SWAN ADMINISTRATORS' & DIRECTORS' QUARTERLY MEETING

Oak Brook Public Library
600 Oak Brook Road
Oak Brook, IL 60523

June 6, 2019
10:00 A.M.

SWAN Administrators' & Directors' Quarterly Meeting

June 6, 2019
10:00 a.m. – 12:00 p.m.
Oak Brook Public Library, 600 Oak Brook Road, Oak Brook, IL 60523
Meeting Room

Agenda

1. Call to Order and Welcome

2. Public Comment

3. Introduction of New Library Directors

4. Action Item-- Approval of the March 6, 2019 Quarterly Meeting Minutes (Exhibit pgs. 4-10)

5. Information Item – 2019 SWAN Board Election Results

6. Information Item—BLUEcloud Mobile App

7. Information Item -- Enterprise Usability Test: Article Search (Exhibit pgs.43-66)

8. Information Item – SWAN Strategic Plan & 2019-2020 Roadmap

9. Information Item -- BLUEcloud Analytics Dossiers

10. Information Item -- Cataloging Library Overview & Eisenhower Welcome

11. Information Item – Book Clubs: a Holistic View

12. Announcements and Questions

13. Next meetings

Meeting Information

Member Comment after each agenda item.

The Quarterly Meeting will be live-streamed via GoToMeeting. The URL below is specific to the date of the meeting. Please join the meeting from your computer, tablet or smartphone. SWAN Quarterly Meeting

Thu, Jun 6, 2019 10:00 AM - 12:00 PM CDT

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

https://global.gotomeeting.com/join/853763557

You can also dial in using your phone.

United States: +1 (786) 535-3211

Access Code: 853-763-557

New to GoToMeeting? Get the app now and be ready when your first meeting starts:

https://global.gotomeeting.com/install/853763557

First GoToMeeting? Let's do a quick system check:
https://link.gotomeeting.com/system-check

SWAN Administrators' Quarterly Meeting Notes
Oak Brook Public Library
600 Oak Brook Road
Oak Brook, IL 60523
March 7, 2019, 10:00 A.M.

1. **Call to Order and Welcome**
   President Bodewes called the meeting to order at 10:01 a.m. Losey, Bodewes, Verzani, Bukovac, and Wolff were present to establish a quorum

2. **Public Comment**
   No public comment

3. **Introduction of New Library Directors**
   Jane Jenkins, Green Hills Public Library
   Amy Hollis, Homewood Public Library
   Donna Dukes, Acorn Public Library

4. **Approval of the December 2018 Quarterly Meeting Minutes**
   Rich Wolff moved to approve the December 2018 Quarterly meeting minutes, seconded by Tiffany Verzani. Motion carried by unanimous voice vote.

5. **Approval of the FY20 Budget & Fee Schedule**
   Skog indicated that most of the increases on budget were due to vendors like OCLC, EBSCO, and Unique Management's notice printing which is due in large to annual increases and in part to finalizing licensing the 19 new libraries. Discussions at our Circulation Advisory Group about doing a "Go Green" campaign would be one way to bring down the printing cost. The personnel balance stayed flat. Buildings & Grounds had a slight increase. Biggest change you have seen is the LLSAP funding grant we get from RAILS, decreased by the amount of $74,000. This for public libraries results part of chart where you get a deduction, that amount is not as large as it was last year.

   Q&A
   Question: Why did EBSCO Novelist Select go up 64%.

   Answer: Skog wanted to make sure cost low as possible but did not factor in licensing going up with 19 new libraries.

   Question: Is there an increase expected each year.

Answer: This has been discussed with the board. We have a year to year agreement with them now. Skog will commit to a long-term agreement with large vendors with terms for a low increase.

Question: Why has the RAILS Grant decreased.

Answer: The biggest factor in that was they went from cutting Grant checks from 4 groups to 6.

Question: Is it still within SWAN'S long-range plan to become 100% fully independent of RAILS Funding? Why is SWAN still using RAILS for accounting services?

Answer: We still use RAILS Finance to do our accounting. Skog still open to bringing that in house, making changes with that. He will discuss this with the SWAN Treasurer.

Question: Do we have a voice at the table when those LLSAP formulas are made? We have a massive footprint. Do you think it is advantageous to not rely on RAILS to do our accounting, so we can become completely independent? Is our voice being heard?

