



SWAN Circulation Advisory Notes

Wednesday, January 22, 2020, 9:30 AM – 12:00 PM

Location

Members:

1. Jeri Cain (Carol Stream Public Library)
2. Stephanie DeYoung (Batavia Public Library District)
3. Sue Feddersen (Bensenville Community Public Library District)
4. Sandra Leyva (Alsip-Merrionette Park Public Library District)
5. Victoria Muraiti (River Forest Public Library)
6. Cheryl Pawlak (Downers Grove Public Library)
7. Debbie Sheehan (Indian Prairie Public Library District)
8. Brittany Smith (Westmont Public Library) – joined after break
9. Christine Sporleder (Bloomingdale Public Library)
10. Peggy Tomzik (Eisenhower Public Library District)
11. Thomas Webb (Matteson Area Public Library District)

Facilitators:

1. Crystal Vela, Consultant, User Experience, SWAN
2. Sam Dietel, Consultant, Bibliographic Services, SWAN

Agenda/Notes:

I. Welcome and introductions

23 libraries from the membership were represented by Advisory members and attendees.

II. Circulation Policy [Exhibit A]

Correction in Section 4.C. Remove period in second sentence “replacement costs.”

The updated Circulation Policy will be forwarded to the SWAN Executive Director for inclusion in

SWAN Board review and approval.

III. Charge [Exhibit B]

Updated charge was reviewed. Correction of missing Advisory member names has been made.

IV. Notices

Vickie shared notices update regarding 2nd overdue notices via SVA. We have removed notice preference of PHONE from email and print selection for 1st and 2nd notice. This removal now ensures that phone messages selected for SVA are properly sent.

After further looking at the reports, no one has been receiving a phone notice for bills. They have been receiving those via email and print. SVA bill report is being removed completely. Will be updating all documentation to reflect that bills will not be sent via SVA.

Patrons are getting correct notices now.

V. Patron Purge

Process is ongoing. We are accumulating a list of patrons that meet criteria and removing those patron records. BADADDRESS records, if they meet criteria, will be removed. If they do not meet the criteria they will remain in the system.

Will start seeing more patron records removed next week. At any time, you can submit a list of barcodes to be removed and SWAN support will process those removals.

VI. System Updates

a. 3.6.2

3.6.2 went live last Thursday. Upgraded overnight and tested early, allowing libraries to be online Thursday. All new features are activated with the exception of the OCLC Connexion import which will be activated on a library-by-library basis working with Bib Services.

Libraries have a month to verify that the new client is installed. Fill out a form to indicate your library has made the changes.

Link to webinar and news updates:

Member Update Recording - <https://support.swanlibraries.net/tutorial/67057>

12/20 News Post - <https://support.swanlibraries.net/news/2019-12/67030>

1/17 News Post - <https://support.swanlibraries.net/news/2020-01/67100>

b. Rebuild (offline)

Feb 23-24 – Monday morning Feb 24th libraries will be using offline circulation. Enterprise will be up, but item availability and my account features will be limited. This is the first rebuild we are doing on the Azure server. It used to take up to 36 hours to do a rebuild; on the new infrastructure we are planning a much faster rebuild.

Expect Monday Feb 24th to be an offline day. Ian posted a webinar on how to use offline, as well as documentation.

Link to webinar and news updates:

Training Recording: Using WorkFlows in Offline Mode -

<https://support.swanlibraries.net/tutorial/67031>

1/21 News Post – Database Rebuild & Scheduled Downtime on February 23rd/24th -

<https://support.swanlibraries.net/news/2020-01/67116>

1/21 News Post – February Rebuild, Summary of Bibliographic and Item Record Updates

- <https://support.swanlibraries.net/news/2020-01/67128>

There was discussion on communication and timing of the upgrade to 3.6.2. Some felt additional SWANcoms and discussion prior to the upgrade would have been helpful. Others felt the Member Update session provided the information needed and shared with their staff.

SWAN IT will work with libraries who have problems with the value statement now available on receipts.

