SWAN Circulation Advisory
Wednesday, May 15th, 2019
9:30 am – 12:00 pm
RAILS Main Meeting Room
125 Tower Drive, Burr Ridge, IL 60527

AGENDA

1. Introductions

    a. Housekeeping (facilities)

2. Review of Notes, March Meeting [Exhibit A]

3. SWAN Updates & Discussion

    a. Mobile App Update [Exhibit B]

    b. Book Discussion Cards [Exhibit C]

    c. Checking out without a library card [EXHIBIT D]

    d. Assigning a Pickup Anywhere Library for Library Closings

    e. Extended Fields update [Exhibit E]

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

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

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

SWAN staff present: Crystal Vela, Samantha Dietel, Steven Schlewitt, Michael Szarmach, Dawne Tortorella, Vickie Totton, Tara Wood

Visitors present: Juan Estrada (LSS), Mary Moss (EPS), Mary Malach (MED), Marla Cole-Wieringa (MTS), Debbie Walsh (NUD), Maureen Sill (LPS), Pat Sinacore (WCS), Debbie Weishaar (CTS), Norma Rubio (CTS), Linda DuPree (BWS), Sylvia Jarecki (VPD), Dorothy Adgent (PTS), Francisco Cruz (CIS), Martha Kennedy (HDS), Crissy Barnat (CNS), Jasmina Lapo (SCD), Nathan Hare (OLS), Jessica Rock (PPS)

25 SWAN Libraries represented.

1. Introductions

2. Review of Notes, January 16, 2019
   Motion to approve notes from Lombardo, seconded by Sheehan.
   Notes were reviewed and with modification to remove the 3.m To Do list, replacing with statement "SWAN will gather information on this topic and present at the next Advisory meeting."

3. SWAN Updates & Discussion
   a. Mail Returned Status
      Vickie Totton provided an update on the new status of MAILRETD which can be used to block patrons with returned mail. Patrons will still be able to place holds. Documentation is available on the support website -
      https://support.swanlibraries.net/documentation/66594

      Discussion included considerations for how to also block these patrons from using computers, verifying through computer reservation systems. If staff would like to block these patrons from use of computers, they should update User Cat 4 (Internet) to INTERNET_N. This is a more consistent method of blocking computer use. Work with your reservation system vendor or update those settings in your reservation software.

   b. Hold Wrapper
      Exhibit C outlines the available and optional fields that can be configured on hold wrappers. The first characters of the Patron Last Name (up to 5 characters) and the last digits of the patron barcode (up to 5 digits) are recommended as options.

Some libraries have submitted support tickets to request these changes since the January meeting. SWAN will contact libraries still using full last name and full first name to review options.

Libraries (INS, DGS, WMS) stressed the concern for making holds pick-up more difficult for patrons and the need to retrain patrons with any change. Need to balance a positive patron experience in ease and access with privacy and security is noted. Every library works to make the appropriate decision based on their library community. A future release of Symphony will offer an alternative id for this purpose where additional customizations may be possible which may help balance these competing needs (convenience/ease and privacy/security).

The concerns for privacy/security extends to all areas where patron identification is printed and could be compromised.

c. Modifying Logins and Generic Users reminder
Sam Dietel shared a reminder that generic user logins should not be modified. These logins are tied to reports and processes.

d. Book Club Best Practices
Discussion included local practice for how libraries request and circulate these items. Most libraries book club selections and requests are handled by Adult Services with guidance from circulation. In some libraries, circulation staff place holds for these titles.

Some libraries check out the items to specific bookclub users and then distribute/check-out to the participants. Others manage bookclub bags/sets where a moderator can check out multiple copies. These bookclub bags/sets can create confusion for patrons searching in Enterprise where they accidentally place a hold on the set when they were looking for a single copy.

Coordination between circulation, technical services, and bookclub moderators impacts all areas of the system, so a unified approach with recommended best practice would be helpful for all.

