# 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?

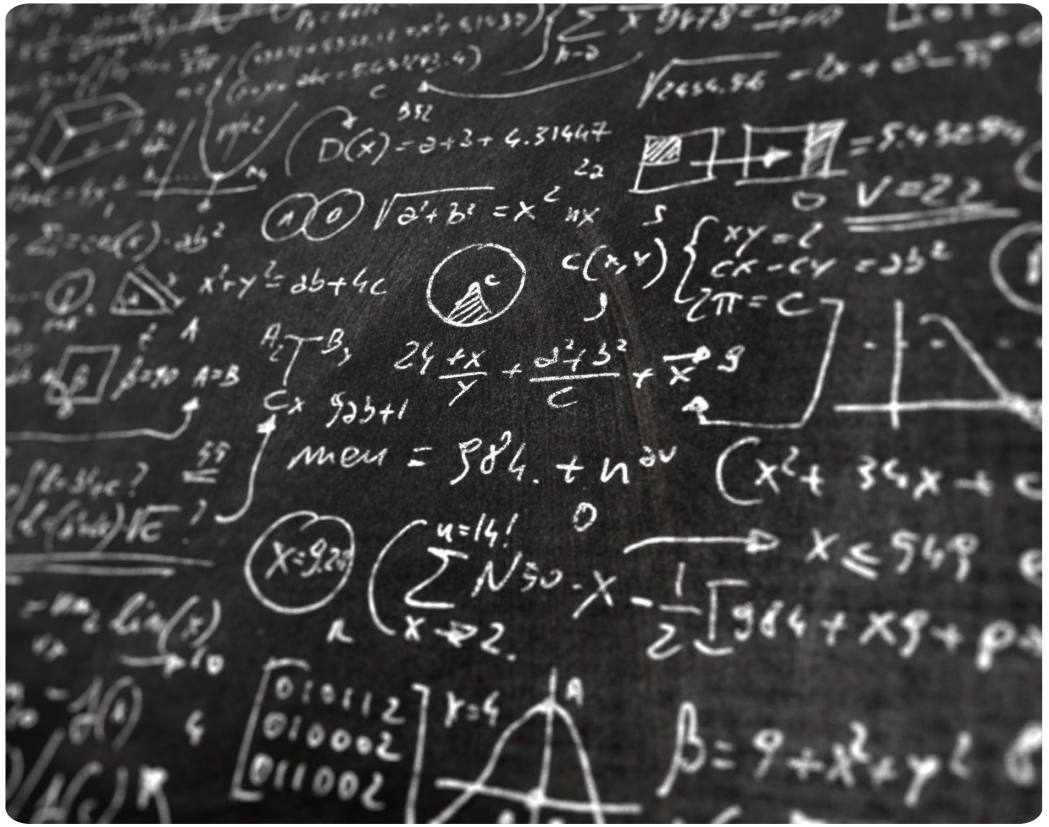
Visit
support.swanlibraries.net/swanexpo

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



# 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

# Special thanks to presenters

| | |
|---|---|
| Amanda Musacchio | College of DuPage |
| Christy Eyre | Linda Sokol Francis Brookfield Library |
| Gail Smith | Warrenville Public Library District |
| Jenny Cuevas | Addison Public Library |
| Jessica Frazier | Bloomingdale Public Library |
| Josephine Tucci | Batavia Public Library District |
| Joy Anhalt | Tinley Park Public Library |
| Julie M Milavec | Downers Grove Public Library |
| Kathryn O'Connor | HR Source |
| Laura Folliard | Westmont Public Library |
| Lauren Maxwell | Geneva Public Library |
| Meghan Moran | Oak Lawn Public Library |
| Melissa Siddiqui | Oak Brook Public Library |
| Michelle Kurczak | Messenger Public Library of North Aurora |
| Rebecca Bartlett | LaGrange Public Library |
| Sandra Leyva | Alsip-Merrionette Park Public Library District |
| Sarai Barrios | Eisenhower Public Library District |
| Susan Reynders | Mt Prospect Public Library |
| Stacey Peterson | Batavia Public Library District |

# SWAN Consortium

## *Who We Are*

Today 101 libraries of all types

- 96 Public Libraries
- 2 Academic
- 2 Special
- 1 School

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- 1.5 million titles
- 8.3 million items
- 1 million users
- 13 million annual circulation

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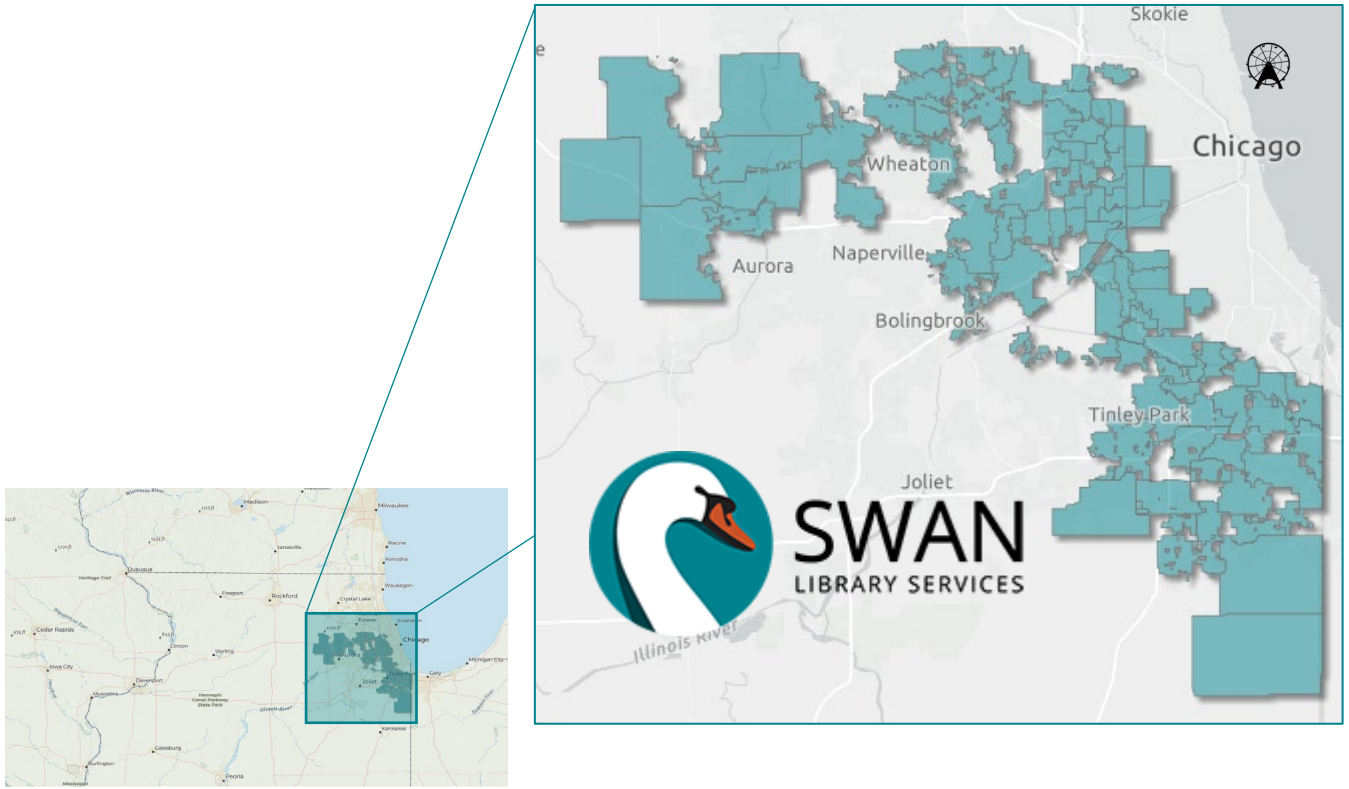
- 1.3 million ILL (FY23)
- 900,000 reciprocal borrowing (FY23)
- 240,000 reciprocal borrowing transactions outside of the library membership