Answer: Bukovac commented that we each have a voice. Each of us must talk to the board members of RAILS. The money needs to go towards reciprocal borrowing. The board members need to be talked to individually. As SWAN, what is our tactical plan.

Question: It would be interesting to see the breakdown of what amount each of the consortium's gets from the RAILS LLSAP Grant.

Answer: Skog will send out a SWAN com.

Question: Libraries have been closing their doors and as they close they are not going to be able to pay their SWAN bill. Along with the minimum wage going up, with all that taken into account, the fact that the last few audits have shown SWAN has gone over budget, how confident are you that this year you will stay within budget?

Answer: Skog said he was very confident. The deficient budgets were always planned. The three years where it was planned was in turn to pass onto the savings of 16% to all the membership. When the freeze came off and fees went up, members were questioning the increase. Some SWAN expenses can't be controlled. OCLC needs to be talked about. Bukovac pointed out we are using reserve money approved for BLUEcloud Mobile.

Comment: There are two issues being talked about. 1: How RAILS is educated about how they prioritize their funding through delivery, through resource sharing. That is something that needs to be conveyed through attendance at RAILS Board Meetings. 2: What we can control on how much funding we get. What can SWAN do organizationally.

Comment: The Committee that is going to be formed to create the 501c3, effective of the committee, being an independent 501c3, how financially independent we want to be.

Motion carried by roll call vote with the following results:
40 IN FAVOR, 0 NAY, 57 ABSENT, 0 ABSTAIN

6. **2019 SWAN Board Election Process**

Timeline for SWAN Board Elections with 3 Terms open. They are Three-year terms. Self-Nomination process began March 4th. April 1st announcements will be made. Ballot will be posted on April 29th and runs thru May 17th. Results will be tallied on May 21st. The results will be announced at next quarterly meeting on June 6th. First Board meeting will be June 21st. Term begins on July 1st.

7. **Internet Access Changes**

For background, the Internet Access libraries have a barcode to log into the catalog and place requests and then billed and routed by delivery to that location. Discussion at last Board meeting and last Quarterly meeting was looking at the Internet Access Service and either eliminating it or modifying it. The SWAN Board choose to modify it.   It would only be for schools. However, this would affect Orland School District, due to we are looking at a requirement that it should have a SWAN Public Library as a partner. Since Orland District #135 is not in SWAN, we would need to end the school district's internet access.

Comment: The fallback for small libraries would be OCLC. Could they get a little training?

Answer: Using OCLC is the responsibility of the libraries.

Question: Will RAILS Deliver to schools?

Answer: Delivery is either direct or indirect. So, depending on the school, we would have to check with RAILS Delivery if it is direct or indirect.

Skog would like to see more discussion on Teacher Cards in the future among SWAN libraries.

8. **Server Migration Recap: IT Manager – Steven Schlewitt**

18 Month project that has wrapped up. Rent Server Hardware from Microsoft, always ahead of the game. Went with Cloud Hosting Server. Had some troubleshooting. In November we upgraded RedHat Operating System. In January 2019 we rolled out a new email system. On January 13th we did the Microsoft Azure Upgrade. We had a few issues, but we have been stable since January 15th. We have 99.6% uptime on Symphony Server. Azure environment has made things more stable.

Schlewitt discussed the email instructions members should have with patrons.

Question: Is there a report for unreceived emails you can go back to see?

Answer: No, only your daily emails of bounced email addresses.

Question: What information do you need for inquiries regarding the unreceived emails?

Answer: Send a ticket to help@swanlibraries.net

Comment: It would be great to share the statistics in SWAN newsletter or at the June Quarterly meeting.

9. **SWAN Advisory Group Updates**
   Cataloging Advisory Group: Claudia Nickson

The last cataloging advisory group met in November and highlights from that meeting were as follows: Box read along best practices discussion and we went to The Box Branded audibles and other similar read along formats because currently they are split between print and audio formats in the catalog and sometimes it's hard to find them in Enterprise, so the goal was to choose a format and group the items together and fastest search in Enterprise to facilitate clearly recognizable. Consensus was box read along and other read along formats are vast represented as audible formats, so they will have a 590 other audio in the format facet. The blue ray DVD video combo packs: discussed the splits, what is available, what is on hold, etc. Trying to establish new practices. SWAN Bib services working together with User Experience Team to find out what can be done as far as how to display in Enterprise. The local 591 tag: Bib Service used as an internal note among catalogers to add relevant records. This field is not in Enterprise. Reclamation project is complete. We are in the process of cataloging standards.