Crystal will work with Julie (WRS) to identify best practice/guidelines that may be useful. Crystal will assemble SWAN staff to discuss the intersection of cataloging, circulation, and discovery to provide examples of how decisions in each area impact others. Examples, recommendations, and findings will be shared at the next Circulation Advisory meeting.

Debbie Walsh shared that she will bring this discussion to the Readers Round

Table to help determine which libraries are willing to share their bookclub sets/bags and how to contact those libraries.

e. Checkout out to Patrons without a library card
Practice amongst libraries varies on whether or not identification is required to check out material. Some useful methods of verifying identification without being intrusive include: search on birthdate, picture id verification, library card on phone. Patrons expect the same service at circulation desk and self-check – if self-check allows patron to check out without their library card, it is difficult to expect more verification when checking out at the circulation desk.

Some libraries require additional verification if the patron is an RBP, as the library does not want to assume the other library is assuming responsibility for items checked out.

Please send your checklist of what you do at your library when a patron comes in without their library card and without additional identification. How would you verify the patron? Questions asked? Different process for own patrons vs RBPs? Any difference in how self-checks would allow check-out (do self-checks require pin verification)?

f. Consolidation of Extended Fields
Work continues on implementing the recommendations of the sub-committee and approved by the Circulation Advisory Group to consolidate multiple phone fields and remove extraneous and unnecessary extended information fields. Dave Pacin is working on the phone field clean-up and consolidation as the major piece of work needed.

g. Going Green Best Practices for getting patrons Email address
It was agreed that the suggestion of book mark was an archaic practice. It was made clear that any approach taken should reinforce that the library is relevant. Whatever approach we take, needs to reinforce that the library is relevant. Examples include social media marketing vs print marketing.

Members shared that collection of email address is a requirement at registration now, so there are fewer patrons without this information. To help identify those without email address, a BLUEcloud Analytics report is available:
SWAN Reports > Users > List Users without Email Address

There is a shared concern that print costs continue to rise and belief that as a consortium we should be reducing the carbon footprint and cost associated with print notices. It would be helpful to determine which patrons may be eligible for automated PHONE notification if no email address is available on their patron

record. Some libraries are moving to patron record updates to reflect PHONE notification preference if no email address is on file.

As most have transitioned to using BLUEcloud Analytics for statistics, reminder that SVA failure reports are delivered via Symphony in the NOTICES logins. Be sure to checks those daily for failed calls. Just because Workflows indicates a notice was sent does not mean delivery of the message occurred. The SVA call failure report lists those patrons who did not have a successful connection from the automated phone system (e.g. no voice mail system picked up, patron hung up on call, more than 7 rings).

Now may be a good time to revisit how notices are prioritized and sent to patrons. Practices put in place 4 years ago may require adjustments now. Coordinating changes to how notices are sent with release of the mobile app may be worthwhile.

h. Staff Changes
Dawne Tortorella reviewed the organizational changes in SWAN (Exhibit D). While the reporting structure has changed, staff have not - expertise has been distributed across the organization.

