



SWAN Administrators & Directors Quarterly Meeting

December 6, 2018

9:30 a.m. – 12:00 p.m.

RAILS 125 Tower Drive, Burr Ridge, IL 60527

Main Meeting Room

Agenda

1. Call to Order and Welcome
2. Public Comment
3. Introduction of New Library Directors
4. Approval of the September Quarterly Meeting Minutes – Action Item (Exhibit pgs. 3-8)
5. Strategic Planning Process – Information Item (Exhibit pgs. 9-15)
6. Recommendation on Purchase of BLUEcloud Mobile app – Discussion Item (Exhibit pgs. 16-18)
7. Revise FY19 Budget – Action Item

THE FY19 BUDGET LINE #5400 "EQUIPMENT RENTAL, REPAIR AND MAINTENANCE AGREEMENTS" BE REVISED FROM \$468,200 TO \$491,683 FOR THE SUBSCRIPTION OF BLUECLOUD MOBILE, AND THE FY19 BUDGET LINE #5430 "CONSULTING" BE REVISED FROM \$44,500 TO \$65,100 FOR THE ONE-TIME SETUP COST FOR BLUECLOUD MOBILE

SWAN Library roll call vote performed by Tiffany Verzani, SWAN Board Secretary

Article IX Section 6 Voting: The following items require membership vote to pass:
Budget & Revisions (In-person affirmative vote of 2/3 of all members present is required)

8. SWAN Resource Sharing & Find More Illinois – Information Item (Exhibit pgs. 19-26)
9. New SWAN Support Site Overview – Information Item
10. Enterprise Usability Test Report Fall 2018 – Information Item (Exhibit pgs. 27-37)
11. Upcoming Server Upgrade January 2019 – Information Item
12. Green Hills Public Library District Joining SWAN – Information Item
13. SWAN Executive Director & Operations Report (Exhibit pgs. 38-62)
14. Announcements and Questions

15. Next meetings

Friday, December 21st (next Board Meeting)

Tuesday, February 5, 2019 (next Committee of the Whole Meeting)

Thursday, March 7, 2019 (next Quarterly Meeting)

Meeting Information

Member Comment after each agenda item.

The Quarterly Meeting will be live-streamed via GoToMeeting:

Please register for SWAN Quarterly on Thursday, December 6th, 2018 9:30 AM - 12:00 PM CST at:

Please join the meeting from your computer, tablet or smartphone.

<https://global.gotomeeting.com/join/641259789>

You can also dial in using your phone.

United States: [+1 \(646\) 749-3122](tel:+16467493122)

Access Code: 641-259-789

First GoToMeeting? Let's do a quick system check:

<https://link.gotomeeting.com/system-check>

After registering you will receive a confirmation email containing information about joining the training.

SWAN Administrators' Quarterly Meeting

RAILS Burr Ridge

125 Tower Dr.

Burr Ridge, IL 60527

September 6, 2018 9:30 A.M.

Call to Order and Welcome

President Bodewes called the meeting to order at 9:33 a.m. Losey, Wittman, Bodewes, Verzani, Bukovac, Milavec, and Wolff were present to establish a quorum.

Public Comment

No public comment

Introduction of New Library Directors

Brian Vagt, Glenwood-Lynwood Public Library District.

Approval of the June Quarterly Meeting Minutes

Doug Losey moved to approve the June Quarterly meeting minutes, seconded by Jamie Bukovac. Motion carried by unanimous voice vote.

Strategic Planning Process

Bodewes provided an outline of the strategic planning process and timeline. Consulting Within Reach (CWR) has been engaged, holding membership meetings in August and conducting interviews with SWAN staff and board, on phone interviews with individual library directors (12), and interviews with external stakeholders (8).

Last week a survey went out inviting all SWAN member staff to participate. Approximately 350 responses were received.

The next three regularly scheduled Board meetings will include presentation and discussion on the Strategic Plan.

- On September 21st, CWR will present to the SWAN Board, during the regularly scheduled Board meeting, Mission, Vision, and Identity Clarification: where SWAN is trying to go in the future. That afternoon CWR will provide an assessment report to SWAN staff.
- On October 19th, CWR will present the Strategic Plan recommendations.
- On November 16th, Executive Director Aaron Skog will present the initial Tactical Plan (1-year tactical plan created by CWR and SWAN Executive Director)

The December 6th SWAN Quarterly Membership meeting will include a presentation of all phases of the Strategic Plan Process.

Question was raised asking what the timeframe for the Strategic Planning Process was – 5 years.

Update on Electronic Participation for Membership Meetings

Bodewes reminded members of the discussion at the last quarterly regarding electronic participation. In review of Bylaws and Open Meetings Act, Board asked for legal opinion on remote participation including best practices.

Legal opinion will be reviewed at next Board meeting and then discussed at the December quarterly.

SWAN Reports on Projects & Operations

Skog presented an update on SWAN projects and operations. The quarterly packet contains a condensed overview of Executive Director and Operations monthly reports for the past quarter of activity.

SWAN Membership changes reflect the new state of SWAN in terms of growth since May. Cataloging libraries have tripled in size; Acquisitions libraries have nearly doubled. Acquisition processing has suffered the biggest bottleneck since adding the new libraries. We have worked with SirsiDynix to addresses some processing and some libraries have made behind-the-scenes workflow adjustments. We continue to work with our Acquisitions libraries in identifying issues and best practices for efficiency.

Asked whether this was due to individual processes at the libraries or the system, Skog indicated both. In the morning we are experiencing longer processing queues. EDI processing is sequential in nature and therefore reports need to be queued. Skog mentioned BLUEcloud Acquisitions which has been under development for a very long time and we do not know when general availability will be announced, but it offers promises of offloading much of the Symphony system processing demands of acquisitions.

Growth in titles and items – ran large deduplication and Bib Services team is continuing to address merge record requests.

Patron database and circulation increased, as did our geographic coverage.

Dawn Bussey mentioned that the acquisitions processing requires more clicks than previously, to the point where they may need to add more staff. Skog and Tortorella are meeting with several of the newly migrated libraries to surface these concerns and identify workflow issues that are still remaining.

Rebecca Bartlett asked for clarification on the processing window allowed to run library-specific reports, such as acquisitions. Many libraries are working within a 9 AM – 6 PM processing window. Skog shared that restrictions were initially placed at time of 2015 migration. Not until early Jan 2016 and movement of statistical reports to BLUEcloud Analytics were we able to free up some of the processing window. Continued efforts include movement of statistical reports to BCA and consolidation of notices.

Other highlights shared include:

- Notification brochure – shared with libraries in SWAN, well received. Not sure if there is interest in doing a second run of this brochure. ESS used the brochures at outreach events. MPS – would like to customize a bit
- Training & Events – BCA Open Labs provide consultation sessions with library staff
- Reciprocal Borrowing – CPL patrons are most prevalent, Green Hills is second in number of patrons that visit SWAN libraries; saw an increase in NON-SWAN RBs after migration, but not a large impact on these patrons placing holds. Not an explosion of new RBPs, just a new feature that these patrons were allowed.
- Patron Lookup Tool – created as a tool during consortium-wide downtime to look up patrons during offline circulation. Continued development and created a patron lookup tool for CPL. This tool will be released to CPL staff and other libraries wishing to verify SWAN patrons for reciprocal borrowing privilege at their libraries.

What's Coming – next 3 months

- Skog presented the SWAN platform diagram which illustrates the interface between multiple vendors. Some of the vendors we work with will be partners in future development. TMQ who has provided our SWAN holdings in OCLC will be sunsetting service and SWAN will be working directly with OCLC to manage holdings in the future.
- RAILS projects – Explore More Illinois (Museum Pass), Find More Illinois (FMI – Overlay) SWAN will work with vendor Quipu on Explore More Illinois and Auto-Graphics on Find More Illinois. Patron authentication in both projects will transfer confidential data via web services. Bukovac asked about decision on whether SWAN was participating in FMI. Skog verified that SWAN staff is working with RAILS and vendor partners on readying the technology necessary to make this possible, should member libraries wish to participate. No decisions or assumptions on participation have been made – rather readying of technology using standard means of secure interface.

- Catalog Usability Testing, Tara Wood and DUX are looking at patron sessions on usability later in September. These usability tests will target specific design recommendations made by DUX. Bussey asked if usability study will include non-power users and how these studies can tap into novice users. Skog indicated that part of this process is to provide the tools for SWAN staff and member libraries to conduct ongoing usability and target specific groups of users. This process is being led by SWAN staff and members with no outside consulting services as was conducted with the previous study.
- Responsive design has been announced for Q4 by SirsiDynix. SWAN has readied our catalogs for quick movement to this release when available.
- Support Site revamp – have conducted interviews with library staff and conducted a card sort online to help organize content areas. Focus is on documentation and providing documentation in context – will include continuous development into 2019. This model builds on the Cataloging Manual which was released last spring. Rather than developing individual PDFs, we are moving to related documentation sets that can be printed in PDF from the interface but will live in a native text format for increased searchability. Governance documents, meeting documents, and statistical files will be moved to the new site.
- Cloud Instructure-as-a-Service – Moving to cloud-based service on Microsoft Azure. Steven Schlewitt wrote an extensive white paper which outlines the recommendation to move to a cloud-based infrastructure. One of the benefits is that we will be able to add resources on demand, for special processing such as an index rebuild. Prior to this move to the cloud, we need to:
 - upgrade from Symphony 3.5.2 to 3.5.3 (planned for off- hours)
 - upgrade to Redhat 7 operating system (uses Symphony Bridge)
 - move from the RAILS datacenter to Microsoft Azure cloud (uses Symphony Bridge)
 Details will be forthcoming as dates are finalized.
- FY20 RAILS LLSAP Grant – expansion of consortia that have applied for FY20 funding from RAILS.

BLUEcloud Mobile app

SirsiDynix has released their next mobile application, BLUEcloud Mobile. Skog is working with SirsiDynix on pricing for the consortium and options for library-branded offerings directly available from Apple and Android app stores.

Karen Keffe asked if SWAN has done a survey to determine which libraries currently have mobile apps, what they are, contract expiration, and pricing. This information would be

helpful in helping libraries assess the ROI for BLUEcloud Mobile and if the value-add is worth having.

Skog asked if there was agreement that SWAN should be looking at the latest version of the SirsiDynix mobile app. Membership present was in total agreement.

Skog also shared news of the Kids Catalog app which gamifies catalog interaction. A link to a recent webinar recording showing BLUEcloud Mobile and the Kids app is available in the packet.

OCLC Reclamation & Additional SWAN-OCLC Projects

SWAN is working with OCLC to use the services to our full advantage with OCLC membership. SWAN staff will be providing configuration for all SWAN libraries to provide integrated into Enterprise through Library Information, customization/library branding of WorldCat Discovery, SWAN-library scoping within OCLC, authentication through OpenAthens, and ability to provide patron-requests for items worldwide and not available in the SWAN catalog (directed to a staff-mediated request queue). This work is currently underway and expected to be available to all libraries by the end of the year.

Workshops/webinars will be forthcoming to review these processes and in 2019 an Interlibrary Loan Users Group will be established for networking and sharing best practice.

Green Hills Public Library District Application to Join SWAN

Skog discussed admitting Green Hills Public Library District to SWAN. Green Hills Public Library District expressed interest in joining SWAN when the N19 project had just started. They have been waiting for about 2 years to request SWAN admission.

Green Hills Staff and SWAN staff met and we are confident, based on the library profile and resources needed to add them into SWAN, this will be a successful project. We have learned much from the recent N19 project to streamline migration activity. Green Hills does not use the Acquisitions module and at this time does not believe they will apply as a cataloging library. Admission of Green Hills into SWAN was included in the FY19 budget.

SWAN Joining Fee

Impact/Joining fee will require a 2/3 vote of all libraries for adding new libraries and setting an Impact Fee. SWAN will hold an electronic vote to set the Impact Fee for all new libraries at 25% of the estimated annual SWAN Membership Fee. This fee would need to be paid by the library joining as this fee is no longer eligible for grant funding from RAILS.

Green Hills Board is looking to pass the SWAN agreement at their October Board meeting.

Grant for the migration fees (one-time) cost will be eligible for RAILS funding. RAILS recently announced the grant program for adding members to LLSAPs is available for this FY.

Question was asked if the 25% Joining Fee would be calculated with or without the RAILS grant. Skog clarified that the Joining Fee is based on the estimated SWAN membership fee and is not associated with the RAILS Catalog Grant.

SWAN will hold an electronic vote to set the Impact Fee for all new libraries at 25% of the estimate annual SWAN Membership Fee. The SWAN Board should ratify the vote of the Membership to ensure the will of the membership is carried out. Electronic voting on Impact Fee and Green Hills membership approval will be held.

Announcements and Questions

EPS – raised over \$20,000 and will remodel story room. They held a fundraiser and received over \$4,000.

LGS – lobby is under development, temporary walls, difficult to figure out how to get into the library, end of Dec/early Jan expected to be complete

TFS – construction starts in early Jan, will be closed for 2 weeks near end of Jan

DGS – small construction, lobby reconfiguration – moving circulation desk for visible sight lines with entry

Upcoming:

Sept 21st – SWAN Board Meeting

Dec 6th – next Quarterly at RAILS

Adjournment at 11:03 a.m.

SWAN Strategic Plan (DRAFT)

Introduction

This document is intended as a guide for the SWAN Board and Executive Director over the five years between 2019 – 2023. The tactical plan will be updated each year.

Identity: Defines how decisions are made

Mission: Defines the problem in society the organization is trying to solve

Vision: What is the organization's solution?

Purposes of this Strategic Plan

- A. Sets high level **strategic objectives** (*where* you are trying to go)
- B. Articulates the underlying **rationale** (*why* you are trying to go there)
- C. Establishes agreed upon **markers** (*how* you will know you are making progress)
- D. Provides **guiding principles** for execution (*what* is the right path)

Identity, Mission, and Vision

Identity

SWAN provides resources and services to member libraries and the constituencies they serve and is governed as a representative democracy of elected Board members who represent the entire membership. Decision making is driven by the patron experience, patron rights, and security.

Mission Statement

SWAN seeks to improve patron ease of access to information, resources, and services through serving our member libraries. SWAN is dedicated to supporting our community of member libraries by sharing resources and technology.

Vision Statement

SWAN sets the standard of excellence for member and patron experience. We are the catalyst in creating and nurturing an ecosystem of ingenuity and collaboration. We engage in open dialogue with our membership and use purposeful communication in our community. We utilize careful planning of our key resources and are ready to seize opportunities as they arise.

Objective 1: Develop a Shared and Accurate Diagnosis of Member Dissatisfaction Around the Existing ILS and OPAC (Staff Interface and Online Catalog)

Rationale

The SWAN software platform is at the center of the chosen mission for the SWAN organization. The membership survey and interviews conducted as part of the assessment and analysis revealed member dissatisfaction exists at a meaningful enough level.

Satisfactory solutions depend on proper diagnosis: “What are the contributors for member dissatisfaction?”

There are three possible contributors to the problem:

1. **SWAN staff** (i.e. don’t perform enough training, are not providing adequate documentation, etc.)
2. **SWAN member libraries** (i.e. have different opinions on how software should work, don’t share common practice, don’t own their role in developing solutions, etc.)
3. **Vendors** (i.e. not investing enough resources in product software development, don’t meet timelines, etc.)

SWAN is missing a **shared** diagnosis. The below actions will lead to a clearer understanding of where SWAN’s member dissatisfaction stems from and will allow us to develop adequate solutions to counter it.

Markers

- A prioritized list of SWAN software platform related problems has been developed with input from member libraries and patrons (see Objective 4).
- SWAN Executive Director and the board systematically work through the list and develop initial diagnostic hypotheses that considers the role of all three potential contributors (staff, member libraries, vendors).
- Where there is disagreement or uncertainty, SWAN Executive Director proposes short term “triangulation” experiments to obtain more accurate data. Each experiment should intentionally modify one of the three potential contributors to discern what moves the meter on which problems.
- The experiments are agreed to by the board. Results are tracked and reported.
- At the end of this process, the Board and Executive Director agree on properly nuanced diagnoses of the major problems of the ILS and connected platforms.
- These findings are shared with the broader membership.

