Committee members present: Stephanie DeYoung (BLD), Sue Feddersen (BVD), Cindy Maiello Gluecklich (MPS), Sandra Leyva (AMS), Julie Lombardo (WRS), Victoria Muraiti (RFS), Cheryl Pawlak (DGS), Debbie Sheehan (INS), Brittany Smith (WMS), Peggy Tomzik (ESS), Thomas Webb (MTS)

SWAN staff present: Crystal Vela, Samantha Dietel, Ian Nosek, Dave Pacin, Michael Szarmach, Dawne Tortorella, Vickie Totton, Tara Wood

Visitors present: Juan Estrada (LSS), Emily Cotterman (ITD), Francisco Cruz (CIS), Mary Moss (EPS), Norma Rubio (CTS), Crissy Barnat (CNS), Leslie Hartoonian (LGS), Marla Cole-Wieringa (MTS), Pat Sinacore (WCS), Kathy Zaleta (HSS), Elizabeth Wald (CRS), Sylvia Jarecki (VPD), Nathan Hare (OLS), Teri Wilson (GHS), Elizabeth De Jong, (SHS), Pat Sinacore (WCS), Bonni Ellis (SCD), Sylvia Jarecki (VPD)

28 SWAN Libraries represented.

1. Introductions

2. Review of Notes, March 20, 2019

    Stephanie DeYoung was present at the March 20, 2019 meeting – meeting notes will be corrected and posted.

3. SWAN Updates & Discussion
    a. Mobile App Update [Exhibit B]

        BLUEcloud Mobile is in test phase. Tara posted an update outlining the remaining bug fixes that need to be addressed before the app is publicly released. Some configuration issues need to be completed. SWAN has a configuration call next week to go over the outstanding issues. We may be able to help manage some of these updates to help SirsiDynix in the process of updating. The biggest issue is synching with the eResources. SWAN may end up making some of those configuration changes. Robin is testing the synching of these collections and identifying specific collection issues.

        Peggy asked about the ability for libraries to customize once the app is live. Tara shared that one of the things working well is the profiling for libraries once a patron logs in. Once logged in, the interface highlights the home library matching library branding. It will also include scoping to your eResource Collections, links to your eVanced or Communico feed for events, as well as additional social media and website links provided by the library during the setup. After the go live rush of activity, we will offer training on the admin module to allow libraries to further customize their app. We will also have a customization form available

from the support site for those libraries who prefer SWAN maintain their customizations. It is up to libraries when to promote. We are happy for a slow roll-out. As soon as the app is ready, it will in the app stores, so patrons might find it even before it is widely publicized.

Linked accounts and my account features work well in the app. You can view checkouts and fines for all linked accounts in the app, and checkout history, if enabled. Patrons need to have the pin to first bring the card into the app as a linked account providing a layer of security and authentication when linking multiple cards to the app.

No official go live has been set until we get the major bugs ironed out.

b. Book Discussion Cards [Exhibit C]

Crystal included best practices for Book Discussion. DUX, Cataloging, and Circulation groups have all been discussing this topic from specific perspectives. When you check out to a Book Discussion group, you can set that discussion group as a patron using the BOOK_DISC profile. This will allow consistent display in Enterprise to show that items are checked out for a book discussion group.

If you are already using a card with a BOOK_DISC profile, you can review your account settings to verify that BOOKDISC type, NO_UNIQUE, and staff email are set. Scott Brandwein will be covering some cataloging standards for book discussion sets/kits to further provide consistency in the Cataloging groups.

Documentation Link: https://support.swanlibraries.net/documentation/66652

c. Checkout out without library card [Exhibit D]

Crystal received input from Advisory members on how libraries follow checkout without a library card present. Based on that input, some best practices and guidelines to assist libraries in following a streamlined process were drafted and are available on the support site.

Documentation Link: https://support.swanlibraries.net/documentation/66653

If you find a library not following these recommendations, feel free to refer colleagues to the documentation. Your patron, your library, your rules. Not your patron – follow recommended verification steps.

We need to pass these tips on to service desks too. These tips are generally followed in Circulation, but sometimes patrons are given their barcodes from

service desks (e.g. patron wants to log into computers). In this case, consider distribution of a guest card rather than giving out a barcode for them to use. This information needs to be shared with Reference staff. Ref desk is wish fulfillment, Circ is code enforcement. There are different ways to yes. In public service, we need to find alternative paths to yes.

At some point a meeting with Circulation and DUX combined would be helpful. We can easily communicate a best practice more widely. Also, it may be helpful to bring this practice up at your managers/team meetings internally.