When using Offline, the recommendation is to leave the Due Date blank so that the system correctly and automatically calculates the due date when the transaction is loaded to the system. Some libraries prefer to enter the due date so that it prints on the receipts. If your library fills in due date, verify that the date is correct. If incorrect dates are entered, it is possible that patrons will immediately be billed (e.g. wrong year entered). SWAN typically encounters a couple of libraries with this problem after offline transactions are loaded.

Stephanie has a spreadsheet that they use at Batavia which calculates due dates. They use this to print bookmarks and share with patrons when they are in offline. She will share this spreadsheet.

Also note that checkin is disabled in Offline mode.

VII. Card Renewal through Enterprise

Crystal shared functionality that allows patron card renewal through Enterprise. This feature can be enabled upon request; it will be an opt-in configuration which can be customized based on patron profile allowed to renew cards online.

Discussion included ongoing need for NCOA to help ensure accurate addresses. A question was

asked whether renewals through Enterprise could be pulled from BLUEcloud Analytics versus renewals through WorkFlows. SWAN staff will review this possibility.

Peggy shared that a similar process is in place at Chicago Public Library and that we had this capability in Millennium. Concern was raised over the parameters and time frame of these renewals (e.g. 3 months vs 3 years). Of course, libraries that have a NEVER expiration date on patron records have no need for this functionality.

Currently there is no documentation on the support site, but SWAN will work on updating documentation to include this feature.

If your library is interested in the functionality, submit a help ticket to enable.

VIII. Patron site demo

The SWAN patron facing website is getting a facelift and is scheduled to be available March 2nd. This site is intended for libraries to share with their patrons or use the content directly, if desired.

A link will be provided from the Enterprise catalog and will replace the current SirsiDynix help for patrons which is linked from the catalog via the “?” icon at the top and in the footer. Providing SWAN-specific patron tutorials and help is intended to better address patron questions in using the catalog.

SWAN staff will look into the possibility of providing a preview link for review prior to launch.

IX. Trainings

a. Outline activity

Circulation Advisory members received a request for feedback related to SirsiDynix training content. Crystal has incorporated this feedback into plans for web-based trainings.

The group brainstormed on critical content to include in training which will be offered online and recorded.

[Training Outline Activity](#)

[Circulation Basics – class outline](#)

Audience – Sunday, part-time clerk, new hires

- Navigation
 - Login
 - Wizards
 - Helpers

- Checkin
 - Checkin bookdrop
 - Backdate
 - Checkin alerts – what do they mean
 - Hold alerts
 - Fine-free checkin
 - Routing ILLs
 - Warning – this item is... what is next step
- Checkouts and Renewals
 - Glossaries
 - Modify due dates
 - Overrides
- Users
 - Lookup
 - Display
 - Summary
 - Statuses
- Paying Fines (part of checkout) – just the basics

Reports for Circulation (Peggy & Debbie)

Audience: Circulation Manager/Department Head

Which ones are automatic, which are scheduled for delivery via subscription

- CLR – Custom Long Overdue
- Failed Calls
- Monthly Stats – ones on the website
- Patron Clean-up
- Shelf Check – In Transit 10-30 Days
- Prebilling Shelf Check
- Last Copy Hold (Tuesday report)
- Clean Holds Report
- Bounced Emails
- On Shelf Items – Pick List
- Pending Transits
- List Users with Holds on Shelf Yesterday (N19)
- Documentation

Patron Management

Audience: Circulation Staff

- Searching for a user
- Issuing library cards
- Renewing
- SMS Contact tab

- Identifying entire user record
- Duplicate records – what to do
- Reregistering a user
- Modifying a user; properly modifying extended user info
- For Supervisors only:
 - User ID Manager - Supervisor functions [disclaimer – check with your supervisor if this is a function]
- Lost cards (don't use user lost card wizard – is it banned)
- Claims Returned (part of billing?)
- Reciprocal borrowers
 - Registering
 - Hometown (5 digit code), Lemont – what is best practice for non-standard barcodes?
 - Right library, user profile
 - Reciprocal borrower verification

Holds

- Cancellation
- Holds list

Transactional Billing

- Damaged item

Additional Topics/Discussion:

During the past year and for 2020, several new users groups have been convened. Sharing common goals in 2020 and cross-discussion between groups is a goal for 2020.