# SWAN Membership includes

## Library Services Platform

- Aspen Discovery
- BLUEcloud Analytics
- BLUEcloud Commerce
- BLUEcloud Mobile
- BLUEcloud Staff
- 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**

**1ST OVERDUE NOTICE**

Please disregard this notice if you returned your material in the past week.
All material is held in quarantine before being checked in.

The following item(s) are now overdue. Please return the item(s) below to avoid potential fines.

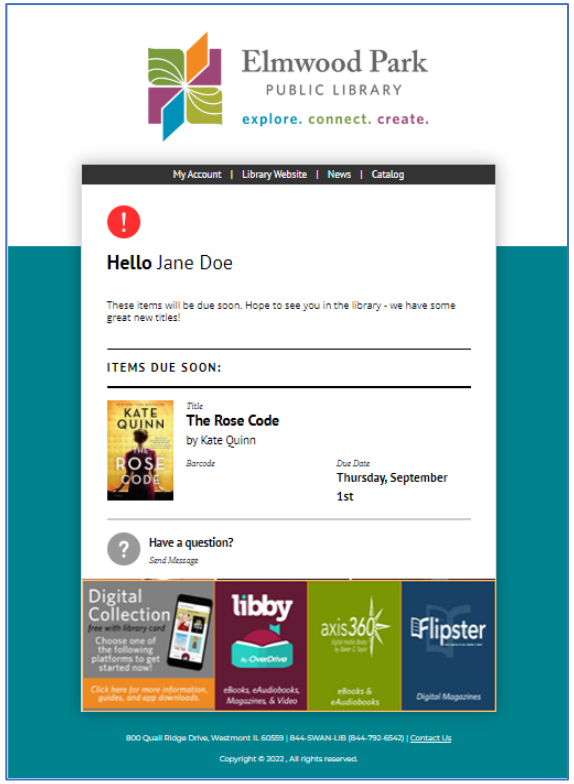
Thank you!
**Do not reply to this email**

1 call number:CRAFTS QUILTING MENARDI ID:32957005008340
Modern quilts : designs of the new century / the Modern Quilt Guild ;
Riane Menardi, Alissa Haight Carlton, and Heather Grant.
Morrison, Riane Menardi
due:8/3/2020,23:59

2 call number:746.74 PEARLMAN ID:31186030512495
Modern rug hooking : 22 punch needle projects for crafting a beautiful
home / Rose Pearlman.
Pearlman, Rose,
due:8/3/2020,23:59

3 call number:746.46 BRY ID:31321006971991
Modern triangle quilts : 70 graphic triangle blocks--11 bold samplers /
Rebecca Bryan.
Bryan, Rebecca, 1980-
due:8/3/2020,23:59