Guiding Principles

At this stage, the primary goals are gaining insight and developing a culture of collective ownership of problems..

Research and performance enhancements SWAN completed within Objective 1 should not lose sight of finding ways to improve the patron experience as part of objective 4.

Objective 2: Deliver on the Solutions that Can Be Readily Implemented, While Focusing on Long Term Solutions

Rationale

With the (a) prioritized list of problems and (b) the shared and accurate diagnoses, SWAN should then be better positioned to execute solutions. The solutions that have the greatest possibility of success will be ones that depend on SWAN staff and member libraries. These solutions should have a measurable positive impact on member library staff and patrons.

Markers

- SWAN board and staff agree on the prioritized list of solutions to be executed (emphasizing ones that are most under SWAN control). This agreement is communicated to the broad membership.
- SWAN staff executes on the list.
- Member satisfaction shows improvement (i.e. compared to most recent net promoter scores).
- SWAN staff increases its engagement of SirsiDynix to impact performance improvement.
- Current contract with SirsiDynix is renewed because SWAN needs more time with the current vendor.
- SWAN explores other community driven software solutions that can be implemented on top of the SirsiDynix Symphony ILS.
- A feasibility study is conducted about alternate software
- Board and Executive Director make a long-term decision about the ILS, catalog, or other components of SWAN's platform: accept the constraints of the library commercial market or more aggressively pursue the community driven, open source options.

Guiding Principles

SWAN board and members focus on research and development.

SWAN will build solutions that steadily improve the ecosystem within the consortium to steadily improve SWAN's software platform.

Objective 3: Reconstitute as a Mission Driven 501c3 with Clear Representative Governance Practices

Rationale

A 501c3 organization will more clearly express a mission-centric identity than an “intergovernmental instrumentality.” For the 501c3, a mission statement around an overarching “public good” is definitional. For an Illinois Intergovernmental Instrumentality, the “governmental” identities are definitional.

The “public good” requirement of a 501c3 reinforces the explicit inclusion of patron experience into a new mission statement. Practically speaking, becoming a 501c3 removes burdens hampering current governance such as insufficient quorums and barriers to participation (i.e. requirement to be physically present at meeting; prohibition of email as vehicle of decision-making). Another practical advantage will be to support grant seeking (Objective 6) as 501c3 is a more natural and understandable fundraising vehicle.

Reconstituting as a 501c3 provides a context for figuring out new governance policies and practices that strengthen representation:

- Designated board seats by type, geography, size
- Term limits by libraries (not just by individuals)
- Expanding the number of seats

Note: representative democracy sometimes means a board member has to hold the proper tension of representing some defined constituency AND the greater public good – like a legislator.

Markers

- Board committee is formed to draft a new set of bylaws for 501c3 incorporation that addresses the representation issues.
- Executive Director completes study investigating all relevant implications and proposes an execution plan.
- Vote is taken.
- Plan is executed.
- Process is developed for SWAN staff to spend more time onsite at member libraries to serve as “eyes and ears” on behalf of the board, giving members greater confidence that their interests are being represented.
- New board is constituted. There could be overlap with current composition, but there is a true “reboot.”
- Purpose and structure of all member meetings (whether quarterly or some other frequency) is clarified and communicated to the membership.
- Invest in board development and training, especially in this transition process

Guiding Principles

This objective should underline the collective mentality required of the new board members: that when they enter that role, they are acting as a representative of the interests of all the members *and their patrons* – not representing their own library.

The board must also commit to owning their authority and resist temptation to push things to mass member decision making. However, opening more channels to gain informative input from members should be done.

Objective 4: Increase Presence of the Patron Perspective

Rationale

Regularly receiving input from the patron as end user will be especially important as SWAN implements solutions for patron facing interactions. Simply inserting the words “patron experience” into the mission statement is not enough; this must be translated into practices that inject the patron perspective into decision making.

The patron perspective is the best way to achieve more standardization of resource sharing activities and act as a counterweight against (note: “counterweight” not “complete erasure of”) the tendency towards library by library customization.

Markers

- SWAN board and membership embrace that patron perspective should serve a determinative role.
- SWAN has a defined structure and strategy to regularly convene patrons and access their input.
- SWAN staff can cite data in their claims about patron needs, and not solely rely on anecdotal/subjective impressions from library staff.
- The practice of testing potential new features or ideas with patrons directly is built into the roll out process.

Guiding Principles

SWAN uses a variety of research methods to find the solutions that best meet the needs of our patrons and represent the demographics of the SWAN library community.

Objective 5: Strengthen the Collective Identity

Rationale

Community driven solutions depend on a collective responsibility.

There is a desire for opportunities to share expertise and provide other kinds of peer support.

Markers

- SWAN leadership—board and management—allocate resources towards building a collective identity.
- Vision and rationale for SWAN events like the recent member conference are communicated explicitly.
- SWAN staff adopts more peer learning and peer support responses, helping to connect members to the knowledge resident in the collective.
- Evidence of members proactively reaching out to other members and receiving the help they need.
- Survey feedback from collective identity building events show high levels of appreciation.
- Explore grant funding for these initiatives (see Objective 6 for rationale).
- Choose topics and design collective events so as to reinforce other strategic objectives: i.e. events that anchor everyone more in patron perspectives.

Guiding Principles

SWAN must consistently and repeatedly provide the rationale for building collective identity. There are many avenues towards building the collective identity—shared experiences, leadership practices, organizational routines, messaging, etc. all are tools that should be used.

Objective 6: Seek External Funding Options to Support the Research & Development Initiatives of SWAN

Rationale

We want to keep membership fees low while embracing innovation.

Markers

- A grant writing capacity is either developed in house (i.e. freeing up some portion of Executive Director or Assistant Director time) or outsourced.
- A proposal pipeline is developed based on SWAN priorities that can be matched against funding opportunities.
- An experiment is run with corporate sponsorship and cross-network branding, testing the hypothesis that SWAN can leverage its geographic and numerical scope to attract sponsors.

Guiding Principles

Start small and experiment in this effort. Build on success.

DRAFT

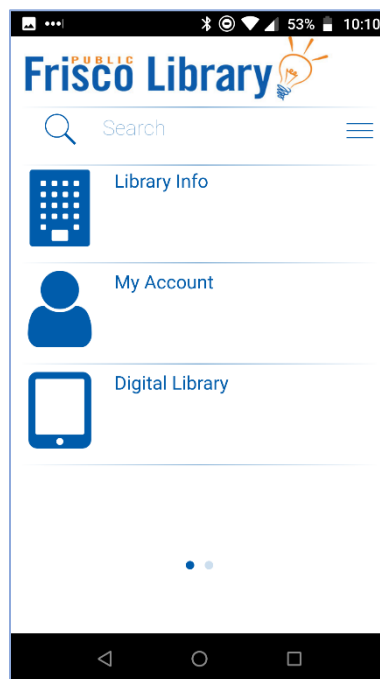
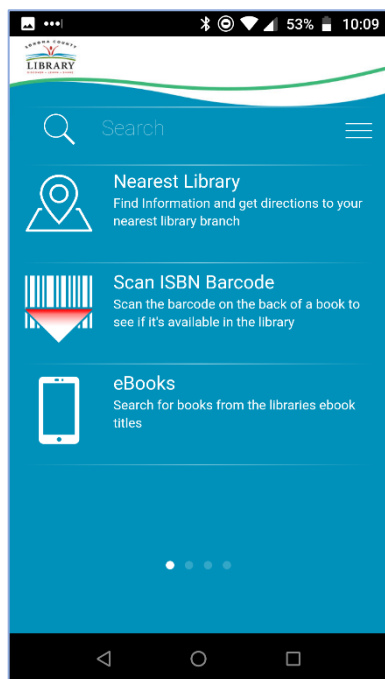
Request to Enhance SWAN Mobile Capabilities

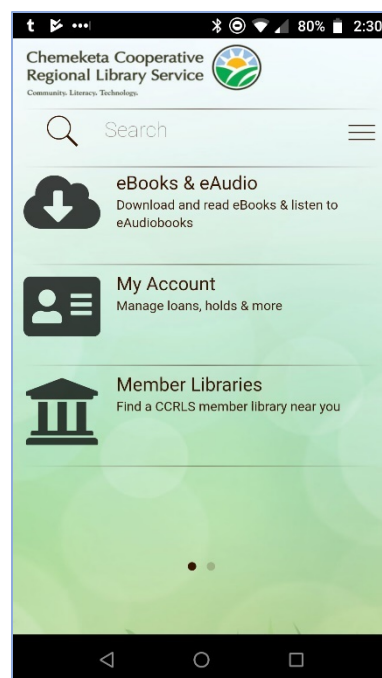
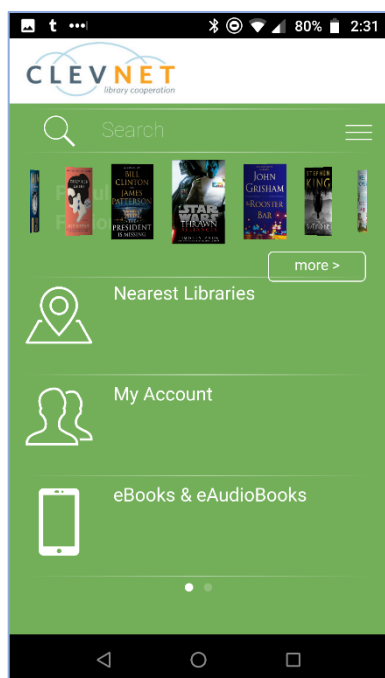
December 6, 2018 Membership Update

BLUEcloud Mobile

In 2016 SirsiDynix partnered with a mobile app development company Solus to build a new mobile application for customers. This development took place throughout 2017. The 1.0 version was released in early 2018. At the March 2018 Quarterly meeting, SWAN shared that Mobile was in public release for three customers: Frisco Public Library, Sonoma County Library, and CLEVNET.

As of this summer, 2 consortia are now live on BLUEcloud Mobile: CLEVNET and CCRLS. Each consortium has deployed BLUEcloud Mobile in the centralized configuration: patrons search for the mobile app in iOS or Android stores under the consortium name. SWAN shared an overview of our mobile capabilities at the September 2018 Quarterly meeting.





*Top row: two individual library BLUEcloud Mobile
Bottom row: two BLUEcloud Mobile consortium configurations*

SWAN has monitored the development of Mobile as a possible replacement for the current BookMyne app.

BLUEcloud Mobile Capabilities:

- Individual library branding through templates
- Individual library content, such as events
- eResource Integration
- Axis360 one-click download of content, no additional app or website required
- Integration with a new BLUEcloud Search, which is real-time catalog searching, requiring no harvests or extracts
- My Account features for holds, checkouts, suspending holds
- ISBN Barcode scanning and search against library catalog
- Multiple library barcode storage that could be helpful for families

What is under development?

- Overdrive integration with Mobile, with one-click download of content, no additional app or website required
- Ability to pay fines via BLUEcloud Mobile within SWAN's BLUEcloud Commerce (ProPay)
- Format filters that reflect SWAN's format categories
- Push notifications for overdue and holds
- Self-service for checkout and check in

Integration of check out/charge history is not on the development schedule.

BLUEcloud Mobile Kids App

There is a mobile app under development for kids. This will be quite different from Mobile, utilizing online games, in addition to searching the catalog. The approach is to gamify the library experience and interaction with the library catalog.

Recorded SirsiDynix Webinar: conducted November 7, 2018

The most recent BLUEcloud Mobile webinar is available for viewing.

<http://go.sirsidynix.com/BLUEcloud-Mobile-Overview-Nov-2018-On-Demand-Reg.html>

Enterprise Responsive Design ("Mobile Pages")

It is worth noting that Enterprise will become responsive for mobile devices in 2019. SWAN has prepared the current Enterprise 5.0 SWAN library profiles for the upcoming release of Enterprise 5.0.1 that will have responsive design capabilities. The release of 5.0.1 was targeted for Q4 2018 (October-December) release but has been pushed back to Q2 2019 (April-June) release.

Recommendation

SWAN should provide BLUEcloud Mobile for all member libraries. The subscription would be for two years and be paid for through SWAN reserves. Mobile would not be paid through SWAN membership fees for FY19 and FY20. We do not recommend a subscription to the Mobile Kids app at this time.

SWAN will discontinue supporting the current BookMyne for all libraries.

SWAN will provide a single BLUEcloud Mobile app under the SWAN name with customized templates for each SWAN library with library-specific branding. Individual BLUEcloud Mobile versions are possible but would not be part of the two-year implementation. The SWAN implementation would include training for library staff and printed promotional material for distribution to library patrons. We expect to go-live with BLUEcloud Mobile in April 2019.

Mobile Quote	Quantity	Year 1 Total Cost	Year 2 Maintenance
Annual Subscription	1	\$ 31,448	\$ 31,450
Template Support	97	\$ 19,400	\$ 19,400
SirsiDynix Consulting			
App setup	98	\$ 24,500	
SureStart	1	\$ 700	
Install	1	\$ 250	
Project Management	1	\$ 300	
Self-paced tutorial	1	\$ -	
Solus Subscription	98	\$ 19,600	\$ 19,600
Discount		\$ (5,150)	
Total		\$ 91,048	\$ 70,450

SWAN Resource Sharing: Overview & Recommendations

Introduction

Currently, SWAN participates in 4 resource sharing initiatives.

1. SWAN: shared ILS consortium of 97 libraries with high levels of reciprocal borrowing and ILL
2. OCLC: the Illinois statewide platform for resource sharing
3. SWAN Internet Access: a service SWAN provides school and public libraries for a fee
4. Share Illinois: a cooperative between consortium in the RAILS area

There is a new resource sharing initiative from RAILS, called Find More Illinois. This initiative has previously been called an “overlay” platform by RAILS. To provide an overview of Find More Illinois, it is important to understand the resource sharing SWAN participates in currently. It is also important to understand the network protocols and security involved. The inter-library lending outside of SWAN has changed recently and is also a factor to consider.

SWAN

The resource sharing in SWAN is built on the shared ILS model. Bibliographic and patron data is shared between all participating libraries. This model avoids duplication of records and allows patrons to borrow materials easily within the SWAN system.

Patrons can track the requests for materials online in My Account—along with preferences for notification of fulfilled holds and overdues, patrons can cancel and suspend holds on materials.

OCLC

Use of OCLC as has two separate functions:

- Supplying bibliographic records, i.e. bibliographic utility, through WorldCat
- Resource sharing platform, WorldShare ILL, through which libraries and patrons request material

The efforts to create a statewide catalog in Illinois have required sustained, strategic use of OCLC. The Illinois State Library negotiates a statewide contract for the resource sharing platform, but the need to have a bibliographic utility remains intertwined within that service.

SWAN fees include OCLC access to all its member libraries. SWAN updates the OCLC holdings monthly for the entire membership. SWAN recently conducted a “reclamation” of all individual library holdings in OCLC, which was paid through a \$10,000 State Library grant. Access to the OCLC WorldShare ILL is available to all SWAN libraries that wish to use it. Materials throughout Illinois can be requested and sent via statewide delivery. Material requested outside of Illinois can be shipped for a cost.

SWAN in 2011 [conducted a study of SkyRiver as an alternative to OCLC for the bibliographic utility](#) (link to that study). That study concluded SkyRiver would not sufficiently supply the consortia catalog with the records SWAN member libraries need. SkyRiver remains an active service under Innovative Interfaces, but consortia using SkyRiver instead of OCLC have tended to rely on additional consortia bibliographic databases to search and supply bibliographic records that cannot be found in SkyRiver. Ironically, these outside resources are built on OCLC supplied records.

In 2018, SWAN enabled for all 97 libraries the ability to have patron-initiated requests for materials in OCLC WorldCat Discovery. The patron authenticates via SWAN's OpenAthens system and is now configured for all 97 SWAN libraries as of September 2018 for any member that wishes to opt-in.

Internet Access

SWAN created Internet Access level membership some time ago, after modem "dial-up" access was discontinued. Internet Access is quite simple: a librarian at a non-SWAN library searches the Enterprise catalog and places a hold on material using a special barcode for her library. SWAN provides a user barcode to the library for an annual \$606.50 fee. These barcodes are commonly referred to as "institutional barcodes." Materials are delivered indirectly (RAILS distinguishes between direct delivery and indirect delivery) to school libraries, or directly to the public library enrolled as a SWAN Internet Access member.

