

SWAN Advisory: Discovery and User Experience (DUX)
Thursday, March 28, 2019

Notes

1:30 PM – 3:30 PM

Oak Brook Public Library

1. Welcome, introductions, and designate scribe
2. eResource survey discussion
 - Robin led the discussion in reviewing current workflow processes within libraries for managing eResource subscriptions, licensing, and coordination of access. Questions included: What do you know about your electronic resources and how do you track those? How do you manage subscription dates? Do you manage these resources in acquisitions? They will use input to develop a survey to share with the SWAN membership. The purpose is to identify common tracking mechanisms and to determine if additional tools SWAN may support would be useful. Maintaining a tracking system of eResources that is accessible to SWAN would help Robin identify and target members with specific collections when changes occur – enabling more proactive reporting of both problems and solutions.
 - Most shared that their decisions are budget and use driven. Depending on how much budget is available and if prior year's usage can justify, eResource subscriptions are requested to be renewed. Some are approached by vendors with new offerings; others learn about new resources and make requests for purchase. Demos are fairly common and prevalent. A recent example of this is CreativeBug by Joanne Fabrics - <https://www.creativebug.com/classseries/single/crocheted-sloth> :)
 - For those that track resources and license renewals the range of information tracked varies. DGS include usage statistics and calculates a cost per use in their tracking spreadsheet. SCD is centrally managed by Sarah who is the electronic resources point purchase for the entire library, including vendor contact through website link updates/additions. Jane selects electronic collections for youth and works with Sarah.
 - Michelle (MED) uses the RAILS group purchase for EBSCO. Database package remain pretty constant year-to-year. Services are coordinated/paid through RAILS who acts as both PR for EBSCO and sends license reminders.
 - Robin asks how information is passed between staff and to SWAN. How does information changes hands from order to database list? At what point in the process to libraries update SWAN and request athenized links? A checklist of these steps would be very helpful to members, as many do not consider that step in the process of activation. Robin will set up some documentation on the support page to provide this checklist of what to do when you get a new subscription.
 - SWAN is looking at CORAL, as implemented through SirsiDynix, as an eRM tool for managing subscriptions. Would libraries be interested? Yes, but it would depend on how automated the process would be and if an archive would be available. People would also want training in how to use the tool. For Robin a common tool would enable them to more easily evaluate and analyze collections.

- It would be helpful to have a shared knowledge base to keep each other informed of changes. For example, how did you know that EBSCO Auto Repair Reference Center (ARRC) was changed to AutoMate? The contact person for the subscription may be getting specific emails, but generally those providing the direct support for the database do not know when changes occur or are overwhelmed with all the messaging from the vendor, it is difficult to know which to pay attention to that might impact access for patrons. The vendors are not providing maintenance support once the databases are activated by the libraries.
- Most patrons usually get to EBSCOhost by accident. Some staff may have it bookmarked, but general links for patrons are to the specific databases. Specific links are commonly provided within context on the library's database page so that they know what is contained in the resource.
- SCD gets some databases through their Amigos membership. Discounts have largely paid for their membership.
<https://www.amigos.org/>

3. Article Search use cases discussion

- For the most part, there is little demand for research/reference. But, when staff can intervene in a reference interview and direct patrons to the resources, it is rewarding for both patron and staff. It opens a whole new area of resource. Much of the instruction is done one-on-one, as-needed, specific use case. It would be very helpful if Robin provided a class and produced a video that could be shared with staff. Rather than have an open class, site visits to libraries providing instruction to teams would be ideal – specific resources could be targeted and the training would then be more relevant to the libraries.
- Sending a fish, teaching to fish – when library staff interact with patrons they use a combination of provide the source material directly via email and providing instructions to access and perform additional searches. Many use a “here’s what you requested and how to find more” approach.
- Name Brainstorm activity
 - Research
 - More Information
 - Research Resources
 - Research and Homework Help
 - Full Text Articles
 - Downloadable Research
 - Credible Sources (Incredible Sources!)
 - Information
 - Digital Research
 - Research Portal
 - **Research and Articles** this was the most popular, but not overwhelming popular. Consensus was that the name is perhaps not as important as visibility of the tab. The invisible/white/no-border tab becomes unnoticeable.
 - Generally, Research is a good general term to capture the essence

4. BLUECloud Mobile promotional materials

- Lauren shared a bookmark design and confirmed with the group that this is an effective method of sharing information. She also shared the help tips developed on the SWAN patron-facing website (not yet live) and reviewed the focus on revisioning this website to be more about patron help. When the mobile app is launched, there will also be promotional links from Enterprise profiles. Members would appreciate getting sample graphics and content that they can promote through their own social media platforms and websites.
 - Timeline – Dawne updated the group on what was learned at COSUGI regarding timeline. Our templates are with the SOLUS app developers from Scotland and they did confirm that it is taking longer than initially expected. Dawne shared a need to have this launch ready before mid-May to coincide with summer reading programs.
5. SWAN staffing updates
- Dawne shared the SWAN organizational changes and everyone welcomed Crystal to the UX team. Crystal will be leading many of the efforts addressing the staff user experience as we prioritize evaluation of Symphony Workflows and BLUEcloud Circulation in the next year. Crystal is the Chair of Circulation Advisory and has already identified areas where circulation/cataloging/discovery intersect, working with SWAN staff and members to help identify recommendations for handling book clubs and bookclub resource sets.
6. Next meeting April 25th

Attendees:

- Jane Arndt (Saint Charles)
- Madeleine Belk (Tinley Park)
- Graham Dostal (Tinley Park)
- Doug Ferrini (Tinley Park)
- Sharon Hrycewicz (Downers Grove)
- Greg Hunt (Frankfort)
- Jean Jansen (Villa Park)
- Michelle Kurczak (Messenger)
- Joy Matteson (Downers Grove)
- Kelly Mueller (Itasca)
- Sarah Slack (Saint Charles)
- Scott Brandwein (SWAN)
- Robin Hofstetter (SWAN)
- Lauren Levaggi (SWAN)
- Michael Szarmach (SWAN)
- Ian Nosek (SWAN)
- Dawne Tortorella (SWAN)
- Crystal Vela (SWAN)