Circulation & Advisory Group: Crystal Vela

National Change of Address Project: Who do we want to capture with this project. We received tips on what we should do in the future: Timing – We did the NCOA right before winter of 2018, recommendation is for Spring which will do in the Spring of 2020. A lot of talk about notifying patrons. SWAN can work with this group via documentation, social media, flyers, etc. to notify patrons this is coming up.

Question: What about consideration not to block the addresses?

Answer: There is a consideration as to when to possibly block. A, block at all, B block later in the process, we will be working on this later.

Customer long overdue report: This is a report for SWAN to allow libraries to discard an item but retain all that information like barcode, item price, everything like that to make sure everyone is being paid accordingly.   After 365 days it is no longer going to be accepted or flipping.

Annual Patron Purge: Circulation Advisory will come up with a criteria.   It is then talked about, some recommendations are made and then put together. We take a lot of things into account. The group asked for reports, so they can have a list to decide whether to waive fines or not.

Green Hills Migration: Two members went to training and presented what Circulation Advisory does.   They gave out contact information and they were there for general help, etc.

Outreach Module: This is a newer module to some of our libraries. St Charles library has been instrumental in helping create standardization and best practices. This was brought forth to the Circulation Advisory Group as there are Circ. rules for outreach patrons that are all encompassing.

Circulation Policy: A few things that have changed in the policy are as follows: Optional grace period has gone up to 3 days. Delivery slips, exceptions of multiple records.

Hold Wrapper and Patron Privacy: Discussion on how we create a great user experience for a patron that comes into your library and able to pick up a hold with ease. We will have examples at next meeting.

Mail Returned Status: This will allow libraries who send out mass mailers and don't have expiration dates to see if a patron has moved or is still active. This is an easily identifiable way to say" therefore this patron is blocked".

Consolidation of overdue notices: The best practices on how to really get patrons to give emails & phones numbers for text messages.

Unusual and Damage Material: A procedure was developed for the best decision possible.

Circulation Advisory Group is elected and most recently Circulation User Group has undergone a change where it is membership led. Circ User Group has Peggy Tomzik from Eisenhower leading the meetings.

Question: For the staff: What is the recommendation for attending which group—Circ Advisory or Circ User, and what is covered?

Answer: Advisory group is going to make best practices, procedures, talking about the circulation policy, giving SWAN recommendations on how to improve software. The 11

members of the Circ Advisory are elected and speak at the table. The Circulation User Group has support staff and it is membership driven discussion and topics. Agenda & packets are posted online. User groups are great way to network with your colleagues.

Question: What is the Outreach Module?

Answer: Allows you to take all your homebound patrons, create routes, allows reading suggestions, search interests. There are some standards.

Questions: How helpful is Outreach with history? Would it prompt you if they have already checked out material?

Answer: Will check into this.

Discovery User Advisory Group: Robin Hofstetter

Support Site Documentation: Documentation for all the things you need to know about OPAC, OpenAthens, E resource, Mobile App, Article Search, User Stats, Usability Studies. We discussed call numbers and we will clear that up for those unfamiliar with that.

Biblioboard: The sales people from Biblioboard were very diligent and wanted us to add to OPAC. Discuss the collections in biblioboard but are not necessarily electronic resources that people would expect to see mixed in with hoopla and overdrive, so we ask that everyone looks what is in the collection.

Usability Testing: We did some changes based on that testing. Enterprises outages & troubleshooting: back up and running smoothly. On Feb. 11th we upgraded Swan Libraries to New Novelist Select.

SirsiDynix Enhancement Forums: SWAN can summit enhancement requests, we then vote on these requests.

SWAN Electronic Recourse Licenses: We have been talking and meeting with vendors regarding SWAN signing a license for electronic resources. So far, we do not have anything that will work as far as a SWAN license, but we continue to meet with vendors.

Article Search Configuration Demo: We did a complete overall of the article search configuration. We will be doing an article search usability test in the Spring.