Should an Internet Access library require multiple titles (book club, etc.), they must send a request to SWAN staff directly so that multiple title holds can be placed in Symphony.

SHARE Illinois

Not to be confused with the SHARE consortium in Heartland Library System or the AutoGraphics SHAREit platform explained later in the document, the 6 consortia in RAILS have used an informal arrangement to allow libraries in the consortia to use an institutional barcode to request materials. SHARE Illinois is used only by library staff to search 6 independent consortia catalogs for material, and log into that catalog to place requests. The [SHARE Participation Agreement is online](#) and was updated in 2011.

SWAN staff have created 390 institutional barcodes for libraries in CCS, LINC, MAGIC, NIC, Pinnacle, PrairieCat, and RSA in Symphony to participate in SHARE Illinois. The use of SHARE Illinois institutional barcodes in LINC and MAGIC varied, so when this data was imported into SWAN in May 2018, we now have duplicate accounts. This will require significant cleanup as these now number in the thousands due to creation of SHARE Illinois library accounts for many libraries who do not qualify as a participating in a RAILS consortium.

SWAN member libraries respond to the request placed by SHARE Illinois within the Symphony WorkFlows staff client, just as any other library request. The routing of materials via RAILS delivery requires additional attention at the SWAN library to ensure the item is processed, checked out, and labeled for either direct or indirect delivery to the requesting non-SWAN library.

ILL Outside of SWAN

The size of SWAN has allowed patrons in the consortium to largely find the material they need within SWAN. Prior to the New 19, the amount of ILL outside of SWAN via OCLC represented 5% of the total ILL within SWAN. Recent data between May – October 2018 shows the addition of 19 libraries to SWAN has reduced the outside ILL to be less than 1%.

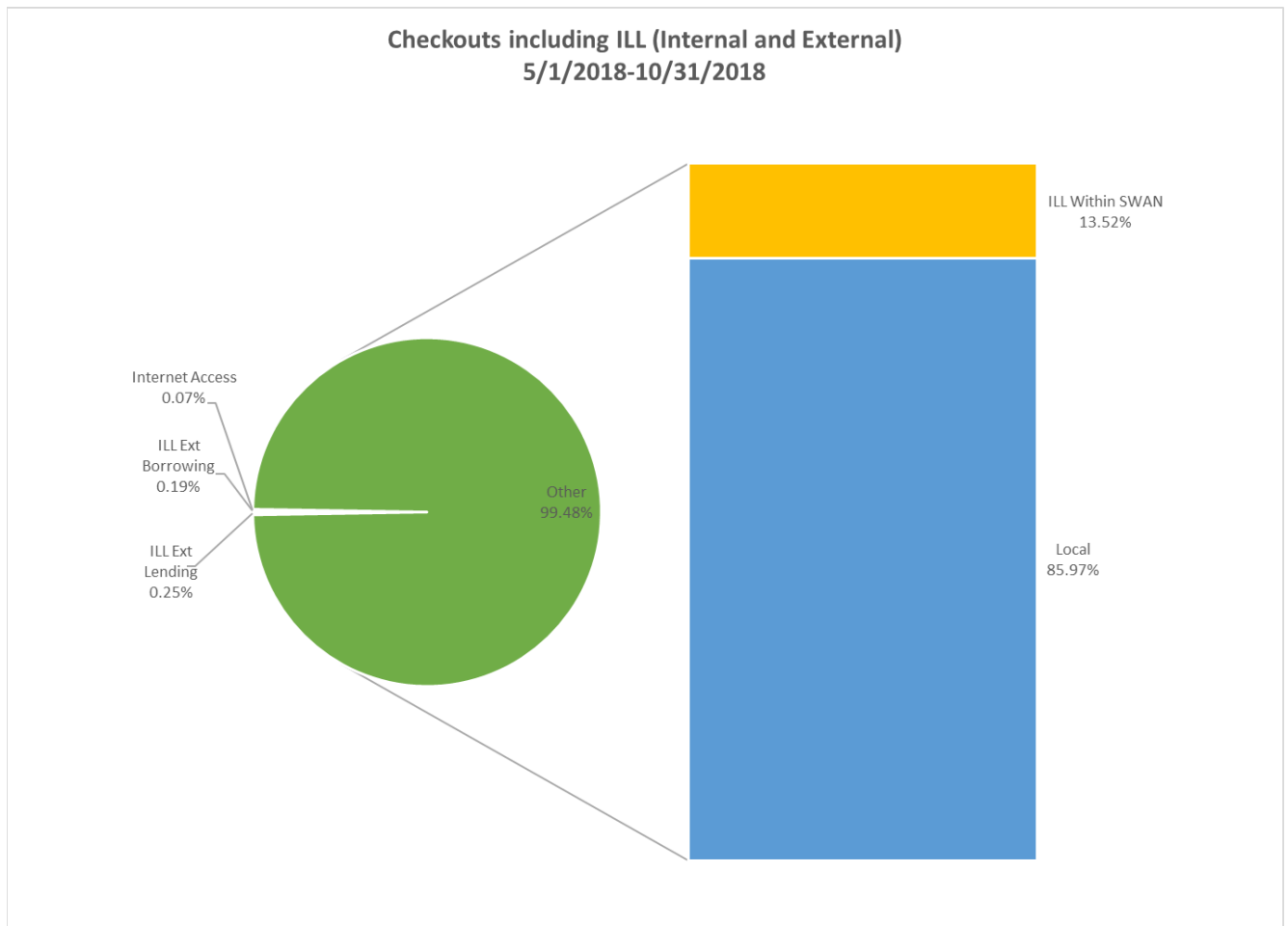


Figure 1: The green figure is all checkouts in SWAN, with less than 1% total for material requested outside of SWAN and checked out to SWAN patrons or Internet Access institutions in Symphony. The blue represents all checkouts of local library collections, the yellow showing ILL among SWAN libraries.

The non-SWAN ILL could increase after more SWAN libraries implement the OCLC WorldCat patron-initiated request arrangement. It could also increase if Find More Illinois was adopted by SWAN libraries. The AutoGraphics SHAREit model has noted a 50% increase in ILL in other implementations of SHAREit.

Protocols & Security

This quick overview is to help explain why patron privacy and data exchange go hand in hand within resource sharing technology. All resource sharing platforms must contend with these protocols and security in some way.

SWAN utilizes virtual private networks (VPNs) throughout its network as a requirement for membership participation. All SWAN websites use Hypertext Transfer Protocol Secure (HTTPS). Communication between SWAN's datacenter and SirsiDynix hosted services (Enterprise, BLUEcloud services) also utilize HTTPS to secure all transport of data.

Z39.50 ("Z 39 Dot 50")

It is very common for union catalogs to be created using this data query standard. This standard is used to exchange bibliographic (title) information and holdings (owning library items). Z39.50 can also be used to exchange MARC data. The SWAN Symphony ILS has a Z39.50 server so there is no additional cost to SWAN to use it. More recently, we have experienced Z39.50 issues impacting our ILS server load, particularly if Z39.50 queries made by the 3rd party vendor are improperly written—the server operating system load becomes high enough that Symphony circulation functions begin to disconnect. To mitigate improper queries, SWAN would restrict access to its Z39.50 via the firewall to specific vendors.

SIP2 (Standard Interchange Protocol Version 2)

The use of SIP2 is ubiquitous throughout the library software industry. This data exchange was developed by 3M for its self-check systems. SWAN has wide use of SIP2 throughout the consortium. Because SIP2 predates any wide adoption of the Internet and the World Wide Web, it exchanges information via the network in clear, unmasked text. It was meant for a private network. To make SIP2 data exchanges secure, it is usually used with additional security, such as a Virtual Local Area Network (VLAN) or Virtual Private Network (VPN)

NCIP ("N Sip" NISO Circulation Interchange Protocol)

The development of NCIP was to build a library standard for ILS software to use that improves upon SIP2. The improvement would be in the areas of temporary records created when an ILL transaction is made. This allows for the local ILS to seamlessly honor the outside request without additional library staff intervention. The application of NCIP throughout the ILS industry is uneven. NCIP has not been used within SWAN yet as no 3rd party vendors have required it. SWAN's SirsiDynix agreement provides NCIP at no additional cost. Due to the fact that the NCIP model has not been widely adopted by 3rd party vendors, a case could be made that it is failed protocol.

OpenAthens

This service is used by SWAN to authenticate patrons who access online subscription databases. We have used OpenAthens to replace any EZproxy authentication. SWAN pays an annual subscription to use the OpenAthens platform. The authentication used is based on the SAML 2.0 protocol, which is the standard for the Internet. OpenAthens talks to SWAN via the Web Services HTTPS Apache TomCat. Patrons authenticate through OpenAthens via HTTPS on the SAML protocol. SWAN has been converting patron authentication to use OpenAthens—most recently with OCLC WorldCat Discovery.

Find More Illinois

The Find More Illinois is a service supported by RAILS through a contract with AutoGraphics for the SHAREit platform. SHAREit creates a union catalog through collecting catalog data from independent ILS. The purpose of Find More Illinois is detailed on the [Find More Illinois website](#). The impact on SWAN would be in these areas.

- Once a single SWAN library participates in Find More Illinois, the entire SWAN catalog would be “ingested” into Find More Illinois/AutoGraphics SHAREit platform. So, while all of SWAN would appear in Find More Illinois, only the participating library would lend its local material. The following display is similar in how SWAN holdings might appear, only participating libraries would appear as an ILL Lender.

Location	ILL Lender?	Call Number	Status
Alpha Park PLD	[ILL Lender]	302 GLA	On Shelf
Chillicothe Public Library District		302 GLA	On Shelf
Creve Coeur Public Library District		302 GLA	On Shelf
Dunlap Public Library District		302 GLA	On Shelf
Eureka Public Library District		302 GLA	On Shelf
Farmington Area Public Library District		302 GLA	On Shelf
Fondulac Public Library District		NF 302.14 GLA	On Shelf
Forman Valley Public Library		302 GLA	On Shelf
Galesburg Public Library		NFIC 302/GLA	On Shelf
Galva Public Library District		302 GLA	On Shelf
Henry-Senachwine CUSD #5 - High School		302 GLA	On Shelf
Hudson Area Public Library District		302 GLA	On Shelf
Illinois Prairie District Public Library - Metamora Branch	[ILL Lender]	302 GLA	On Shelf
Illinois Prairie District Public Library - Washburn Branch	[ILL Lender]	302 GLA C.2	On Shelf
Illinois Valley Central Unit District #321 - High School		302 GLA	On Shelf
Illinois Veterans Home		302 GLAD Q03590	On Shelf
Jacksonville Public Library		302 GLA	On Shelf
Kewanee CUSD #229 - High School		302 GLA	On Shelf
Kewanee Public Library District	[ILL Lender]	302 GLA	On Shelf
Lillie M. Evans Library District		302 GLA	On Shelf
Show More...			

Figure 2: Search results in Find More Illinois showing PrairieCat consortia libraries. If only one consortia library participates as an ILL lender, they will appear with "ILL Lender" while the others will show holdings, but not be available for patron requests.

- Per the Find More Illinois website: “The SHAREit software being used for Find More Illinois also includes the ability for cataloging staff to search and download bibliographic (MARC) records and for nonautomated libraries to participate in resource sharing by attaching their holdings to the appropriate bibliographic records in the union catalog.”

This means the entire bibliographic database SWAN is maintaining and built using OCLC records would be accessible to all participants in Find More Illinois for copy cataloging (either in standalone settings, or consortia).

- Cost to participate in Find More Illinois is per library, using a formula RAILS has created. SWAN does not need to participate 100% in Find More Illinois in order for individual libraries to participate
- Find More Illinois is not using any time saving steps that other AutoGraphics SHAREit implementations have used (see NCIP). The request for material will come to the library via the SHAREit portal, which will require the SWAN member library to check out the material to the requesting institutional library barcode or NON_SWAN user in Symphony. For items borrowed on behalf of their patrons, the library would need to create a pre-cat ILL record and check out the item to the patron requesting it. Once the item is returned to the lending library, the pre-cat ILL record must be deleted in Symphony. This process is identical to existing practice SWAN libraries use when processing OCLC requests.

RAILS has implemented the 21-library pilot and continued “cohort” expansion of Find More Illinois with AutoGraphics entirely using Z39.50 and SIP2 without encryption. This means all patron authentication and data exchanges are not secure. Patron barcodes, names, and various fields are traveling between AutoGraphics SHAREit and the multiple ILS servers associated with the Find More Illinois. So, while Find More Illinois uses HTTPS within its website and users, its backend is communicating to the current participants without any meaningful security.

RAILS is aware of SWAN concerns regarding patron data being exchanged insecurely. It is not clear if participating libraries in Find More Illinois are aware of the insecure exchange of patron information. Any Find More Illinois patrons within PrairieCat, CARLI I-Share, Resource Sharing Alliance, and Rock River Library Consortium will have their patron information exposed during authentication. AutoGraphics and OpenAthens are working together to add secure authentication through OpenAthens for SWAN libraries that wish to participate in Find More Illinois. Timeline for completion of this work is unknown.

Comparison of Resource Sharing Platform Features

The chart below is a summary of the features that would benefit library patrons.

	SWAN	OCLC	Share Illinois	Internet Access	Find More Illinois
Participants	97	1,123 Illinois library suppliers, over 5,000 additional suppliers in the U. S	6 consortia (490 institutions)	14 libraries have access to SWAN	28 individual libraries (I-Share CARLI, PrairieCat, Rock River Library Consortium)
ILL	Yes	Yes	Yes	Yes	Yes
Reciprocal Borrowers in shared database	Yes	No	No	No	No
Cost per Library	Yes	Included in SWAN Fees	No	Fee per library	Fee per library
Library Staff initiated requests	Yes	Yes	Yes	Yes	Yes
Patron initiated requests	Yes	Yes	No	No	Yes
Patron account for managing, monitoring requests	Yes	Via My Account, or Requires OCLC Tipasa service	No	No	Yes
Holds Transaction Created in ILS	Yes	No	Yes	Yes	No

Recommendation to SWAN Board

There is no compelling need to promote Find More Illinois to SWAN libraries as a solution to replace OCLC. Non-SWAN ILL has fallen from 5% to 1% after 19 libraries joined the SWAN consortium. This is evidence that consortia resource sharing is incredibly effective for patrons. Find More Illinois holdings are small compared to OCLC and will remain so even if it grows to the size the suppliers in Illinois OCLC, as OCLC will have library suppliers outside of Illinois. The time savings for library staff using Find More Illinois instead of OCLC will remain unrealized until NCIP is used in Find More Illinois. There is no significant cost savings to SWAN. Patron initiated holds is a compelling feature of Find More Illinois, but as noted above, SWAN has recently implemented patron-initiated holds for OCLC WorldCat Discovery, so there is no advantage for SWAN library patrons to use Find More Illinois over OCLC WorldCat Discovery.

I have no concerns with Find More Illinois bibliographic database being distributed as a bibliographic utility within the Find More Illinois group, as long as the SWAN connection to Find More Illinois/AutoGraphics SHAREit has absolutely no impact on SWAN's core services. Should the Z39.50 connection to present an issue, it would be brought down until a remedy was put into place.

The continued use of SIP2 without any VPN by Find More Illinois is a concern, particularly as data security at a transport layer should be paramount within any serious web application platform. The good news is that RAILS understands this is important to any SWAN library participation and is supporting the effort to create a new AutoGraphics authentication against OpenAthens.

The number of resource sharing platforms SWAN is participating in is diluting the effectiveness of SWAN's efforts in statewide resource sharing.