**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

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

- 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*

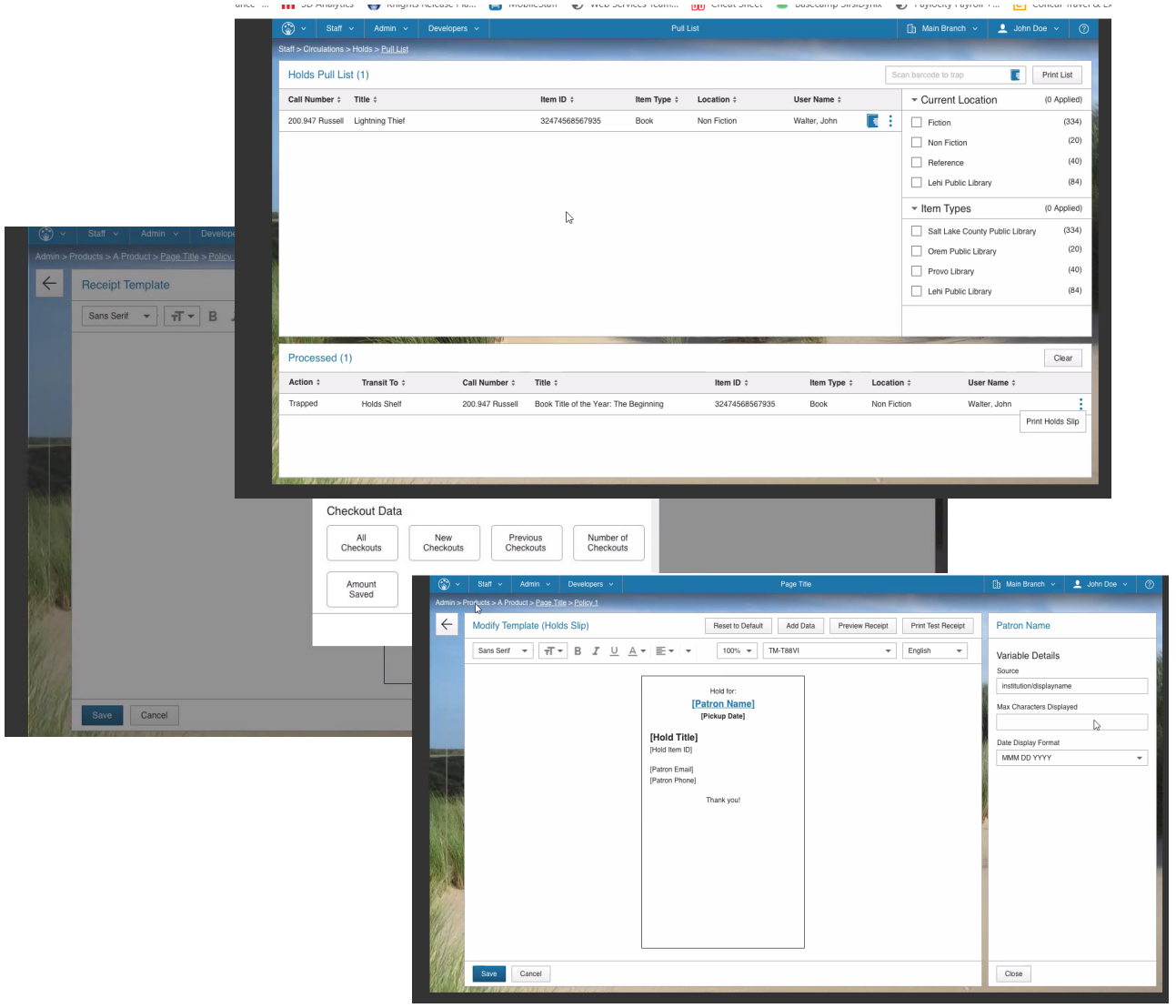
*SWAN request

- 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

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



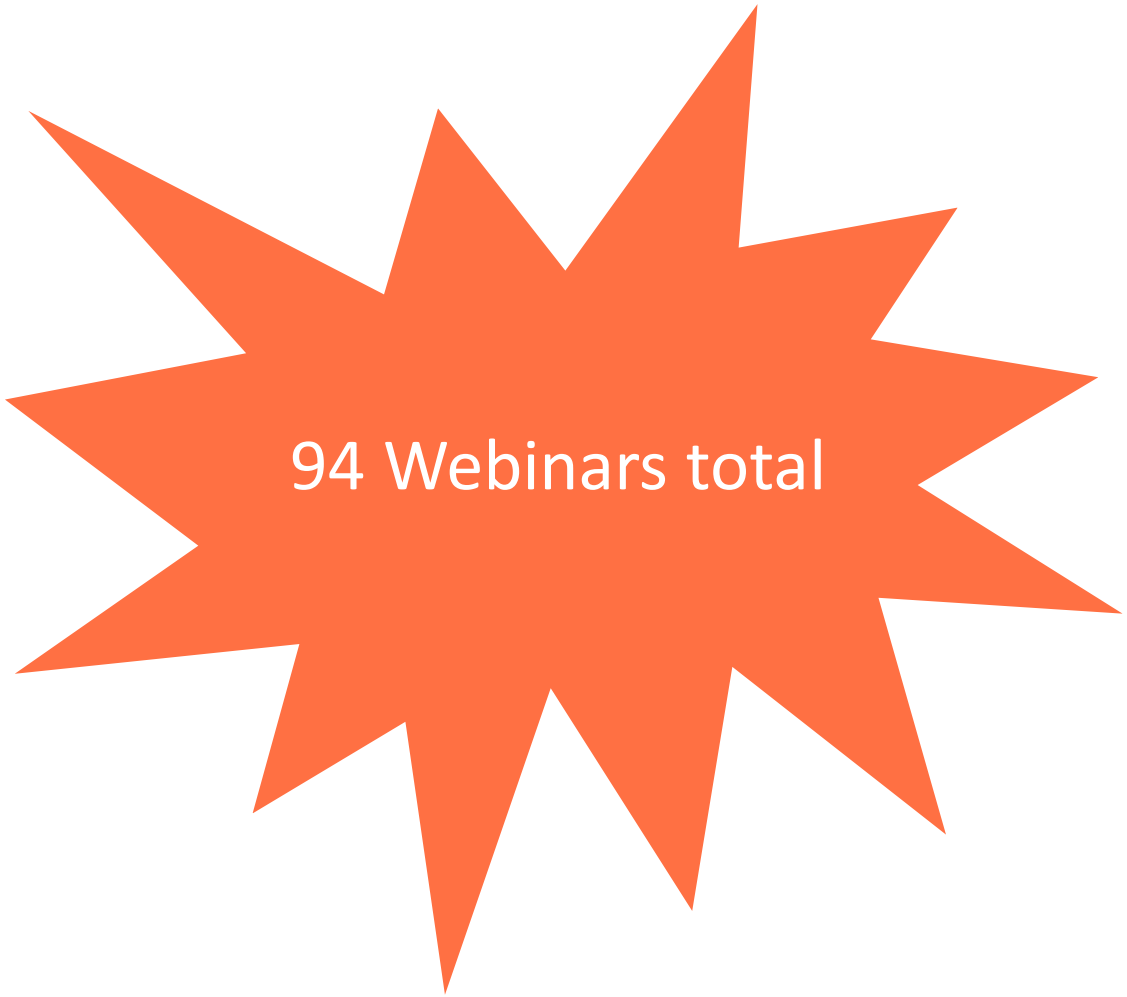
# BLUEcloud Circulation development recap