While some initially felt concern where circulation functions now reside, referring to the Key Areas of Responsibility chart helped alleviate those concerns. The chart shows how circulation functions are addressed in all functional areas.
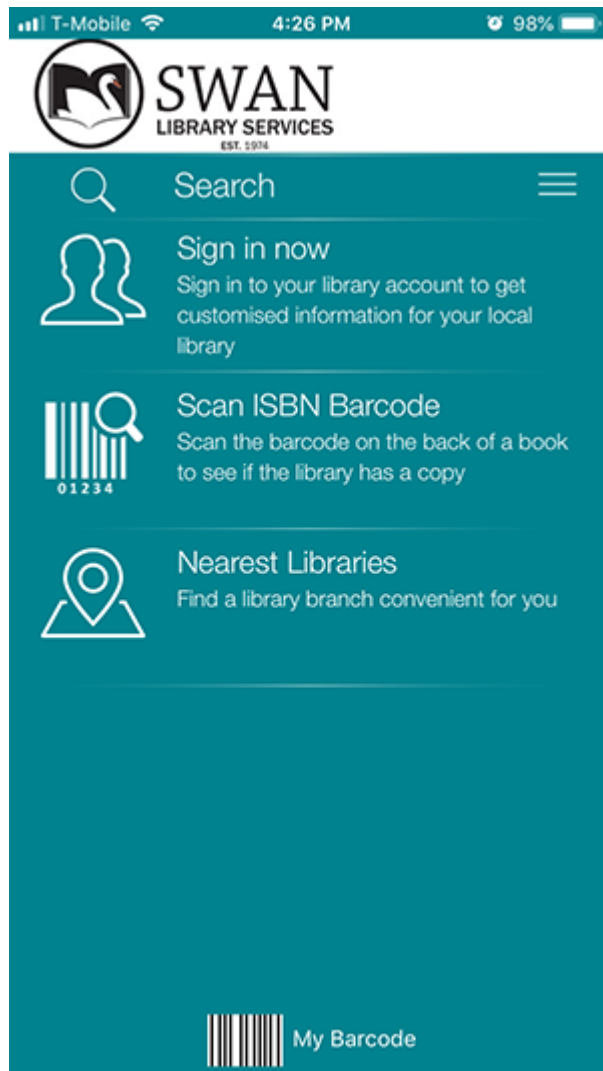
Members would like to see a Reference Users Group formed within the SWAN membership to address issues of importance to this group. There was a recommendation that Advisory Groups meet jointly 1-2 times a year.

BLUEcloud Mobile Progress Update

Added by **Tara Wood** (05/03/2019 - 12:17) , last updated by **Tara Wood** (05/03/2019 - 12:39)

SWAN staff received access to the test instances of the [BLUEcloud mobile app](#) on April 25th. We have spent the past week testing all 98 app profiles, along with members of our Discovery and User Experience Advisory Group (DUX).

Branding set up is complete, and patrons are automatically directed to your profile when they log in. We've also verified the linked accounts are working, as well as the "scan ISBN barcode" search feature, which allows patrons to scan an ISBN barcode with their phone's camera and pull it up if it is in the catalog.

However, we have identified several areas to address before the app is ready for patrons. These include:

- Reviewing and correcting eResource Central (eRC) integrations to ensure your Overdrive, Baker & Taylor, and other e-materials collections are appearing correctly
- Slowness and issues with viewing holds, and suspending and unsuspending holds
- Display of item availability
- Troubleshooting our Syndetics integration, which provides item covers, summaries, table of contents, and other enhanced content for items
- Setting up fines and ProPay integration

We will be working with SirsiDynix to resolve these issues and complete your configurations before sharing the test app more widely among the membership.