I recommend the following:

- Eliminate the Internet Access Membership level service starting in FY20 and promote the use of partnerships at public libraries. Public libraries already issue teacher cards to school librarians. Public libraries such as Lisle should be encouraged to use OCLC to request SWAN material or use Find More Illinois to acquire material. SWAN will lose around \$7,300 in revenue due to this change.
- Withdraw participation in SHARE Illinois due to the duplication of resource sharing ILL networks in Illinois. This will ensure ILL outside of SWAN is either through participation in OCLC or Find More Illinois.
- Continue participation in OCLC as a consortium provided service. There is no significant cost savings for SWAN to leave OCLC and use Find More Illinois.
- Promote the use of OCLC WorldShare ILL throughout the SWAN consortium to library staff
- Promote and encourage the use of OCLC WorldCat Discovery to libraries that wish to provide additional means for requesting material outside of SWAN. OCLC holdings include all major Illinois universities and requests are honored and fulfilled via the Illinois Library Delivery Service (ILDS).
- Require the use of OpenAthens for patron authentication for any SWAN member participation in Find More Illinois. Discussions are underway between AutoGraphics and OpenAthens (parent company EduServ, provided to SWAN through EBSCO) to build a connection using OpenAthens.
- Require RAILS and AutoGraphics to sign the SWAN non-disclosure agreement and sign the SWAN Vendor Policy. These agreements are intended to protect the SWAN 1.2 million registered patron data from being collected or used beyond the purpose of authentication.

These recommendations will require the SWAN Executive Director to present additional background and plans to the SWAN Board. A version of this document was shared with the SWAN Board at the November 16, 2018 meeting.

Aaron Skog

SWAN Executive Director

Fall 2018 Usability Test Report

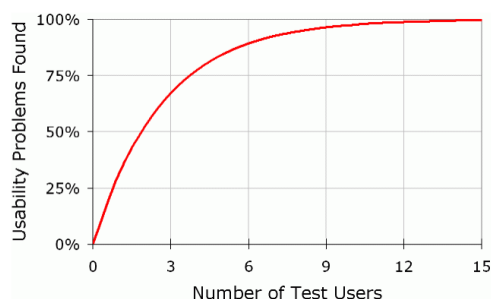
Tara Wood, SWAN User Experience Manager

Overview

A total of 6 people participated in usability testing of the SWAN catalog (OPAC) at the St. Charles Public Library, Tinley Park Public Library, and Oak Lawn Public Library. Testing took place in the last two weeks of September 2018.

Methods

Usability testing is a design research method in which representative users – in this case, patrons who use the catalog – complete typical tasks. The standard number of participants for a usability test is 3-5 participants. The number of additional usability problems found testing with more than 5 participants drastically decreases. As Jacob Nielsen argues, “Elaborate usability tests are a waste of resources. The best results come from testing no more than 5 users and running as many small tests as you can afford.”¹



We recruited two participants from each of the three libraries through an online survey posted to the library catalogs for each library. Through a brief recruitment survey, we asked participants if they preferred physical or digital formats and how frequently they used their library catalog. Selected participants received a \$25 Visa gift card.

Participant	How often do you use the library catalog?	Do you prefer downloads or hard copies?
A – St. Charles	Frequently (once a week)	Hard copies (books, dvds, etc.)
B – St. Charles	Frequently (once a week)	Downloads (ebooks, streaming video, etc.)
C – Oak Lawn	Occasionally (once a month)	Downloads (ebooks, streaming video, etc.)
D – Tinley Park	Rarely (a few times a year)	Hard copies (books, dvds, etc.)
E – Tinley Park	Frequently (once a week)	Hard copies (books, dvds, etc.)
F – Oak Lawn	Frequently (once a week)	Hard copies (books, dvds, etc.)

Members of the Discovery and User Experience Group (DUX) identified common tasks and the most important challenges they wanted to learn more about in this test. The usability testing script is included as an appendix to this report. Patrons looked at three different versions of the catalog:

- Version A: Their current library catalog

¹ Source: <https://www.nngroup.com/articles/why-you-only-need-to-test-with-5-users/>

- Version B: Their current library catalog, with revised facets for Download Format and an 'Only Show Available' button

The screenshot shows the Tinley Park Public Library website's search results page. The header includes navigation links like 'Library Home', 'Catalog Home', 'Log In', 'My Account', 'My Lists', 'Library Information', and 'Select Language'. The main search bar contains the text 'costa rica'. Below the search bar, the 'Search Results' section is active, showing '589 Results Found'. On the left, there are two facet panels. The 'Limit Search Results' panel has an 'Only Show Available' button and a list of formats: Book (404), DVD (67), CD (24), Audiobook CD (14), and Blu-ray (3). The 'Download Format' panel, which is highlighted with a blue box, includes 'Include' and 'Exclude' buttons and a list: eBook (40), eVideo (10), Music Sound Recording (6), and eAudiobook (5). The main results area lists three items: 1. 'Costa Rica : national parks and preserves.' by Franke, Joseph, Format: Book, SWAN 590, 1 copy; 2. 'Costa Rica : Americas great getaway.' by Questar, Inc., Format: DVD, SWAN 590, 2 copies; 3. 'Costa Rica.' Series: Insight guides, Edition: Revised edition. Each item has a 'Place Hold' button.

Figure 1 Version B

- Version C: A test version of the catalog with tabs for formats

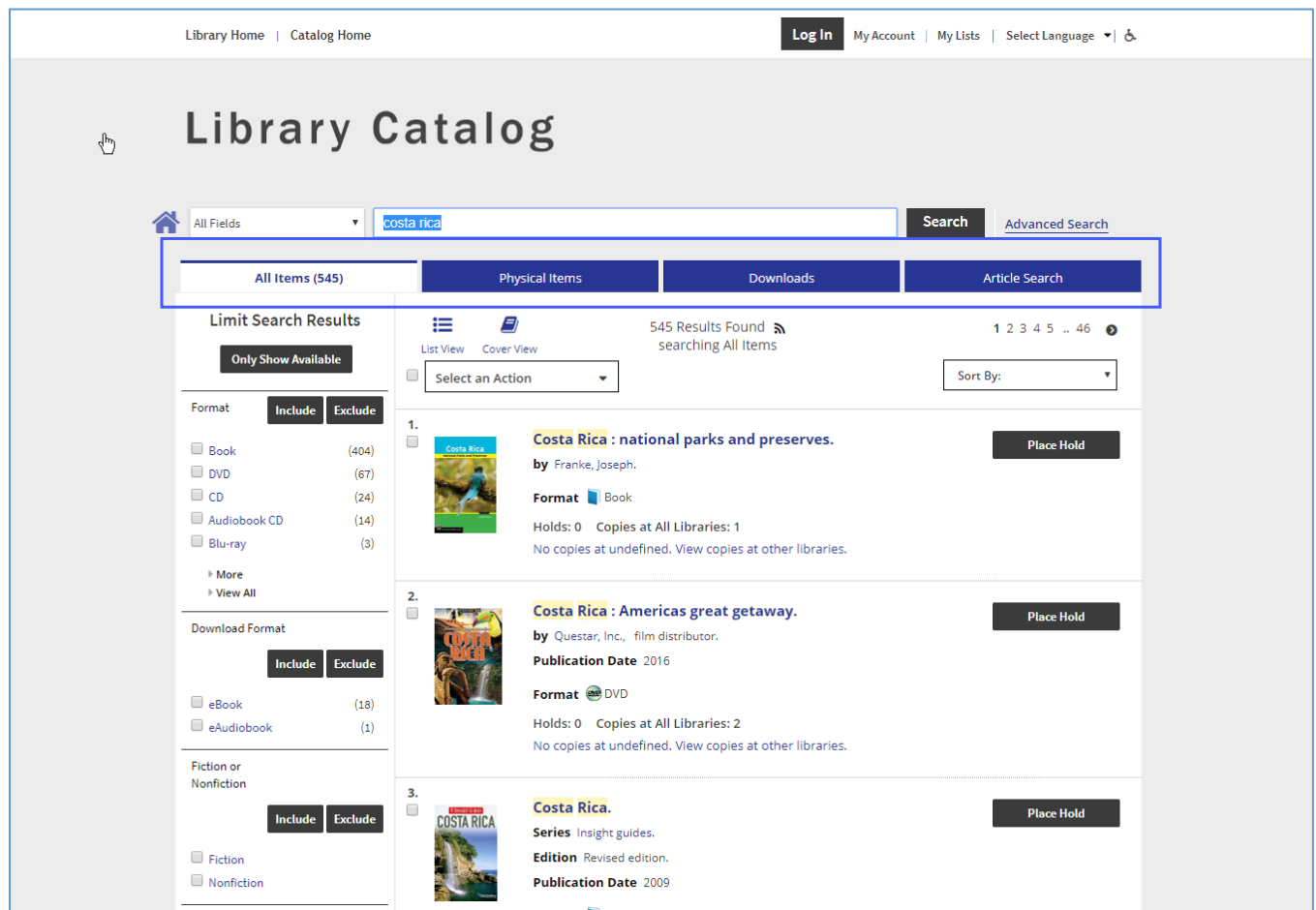


Figure 2 Version C

DUX members from the hosting libraries took notes and observed, while the SWAN UX Manager moderated the sessions.

Summary

The new features we tested – tabs for formats and revised facets for Download Format—were not as helpful to participants as we had hoped. Only one participant noticed the tabs without a moderator pointing them out. Only two participants used the eBook facet in the revised Download Format facets.

Participants were able to navigate the existing facets better than initially expected. When we tested the Only Show Available button, all the participants looked for it as a facet with checkbox options. However, it was clear that they expected to see downloads and physical formats grouped together. Most of the participants struggled with having the Download Format separated from Format.

Results

Patrons mix-and-match formats and services

Most participants use a mix of downloads and physical items – just one preferred only print, and said their spouse uses downloads.

Some participants noted that they prefer physical items, but they will use a download if it is available. This is a case of “satisficing” -- people don’t always look for what they really want, they settle for what’s good enough.

One participant that likes to check out movies said they used Redbox for newer movies, and the library for older movies since they know they can get the older movies from the library. The same participant said that placing holds is “like online shopping” -- they can order what they want, then pop into the library to pick up their order.

Another participant called Hoopla Hulu. Like the participant who uses Redbox, the library’s services fit into a larger constellation of media services they use.

Differences between physical and digital formats aren’t always clear

Participants were not always clear on what results were for downloads and what results were for physical materials.

Even when they looked at the formats on each search result, they were not sure if ‘Book’ included eBooks, or if ‘Audiobook CD’ might include downloadable audiobooks. It also wasn’t clear that eReaders were physical items and not eBooks. One participant thought that the permalink in the detailed item display would show them other formats of a title.

Format means ‘All Formats’ to users

All participants used the Format facets during the tests, but all participants looked for e-formats under the Format facets even though they only include physical formats.

Sometimes, participants didn’t notice when other limits prevented download formats from displaying, such as ‘All Libraries (no eBooks)’ in the Dropdown limit. Sometimes the download formats were present, and participants still looked in Format and never noticed the Download Formats. This occurred when testing both the current version of the catalog and the new versions of the facets.

EReader means eBooks to users

4 of the 6 participants selected eReader thinking it would return eBooks. When participants saw results for eReaders, they did not realize they were not seeing results for eBooks. Again, this occurred in both the new and current versions of the catalog facets.

Simplifying Download Format facets didn’t help

When asked to locate an eBook, 2 participants immediately noticed the new 'eBook' facet and were able to more quickly filter to eBooks. It's worth noting that these two participants used a larger computer screen, and for the remaining participants the Download Facet was 'below the fold'.

The remaining participants struggled equally with both sets of facets. One didn't notice the eBook facet, one got stuck in the physical Format facets, and one struggled trying to use Advanced Search instead of the facets.

One participant preferred to filter to Kindle items, and they struggled to find Kindle items with the simplified facets. Devices and download formats are still important for some users to navigate to items available for their preferred device or app.

Format	Include	Exclude
<input type="checkbox"/> Book (1115445)		
<input type="checkbox"/> DVD (105296)		
<input type="checkbox"/> CD (86612)		
<input type="checkbox"/> Audiobook CD (53382)		
<input type="checkbox"/> Large Print (37226)		
More		
View All		

Download Format	Include	Exclude
<input type="checkbox"/> eBook (320335)		
<input type="checkbox"/> Music Sound Recording (250309)		
<input type="checkbox"/> eAudiobook (76669)		
<input type="checkbox"/> eVideo (35461)		

Figure 3 Simplified Download Format facets

Facet selection isn't intuitive

The current facets require patrons to check checkboxes and select 'Include' or 'Exclude' to include multiple facets; or they can click the linked facet label to limit to one. Performing a new search clears facets.

Include/Exclude

Participants used the Include/Exclude buttons and facet checkboxes more than the facet links. However, most expected that checking a facet checkbox would include the facet, and some forgot to click the 'Include' button. Some participants realized after a brief pause that they needed to click include and quickly recovered. Some did not realize the results hadn't filtered, and they thought they were looking at filtered results.

Select-then-search

Several participants expected they could select facets, and then perform a search limited to those facets. Enterprise clears facets on every search.

More vs. View All

All the participants used the 'More' and 'View All' filters for facets at some point in the test. As one DUX member noted, this is a common feature in many retail sites.

Removing Facets

Format	Include	Exclude
<input type="checkbox"/> Book (1115445)		
<input type="checkbox"/> DVD (105296)		
<input type="checkbox"/> CD (86612)		
<input type="checkbox"/> Audiobook CD (53382)		
<input type="checkbox"/> Large Print (37226)		
More		
View All		

Figure 4 More and View All for facets

Participants had success removing facets that had been selected. One participant used the 'home' button as a reset, and many used the 'x' to clear individual facets.

The scope of the Library facet is unclear

Some participants thought limiting by library would include downloads, and others thought it would limit to only physical items. The scope of this limit is unclear, especially when considering that there is also a dropdown menu limit for library that includes digital materials, while the facet does not.

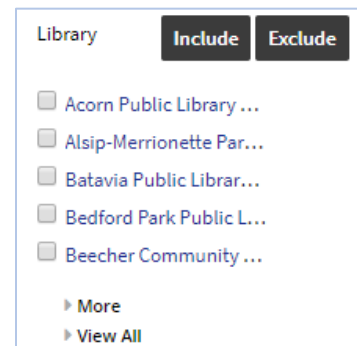


Figure 5 Library facet

The Sort-By Publication Date dropdown is more useful than the Publication Date facet

All the participants were able to sort by the newest publication date. None reported using the publication date facet.

One participant looking for a DVD from the 1930s knew that the publication date facet wouldn't help them, since it would limit by the DVD release date and not the original release date. They browsed through the results by cover to find what they wanted.

The tabbed search results weren't noticeable

Only one participant noticed the tabbed results. One participant did not see the tabbed results, since there was an Enterprise outage near the end of the test.

When the tabs were pointed out, participants were unclear what 'Article Search' meant, though the Physical Items and Downloads labels were clearer. Only one participant said they preferred the tabs. The others would use the existing facets.

The availability button should be a facet

The 'Only Show Available' button was not noticeable to participants. Those that did eventually find it reported that they were looking for a checkbox.

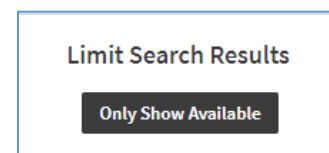


Figure 6 Only Show Available button

Patrons can manage their holds successfully

Several participants selected the 'Cancel Hold(s)', 'Suspend Hold(s)', and 'Edit Pickup Location(s)' buttons before selecting an item (or items).

Enterprise requires you to select the items first, and then use the action buttons. While this sequence is the opposite of what participants expected, they were able to quickly recover.

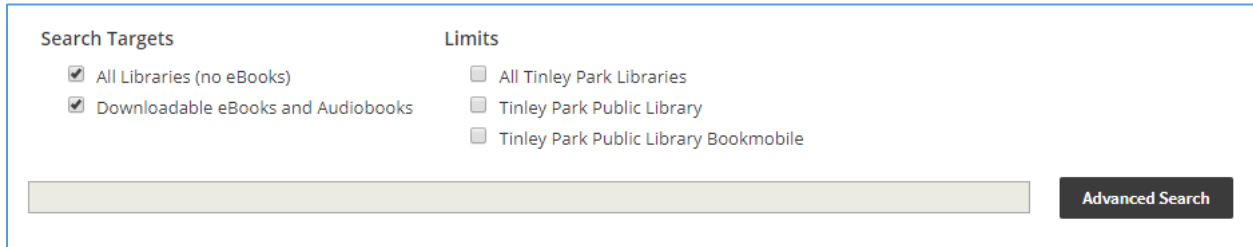
None of the participants reported having used the functions to cancel or suspend holds, and only one participant had used the 'change pickup location' feature before.