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*

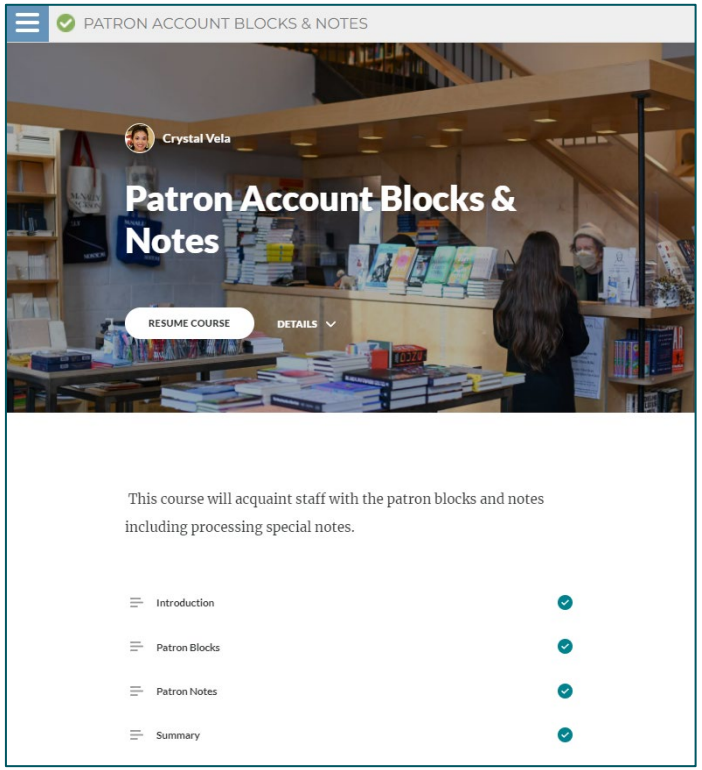
*SWAN request

# TRAINING: SWAN Webinars




| 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 |

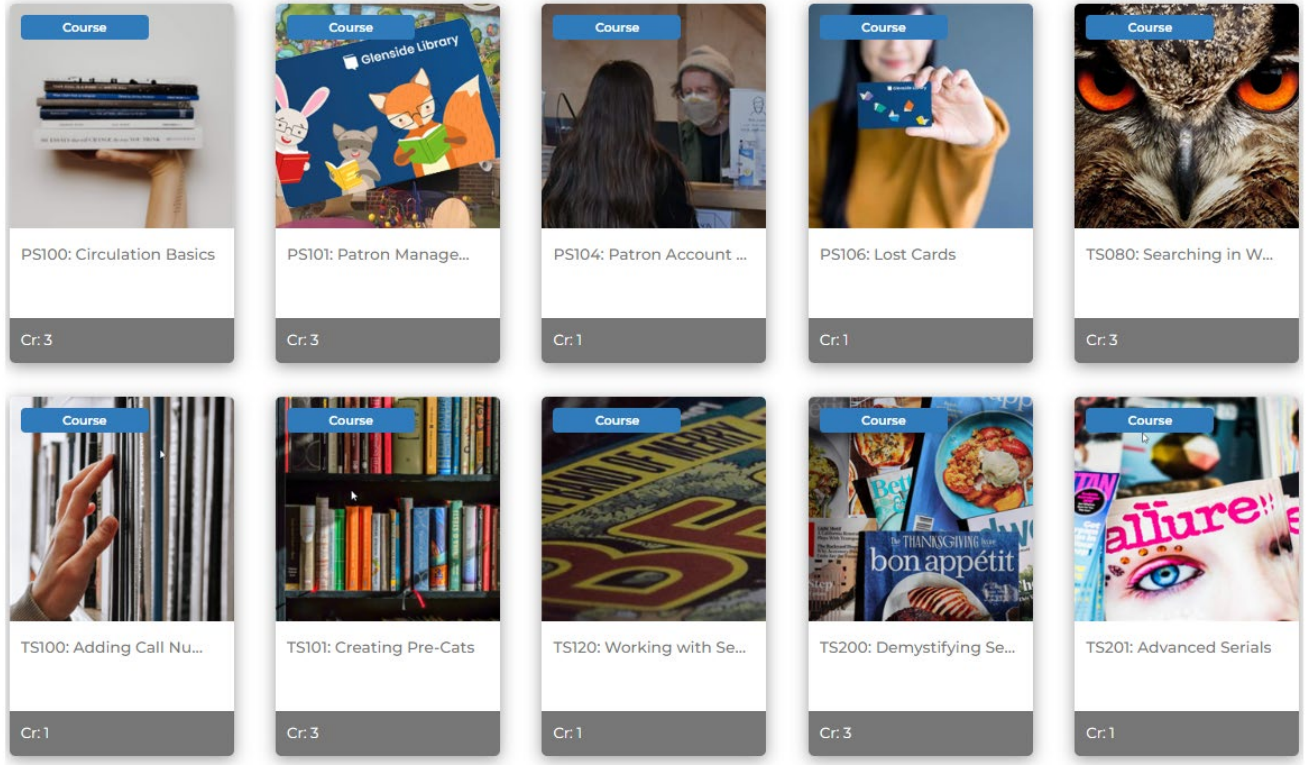
# Training: Online Learning Management System



# Online Learning: growing steadily

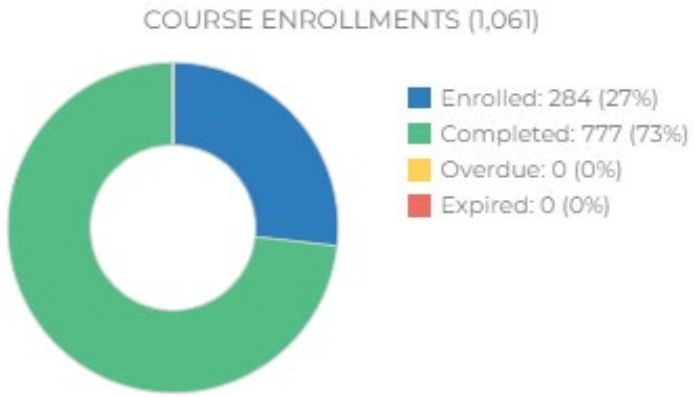
Now has 16 courses (6 added past year)