10. BLUEcloud Mobile App & Enterprise Update: Tara Wood

From our usability test we found that from the facets formats & icons were used the most but also ones that were struggled with the most.

BLUEcloud Mobile: SirsiDynix is currently working on building a graphics package. They will also set up administration packages. They will do training at all libraries as well as quality control. We will do our own testing as well. As we get closer we will give you an update.

11. Announcements and Questions

Directors University will be in Springfield first week of June.

Friday, March 15th will be the next Board Meeting

Thursday, June 6th will be the Next Quarterly Meeting

Adjournment: 11:45 A.M.

SWAN Executive Director Report

June 6, 2019 SWAN Quarterly Meeting

1 SWAN BOARD ELECTION

Please welcome these three representatives to the SWAN Board.

Dawn Bussey, Director, Glen Ellyn Public Library

Jane Jenkins, Director, Green Hills Public Library District

Robin Wagner, Director, South Holland Public Library

The next SWAN Board meeting has been rescheduled for Friday, June 28th at the Thomas Ford Memorial Library. The new representatives will be at this meeting.

Thank you everyone that participated!

2 STAFF RESTRUCTURE

The SWAN Board has asked for a review of the SWAN organization on how member needs and projects are prioritized, managed, and shared. All SWAN staff support the membership; service to members is pervasive in all work we do.

The Board has requested a review of departmental structure with increased emphasis in areas identified through the strategic planning process:

- commitment to the patron (and staff) experience

- increased consultation, training, and documentation

- cross-functional collaboration (both within SWAN organization and throughout the membership groups)

- streamlined processes

- commitment to data integrity and automated processes

- ease of data reporting and access to actionable data

- responsive/pro-active support

- increased research and development

Following their fiduciary responsibilities, the Board has requested SWAN Management to evaluate positions as they become available, ensuring strategic priorities are addressed in staffing decisions. The SWAN salary and benefits budget for FY20 is funded at the FY19 level.

These priorities require creative solutions and a reallocation of staff to define more effective working relationships both within SWAN and with our members. The success of this plan depends greatly on the ability of SWAN staff to collaborate, work in an agile environment (assignments may shift based on projects), mentor and nurture colleagues, and work toward the common goals of our consortium.

The transition plan will be fully implemented by July 1, 2019. Job descriptions and performance goals will be reviewed and documented before the end of FY19.

You can read the changes announced to staff and membership support, shared March 13, 2019 online under the SWAN Board March 15, 2019 meeting information.

3   SWAN Strategic Plan 2019-2023

Here are updates on the plan objectives.

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

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

3.1.1   Form Clarity Task Force

The Clarity Task Forces serves as an operational task force of member library front-line staff, representing a wide range of expertise. This Task Force is collectively charged with assisting the SWAN Executive Director in evaluating core Library Services Platform software and services and how it is implemented in our consortium. Membership expertise and creativity are critical to the success of surfacing areas of improvement, increased efficiency, and future exploration/experimentation.

The group will assist SWAN in surfacing and documenting areas of dissatisfaction and frustration with our Library Services Platform, as well as help provide direction in priorities for research and exploration. The group will look at specific areas of inefficiency and concern including:

- acquisitions processing bottlenecks,
- circulation practices,
- resource sharing,

- patron access to resources.

This group will also look at the product roadmap of releases and how that impacts implementation into SWAN's project list and strategic priorities.

Members of the Clarity Task Force

Kerry Halter, Technical Services Manager, Batavia Public Library District,

Kristina Howard, Adult Reference Manager, Tinley Park Public Library

Michelle Kurczak, Head of Youth and Young Adult Services, Messenger Public Library of North Aurora

Cindy Maiello Gluecklich, Director, Melrose Park Public Library

Amy Prechel, Head of Access Services, Downers Grove Public Library

Angela Romano, Fiction and Reference Librarian, Oak Lawn Public Library

Ahren Sievers, Reference Technology Librarian, Elmwood Park Public Library

Colleen White, Cataloging Librarian, Oak Park Public Library

The Work Ahead

Clarity has met twice and begun its work. These meetings can be found along with the other advisory and user group meetings in SWAN. Look under the Clarity Task Force section for the agendas and notes. Initial work of Clarity has discussed statistical reporting through BLUEcloud Analytics, the structure and purpose of advisory and user groups, frustration around Symphony Acquisitions, difficulty placing holds in Symphony, along with a number of other issues to be explored over the next year (see page 2 of the April 3, 2019 meeting notes). As we continue our work, we will seek additional input and share the insights with you.