The documentation should be updated to clarify "library card" as meaning physical and digital library cards. Use of library apps provides an added layer of security when creating/storing a digital card since pin is verified at initial authentication/registry of card. For non-library app electronic storage, many libraries also accept these as valid digital cards (e.g. Stocard).

Photos have eliminated so many problems and barriers to patron service.

Also think about implied consent. Since many self-checks currently do not have pin verification on self-checks, processes need to mirror service provided at self-check where patrons can scan card without pin.

d. Assigning a Pickup Anywhere Library for Library Closings

When a library is closing for renovation, consider partnering with a nearby library. If a library is closed for a period of time, SWAN can modify holds to reflect the temporary pick-up point. We can also set a default pick-up library in Enterprise during the closure. Removing the home library from pick-up anywhere list defaults to the first library in the list and often causes problems for patrons who inadvertently place a hold without checking pick-up location.

SWAN can also put a banner on Enterprise to indicate where holds can be picked up. If your library is closing for a period of time, submit a support ticket and a discussion and temporary changes can be put in place.

e. Extended Fields update [Exhibit E]

Dave has finished the phone record clean-up process. He has consolidated all phone fields into PHONE and ALT_PHONE.

The remaining extended info fields will follow shortly. It took an entire week just to run through all the phone field updates due to the volume of patron records. Next steps include completion of the recommended field changes approved in

See September 19, 2018 packet, pg. 7-9 -
https://support.swanlibraries.net/sites/default/files/meeting/18_09_19/65234/
packet2018-09-19.pdf

f. New documentation on Failed Call Notice Reports [Exhibit F]

Debbie presented the procedure for checking the Failed Call Notice Reports last
month at the Circulation Users Group. Her presentation sparked creation of
documentation. Debbie prints the report and staff call. If no one answers, a
postcard is sent. Generally, it is a very small number of patrons on the list, some
days no failed calls are reported. They encourage patrons to change to email, but
many of them do not have or want to use email.

The phone number calling is 877 662 8190. It is also worth knowing that patrons
can call that number and renew items. This information will also be added to the
documentation.

Documentation Link: https://support.swanlibraries.net/documentation/66661

g. New location to appear on Clean Hold Shelf Report: CHECKMEIN

Vickie conferred with SirsiDynix on creation of another location to fix the
problem when an item is stuck in holds. When working through the Clean Hold
Shelf report, after checking in an item, it sometimes (although quite rarely) says
route to HOLDS but no hold is available. This condition shows that there is still an
open hold until it is trapped. Check the item in first.

It does not happen often – only happens when you have one more hold and it is
at your library.

Creation of another location was not recommended at this time by SirsiDynix, so
instead of using this process, a known issue has been created. If you want to
retain the last patron information, you should follow the process listed in the
Known Issues log.

Known Issue: https://support.swanlibraries.net/node/66641

Known Issues led to a discussion on how members are supposed to know there is
a known issue. SWAN's process moving forward is to create a known issue
(https://support.swanlibraries.net/help/known-issues). Open known issues show
on the SWAN Support Site home page. If the known issue is affecting multiple
libraries or impacting patron experience, SWAN will immediately post a
SWANcom with a link to the Known Issue. Further updates will be posted in the

Known Issue. When the known issue is resolved/closed, a SWANcom will also be posted to provide that status update. Circulation Advisory members agreed that this "bookend" approach of notifying the membership of known issues and providing a historical record of known issues and their updates represents a good balance for communication.

Meeting agenda completed 10:41

After the meeting agenda completed, some additional topics were discussed:

- Members have noticed holds are no longer allowed for Bensenville School District #2 items. A procedure for end-of-school and start-of-school has been develop. Advisory asked that SWAN provide some documentation and send a SWANcom explaining these processes.
- Notes fields – ACTIVEID. There are two situations occurring in relation to ACTIVIDs. Since our last Symphony upgrade (prior to N19 migration), multiple active ids started occurring. Currently there are about 40,000 records in this condition. SirsiDynix will be helping us clean these records. This situation can also be fixed with the User ID Manager wizard. Documentation will be provided to show how to save changes in User ID Manager.
  Libraries who had used User Groups set and patron comes in from a User Group, re-registering a user causes all the user group ids to be included. If this happens, please submit a support ticket.
- Naperville has a patron lookup like Chicago. This will be featured at the next Circulation User Group meeting.
- Oak Park and Wood Dale are fine free for all patrons. Some libraries are fine free for their patrons. LSS, ESS are fine-free for their own patrons.