All but one participant was able to complete these tasks. That participant noted they would just ask at the reference desk and did not try to complete the tasks through Enterprise.

Advanced search is confusing

Participants that used the Advanced Search struggled with distinguishing multiple search boxes and format limits. Participants were not prompted to use it, but some chose to use it after struggling to limit to eBooks.

The advanced search form allows patrons to choose conflicting combinations of search options, for example and patron can limit to 'All Libraries (no ebooks)' and 'Downloadable eBooks and Audiobooks', which would return no items.



The screenshot shows the 'Advanced Search' interface. It is divided into two columns: 'Search Targets' and 'Limits'. Under 'Search Targets', there are two checked options: 'All Libraries (no eBooks)' and 'Downloadable eBooks and Audiobooks'. Under 'Limits', there are three unchecked options: 'All Tinley Park Libraries', 'Tinley Park Public Library', and 'Tinley Park Public Library Bookmobile'. Below these options is a long, empty text input field. To the right of the input field is a dark button labeled 'Advanced Search'.

Figure 7 Advanced search with conflicting limits

Recommendations

Remove eReader facet

Since 'eReader' vs. 'eBook' was confusing for patrons, we should find a new facet label that makes it clear that a preloaded device is a physical item to check out.

Using 'e(term)' only for downloadable items will help make it clearer what's a download and what is a physical item to check out.

Next step: Cataloging Advisory should determine a better facet term.

Combine physical format and digital format facets

We should include facets for eBook, eAudiobook, etc. in one Format facet. SWAN's customized 590 field for format makes this more challenging, and we will discuss with SirsiDynix how we might approach this.

Next step: Speak with SirsiDynix in a SureSailing call about options available to combine the 590 field facets and digital format facets.

Use hierarchical facets

To clarify confusion around whether 'Book' includes eBook, we could use hierarchical facets. This would require significant changes to the catalog from SirsiDynix, so this would not be a near-term step.

Next step: Submit an enhancement request to SirsiDynix.

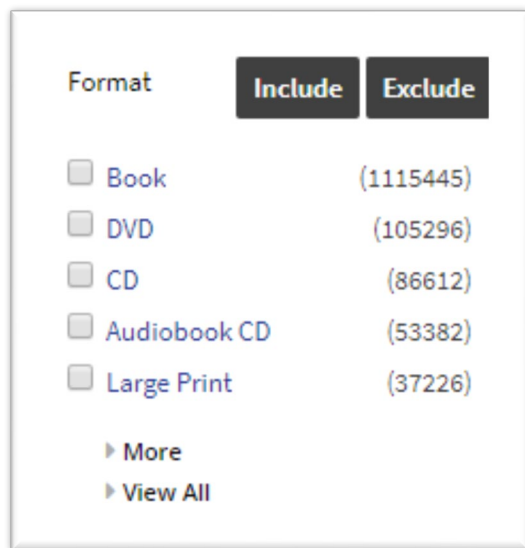


Figure 8 Current facets

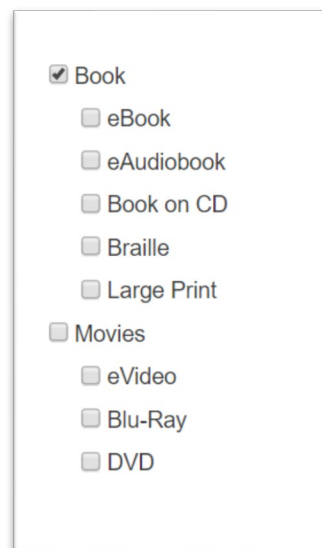


Figure 9 Desired hierarchical facets

Use persistent facets, with a “clear search” function

Users expect to have control over clearing their facets. Selected facets should remain applied until a user clears their facets. Again, this would require significant changes to Enterprise from SirsiDynix.

Next step: Submit an enhancement request to SirsiDynix.

Remove the “include/exclude” function for facets

The include/exclude functionality doesn’t match patron’s mental models. One short term step could be to include only an ‘Apply’ button, which is more commonly used on retail sites.

While an ‘Apply’ button would work the same way as the ‘Include’ button, and it wouldn’t save users any clicks, it would reduce the mental effort of choosing between include and exclude.

Next step: The SWAN User Experience manager writes a custom widget to hide the Exclude button and change the label for Include.

Implement an Availability facet

An availability facet matches our users’ mental models better than the button that is currently provided for Enterprise. A facet could also provide options to only show available items at all libraries and for the current profile. This would require significant changes to Enterprise from SirsiDynix.

Next step: Submit an enhancement request to SirsiDynix.

Research facets and fields to include in search results for vendor and device information

It isn’t clear to users when they skim their search results which results are for downloads and which results will work for their device. We need to investigate what exactly users are looking for, for example

'Kindle' or 'Libby', and see how we can get that data from eRC and display it in search results. Then, we can use those same terms as a facet.

Next step: The SWAN User Experience Manager and Electronic Resources Consultant will develop a research plan to find what labels patrons are using, and some potential ways we can work with eRC data.

Research ideal facet behavior

In the Discovery Services Advisory Group, there was some debate over what was the best facet behavior: a 'select your facets, then click an apply button' approach, or a 'click and results immediately narrow down' approach.

Next step: Discovery Services Advisory Group conducts a survey of popular retail sites and their facet behaviors.

Research a better label for Article Search

Since the Article Search label was confusing for patrons, we should see if a better label draws more interest.

Next step: The Electronic Resources Consultant develops a plan to A/B test new labels and measure the effect on use.

Research a better way to get to Article Search

Statistics show us that use of Article Search is low through the dropdown menu, and usability testing showed that users do not notice the tabbed display. We need to see if there is a better way to guide users to Article Search, through the catalog and/or libraries' websites.

Next step: The Electronic Resources Coordinator conducts a trial period for an article search box embedded into a library's website. In addition, the User Experience Manager and Electronic Resources Coordinator will work together to develop prototypes for alternate locations in the catalog to guide users to Article Search. This work should happen after testing an alternate label, so we can measure the results of a label change.

Appendix: Questions & Testing Tasks

Pre-test questions

- What do you like to use from your library? (services, types of things to borrow)
- Do you ever download items from the library?
 - If yes, do you have a favorite app? What device do you use?
 - What kind (ebook, eaudiobook, etc.)
 - Do you use the catalog, or go straight to the app?
 - What do you like about downloads?
- What's something/the best thing you checked out recently or downloaded from the library?

Testing tasks

Current catalog

1. You said the last thing you checked out was _____. How would you find that in the catalog again?
 - Backup: Secret Life of Pets
2. Let's say you'd like to search for books by Nora Roberts. How would you search for those?
 - (Choose item not owned by library)
 - ("No copies at..") What does this message mean?
 - How would you get that book?
3. How would you find the newest books by this author?
4. If you wanted to check out an audiobook of this from the library, how would you find that?
5. Let's place a hold on this item (pick an item from the results)
 - How would you check to see how long it will take to get that?
 - How would you see a list of your holds?
 - Have you ever used this before? (My Account)
 - How would you change where to pick up a hold?
6. If you were going on vacation, how would you make sure it didn't come in while you're on your cruise ship?
7. How would you cancel that hold?
8. Let's go back to the search results, and this time let's say you were looking for an ebook by this author you could download [to favorite app if they have one]. How would you do that?

Catalog with revised Download Format facet

9. This time, we're going to search for ebooks about hurricanes.
 - How would you find an ebook on that topic?
 - How would you download and read that ebook?
 - Was this easier, or harder this time?
10. Now let's say we want print books about hurricanes that are available to check out now. How would you find this?
 - (if they don't notice Only Show Available button) What does this button do?
 - Tell me what this information means (item availability table)
11. (Map It) What does this button do? (St. Charles Only)

- Tell me about what you're seeing?
- 12. Let's look at these things on the left.
 - [Review each facet not used] Is this something you have ever used?
 - What do you think will happen if you limit to:
 - Format
 - Download Format
 - Fiction/Non
 - Audience
 - Subject
 - Publication
 - (Ask about terms in the facets) Tell me what that term means?

Tabbed search results display

- 13. I'm going to show you a different version of these search results.
 - Tell me about what you're seeing?
 - How would you get ____ (preferred format)?
- 14. Which display do you prefer? (Switch back and forth if needed)

Questions to ask throughout

- Is that something you download, or get from the library? How can you tell?
- What does that term mean?



SWAN Executive Director Report: Q4 2018

Aaron Skog, Executive Director

Strategic Plan 2019-2023

Assessment Report & Strategic Plan Draft

Curtis Chang from Consulting Within Reach presented an assessment report to the SWAN Board. The identity, mission, and vision of SWAN was discussed by the board at the September 21, November 1, and November 16 meetings. The draft of the strategic plan is ready and is included in the December 6th Quarterly packet. The 2019 tactical plan is being created by the SWAN Management Team and will be reviewed by the SWAN Board. This tactical plan will outline steps to undertake in the 2020-2023 years.

Next Steps & Updated Timeline

Plan Step	Responsible	Date
Mission, Vision, and Identity Clarification: where SWAN is trying to go in the future	CWR presentation to SWAN Board in person	September 21, 2018 SWAN Board meeting
Assessment Report: where SWAN is relative to the desired future	CWR presentation to SWAN Board in person	On same date as the Mission, Vision meeting
Strategic Plan: requires SWAN leadership agreement on desired future	CWR presentation to SWAN Board remotely	October 19, 2018 SWAN Board meeting
Strategic Plan, Identity, Mission, Vision, Tactical Plan	Executive Director presentation to SWAN Board	November 16, 2018 SWAN Board meeting
Strategic Plan Update	Strategic Planning Committee	December 6, 2018 SWAN Quarterly Membership meeting

Strategic Plan, Identity, Mission, Vision, Tactical Plan	Executive Director presentation to SWAN Board	December 21, 2018 SWAN Board meeting
Strategic Plan, Identity, Mission, Vision, Tactical Plan	SWAN Board reviews & adopts plan	January 25, 2019 SWAN Board meeting (rescheduled from January 18, 2019)
Presentation of all phases	SWAN Board & Executive Director	February 5, 2019 SWAN Committee of the Whole Meeting

FY2020 SWAN Budget Presentation on February 5, 2019

The work on the SWAN budget is underway. There is a Committee of the Whole meeting set for Tuesday, February 5, 2019 at 9:30 a.m. at Oak Brook Public Library to discuss the budget and membership fees for the July 1, 2019 – June 30, 2020 fiscal year.

The budget will be presented for approval at the March 7, 2019 SWAN Quarterly meeting.

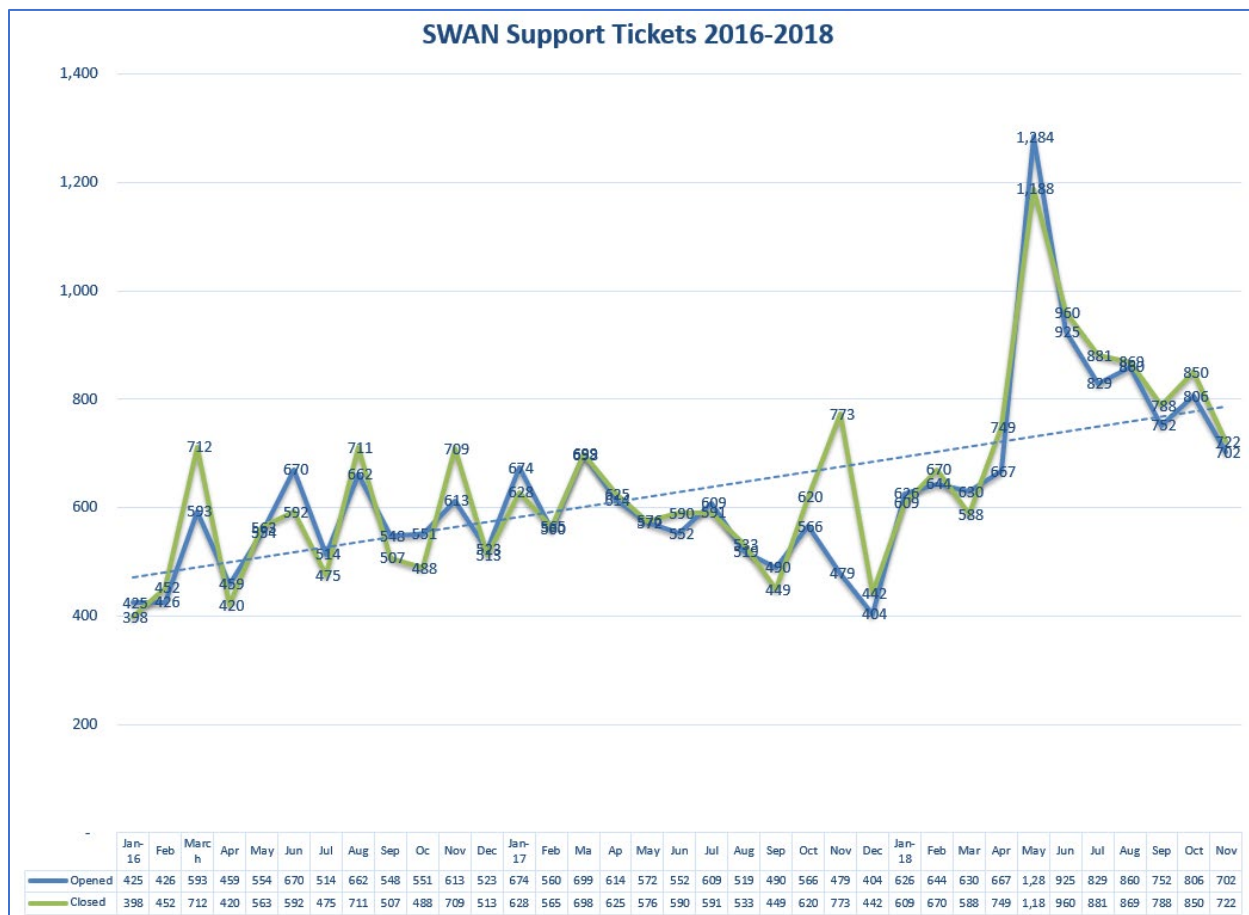


SWAN Quarterly Operations Report: Q4 2018

SWAN Administration (Dawne Tortorella)

Support Tickets

The slight upward trend of new tickets and slight decrease in closed tickets is due to projects underway requiring member interaction and verification (OCLC WorldCat/ILL configuration and patron clean-up prior to processing long overdue items). We saw our first post-migration increase in monthly tickets in October. SWAN staff have been diligent in reviewing open tickets and responding in a timely fashion to new requests. Through this process we are also strengthening our cross-team communication and depth of expertise/coverage. We have returned to our pre-migration target of open tickets below 100; as of November 30th, there are 73 open tickets somewhere in the process of resolution.



Library Visits

Aaron and Dawne completed several post-migration site visits with members to identify and address any outstanding issues. These visits have proven very effective and will become an ongoing effort in member visits/assessment.

The following visits occurred in the past quarter:

- 8/29 – Carol Stream
- 8/31 – Oak Park
- 9/10 – Glen Ellyn
- 9/11 – Geneva
- 10/7 – St. Charles
- 10/14 – Oak Brook
- 10/7 – Bloomingdale
- 10/26 – Wood Dale
- 10/31 – Messenger

These visits have included discussion on bibliographic standards, acquisitions processing and need for more efficiencies, duplication of patron records and need for ongoing process of record improvement and address review (NCOA), consistency of library policies/configuration, and ongoing desire for more user networking, training, and documentation.

We have surfaced priorities for review including:

- Acquisitions workflow efficiencies related to job scheduling, vendor configuration for orders (Midwest Tape, Ingram, B&T), past fiscal year open order clean-up, and on-order item processing for surfacing in Enterprise.
- Review of holds configuration to determine if most efficient selection of available item selects home library for fulfillment.
- Priority need for In Transit label generation
- Simplification of BLUEcloud Analytics reports – clear and consistent way to capture circulation statistics based on:
 - Circulation transactions processed at the library (My station library, all patrons)
 - Circulation transactions associated with library's patrons (My patrons, all libraries)
 - Circulation transactions associated with library's items (My items, all libraries)

Several of the libraries we have visited over the past three months have commented on SWAN library practice of restricting holds on new material. They have had patrons notice these restrictions, as well as staff. Practice in LINC and MAGIC was to allow new items to be freely exchanged without restrictions. Due to the lack of universal practice among SWAN libraries sharing new material, some of our new libraries have implemented additional item types and purchased multiple copies to allow holds to be

placed for all libraries, while retaining holds-restricted local copies. In other words, their new material is split into two collections: one shared, one restricted. This practice reinforces the need for a consortium-wide collection of popular material which is unrestricted.