The group held its first meeting and Dawne Tortorella facilitated a discussion to help identify areas within the consortium that need attention or are working well. This included:

- Statistical reporting platform under BLUEcloud Analytics is confusing to library staff

- Symphony Acquisitions is inefficient for library staff

- Placing requests and being denied access to new material is confusing to patrons

- Patron complaints to library staff about not receiving notification is a constant, low-level issue

- SWAN support and meeting preparation get high marks; post-meeting information and sharing could be improved

These topics will be explored fully over the next several meetings. The [full meeting notes are posted online](#).

Our next meeting is Wednesday, June 5th.

3.2 OBJECTIVE 2: DELIVER ON THE SOLUTIONS THAT CAN BE READILY IMPLEMENTED, WHILE FOCUSING ON LONG TERM SOLUTIONS

The strategic plan objective 2 activities noted within the Operations Report include the following:

3.2.1 Improve patron email notification through a volume email service: COMPLETE

Steven Schlewitt shared at the March quarterly meeting on how this new service allows SWAN to better monitor the delivery success of emails. SWAN staff can now verify upon library request if a specific patron email address successfully received an email or bounced.

3.2.2 Provide all SWAN libraries a mobile app through BLUEcloud Mobile

Tara Wood updated the membership at the March quarterly meeting. We do have some support cases open with SirsiDynix that pertain to some snags encountered in the setup of eResource Central resources within Mobile. Tara has cautioned us that the late April publication in the app store will depend on these cases being resolved. I have escalated these cases with our SirsiDynix Library Relations Manager Pam Arnold.

3.2.3 Perform a catalog discovery evaluation

Tara Wood and the DUX group reviewed criteria and weighting for an OPAC evaluation.

3.2.4 Begin an assessment of BLUEcloud Acquisitions

SWAN is working with Rebecca Bartlett at La Grange Public Library and Amanda Kaiser at St Charles Public Library on the SirsiDynix Strategic Partner Program for BLUEcloud Acquisitions.

3.2.5 Develop and pilot a SWAN created Automated Delivery In-Transit Label

Green Hills Public Library District went live with this online label system. The system was piloted with three member libraries, and was announced for general availability on May 28, 2019.

3.2.6 Create a new OCLC holdings update process for SWAN

Consortia staff from CCS, Pinnacle, PrairieCat, RSA, SHARE, and SWAN met at RAILS Bolingbrook on March 8th to continue work on the technical requirements for transitioning to a new system.

3.3 OBJECTIVE 3: RECONSTITUTE AS A MISSION DRIVEN 501C3 WITH CLEAR REPRESENTATIVE GOVERNANCE PRACTICES

3.3.1 Complete a 501c3 Conversion Study

Our attorney has completed the initial review of having SWAN convert from an Illinois Intergovernmental Instrumentality to a 501c3 entity. This 6-page letter is included as a discussion for the April 12, 2019 SWAN Board meeting. The letter addresses the following 8 topics:

1. SWAN as a public body (including OMA and FOIA)

2. Governance

3. Cost of converting to a 501c3 entity

4. Required tax filings

5. Grants

6. Donations

7. Employee benefits

8. Liabilities

Based on the letter, I recommend the following items should be discussed over several board meetings and included as part of the study.

1. SWAN as a "public body" and the role the SWAN organization has in providing services to public libraries/government entities

2. Role of board governance in the 501c3

3. Composition of the board

4. Creating new bylaws

5. Creating new service agreements, replacing existing intergovernmental agreements

6. Filing and operations

   a. Filing IRS tax exempt status

   b. Registering with Illinois Attorney General's Office

   c. Selecting new 401a/401k provider as ICMA-RC could no longer be used

   d. Additional D&O insurance purchased

   e. Devise accounting structure for receiving grants and donations

After these 6 areas are discussed and expanded up on as part of the study, I recommend a decision to proceed with 501c3 status be undertaken. The Objective 6 "Seek External Funding Options to Support the Research & Development Initiatives of SWAN," is an important aspect of the strategic plan which should be considered within the Objective 3.

