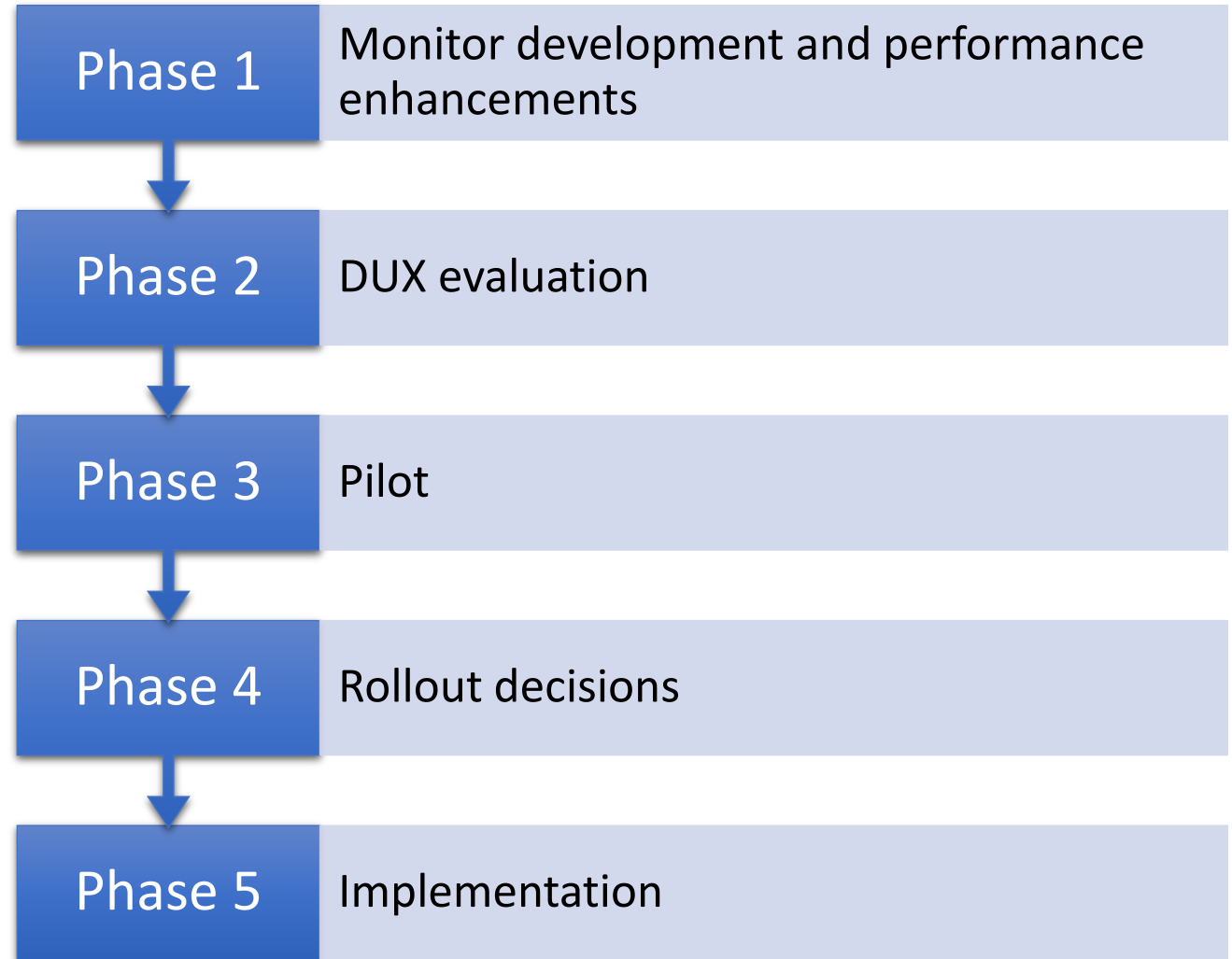
Mobile App Evaluation

Currently in Phase 1 and moving to Phase 2.

No firm timelines until Phase 3: Pilot.

Questions to consider before moving to a pilot phase:

- What issues are early adopters encountering?
- What immediate features, performance enhancements, or usability improvements are needed before a pilot?
- Are libraries ready to support this app on an ongoing basis?



Our next year...

SWAN headquarters move

Network Infrastructure Redesign

Information Security

Infrastructure Security: MDR

Data Encryption

Support site development

New ticketing system/CRM

Mobile app evaluation

MessageBee phase 2

Infographic SWAN value

Strategic plan

SWAN 50th Anniversary!

- SWAN formed March 1974
- 9 libraries automated circulation
- See the history on SWAN Support
- Home > Mission, History, Objectives > History
- [History of SWAN - Overview \(swanlibraries.net\)](https://swanlibraries.net)



SWAN Library Services

History of SWAN

START COURSE

SWAN LIBRARY SERVICES

SWAN was formed in 1974 when staff from nine public libraries located in the south suburban Chicago area formed the System Wide Automation Network (SWAN) consortium. Currently, the SWAN member is 100 libraries strong. This includes 95 public libraries, 2 college libraries, 1 elementary school district with 3 libraries, and 2 special libraries.

Join us on a journey through SWAN's history, visiting some major milestones along the way.

Early Beginnings 1974-1979

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- 630.326.7706

help@swanlibraries.net
support.swanlibraries.net
844-SWANLIB

Questions?

- You can reach our management team directly!

Up next... User Groups