Past year registered users grew from 170 to 405



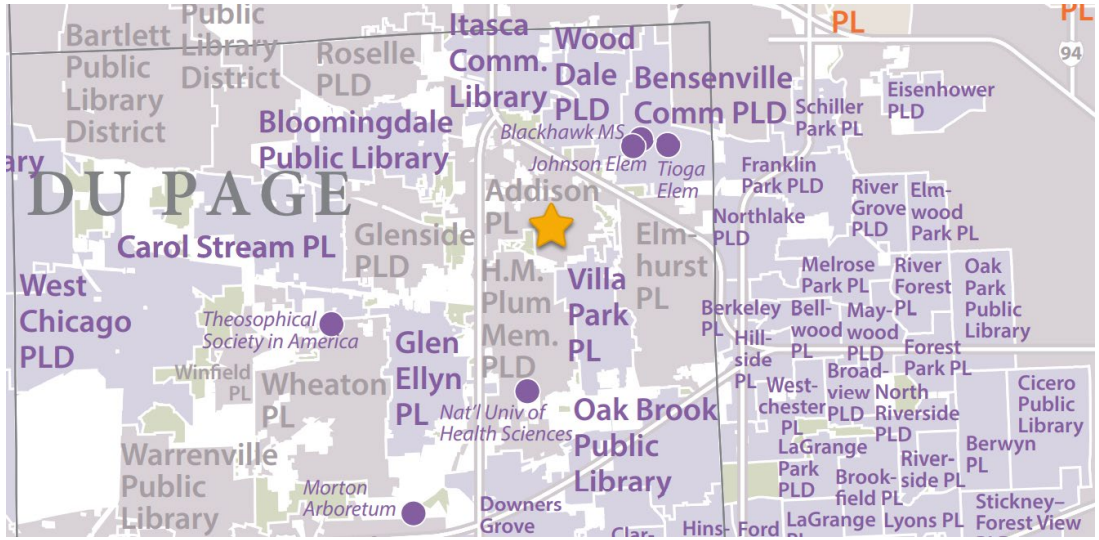

405 Registered Users

77Libraries

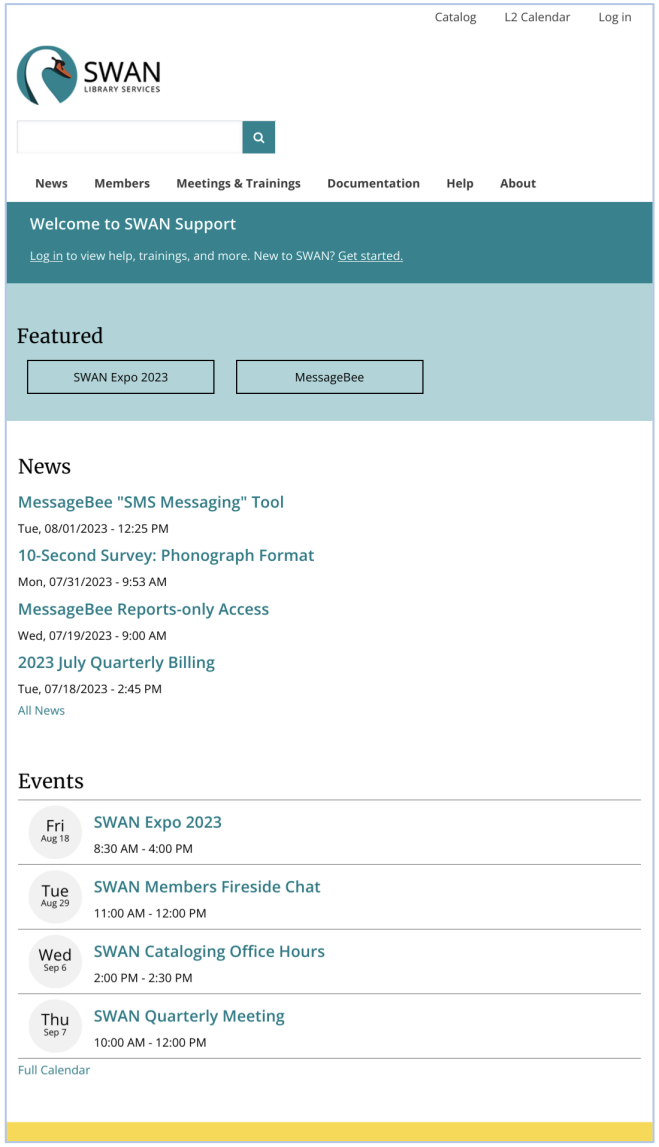


# SWAN Growth: Addison Public Library becomes 101st member library

**Go-live November 2023!**

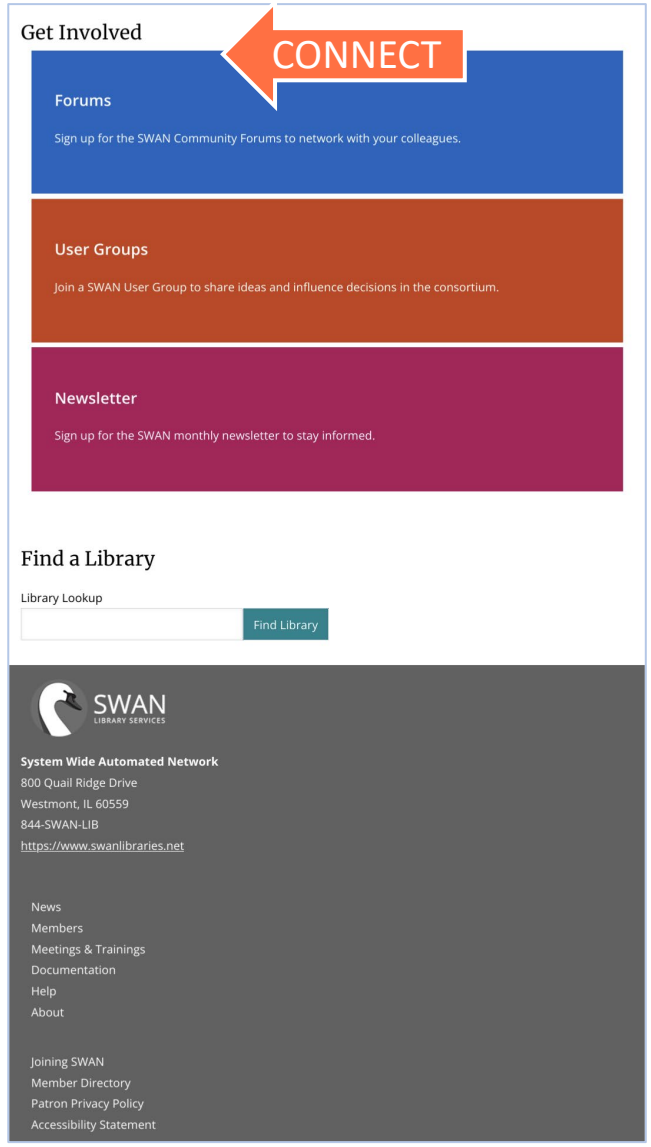


# Updated SWAN support site: News, Events, Support, Topics, Get Involved




NEWS

EVENTS

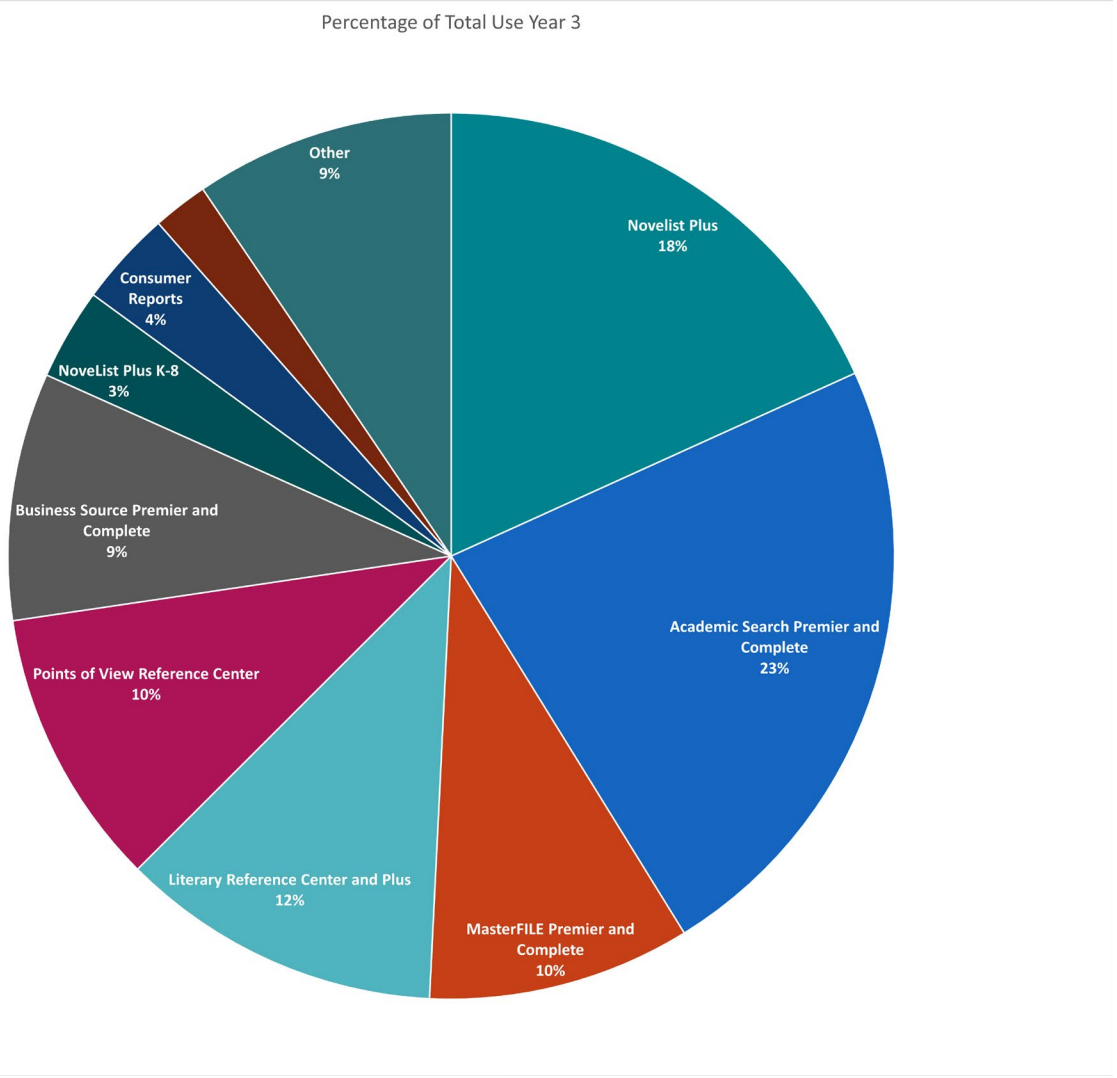