3.4 OBJECTIVE 5: STRENGTHEN THE COLLECTIVE IDENTITY

3.4.1 Establish Vision & Direction of SWANx19 Event

The planning group for the annual SWAN event held two meetings and brainstormed on the event. The call for sessions is complete. The schedule is near complete and we are finalizing the session descriptions. The presenters will be notified the first week of June.

4 LIBRARIES INTERESTED IN SWAN

I recommended as part of the FY20 tactical plan for SWAN that SWAN freeze membership. This will allow us to focus on Objectives 1 and 2 of the SWAN 2018-2023 strategic plan. However, libraries continue to approach SWAN for future membership. Below is an overview and some recommendations on a structure for approving libraries for membership.

4.1 4 PUBLIC LIBRARIES

I have been contacted by the library directors from each of the following standalone libraries, last year in March 2018 with Bartlett and Glenside, and more recently Roselle and Warrenville in April 2019. I have completed quotations for all four libraries and requested a letter of intent indicating acceptance of the quotation and timeline discussed.

LIBRARY	SWAN QUOTATION FY21	CURRENT ILS	LETTER OF INTENT RECEIVED
Bartlett	$ 32,445.72	Millennium III	
Glenside	$ 45,674.26	Polaris III	Yes
Roselle	$ 29,622.80	Library.Solution TLC	
Warrenville	$ 29,960.42	Horizon III	

4.2 REGION

These libraries are in the area where the New 19 libraries are located. The purple pins in the map below note the location of the four libraries. The four libraries are all within SWAN's geographic region and have significant reciprocal borrower activity.
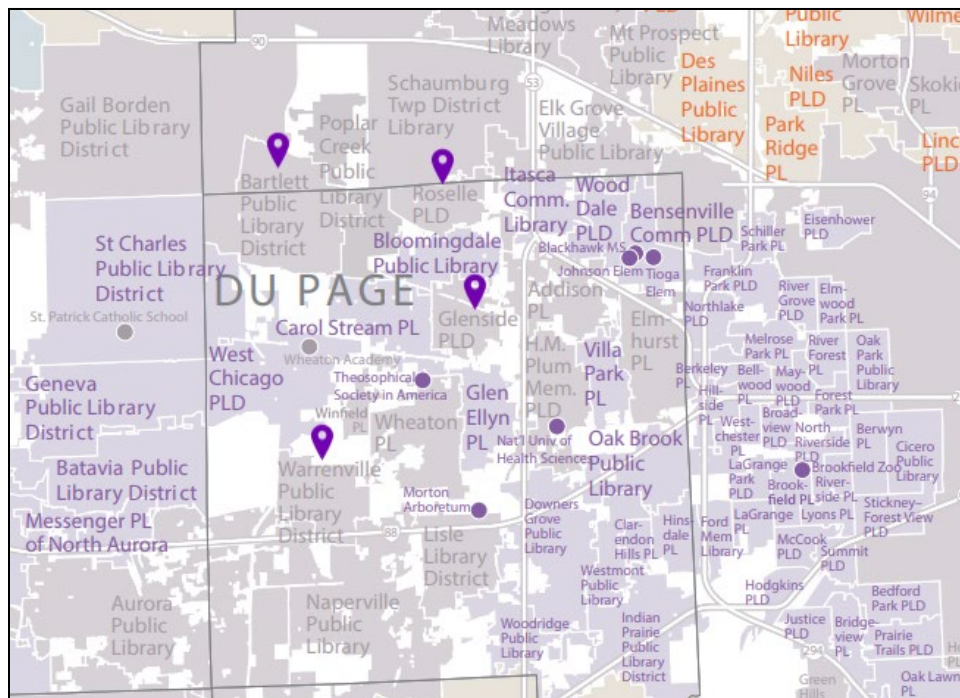
4.3 REVENUE BENEFIT

The addition of these libraries would bring in an estimated revenue of $137,700 annually to SWAN and increase SWAN's operating expenses $68,420. The net revenue to SWAN would be $69,280 annually. SWAN would receive $34,425 in a one-time joining fee for cash reserves.

