SWAN Clarity Task Force

Notes

Wednesday, June 5, 2019, 10:00 a.m. – 12:30 p.m.

Introductions & Welcome

Task Force Membership:

1. Kerry Halter, Technical Services Manager, Batavia Public Library District, khalter@batvaiapubliclibrary.org
2. Kristina Howard, Adult Reference Manager, Tinley Park Public Library, khoward@tplibrary.org
3. Michelle Kurczak, Head of Youth and Young Adult Services, Messenger Public Library of North Aurora, MKurczak@messengerpl.org
4. Cindy Maiello Gluecklich, Director, Melrose Park Public Library, maielloc@mpplibrary.org
5. Amy Prechel, Head of Access Services, Downers Grove Public Library, aprechel@dglibrary.org
6. Angela Romano, Fiction and Reference Librarian, Oak Lawn Public Library, aromano@olpl.org
7. Ahren Sievers, Technology Librarian, Elmwood Park Public Library, asievers@elmwoodparklibrary.org
8. Colleen White, Cataloging Librarian, Oak Park Public Library, cwhite@oppl.org

SWAN Staff:

9. Dawne Tortorella, Assistant Director, Chair
10. Aaron Skog, Executive Director
11. Scott Brandwein, Bibliographic Services Manager
12. Tara Wood, User Experience Manager

Review Notes from May 2, 2019 Meeting

The SharePoint portal for Clarity Task Force members is invitation only to those members. The invitation needs to be accepted prior to accessing the portal or any document links. Ian Nosek will review access issues with Clarity Task Force members individually, he can be reached at ian@swanlibraries.net .

The group discussed some of the feedback from library colleagues regarding the purpose of Clarity. Some library staff wondered if the group was selecting a new ILS. Others did not understand how the group was formed.

BLUEcloud Analytics – Preview of Dossier Snapshots and Templates (Grant Halter, Data Analyst, SWAN)

Based on the facilitation at the first meeting of Clarity in April, the group surfaced issues with BLUEcloud Analytics (BCA). Dawne invited Grant Halter to show some of the direction that we can go in with BLUEcloud Analytics for libraries.

Grant Halter is looking for reactions to the content of the reports, the lists, are we showing the right things, the visualizations. Do not focus on sizing and colors as much, as these can be easily tweaked.

The BCA data analytics runs on a software platform from Microstrategy, which is configured and run by SirsiDynix. The new feature available is called "dossiers" which is best conceptualized as a "book with chapters." The dossier is preconfigured by SWAN and as you click through the chapters, the data visualizations will change. It is also possible to export the dossier as a PDF document.

The BCA dossier drafted and shared with Clarity is common statistical report that could be filtered by library. Each library could select their own library, and the data would change within the dossier framework. (The packet for the June 5, 2019 Clarity Task Force has screen captures as examples.)

Monthly Snapshot Dossier Demonstration

Grant Halter present the BCA dossier's 4 "Chapters" and 21 "Pages" of the Circulation Activity. This dossier has a lot in it, with the intention it could be reduced. Clarity reaction to the overview of the BCA Monthly Snapshot dossier demonstration included the following:

- "Station Library" is a somewhat confusing term. This could be "At Your Library" or "Items You own" or "Your Items Everywhere" or "Your Items at Your Library"
- In essence this report is "what, where, and who?" It is where the library collection is circulating.
- If a report has double information within the report, this could be a barrier for the user.
- Where are we aiming these reports? What is the user? Are they users that are not using BCA? This may not be for the "power users" but be great for the majority of libraries that need a canned activity report for their director and trustees.These reports with visualizations could also have a use for managers and directors to be used in management team meetings.
- Labels like "Cat 1" may be unknown to some staff, so label naming is important. Using natural language, but also making sure to reference the source of the data will really help report recipients understand what they are seeing. For example, 3 letter codes for libraries will not be understood by directors and particularly board members.
- These numbers are good for managing staff, deciding on a self-check to be added, etc.
- If the report could have tick boxes to turn on or off certain elements, even better.

This is an excellent start, especially if we make this per library. There may be too much in this dossier, but it depends on the goal and audience. Here is a summary of the direction SWAN should go in:

- Better labels
- Brief explanations on sections
- Make this a brief starting point, do not overwhelm
- Focus on "The what, the where, and the who"

For comparison, last meeting's demonstration of Collection HQ showed that product has more direction on <u>which decisions to take</u>. So other BCA dossiers that are "role dependent" in the library can be created to help with those decisions.

BCA Templates demonstration

This approach would be for library power users. This report would be all the possible report objects in BCA put into a single report, where a library could pick and choose what they want. The report template can drag and drop objects into the filter.