# Strengthen the collective identity: SWAN Community Forums

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

# 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

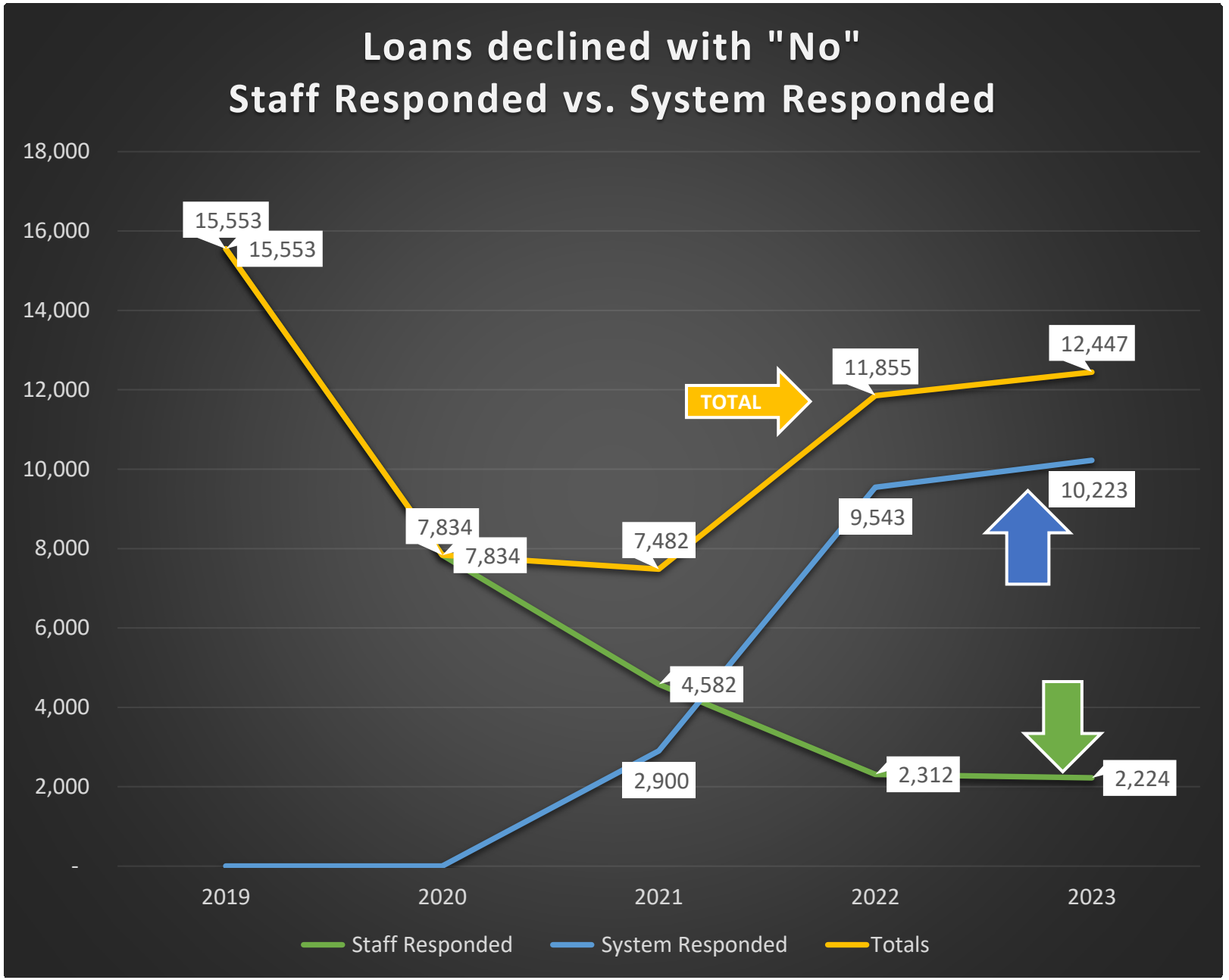
Reset of all library holdings in WorldCat in 2022

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

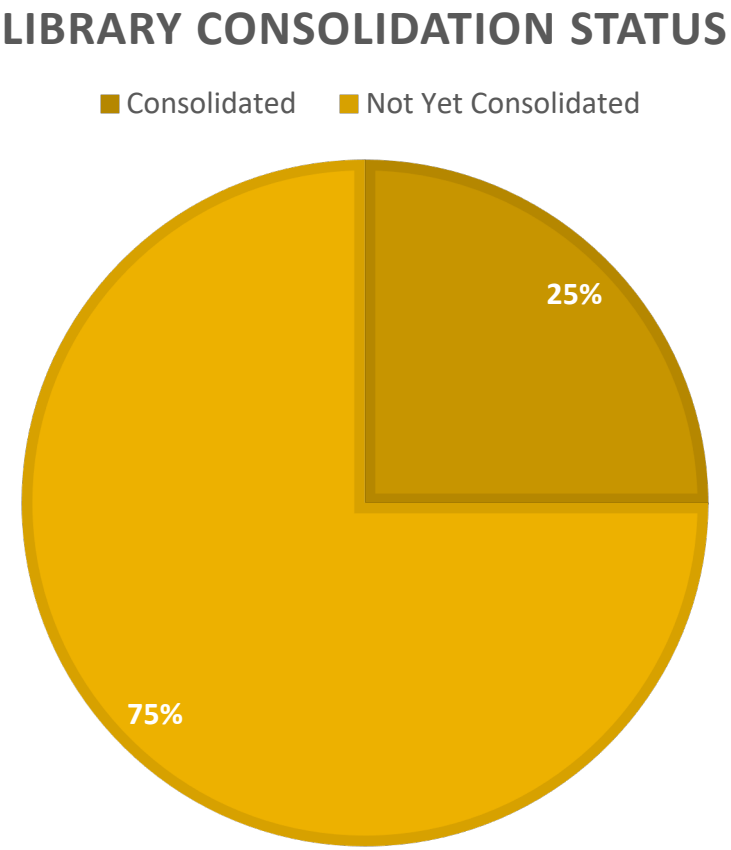


# Quality Control: Symphony Item Type Consolidation Update

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!