4.4 RAILS CATALOG GRANT

I have provided updates to Anne Slaughter at RAILS on the prospect of four libraries joining SWAN in FY21. It would be possible to apply for the grant and be awarded prior to the project start, as funds must be spent within 18 months of being awarded the grant.

4.5 TENTATIVE TIMELINE

The SWAN Tactical Plan freezes adding libraries during the FY20 period, July 1, 2019 through June 30, 2020. I have discussed with these libraries the timeline of joining SWAN in the second half of 2020.

Membership approval	June 2020
Migration Project Start	July 2020
Staff Training	October 2020
Go-Live	November 2020

4.5.1   Recommendation

1. SWAN Board endorses moving forward with limiting new membership to 4 libraries in FY21. This can be made an agenda topic at a future Board meeting.

2. Depending on the next round of interested libraries, SWAN should set an "open period" and maximum number for joining. The next window could be July – November 2022.

3. SWAN staff involvement should be limited only to the SWAN Executive Director and Assistant Director with these library conversations and plans for the FY20 period, honoring the tactical plan membership freeze.

4. Update the SWAN directors at the June and September 2019 quarterly meetings and solicit feedback.

5. Use the FY20 period to create a recommended ILS configuration and data mapping for all new incoming libraries.

5   COSUGI 2019

Dawne Tortorella, Rudy Host, and Steven Schlewitt attended this year's Customers of SirsiDynix User Group, Inc. in Minneapolis. Steven presented at the conference "Controlled Chaos: How SWAN Managed an 18-month, 97-library ILS Infrastructure Migration to the Cloud" with a one-hour session recapping SWAN's Azure migration, the project planning process, and various system tools utilized throughout. Several aspects of the presentation were also shared with membership IT staff at the SWAN Technology Users Group Meeting. We have already heard from two consortia in attendance with interest in Azure.

The conference presented a great opportunity for networking, sharing of ideas, and review of progress on SirsiDynix product development. Steven and Rudy met with many SirsiDynix engineers that assisted with the Azure migration and that provide regular support to SWAN staff. They also discussed and compared infrastructure configurations with several other consortia in attendance. Additionally, they took away some in-house development ideas, including opportunities to refine the pull list process through a web interface and options for single sign-on (SSO) that could greatly improve the login experience across the system platform.

All three SWAN staff met with SirsiDynix staff for a private meeting to discuss the BLUEcloud Mobile implementation, the BLUEcloud Acquisitions pilot, and upcoming service changes to improve the patron text notification platform hosted by SirsiDynix.

6   SLUI 2019

The SirsiDynix Library Users of Illinois held its annual meeting May 7th at Downers Grove Public Library. The meeting was attended by staff representing 25 SWAN libraries and several standalone libraries in the area. SirsiDynix personnel in attendance included Chief Product Office Berit Nelson, Library Relations Manager Pam Arnold, and Executive Account Manager Justin Swain. I held a lunch meeting with Berit, Pam, and Justin and we discussed the issues with Mobile and eResource Central integration, our preparation for assessing BLUEcloud Staff, the Strategic Partnership Program with BLUEcloud Acquisitions, and our libraries using Symphony Acquisitions.

7   EXPLORE MORE ILLINOIS & SWAN: CONNECTION STATUS UPDATE

The Explore More Illinois program offered by RAILS in conjunction with the vendor Quipu requires an authentication connection with SWAN. SWAN is currently working with RAILS and Quipu to provide the secure patron authentication required for participation and to test the platform prior to patron use. That work is progressing and once complete, any SWAN library will be able to use the authentication method as a part of a shared consortium ILS connection – no further authentication or ILS setup information will be needed from the library. You'll simply work with RAILS to confirm your subscription.

 We currently do not have an expected completion date for the setup but hope to have testing concluded sometime in the upcoming month. If you have any questions about SWAN's involvement in the project, please email us at help@swanlibraries.net.

If you're interested in participating in the program, please be sure to contact RAILS to indicate your interest by emailing info@exploremoreillinois.org.

8   FIND MORE ILLINOIS & SWAN: CONNECTION STATUS UPDATE

The April and May issues of The Current newsletter provided an overview of why we are taking extra steps to build a secure connection to Find More Illinois. Auto-Graphics decided to build a secure connection using OpenAthens for SWAN. Auto-Graphics choice of using OpenAthens to provide authentication will have the largest benefit to libraries beyond SWAN.