Clarity comments:

- How soon can we have this? (Amy)
- Will SWAN provide open labs on how to use these? (Yes, likely a GoToMeeting online)

Dawne will have examples of this template-based report for Clarity Members in their BCA folders.

Review of SWAN Strategic Planning Survey from August 2018

This was the membership survey sent out in August 2018 as part of strategic planning. There are comments in this survey that pick up on the frustration, but we will need to drill down into this more to get better insights.

The main takeaways of the survey for Clarity:

- Dissatisfaction exists amongst some library staff.
- Symphony Acquisition users voiced their frustration.
- While there is unhappiness among staff, going through a migration is not desired.
- Survey comments about "duplication" of records could be a reflection of post New 19 bibliographic data, or it could be a misunderstanding of the various formats. This is an example of the strategic planning membership survey not providing enough precise information to take action on, but the survey was enough to pick up on a need for Clarity to determine if the issues are (1) SWAN, (2) Member Libraries, or (3) the Vendor. Regardless of the root cause, any improvements to the way Enterprise displays these records in search results would be helpful and beneficial to users.

Responses from "What does SWAN do well?" [positive sentiment]

Some of the things "SWAN does well" reflect continued improvement within areas of SWAN support. Clarity was eager to discuss the frustration they find within WorkFlows.

Responses from overall rating "What changes would SWAN have to make for you to give it an even higher rating?" [negative sentiment]

Symphony ILS dissatisfaction discussion among Clarity Task Force reps generated this list of Symphony WorkFlows issues:

- WorkFlows editing compared to OCLC Connexion is difficult. (Kerry)
- WorkFlows searching should be easier, but at the same time, it has to be precise. The front-line staff expectations are more around Google, where the search was "close enough." (Michelle
- WorkFlows placing holds faster and efficiently would be a great solution. There are a lot of clicks to complete this task. Staff that do this daily have the number of clicks down pat, but others who do not do this every day will find it less intuitive. (Ahren)
- WorkFlows Acquisitions limit to running one report at a time is a problem due to the Symphony Report queuing reports up one after the other. (Kerry)

- Workflows circulation merging patrons when multiple user entries are found. (Cindy)
- WorkFlows Field sorting within searches, beyond title, but with formats. (Kristina)
- Expanding the number of search results you can sort on. (Michelle)
- WorkFlows SmartPort configuration for Cataloging Libraries, making the configuration work as intended. (Colleen)

MAGIC and LINC libraries joining SWAN: was the WorkFlows frustration present before joining SWAN?

- Not really. There is more data in SWAN, which takes adjusting to. (Michelle)
- There was a bit more rules with proper cataloging in LINC. (Kerry)

Dawne noted that it will help to determine "exception processing" versus "normal processing." We need to answer the following questions:

- How often does it happen?
- And if the exception happens twice a day, how long does that take?

If 90% of the daily activity is normal processing and is completed easily, the 10% exceptions could be the areas to focus on.

Issues identified should be conveyed as the following, particularly if the membership conversation moves towards "we need a new ILS."

- SWAN is a large consortium with a lot of data.
- Is the issue the software tool?
- Is the frustration due to we have not adopted best or common practices?

Evaluating and determining next steps in addressing area of concern/area of improvement

Clarity reps discussed the following ideas:

- New Survey (not effective in this case, not precise enough, based on the August 2018 survey)
- Roadshow
- Town halls
- One on one interviews
- Focus groups
- Delineate the expectations of a "successful" relationship with the consortium.
- Design a roadshow for Clarity reps that can be tested out their library. This could be combined with a SWAN expert/consultant to help outline the needed fixes. Create questions in advance and let staff think about them.

How to seek additional input from membership: develop a process to solicit member feedback

Following this discussion above, Clarity settled on the following as the idea to gather precise feedback.

1. Hold a "diary/journaling activity" for a 1-week period among Clarity rep libraries, where staff record the pain points at the public service desk, frustrations encountered in cataloging, acquisitions, and elsewhere.
2. Compiled these observations.

3. Hold regional meetings to affirm the results Clarity compiles.

How to seek additional input from membership: Time – this summer?

Timeframe: get input from Clarity libraries on diary/journaling activity in June & July.

Hold SWAN town halls in August where the issues uncovered are shared and discussed.

How to seek additional input from membership: Facilitation

The town hall meeting approach will be handled by Dawne Tortorella and Clarity.

Calendar Setting (Date/Time/Place) through June 2020

Next meeting: Wednesday, July 10 (10-12:30) -
https://www.librarylearning.info/events/?eventID=28764

Respectfully submitted by Aaron Skog