We know many of you would like to begin offering the app to your patrons as soon as possible. At this time, we do not have a go-live date. We appreciate your patience as we continue to test and ensure the app is working as intended, and we will update you as we have more information.
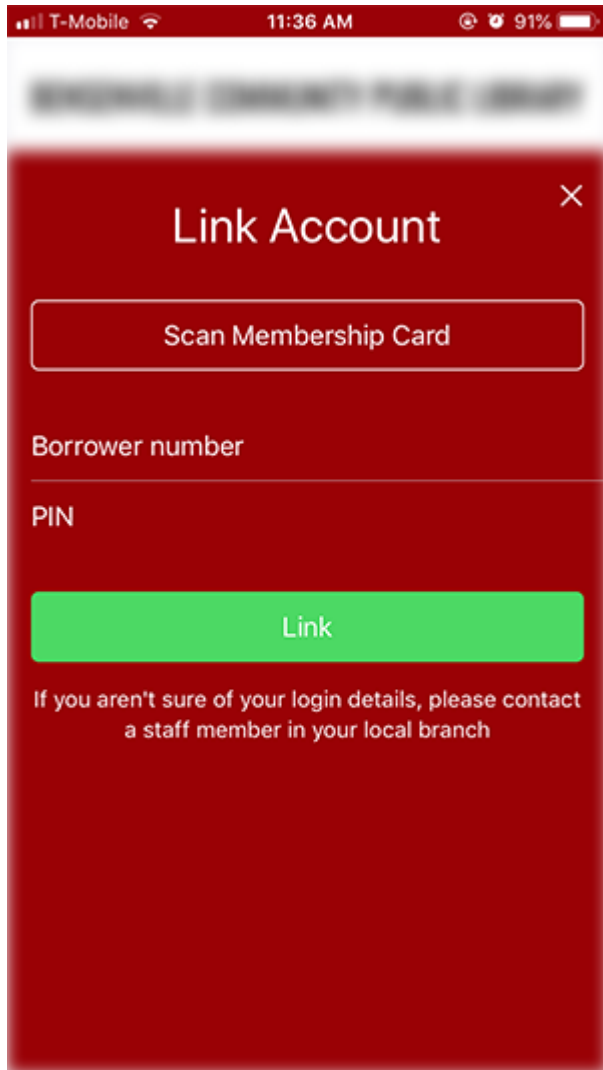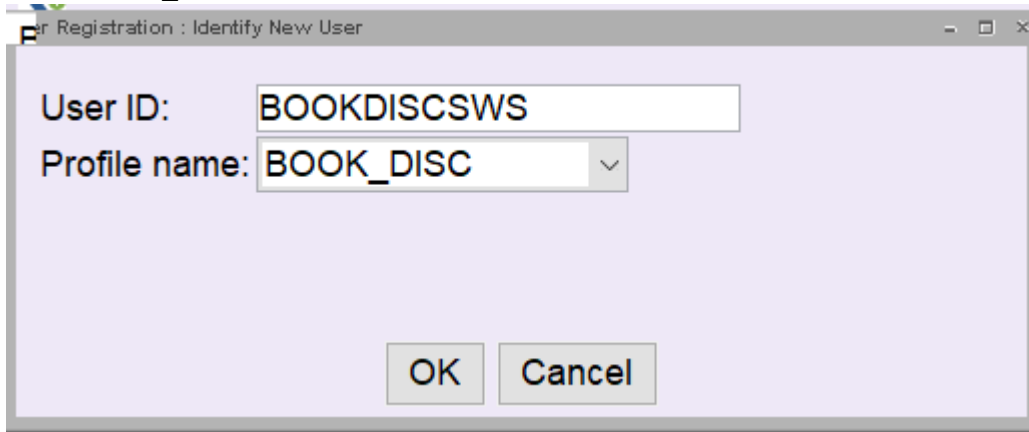
Book Discussion Best Practices

To create a Book Discussion card, please follow the steps below.

1. Type or scan **User ID:** *ex: BOOKDISCSWS*
2. Select Book_DISC as the **Profile Name**

3. **Basic Info** Tab
    1. Last Name: Book Discussion Group Name
    2. Library: Your library's agency code *ex:SWS*
    3. User Profile: **BOOK_DISC** (one circulation rule can be named for all item types, or items will circulate to BOOK_DISC just like any other user at your library). Shows a status of *checked out* on Enterprise.

Title:	
First name:	
Preferred name:	
Middle name:	
Last name:	SWS Book Discussion **1**
Suffix:	
User ID:	BOOKDISCSWS
Alt ID:	
Group ID:	
Library:	SWS **2**
Profile name:	BOOK_DISC **3**
Charge history rule:	NOHISTORY

4. **Demographics** Tab
   1. Type: BOOKDISC
   2. Library Defined: NO_UNIQUE

Basic Info	Privilege	Demographics	Addresses	Extended Info	User groups

Gender:			Age Group:	
Type:	BOOKDISC **1**		Internet:	
Grade Level:			ILL:	
Non-SWAN RB:			Library Defined:	NO_UNIQUE **2**
Notice Preference:			Hold Pickup Preference:	

5. **Addresses** Tab
   1. Email Address: Insert a staff email

EMAIL	STAFF EMAIL ADDRESS

Checking Out materials without a library card present

Best Practice on how to check out to a patron that doesn't have their library card present. When checking out material to patrons without a library card, keep in mind the terms of financial responsibility.