# 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

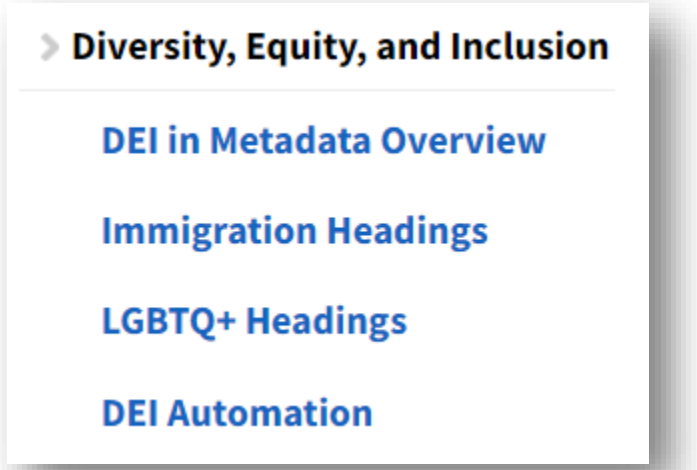
# DEI in Metadata Working Group update

## 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.

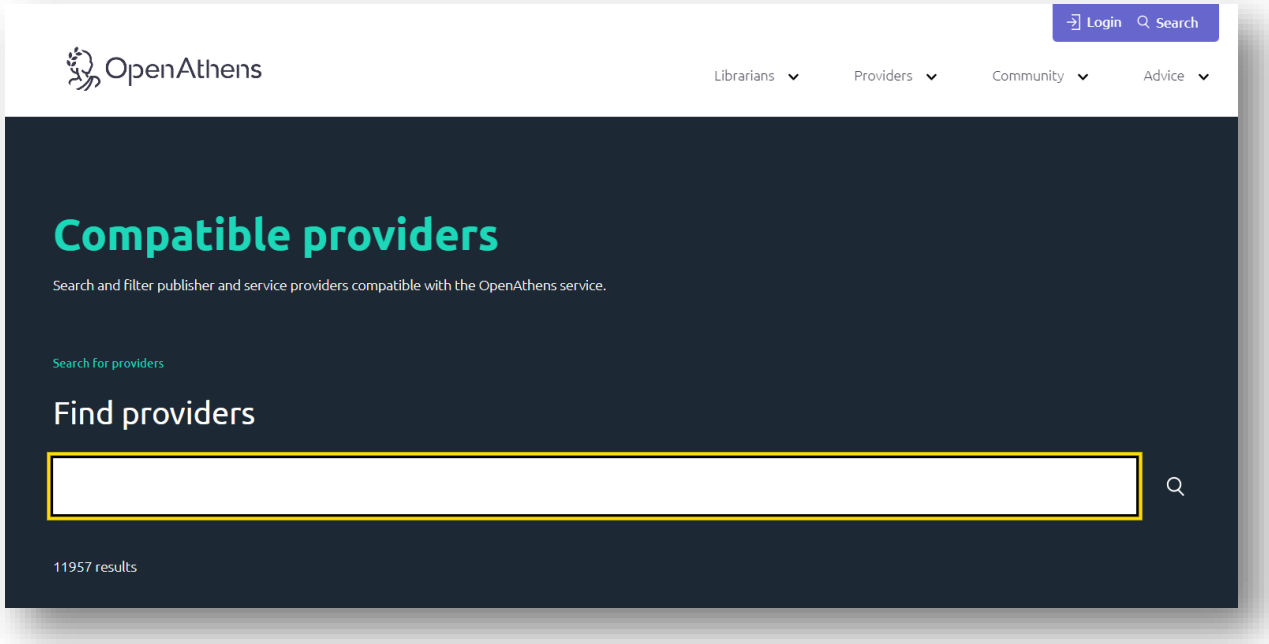
Documentation > Cataloging >



# 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

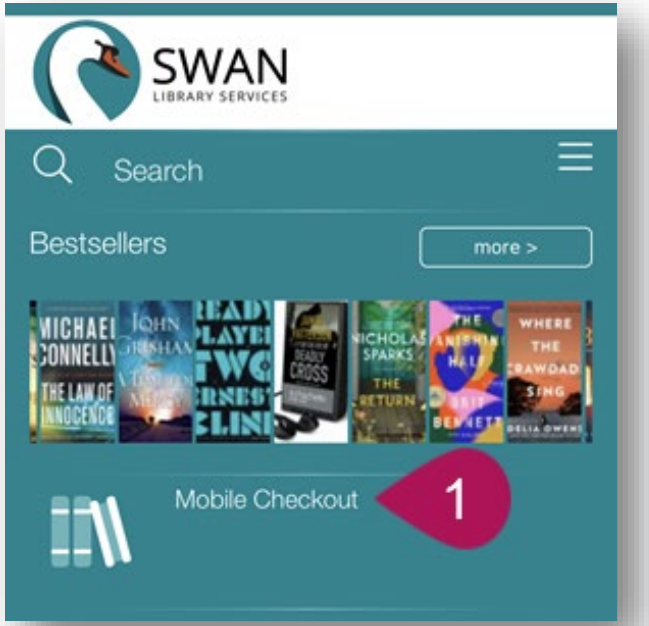
Name *

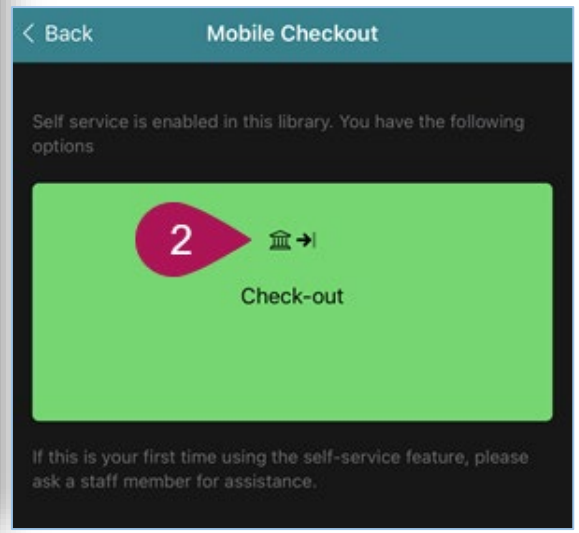
Library *

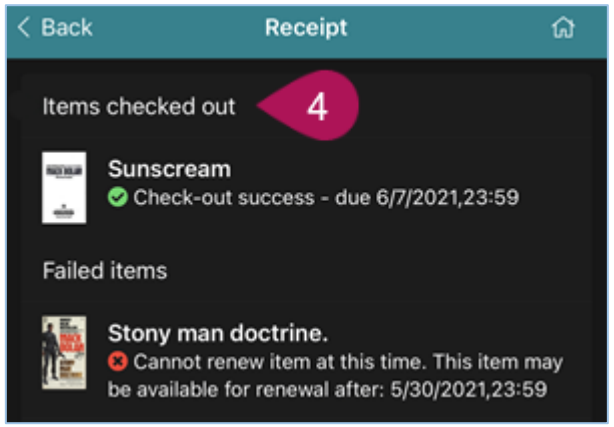
Job Title *