Our visit with both Messenger and Wood Dale exposed an area of further exploration concerning patrons who have moved from one SWAN library to another, as well as previous SWAN patrons (e.g. Orland Park and Elmhurst specifically) that have outstanding bills. We will be analyzing bills to determine the extent of these patrons and potential impact.

Project Manager (Joseph Miller)

The primary project focus of SWAN remains threefold: the server migration, support site upgrade, and Green Hills migration.

Server Infrastructure Migration: Azure Project

The SWAN server migration is our top priority. SWAN IT, along with SirsiDynix support personnel, have found the solution to slow-running maintenance reports in our Azure test environment that had thus far prevented us from completing this project earlier this year. We resumed work on the server migration in June.

On November 6th, SWAN successfully completed the second of three upgrades on the road to Azure. The Operating System upgrade went smoother than we could have hoped and resulted in no library downtime and very few post-upgrade issues. The final jump to the Azure cloud is being coordinated with SirsiDynix and the IT team. SWAN staff will be working on a testing plan this month.

Support Site Redesign

The upgraded support site is nearing completion as well, with a launch date of December 11th. Various SWAN User Groups will see the site prior to launch and a beta link will be sent to the membership on November 26. SWAN staff are still working out the logistics for how to report feedback on the site and we will provide more information as available. While the new site will have most documentation from the current support site, it will not be a one-to-one copy. SWAN staff will continue to work on content rewrites and updates into the new year.

Green Hills Public Library District: Joining SWAN

Now that the membership vote is complete, this project is in full swing. RAILS has unsuspended the LLSAP grant, which was used to migrate the New 19, and we completed this grant application. RAILS approved the funding that will cover most of the migration costs for Green Hills (as discussed at the September Quarterly meeting). As of now, our go-live date is set for January 29th, 2019, though there is a chance that date may change.

Libraries should be seeing Green Hills (GHS) policies in Symphony now and the test data was loaded just before Thanksgiving.

Other Projects

Other projects completed or underway this past quarter include a patron data cleanup against the National Change of Address database through Unique Management and SirsiDynix, a full catalog reclamation with OCLC, SWAN strategic planning, and initial discussions for a BLUEcloud Mobile rollout.

The National Change of Address (NCOA) patron database cleanup will take place before the end of the year, though a specific date has not yet been decided. Prior to completing the NCOA cleanup, Member Services staff will consolidate patron extended info fields on according to guidelines set forth by Circulation Advisory.

More information about these projects will be funneled through normal channels. You can read about these in detail further in this written report.

SWAN IT Services (Steven Schlewitt)

Server Upgrade Project: Azure Migration

In October, the IT team completed a crucial milestone in the Azure infrastructure migration project, the upgrade to Symphony 3.5.3. This upgrade improved the efficiency of overnight processing and better prepared SWAN for the Red Hat operating system upgrade that was completed on November 7th. To roll out the 3.5.3 upgrade to library staff, Ian and Rudy created an MSI installer package of WorkFlows using a new MSI packaging tool. The IT team subsequently refreshed all client update documentation. Several improvements have been made to the new installer, which incorporates support for both x86 and x64 Windows platforms and allows either a prompted (standard) or silent install (advanced). The installer also allows us to track the number of installations that have been completed. As of Monday, October 15, 2018, 973 client downloads of the MSI have occurred throughout the SWAN membership.

In November, the SWAN IT team completed the second of three major milestones in the Azure Infrastructure Migration project. This upgrade was to a new version of the Symphony server's operating system (OS). This upgrade was especially significant as it was the largest change the team has made to the Symphony server since the initial migration in 2015. For this upgrade, the team was unable to perform an in-place upgrade of the OS and instead needed to create a completely new server instance and copy Symphony data and configurations from one server to another. This process was originally expected to take days instead of hours, thus the initial need for the Symphony Bridge service. After considerable pre-configuration and data copy tests alongside a SirsiDynix engineer, the team determined a direct copy without the use of Symphony Bridge would be a faster option if run overnight. This approach was sought to minimize overall downtime.

SirsiDynix preconfigured the new Symphony server a week in advance of the upgrade date and began syncing data on the morning of November 6th while libraries continued to use the live retiring server. Ian then began the upgrade alongside SirsiDynix late into the evening on November 6th, completing the copy and configuration overnight, and wrapping up around 1:30 in the morning. Steven then finished functionality testing early on the 7th as overnight maintenance reports concluded, giving the “all clear” to library staff just after 6am. This completion was an entire two days ahead of the original schedule, which projected a worst-case scenario completion by Friday the 9th.

Throughout the day on Wednesday, a total of 22 support tickets relating to the upgrade were submitted by library staff, with the majority relating to unforeseeable network configuration issues and incorrect references to the previous server’s IP address rather than the hostname. 15 of those tickets were closed within the same day and many of the unresolved cases (6) related to Axis360 authentication, which required reconfiguration from Baker & Taylor support. Those issues were resolved by the evening of the 8th.

The next and final phase of the Azure Infrastructure Migration project involves the move to the Azure server environment with a migration process that will closely mirror this recent upgrade. The migration has been tentatively scheduled alongside SirsiDynix engineers for Sunday, January 13th after library hours. Once this date has been confirmed, Steven will submit an official announcement to the Membership with preparations for that downtime.

SWAN Technology Advisory Group

The IT team hosted a SWANTech users group meeting on September 20th that gathered 19 attendees. Ian and Steven hosted the RFID committee at the Bloomingdale Public Library on October 27th.

Automated Delivery Label

Outside of the Azure project, Rudy has made a breakthrough in the custom development for a delivery label printing app, having now created an interface that runs from the SWAN support site rather than through WorkFlows. The interface is still in an early beta stage, with an expected launch alongside the new SWAN support site. Steven and Ian have also continued work on documentation updates for the new support site.

Other IT Projects

The team has been hard at work with a handful of other projects in-between 3.5.3 preparations, including assistance with SWANx, the Reciprocal Borrower Patron Lookup Tool for Chicago Public Libraries, several vendor integration setups, and a review of the SWAN Vendor Policy.

System Downtime

SWAN IT’s system monitoring tools will notify the three staff of outages via SMS text within 5 minutes. SWAN IT will work with SirsiDynix to resolve the outage within 15 minutes or less. That being the case, library support tickets to inform SWAN staff of the outage are generally not needed unless an outage

seems to be extended (lasting 30 minutes or more). For extended outages, a SWANcom and support post will also be issued by SWAN staff.

Enterprise stability has improved significantly since the previous Quarterly meeting but is not without occasional outages. SirsiDynix hosts SWAN's Enterprise and released a number of patch versions over 2018 to which SWAN upgraded in June, August, and September. Enterprise was last upgraded to 5.0.0.7 on September 20th which improved the stability of the catalog.

On October 8th, the IT team, alongside SirsiDynix support, uncovered a search results bug that could be a factor in some recent Enterprise outages. SirsiDynix has acknowledged the bug and is currently working toward a patch.

Date	Time	Time Elapsed (Min)	System	Planned?	Library Hours?	Reason
9/2/2018	11:49	7	Enterprise	No	Yes	Tomcat memory error
9/4/2018	0:00	10	Enterprise	No	No	Tomcat memory error
9/5/2018	23:14	43	Enterprise	No	No	Tomcat memory error
9/6/2018	23:56	20	Enterprise	No	No	Tomcat memory error
9/7/2018	17:38	7	Enterprise	No	Yes	Tomcat memory error
9/8/2018	20:16	12	Enterprise	No	Yes	Tomcat memory error
9/9/2018	12:58	5	Enterprise	No	Yes	Tomcat memory error
9/14/2018	21:21	47	Enterprise	No	No	Tomcat memory error
9/17/2018	19:20	40	Symphony	No	Yes	Overprovisioning of SIP2 connections resulting in service crash
9/20/2018	0:05	5	Enterprise	Yes	No	Enterprise 5.0.0.7 patch
9/27/2018	6:58	6	Enterprise	No	No	Tomcat memory error
9/28/2018	15:57	12	Enterprise	No	Yes	Tomcat memory error
10/3/2018	15:27	60	Enterprise	No	Yes	Syndetics partial outage caused intermittent 500 errors
10/4/2018	5:52	3	Enterprise	No	No	Tomcat memory error
10/8/2018	15:05	5	Enterprise	No	Yes	Tomcat memory error caused by web spider and search results bug
10/10/2018	21:00	540	Symphony	Yes	No	Symphony 3.5.3 upgrade
11/1/2018	5:24	16	Enterprise	No	No	Unknown error and service restart
11/1/2018	21:27	3	Symphony	Yes	No	Symphony policy updates for Green Hills and restart
11/2/2018	4:40	14	Enterprise	No	No	Unknown error and service restart
11/5/2018	4:20	52	Enterprise	No	No	Unknown error and service restart
11/6/2018	21:30	150	Symphony	Yes	No	Symphony server OS upgrade
11/6/2018	21:30	150	Enterprise	Yes	No	Symphony server OS upgrade - MyAccount inaccessible

SWAN Bibliographic Services (Scott Brandwein)

Cataloging Advisory Group

In August, the Cataloging Advisory Group and Serials Users Group had a joint meeting to discuss a change to call number standards for serials. We reached consensus on a new practice that will simplify call numbers for most of our serials and newspapers that should improve the patron experience of determining what issues are available and placing holds in specific issues.

The meeting was also a success due to the amount of crossover in cataloging and serials responsibilities among member staff. We are planning a similar joint meeting between cataloging and acquisitions staff during the first half of 2019.

Serials Data Cleanup Project

Bibliographic Services and Member Services are currently coordinating a project to clean up serials data. This will include evaluating unused Serial Control records, as these can prevent discarded items from being deleted, as well as item records for old magazines and newspapers that we would like to verify are truly held by the owning libraries. We are gathering data at the moment and will be reaching out to libraries for feedback on what should be retained. We plan to give libraries a good stretch of time to work on this, so the project will take us into January 2019 at a minimum.

We identified serial control and serial item records that may be eligible for deletion and have forwarded the lists to members. Over the next few months, we hope this will help make serial holdings more accurate in the catalog as well as eliminate unused serial control records whose presence can prevent discarded items from being fully deleted from the database.

Acquisitions Data Cleanup

The Bibliographic Services team also met with Vickie and Samantha to review Acquisitions work processes. Acquisition orders impact the integrity of the shared databases as the process brings in brief records that must be matched against existing records, enhanced, and/or merged with other bibliographic records. With doubling our Acquisitions libraries since May, we have noticed more records requiring clean-up and review which may be linked to vendor configuration differences of previous systems and SWAN practice. The combined team work is targeting these areas for research and correction.

Bibliographic Database Deduplication

In August, the Bibliographic Services team has made significant progress on the deduplication cleanup. They have completed the first phase of the project – “known duplicates” – and are now evaluating record pairs that were flagged but that the automated process could not confidently combine. So far, about 90% of these pairs have resulted in merges. We have been evaluating about 1,000 records per week.

We merged about 2,000 matched pairs in October, and this process has included record cleanup and overlays along the way. We prioritized records with one or more active holds and have fully processed

this portion of the matched pairs. The project will take us past the first of the year, but the highest demand items are now complete.

For the Green Hills migration, we developed a method to extract unique bibliographic fields (OCLC numbers, ISBNs, Library of Congress Control Numbers, ISSNs, and UPCs) from the Green Hills bibliographic catalog to compare with our own. We used this to generate a list of matching records that SirsiDynix can use during the data load to attach Green Hills items directly to SWAN records and avoid a deduplication process entirely. We generated nearly 59,000 matching records out of their full bibliographic count of 62,000 records. This should be an enormous time saver when the migration takes place. Some manual work will still be required, but it should be minimal and each to complete before they go live. We will retain a copy of the Green Hills extract for reference in case of any errors.

OCLC Holdings Reclamation

The OCLC holdings reclamation project is complete. Our representative at OCLC informed us that the added holdings are completely processed, so libraries' complete collections as of the August extract should be currently represented in OCLC. Deletes are still being processed and are expected to be finished by Friday, October 19th, at which point SWAN will receive the final reports. This will place us back on our regular holdings maintenance schedule with the MARC of Quality. We will run a new MARC extract at the end of this month for processing at the beginning of November, at which point OCLC holdings will be fully synced.

The reclamation will also provide us with information we can use to coordinate a cleanup project once deduplication is finished. This project will involve evaluating approximately 100,000 SWAN records that do not have OCLC numbers. Many of these records represent special collections and records for devices and equipment for which OCLC numbers don't apply, but the reclamation should provide us guidance in determine which of those 100,000 can be updated with OCLC numbers. They will likely require updated cataloging as well. The data should help us complete this project swiftly and allow us to employ a simpler process for updating OCLC holdings once The MARC of Quality company/staff retires next summer.

Maintaining OCLC Holdings: Beyond The Marc of Quality

At the November 2nd RAILS Consortia Retreat, we discussed the future of OCLC holdings maintenance after The MARC of Quality, the vendor who currently handles this process for SWAN and a number of other Illinois consortia, retires as a company. We have teamed up with staff at PrairieCat, Pinnacle, RSA, CCS, and Illinois Heartland to develop a process that help each group manage their own holdings directly with OCLC. Our first meeting is in early December.

Bibliographic Services Training & Site Visits

Team site visits, training, and networking during the past reporting period (September 13 – October 17):

- 9/13 – Pre-Cat Training (Claudia)
- 9/17 – Carol Stream (Scott and Claudia): Review OCLC Connexion
- 9/27 – Riverside (Claudia and Angela): Cataloging Czech language materials

- 10/4 – Riverside (Claudia)

We have also done a bit of outreach with member libraries. Claudia Nickson and I met with staff at Carol Stream Public Library to discuss configuration and best practices for using the OCLC Connexion client for cataloging. The following week, Claudia and Angela Puckett traveled to Riverside to spend the day creating original catalog records for a collection of Czech-language materials, most related to local history and genealogy.

We are also re-evaluating our cataloging training program after a presentation by PrairieCat at the RAILS Consortia Retreat and considering the decreased demand for pre-cat training. Claudia Nickson will be retooling our current offerings and developing a new class on SWAN cataloging standards and local practices to launch in early 2019. Claudia conducted a pre-cat training this month on Monday, 11/5.

Cataloging Counts: SWAN Bibliographic Services

Counts do not include eighteen cataloging libraries. Original cataloging counts are new records created for SWAN and added to the OCLC WorldCat database. Copy cataloging counts are records downloaded from OCLC and added to SWAN's bibliographic database.

For August, there were 213 upgrades of minimal level records in OCLC to full records.

For September, there were 267 upgrades of minimal level records in OCLC to full records.

For October, there were 232 upgrades of minimal level records in OCLC to full records.

	Jan	Feb	Mar	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Total
Orig 2016	25	38	20	44	30	17	50	78	62	58	97	84	603
Copy 2016	1,506	1,648	1,908	2,022	1,030	1,326	1,337	2,484	2,487	2,565	3,336	2,309	23,958
Orig 2017	96	132	169	131	133	209	266	184	96	195	93	112	1,816
Copy 2017	3,133	3,616	3,203	3,576	3,456	2,954	3,848	4,856	3,031	3,135	3,392	4,054	42,254
Orig 2018	122	89	147	70	119	148	118	167	116	209			
Copy 2018	3,896	3,348	5,157	4,614	2,851	1,493	2,138	2,459	2,010	1,866			

SWAN Member Services (Dawne Tortorella, Interim)

The last quarter of work within SWAN Member Services follows.

Collaboration with Bibliographic Services: Serials and Acquisitions

Member Services team members have been working closely with Bibliographic Services on the project to clean up serials data. Samantha Dietel develop instructions on updating serial control records for call number changes being implemented which was incorporated into the *Changes in Practice for Serial Call Numbers* news post submitted by Scott Brandwein.