Your patron without a card present

Does the Patron have a photo ID	
YES	**NO**
Look the patron up by name and verify Birthday, Address and Phone Number	Follow local policy

Financial Responsibility:

- Your patron - Your library assumes financial responsibility on their behalf for items they checkout from other libraries as part of the quarterly billing process.

Reciprocal borrower without a card present

Does the patron have a photo ID	
YES	**NO**
Look the patron up by name and verify Birthday, Address and Phone Number.	Do **Not** check the patron out.

Financial Responsibility:

- Reciprocal Borrower (**IN SWAN**) - The patron's SWAN home library assumes financial responsibility for items they check out from libraries other than their home library as part of the quarterly billing reconciliation process.

- Reciprocal Borrower (**OUTSIDE SWAN)** - The patron's home library is billed for lost material, not directly collected from the patron.

Tips to improve patron security

- When possible enter a patron photo into the record. Do not give out library card numbers. It
- is also easy to guess library barcodes that may work, so be mindful of areas where this may occur and provide oversight of those processes.

Consolidation of Extended Fields

SWANcom*Completed w/Correction-Cleanup and Consolidation of Phone Records

We are happy to announce that the cleanup and consolidation of WorkFlows phone fields in patron records is complete; you will now see only PHONE and ALT_PHONE fields in patron records. Please feel free to update any records you made note of last week if they were overwritten by the process.

We would like to issue a correction to our explanation of the process, however. The phone number previously listed in the top phone record field, regardless of the label, was retained as the new PHONE field in the patron record. For example, if the patron record had HOME_PHONE as the first phone field, it is now reflected as PHONE. The second phone record field in the patron record containing a different phone number is now reflected by the ALT_PHONE field. The cleanup was handled in this manner because the first phone field listed in the Addresses tab, whether it is labeled as PHONE or ALT_PHONE, is what the SWAN autodialer notice system (SVA) will reference when making calls. Please ensure that field is correct if your patron has opted for a phone notice preference.

We apologize for the confusion. Please let us know if you have any questions about the process or have encountered any issues by emailing help@swanlibraries.net.
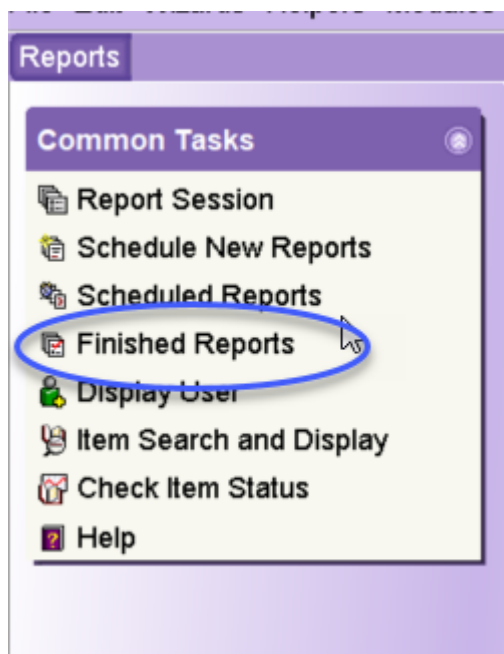
Failed Call Notice Reports

In order to check which of your patrons have had failed calls, follow the steps below daily. If there is no report listed, all your patrons were notified of any hold pickups for that day, and there is nothing left for you to do. If there is a report, view it in order to determine which patrons need to be contacted by you about their items on the hold shelf. After you have contacted your list of patrons, delete the report for your library.

1. Open Workflows and login with the following credentials.

    NOTICES/NOTICES

2. Click on the **Finished Reports** wizard

3. Check for a report for your library *SVA Failed Calls Notices-Hold Pickup only:SWS*

4. Once you have contacted the patrons on your report, you should delete your report.

- Click Remove

- Select your report

- Click Remove Again