# 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

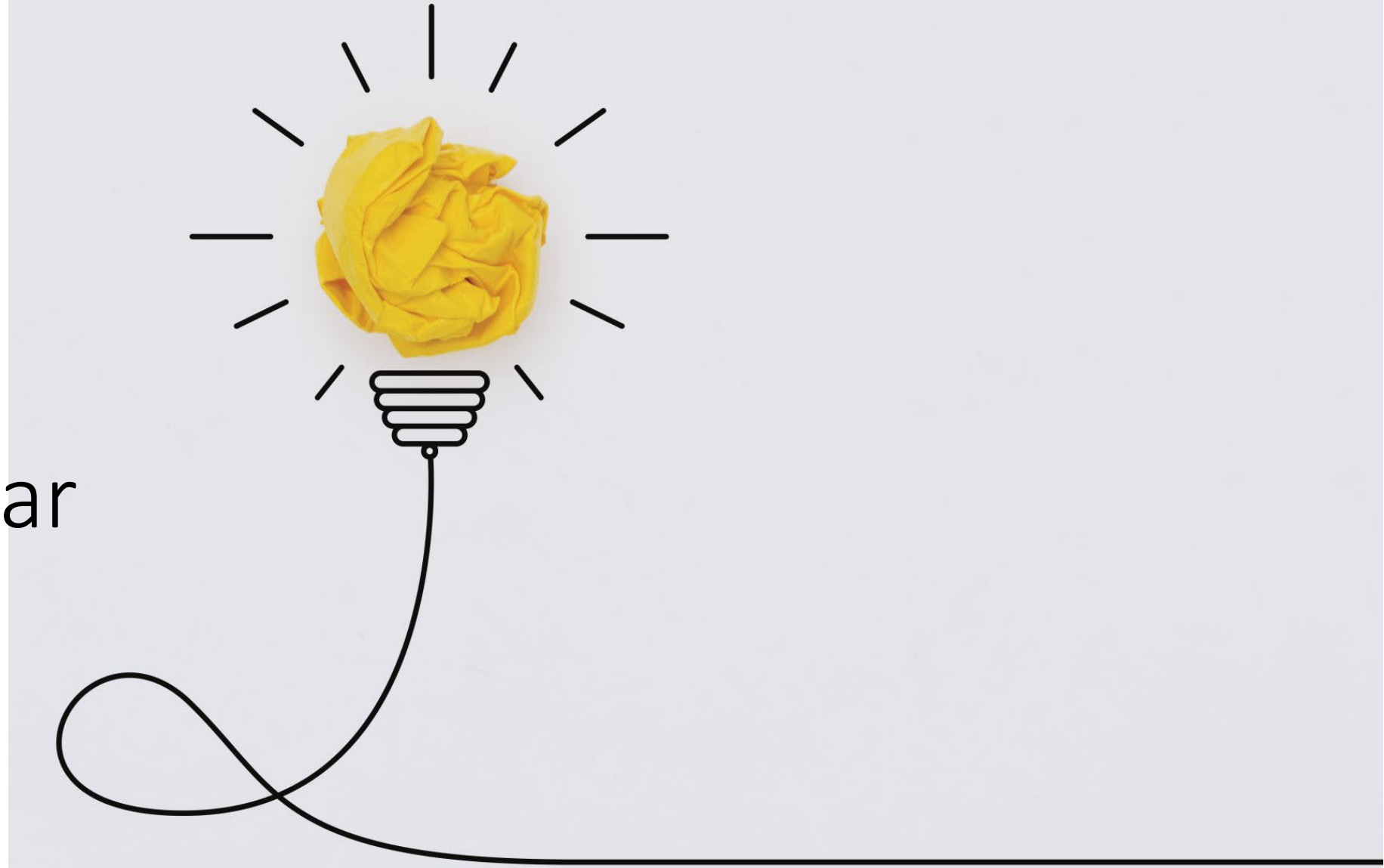
Library renovations & innovative approaches to 24-hour service
SWAN implemented “pseudo libraries”

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



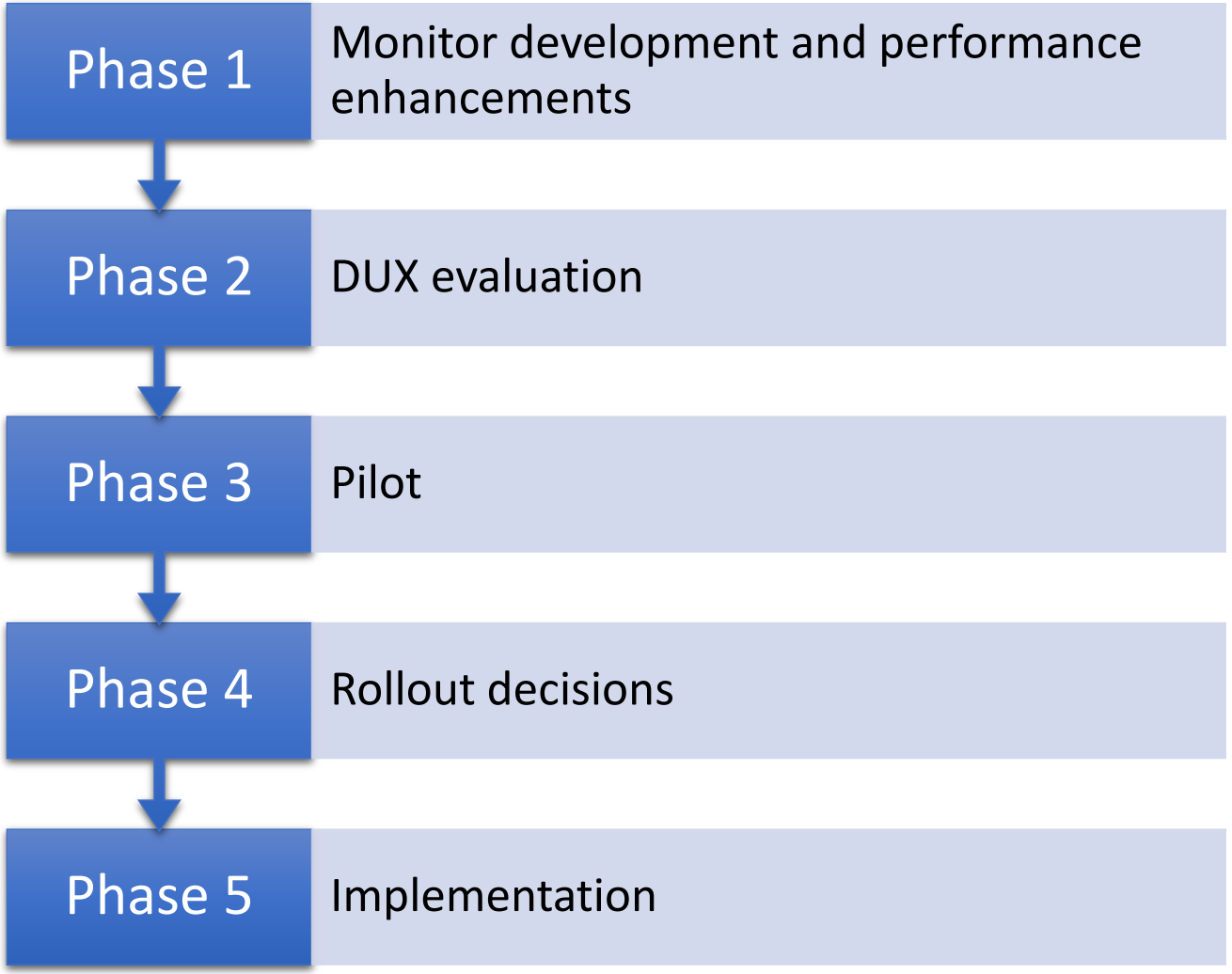
# Mobile App Evaluation

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)

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

# Questions?

- You can reach our management team directly!

# Up next… User Groups