Member Services team members, Samantha Dietel and Vickie Totton continue to work closely with the Bibliographic Services team in both areas as outlined above by Scott Brandwein. Vickie Totton will be leading the Acquisitions Users Group and Samantha will lead Serials Users Group; both groups will meet annually with the Cataloging Advisory Group, chaired by Scott to provide more opportunity to network and collaborate with cataloging peers.

Symphony and BLUEcloud Analytics Reporting

Member Services Support Specialist Michael Szarmach has tracked Symphony report logs to determine processing time and counts processed. We continue to look at ways to consolidate Symphony report processes. Circulation Advisory discussion on September 19th included a review of Overdue notices and a recommendation to consolidate these notices.

Member Services Support Analyst Lauren Levaggi has worked with SirsiDynix to create a general BLUEcloud Analytics account for each library. We will no longer be creating individual accounts for library staff, but instead referring staff to the shared account. This consolidation has been requested by members for ease of coordinating library reports and subscriptions.

Given the unending thirst for BLUEcloud Analytics reports, we have instituted internal procedures for tracking new reports, reviewing/approving as a team, and deploying to shared accounts for all libraries to use. We have also created some Library Specific Folders for those members who request reports very specific to their use. Samantha Dietel, Helen Pinder, Michael Szarmach, Dawne Tortorella, Vickie Totton, and Crystal Vela represent the BLUEcloud Analytics development team. We are fortunate to have a team of staff able to create reports, but it introduces the need for more coordination and our more formal procedures for creation/review/approval/deployment.

Michael and Helen continue to develop BLUEcloud Analytics reports. Michael has created reports to assist in Collection Management. As these reports grow, we are revisiting naming conventions, report organization, and recommend practice amongst report writers on our team and the membership.

Solution for Drive-up Window Holds Pick-up

Member Services Support Specialist Dave Pacin has worked closely with Glen Ellyn Public Library to implement a solution for drive-up window preference in holds pick-up. Dave has implemented use of Symphony User Category 11 to indicate Holds Pickup Preference. Currently settings allow for DRIVEUP, DESK, OPEN options. Other libraries have expressed interest in using this category for patrons who do not want their items placed on open holds shelves. We anticipate this setting to help in several situations for holds pick. Dave has also configured hold wrappers and reports to include this information and he is working with Tara Wood to test feasibility of making this field patron-editable in the Enterprise My Account.

Member Services Library Visits

Member Services Team site visits, training, and networking during the past quarter:

- 9/17 – Villa Park (Dawne): Review of BLUEcloud Analytics and comparison with past circulation statistics and reconciling reporting differences
- 9/19 – Circulation Advisory Committee (Crystal, chair)
- 9/20 – BLUEcloud Analytics Open Lab (Dawne)
- 9/26 – Chicago Public Library (Helen and Dawne): SWAN and CPL reciprocal borrowing and billing
- 9/28 – Westmont (Crystal, Dawne, and Vickie): See Outreach Project below
- 10/2 – BLUEcloud Analytics Workshop (Michael & Vickie)
- 10/11 – Elmwood Park (Vickie and Dawne): Acquisitions workflow review
- 10/16 – BLUEcloud Analytics Open Lab (Vickie & Michael)
- 10/17 – Circulation Users Group (Crystal): See below
- 10/17 – OCLC Interlibrary Loan Configuration (Dawne): See below in UX section
- 10/23 – Outreach Working Group (Crystal, Lead): Working group to determine best practice and shared configuration for Outreach users and module
- 10/24 – Acquisitions Users Group (Vickie, chair & Sam)
- 10/24 – Eisenhower Site Visit (Dawne): Review patron-initiated ILL and OCLC configuration
- 10/25 – Westmont (Crystal, Dawne): Outreach project meeting
- 11/2 – LLSAP Retreat
- 11/8 – BLUEcloud Analytics Workshop (Vickie & Michael)
- 11/13 – BLUEcloud Analytics Open Lab (Vickie & Michael)
- 11/15 – Forest Park Site Visit (Crystal): Outreach Module review

Reciprocal Borrowing Program for Circulation Users Group Oct Meeting

Crystal Vela is leading both the Circulation Users Group and Circulation Advisory Committee. Circulation Advisory Committee members serve as ambassadors for the membership. They serve as liaison – bring concerns, recommends, and innovative ideas, on behalf of the SWAN Membership to SWAN staff. The Circulation Users Group meetings focus on increasing member participation, networking, and sharing best practice at meetings.

Crystal coordinated participation from staff at Chicago Public Library, SWAN libraries, and Rudy Host, SWAN IT, at the October SWAN Circulation Users Group meeting. The meeting focused on processes, tools, and communication to support reciprocal borrowers between CPL and SWAN. The Patron Lookup Tool developed by Rudy for our Symphony ILS downtime in May has been extended to SWAN library partners for verifying patrons in good standing before issuing reciprocal borrowing privileges.

The October Circulation Users Group meeting had over 30 registrants excited to participate in a presentation by Laura Gorczyca Hanes, Circulation Manager for Chicago Public Library. The meeting reviewed reciprocal borrowing processes at Eisenhower by Peggy Tomzik, Header of Library Services, and overview of the patron lookup tools developed by Rudy Host, SWAN IT.

National Change of Address (NCOA) Project

Dave Pacin and Vickie Totton are working with Joseph on the NCOA project with the goal of providing this as an annual, ongoing service. Dave is incorporating consolidation and clean-up of user data, as approved by the Circulation Advisory Committee within this process. (See SWAN Circulation Advisory Sub-Committee recommendations at end of this report, approved by Circulation Advisory 9/19/18).

Symphony WorkFlows Outreach Deployment

Crystal Vela is facilitating deployment of the WorkFlows Outreach module to libraries who have expressed interest: Carol Stream, Indian Prairie, La Grange Park, Oak Lawn, Tinley Park, Westmont, and Woodridge. Saint Charles and Town and Country are currently using Outreach. These libraries met on September 30th to share current service models and begin exploration of the module. All attendees have access to the Outreach module in the test environment. They tested functionality for a month and reviewed findings on October 24th. Those libraries wishing to use the Outreach module will receive access to the module in production immediately upon request.

Dana Hintz and David Kelsey from Saint Charles have shared their expertise and experience with the group and will be providing leadership in our Outreach efforts. Dana has prepared a document for review, *Outreach Module Best Practice Recommendations*. These recommendations were reviewed by a sub-committee and presented to the full group on October 24th.

Workflows Circulation Mapping (3.5.3)

Samantha has tested the consolidated circulation map upgrade introduced with the Symphony 3.5.3 upgrade. She has worked with Cindy Maiello Gluecklich to test the consolidated circulation mapping in the test system. Changes were made on Monday, October 15th to Melrose Park's circulation map to verify the mapping enhancement before deploying throughout.

Overdue Notification Consolidation

The Circulation Advisory Committee approved standardizing overdue notifications regardless of circulation rule. As of October 2, 2018, 1st Overdue Notices are sent 7 days after the due date; 2nd Overdue Notices are sent 21 days after the due date. Billing remains at 42 days.

Patron Database Cleanup

Vickie, Helen, and Dave have coordinated work to reconcile the paid bills from Chicago Public Library patrons and update patron records to reflect that payment, while also removing lost items from the database. Their work continues in helping libraries clean up patron records in preparation for additional lost item processing. Dave has written several custom programs to automate patron record field clean-up and consolidation in preparation for NCOA.

SWAN User Experience (Tara Wood)

Robin Hofstetter started full time in August as our Electronic Resources Coordinator. She is already off to a great start troubleshooting OpenAthens support requests, investigating improvements to our Article Search/EBSCO Discovery Service configuration, and diving into the WorldCat Discovery configuration project. Lauren Levaggi in Member Services has joined the User Experience team, and she will be working on our new support site, assisting with Enterprise configuration and maintenance, and creating documentation and training tutorials for our members.

WorldCat Discovery and WorldShare ILL Configuration

We now have all OpenAthens patron authentication links for our members' WorldCat Discovery instances, and OCLC has set up groups for SWAN and Illinois libraries.

Completing the configuration settings for our 97-member libraries was no small feat. We conducted a workshop for libraries to learn more about configuration settings and using these services, on October 17th. Another workshop will be announced.

Discovery & User Experience Advisory Group (DUX)

DUX members participated in a usability testing workshop, reviewing best practices for conducting usability tests and completing a short usability test of a non-library related website. We hope to further develop this workshop and offer it to more member library staff.

Enterprise Updates

Scott Brandwein and I worked on an improvement to searching by author. Scott realized that the search index did not include 245 subfield \$c, which contains the author's name as listed on a work (often a nickname). For example, if an author is listed as 'Penny Smith' and the authority record is 'Penelope Smith', a search for 'Penny Smith' would not return results. Now, this field is included in the index, and searches for author nicknames should return better results.

We upgraded to Enterprise 5.0.0.6, which contained a patch to resolve an error with eResource Central titles. Unfortunately, the upgrade also introduced a bug in which on-order titles do not appear in the item detail display, which patrons use to place holds on new items. SWAN then upgraded to 5.0.0.7 on September 20th at 1 a.m. which resolved this new bug. Enterprise 5.0.0.6 and 5.0.0.7 also contained patches to improve Enterprise performance.

Support Site Redesign

Brian Smith at RAILS completed the initial set up of our development site, and SWAN staff has been learning the editing functions of the site and adding content. We have been testing the functionality of the content management system and exploring the available configuration options, and we are working with Brian to make tweaks as needed.

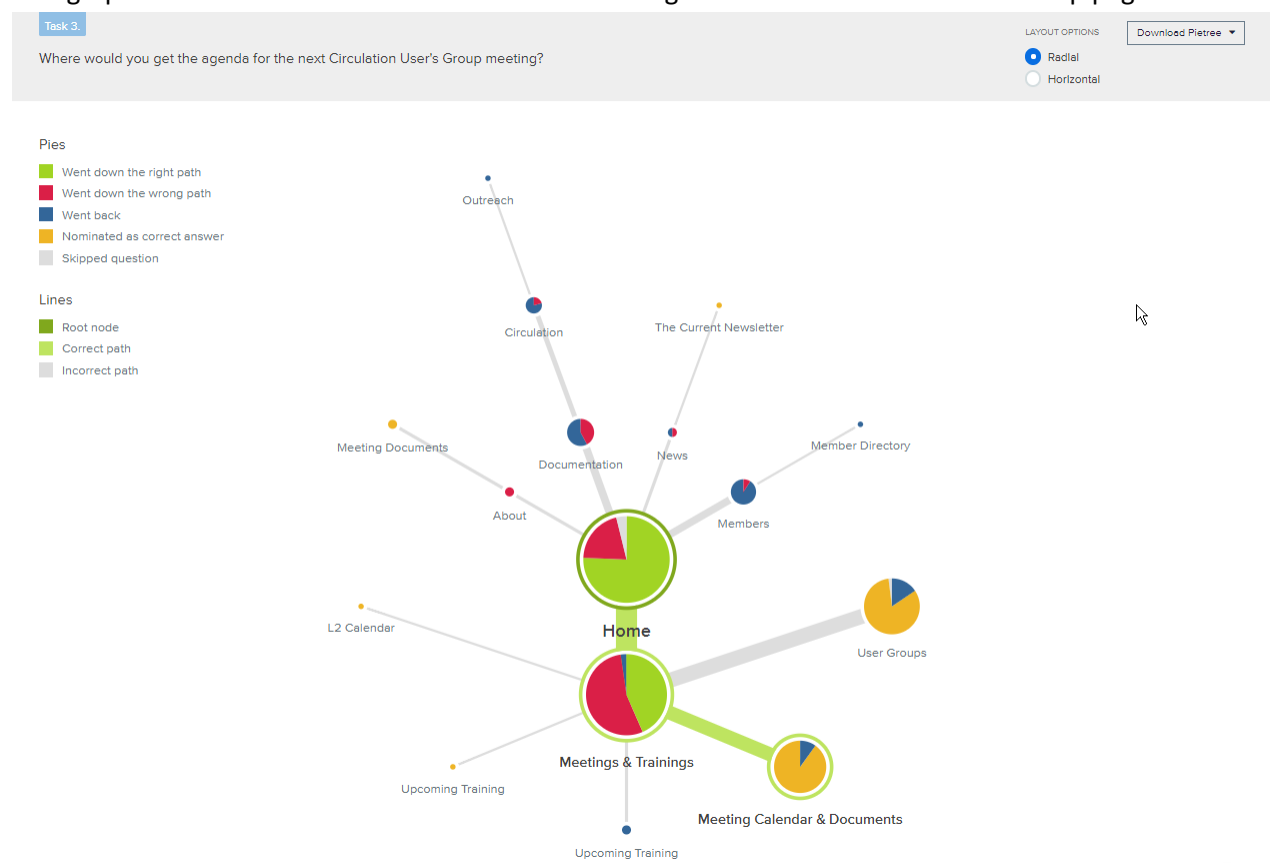
The internal project team and additional SWAN staff participated in information architecture brainstorming sessions. In these sessions, we outlined the major areas of documentation we need to provide and the ‘table of contents’ within those areas. We’re planning to test the table of contents through a tree test, which will be available online for all member library staff to participate in. Tree tests evaluate the usability of terms and menu hierarchies, giving participants a pared-down menu ‘tree’ and information to find within the tree.

Our documentation outline is based on the results of the online card sort. We had a great response – almost 90 participants.

SWAN staff is fully immersed in content creation for the new support site. We set a deadline of November 16th to get content into the site, so we can start sharing the beta version with members.

The tree test, which evaluates the usability of terms and menu hierarchies, was completed with the membership. We had a total of 89 participants in the “tree test” conducted as part of the support site design. We were able to identify several areas for improvement through the data we collected in the test. For example, we can see about half of participants expect to find a user’s group agenda under the User Groups page, and about half expect to find them under Meeting Calendar & Documents.

This graph tells us we need to be sure to link to meeting documents from the Users Group page.



We’re also looking at moving some items higher up in the information architecture and menus that we saw were too buried.

We also saw that 'ILS Configuration' was a challenging label for our members. This is the section of the site where we are including documentation on configuring policies in Symphony. In interviews, we saw that there was a lot of confusion about "policy" as a term—there are policies in Symphony, and governance policies such as the Circulation Policy or Network Policy. To separate these out, we're using 'ILS Configuration' to group policy configuration in the ILS. Since this label is an accurate description, but still challenging to find as a label on its own, we are working on descriptive text that will explain what this term means.

We have a target date of December 11th to launch the new support site. It is important to note that the old support site will no longer be available after this date.

Enterprise Usability Test

The Fall 2018 Enterprise usability testing is complete. We tested with a total of 6 participants at Tinley Park, Oak Lawn, and St. Charles. DUX will discuss and review the findings at our next meeting. The usability testing report with a summary of our findings and recommended next steps for Enterprise was shared with the SWAN Board at their November 16th meeting. See the Fall 2018 Usability Test Report in the December Quarterly packet for more information about the findings.

Article Search & OpenAthens

Robin is developing an inventory of libraries' Article Search and OpenAthens settings. She is working on a set of best practices and an improved process to onboard the remaining libraries that are not set up with Article Search.

Robin worked with EBSCO to get a dedicated customer service representative for EBSCO Discovery Service (EDS). She will work with this person to improve our EDS integration in Enterprise (what we call Article Search) for all our 97 libraries and identify a good baseline setup for libraries that they can customize if they chose. In addition, she met with EBSCO to talk about potential group purchases for EBSCO databases, and she is conducting an overlap analysis to see which purchases would be most beneficial for members.



SWAN Circulation Advisory Sub-Committee Meeting
Tuesday, July 24, 2018
9:00 am- 10 am
SWAN Meeting Room

Sub-Committee members present: Sue Fedderson, Cheryl Pawlek, and Stephanie DeYoung

SWAN staff present: Crystal Vela, Dave Pacin, Dawne Tortorella, Joseph Miller, Michael Szarmach, Samantha Dietel, and Vickie Totton

Reason for meeting: The purpose of the Sub-Committee is to review Address and Extended Information fields to determine which fields should be retained, consolidated, and removed.