So, what goals does Circulation Advisory have for 2020? We want goals that can be accomplished this year, working within limits. We do not want to say “no to Nirvana”, but we do want to be realistic and open-minded.

Brainstorming – Goals for 2020

- Find a way to get more SWAN member libraries involved (make sure best practices are actually practiced) Members of Advisory get buddies of libraries who don't show and call to touch base and let them know what happened at last meeting
 - Think of neighbors that don't come
 - Spread the SWAN message and increase engagement
 - Identify people who could benefit with more information
 - Get contact info of each Circ Manager contact at each meeting – send notes to full group after each meeting. Email with a smack in the face with information
 - Record meetings, log in real time and live stream
- Peggy – everybody is forgetting to do x – what if 2 times a month we had “thought of the month” from Circ Adv – would be cool to allow people to leave a comment. Tip/trick/heads-up

- What happens when a library bills something incorrectly? We typically suggest reaching out to the other library, sometimes just forward the email from SWAN.
- Goal – Billing literacy
- Continue to have conversations about a threshold at which we don't bill libraries at; additional research
- Develop new trainings and have them available online
- Develop Circulation Managers training, assign a mentor, welcome packet
- Education email out to all Directors about what the user groups are so that Directors can determine what they should be sending staff to.
- “Back in the day” – there was a person (Heidi) who went through everything with me. And Renee used to do site visits/training. Does SWAN still do that?
 - Let us know who new staff are.
 - Monthly Operational Report in Board report lists all consultation and training, including site visits that SWAN staff make to member libraries.
- What should our theme of the year be? Teach and Communicate
- Fine Thresholds across SWAN
- Circ Map/Hold Map/User Profile audit – Circ and Hold Map training and move out to the full membership. Cross train in Cat Adv and DUX.
- Bring all players into the room – DUX, Cataloging Adv, Circ Adv – item types and how they drive everything (cross-advisory)

Consensus: Themes for 2020

Teach and Communicate

Library updates:

- Liz, Chicago Ridge – finalizing renovation, began in October
- Juan, Lansing – renovating youth services area; got rid of fees for guest passes
- Stephanie, Batavia – Working with St. Charles to help during St. Charles' month closure in March; Batavia will serve as holds pick-up point for SCD patrons
- Pat, Westchester – demolition of circulation desk is happening, hope to have new service desk within 1 week to 10 days
- Peggy, Eisenhower – wanted to acknowledge Mary Moss' last day and appreciate for Mary's knowledge and willingness to help colleagues was noted by all

Next Meetings

Circulation Users: Wednesday, February 19, 2020 9:30 AM – Noon (RAILS Burr Ridge) – Juan Estrada from Lansing will co-chair with Peggy Tomzik. That afternoon there will be a fine-free discussion/panel. See L2 to register for these events.

Circulation Advisory: Wednesday, March 18, 2020, 9:30 AM – Noon (RAILS Burr Ridge)

Attendees:

1. Juan Estrada (Lansing)
2. Elizabeth Wald (Chicago Ridge)
3. Carla Hibbard (Geneva)
4. Candice Krettler (Villa Park)
5. Julie Lombardo (Woodridge)
6. Manuel Vasquez (Grande Prairie)
7. Crissy Barnat (Clarendon Hills)
8. Pat Sinacore (Westchester)
9. Martyn Churchouse (Oak Park)
10. Norma Rubio (Crete)
11. Marla Wieringa (Matteson)
12. Teri Wilson (Green Hills)
13. Meghan Moran (Oak Lawn)

SWAN staff in attendance:

1. Rudy Host (SWAN)
2. Steven Schlewitt (SWAN)
3. Dawne Tortorella (SWAN)
4. Vickie Totton (SWAN)
5. Tara Wood (SWAN)