Extended Info Tab:

1. **LICENSE:** Decided that it is a risk to collect this information.
 - a. **Suggestion:** REMOVE.
2. **SSN:** SWAN does not support collecting this information.
 - a. **Suggestion:** REMOVE.
3. **RECEIPT:** Libraries wanted this because they thought adding email to this field would drive an auto send receipt; but since it doesn't, there isn't a reason to keep it.
 - a. **Suggestion:** REMOVE. add info to a note field.
4. **ENTERED BY:** This is usually the library staff members initials who created the card. They used to assist in identifying additional needed training for staff.
 - a. **Suggestion:** REMOVE. SWAN will work with SD to move contents to a note field. The standard for entering this information in future notes should be SWS CV 7/24/2018. Note fields are currently indexed in BCA so this information will be accessible via reports including a current report which queries for report note contents. *Need to verify if multiple notes fields are returned for users.*
5. **GUARDIAN:** Information in this field was duplicated in the **CARE/OF** field.
 - a. **Suggestion:** REMOVE. SWAN will work with SD to duplicate any information in the **CARE/OF** field then remove.
6. **SEE SUPER:** Was being used to bring attention to necessary actions, notes tended to run together.
 - a. **Suggestion:** REMOVE. NOTE fields now display in wizards with defined space between each separate NOTE field. SWAN to work with libraries using this field to insert a new

NOTE field at the top of the Extended Info tab then move information to that field.

Moving forward instruct staff if there is an existing NOTE field in the record add a line above the top note and choose NOTE as the field.

7. **READING LEVEL:** Discussed that there is no need to use this. There is no data in this field.
 - a. **Suggestion:** REMOVE.
8. **STUDENT ID:**
 - a. **Suggestion:** REMOVE. Most libraries that record student IDs are entering in the ALT ID field or the ID is the USER ID. SWAN will work with SD to move anything that may have been in this field to ALT ID
9. **P_NO:** Was used in III and migrated to SD to enable RB/ILL billing continuation, no longer necessary.
 - a. **Suggestion:** REMOVE.
10. **PREV ADDRESS:** There is no real data in this field.
 - a. **Suggestion:** REMOVE.
11. **LOSTITEM:** May have been used for the SirsiDynix Long Overdue report; SWAN does not use this report, we have our custom report that doesn't use this.
 - a. **Suggestion:** REMOVE. – SWAN will work with SD to move information in this field to NOTE.
12. **HISTORY:** Most libraries seem to use this field to keep track of waived fines or other issues you want to keep track of but not necessarily have display in checkout.
 - a. **Suggestion:** KEEP. This will allow libraries to have a “private” note that does not display in checkout.
13. **COMMENT:** We are going to keep this field as is, since it can print on hold slips.
 - a. **Suggestion:** KEEP. Review current contents and move to History, retaining use of Comment field to information that libraries may wish to display on hold slips.
14. **NOTIFY VIA:** Some chose to migrate to NOTICE PREF.
 - a. **Suggestion:** REMOVE. Run reports to see if there is still information that needs to be moved to NOTICE PREF
15. **BIRTHDATE:** This is the field that is used for duplicate checking in the User Registration wizard. SWAN does not use this field because it is free-text and we cannot ensure all libraries enter it in the same format.
 - a. **Suggestion:** KEEP. SWAN will work with SirsiDynix to see if we can have this field populated by the BIRTHDATE field we do use and not display.

Addresses Tab:

1. **BUS/SCHOOL:** Libraries may be using to keep track of what school a child is attending or if they issue cards to businesses and/or schools.
 - a. **Suggestion:** KEEP.
2. **COMPANY:** Some libraries are using this, SWAN will contact the library that is using this heavily to talk about moving this information to the BUS/SCHOOL field.

- a. **Suggestion:** REMOVE. SWAN will work with SD to move information to the BUS/SCHOOL.
3. **SCHOOL:** This information should be in the delivered field of BUS/SCHOOL.
 - a. **Suggestion:** REMOVE. We will move any information to the BUS/SCHOOL field.
4. **CARE/OF:** Guardian from Extended was populated here for migrated libraries.
 - a. **Suggestion:** KEEP.
5. **PHONE:** There are a lot of phone fields. We will consolidate and have 2 phone fields total.
 - a. **Suggestion:** KEEP. Add an **ALT PHONE** field for libraries that would like an additional number. There would be a total of 2 PHONE fields.
 - b. Dawne reported we are working on identifying records that have multiple phone fields that have the same number. Once we have identified duplicates SWAN will remove the additional fields. Reports will be available for any users who have more than 2 unique phone numbers currently in their user record.

REMOVE from Extended Info	Remove from Address
Entered By	Company (Move to BUS/SCHOOL)
Guardian	School (Move to BUS/SCHOOL)
License	Home phone (migrate to PHONE, if PHONE is blank)
Lost Item (moving to Note field)	Work Phone (migrate to ALT PHONE)
P_NO	Cell Phone (migrate to ALT PHONE)
PREV_ADDR	
RDG_LEVEL	CREATE ALT PHONE
RECEIPT	
SEESUPER (move to Note Field)	
SSN	
STUDENT ID (anything here move to ALT ID)	

1. [SWAN Circulation Advisory Group Meeting](#)
Sponsor(s): SWAN* and RAILS
Wednesday, January 16, 2019 (9:30 AM - 12:00 PM)
Where: [RAILS Burr Ridge Main Meeting Room / Videoconference Room](#)
2. [SWAN Discovery and User Experience Meeting](#)
Sponsor(s): SWAN* and RAILS
Thursday, January 24, 2019 (1:30 PM - 3:30 PM)
Where: [Oak Brook Public Library](#)
3. [SWAN Outreach Users Group Meeting](#)
Sponsor(s): SWAN* and RAILS
Friday, January 25, 2019 (9:30 AM - 12:00 PM)
Where: [RAILS Burr Ridge Main Meeting Room / Videoconference Room](#)
4. [SWAN Committee of the Whole](#)
Sponsor(s): SWAN* and RAILS
Tuesday, February 5, 2019 (9:30 AM - 12:00 PM)
Where: [TBD](#)
5. [SWAN ILL Users Group Meeting](#)
Sponsor(s): SWAN* and RAILS
Wednesday, February 13, 2019 (9:30 AM - 12:00 PM)
Where: [RAILS Burr Ridge Main Meeting Room / Videoconference Room](#)
6. [SWAN Circulation User Group Meeting](#)
Sponsor(s): SWAN* and RAILS
Wednesday, February 20, 2019 (9:30 AM - 12:00 PM)
Where: [RAILS Burr Ridge Main Meeting Room / Videoconference Room](#)
7. [SWAN Cataloging Advisory Group Meeting](#)
Sponsor(s): SWAN* and RAILS
Thursday, February 21, 2019 (10:00 AM - 12:00 PM)
Where: [RAILS Burr Ridge Main Meeting Room / Videoconference Room](#)
8. [SWAN Discovery and User Experience Meeting](#)
Sponsor(s): SWAN* and RAILS
Thursday, February 28, 2019 (1:30 PM - 3:30 PM)
Where: [Oak Brook Public Library](#)
9. [SWAN Quarterly Meeting](#)
Sponsor(s): SWAN* and RAILS
Thursday, March 7, 2019 (10:00 AM - 12:00 PM)
Where: [Oak Brook Public Library](#)
10. [SWAN Circulation Advisory Group Meeting](#)
Sponsor(s): SWAN* and RAILS
Wednesday, March 20, 2019 (9:30 AM - 12:00 PM)
Where: [RAILS Burr Ridge Main Meeting Room / Videoconference Room](#)
11. [SWAN Technology Users Group Meeting](#)
Sponsor(s): SWAN* and RAILS
Thursday, March 21, 2019 (10:00 AM - 12:00 PM)
Where: [RAILS Burr Ridge Main Meeting Room / Videoconference Room](#)
12. [SWAN Discovery and User Experience Meeting](#)
Sponsor(s): SWAN* and RAILS

Thursday, March 28, 2019 (1:30 PM - 3:30 PM)

Where: [Oak Brook Public Library](#)

13. [SWAN Circulation User Group Meeting](#)

Sponsor(s): SWAN* and RAILS

Wednesday, April 17, 2019 (9:30 AM - 12:00 PM)

Where: [RAILS Burr Ridge Main Meeting Room / Videoconference Room](#)

14. [SWAN RFID Committee Meeting](#)

Sponsor(s): SWAN* and RAILS

Thursday, April 25, 2019 (10:00 AM - 12:00 PM)

Where: [RAILS Burr Ridge Main Meeting Room / Videoconference Room](#)

15. [SWAN Discovery and User Experience Meeting](#)

Sponsor(s): SWAN* and RAILS

Thursday, April 25, 2019 (1:30 PM - 3:30 PM)

Where: [Oak Brook Public Library](#)

16. [SWAN Outreach Users Group Meeting](#)

Sponsor(s): SWAN* and RAILS

Friday, April 26, 2019 (9:30 AM - 12:00 PM)

Where: [Westmont Public Library](#)

17. [SWAN Acquisitions User Group Meeting](#)

Sponsor(s): SWAN* and RAILS

Thursday, May 9, 2019 (9:30 AM - 12:00 PM)

Where: [RAILS Burr Ridge Main Meeting Room / Videoconference Room](#)

18. [SWAN Cataloging Advisory Group Meeting](#)

Sponsor(s): SWAN* and RAILS

Thursday, May 9, 2019 (9:30 AM - 12:00 PM)

Where: [RAILS Burr Ridge Main Meeting Room / Videoconference Room](#)

19. [SWAN Circulation Advisory Group Meeting](#)

Sponsor(s): SWAN* and RAILS

Wednesday, May 15, 2019 (9:30 AM - 12:00 PM)

Where: [RAILS Burr Ridge Main Meeting Room / Videoconference Room](#)

20. [SWAN Discovery and User Experience Meeting](#)

Sponsor(s): SWAN* and RAILS

Thursday, May 23, 2019 (1:30 PM - 3:30 PM)

Where: [Oak Brook Public Library](#)

21. [SWAN Quarterly Meeting](#)

Sponsor(s): SWAN* and RAILS

Thursday, June 6, 2019 (10:00 AM - 12:00 PM)

Where: [Oak Brook Public Library](#)

22. [SWAN ILL Users Group Meeting](#)

Sponsor(s): SWAN* and RAILS

Wednesday, June 12, 2019 (9:30 AM - 12:00 PM)

Where: [RAILS Burr Ridge Main Meeting Room / Videoconference Room](#)

23. [SWAN Serials User Group Meeting](#)

Sponsor(s): SWAN* and RAILS

Thursday, June 13, 2019 (9:30 AM - 12:00 PM)

Where: [RAILS Burr Ridge Main Meeting Room / Videoconference Room](#)

24. [SWAN Circulation User Group meeting](#)
Sponsor(s): SWAN* and RAILS
Wednesday, June 19, 2019 (9:30 AM - 12:00 PM)
Where: [RAILS Burr Ridge Main Meeting Room / Videoconference Room](#)
25. [SWAN Discovery and User Experience Meeting](#)
Sponsor(s): SWAN* and RAILS
Thursday, June 27, 2019 (1:30 PM - 3:30 PM)
Where: [Oak Brook Public Library](#)
26. [SWAN Circulation Advisory Group Meeting](#)
Sponsor(s): SWAN* and RAILS
Wednesday, July 17, 2019 (9:30 AM - 12:00 PM)
Where: [RAILS Burr Ridge Main Meeting Room / Videoconference Room](#)
27. [SWAN Discovery and User Experience Meeting](#)
Sponsor(s): SWAN* and RAILS
Thursday, July 25, 2019 (1:30 PM - 3:30 PM)
Where: [Oak Brook Public Library](#)
28. [SWAN Outreach Users Group Meeting](#)
Sponsor(s): SWAN* and RAILS
Friday, July 26, 2019 (9:30 AM - 12:00 PM)
Where: [Westmont Public Library](#)
29. [SWAN Cataloging Advisory Group Meeting](#)
Sponsor(s): SWAN* and RAILS
Thursday, August 22, 2019 (10:00 AM - 12:00 PM)
Where: [RAILS Burr Ridge Main Meeting Room / Videoconference Room](#)
30. [SWAN Discovery and User Experience Meeting](#)
Sponsor(s): SWAN* and RAILS
Thursday, August 22, 2019 (1:30 PM - 3:30 PM)
Where: [Oak Brook Public Library](#)
31. [SWAN Quarterly Meeting](#)
Sponsor(s): SWAN* and RAILS
Thursday, September 5, 2019 (10:00 AM - 12:00 PM)
Where: [Oak Brook Public Library](#)
32. [SWAN Circulation Advisory Group Meeting](#)
Sponsor(s): SWAN* and RAILS
Wednesday, September 18, 2019 (9:30 AM - 12:00 PM)
Where: [RAILS Burr Ridge Main Meeting Room / Videoconference Room](#)
33. [SWAN Technology Users Group Meeting](#)
Sponsor(s): SWAN* and RAILS
Thursday, September 19, 2019 (10:00 AM - 12:00 PM)
Where: [RAILS Burr Ridge Main Meeting Room / Videoconference Room](#)
34. [SWAN Discovery and User Experience Meeting](#)
Sponsor(s): SWAN* and RAILS
Thursday, September 26, 2019 (1:30 PM - 3:30 PM)
Where: [Oak Brook Public Library](#)

35. [SWAN ILL Users Group Meeting](#)
Sponsor(s): SWAN* and RAILS
Wednesday, October 9, 2019 (9:30 AM - 12:00 PM)
Where: [RAILS Burr Ridge Main Meeting Room / Videoconference Room](#)
36. [SWAN Acquisitions User Group Meeting](#)
Sponsor(s): SWAN* and RAILS
Thursday, October 10, 2019 (9:30 AM - 12:00 PM)
Where: [RAILS Burr Ridge Main Meeting Room / Videoconference Room](#)
37. [SWAN Circulation User Group Meeting](#)
Sponsor(s): SWAN* and RAILS
Wednesday, October 16, 2019 (9:30 AM - 12:00 PM)
Where: [RAILS Burr Ridge Main Meeting Room / Videoconference Room](#)
38. [SWAN RFID Users Group Meeting](#)
Sponsor(s): SWAN* and RAILS
Thursday, October 24, 2019 (10:00 AM - 12:00 PM)
Where: [RAILS Burr Ridge Main Meeting Room / Videoconference Room](#)
39. [SWAN Discovery and User Experience Meeting](#)
Sponsor(s): SWAN* and RAILS
Thursday, October 24, 2019 (1:30 PM - 3:30 PM)
Where: [Oak Brook Public Library](#)
40. [SWAN Cataloging Advisory Group Meeting](#)
Sponsor(s): SWAN* and RAILS
Thursday, November 14, 2019 (9:30 AM - 12:00 PM)
Where: [RAILS Burr Ridge Main Meeting Room / Videoconference Room](#)
41. [SWAN Serials User Group Meeting](#)
Sponsor(s): SWAN* and RAILS
Thursday, November 14, 2019 (9:30 AM - 12:00 PM)
Where: [RAILS Burr Ridge Main Meeting Room / Videoconference Room](#)
42. [SWAN Outreach Users Group Meeting](#)
Sponsor(s): SWAN* and RAILS
Friday, November 15, 2019 (9:30 AM - 12:00 PM)
Where: [Westmont Public Library](#)
43. [SWAN Circulation Advisory Group Meeting](#)
Sponsor(s): SWAN* and RAILS
Wednesday, November 20, 2019 (9:30 AM - 12:00 PM)
Where: [RAILS Burr Ridge Main Meeting Room / Videoconference Room](#)
44. [SWAN Discovery and User Experience Meeting](#)
Sponsor(s): SWAN* and RAILS
Thursday, November 21, 2019 (1:30 PM - 3:30 PM)
Where: [Oak Brook Public Library](#)
45. [SWAN Quarterly Meeting](#)
Sponsor(s): SWAN* and RAILS
Thursday, December 5, 2019 (10:00 AM - 12:00 PM)
Where: [Oak Brook Public Library](#)
46. [SWAN Circulation User Group Meeting](#)
Sponsor(s): SWAN* and RAILS

Wednesday, December 18, 2019 (9:30 AM - 12:00 PM)

Where: [RAILS Burr Ridge Main Meeting Room / Videoconference Room](#)