The secure connection is not complete yet, but last week SWAN staff worked with Auto-Graphics to set the validation permissions and we will begin testing user barcodes next week.

You can get more information on this RAILS service through the Find More Illinois website. Thurs far, SWAN and RAILS has been contacted by one library in the consortium that is interested in participating in Find More Illinois.

SWAN Operations Report: Q2 2019

CONTENTS

1   SWAN ADMINISTRATION

Dawne Tortorella, Assistant Director

As we revise our reporting within the Operations Report, we would appreciate feedback/recommendations on how to convey member engagement and interaction. Currently we have broken this out in each section, but it may be more effective as a combined report of activities related to site visits, training, and networking.

1.1   ADMIN SITE VISITS, TRAINING, AND NETWORKING

During the past reporting period:

- 2/19 – SWAN Quarterly Billing Training for GHS (Helen)

- 2/28 – INS Review of Symphony Reports and BCA (Michael, Dawne)

- 3/5 – BVD and BSD#2 Quarterly Billing Reconciliation at BVD (Helen, Dawne)

- 3/14 – Cataloging Advisory Meeting (Dawne)

- 3/20 – Circulation Advisory meeting (Dawne)

- 3/21 – CCS Site Visit (Aaron, Ginny, Dawne)

- 3/25-3/27 – COSUGI annual conference in Minneapolis, MN (Dawne)

- 3/28 – Discovery & User Experience (DUX) Advisory Group Meeting at OBD (Dawne)

- 4/2 – SWANx19 Planning Group (Aaron, Ginny, Lauren, Steven, Rudy, Crystal)

- 4/3 – Clarity Task Force (Aaron, Dawne, Scott, Steven)

- 4/4 – OCLC WorldCat Discovery and WSILL (Dawne)

- 4/5 – Open Lab – OCLC Configuration & Setup (Dawne)

- 4/8 – Cataloging Automation Discussion OLS (Aaron, Dawne)

- 4/9 – Outreach Consultation GED (Crystal)

- 4/10 – Workshop: Resource Sharing Overview (Dawne)

- 4/17 – Circulation Users Group (Dawne)

- 4/22 – Workshop: OCLC WorldShare ILL – Setting up Groups & Deflection (Dawne)

- 4/25 – RFID Users Group Meeting (Dawne)

- 4/25—Discovery and User Experience (DUX) Meeting (Dawne)

- 4/26—Outreach Users Group Meeting (Dawne)

- 4/29 – Open Lab: OCLC Configuration & Setup (Dawne)

- 5/2 – Clarity Task Force (Aaron, Dawne)

- 5/3 – LLSAP Cataloging Managers meeting with OCLC (Dawne)

- 5/7 – SLUI (Aaron, Dawne)

- 5/8 – Site Visit: SCD to review Bookings module and configuration (Dawne)

- 5/9 – Cataloging Advisory/Acquisitions User Group (Dawne)

1.2   SIRSIDYNIX SUPPORT & CONSULTING

- 4/11 – Sure Sailing Call

    o   Updated system settings to allow authorization on LC Genre and Form Terms

    o   Developed scripts for fixing database errors when paying a bill

    o   Central site administration and review of old logins

    o   Entry type of phone fields and impact on SVA

- 5/10 – Sure Sailing Call

    o   Api script for pulling out SMS field settings

    o   Review consulting offerings in Acquisitions reports and efficiencies

    o   Meeting with training staff to review BLUEcloud Central users/groups/roles and how that ties into Symphony policies

    o   Modifying labels in EDS for limiters

    o   Discussion of multiple ACTIVEID clean-up

1.3   INTERLIBRARY LOAN AND NON-SWAN ACCOUNT MANAGEMENT

Helen Pinder is leading efforts to reconcile all library accounts associated with non-SWAN borrowing. This includes data reconciliation of SHARE Illinois accounts, OCLC (In-State and Out-of-State), and Internet Access libraries. By standardizing policies and data, the next phase of the In-Transit label will be able to effectively rely on data in the record to determine how to check-out and route material to these non-SWAN libraries.

Helen is also leading efforts in review of old patron accounts associated with libraries that left SWAN (Elmhurst, Orland Park, Brookfield Zoo). Part of the clean-up efforts includes developing practice for future use when libraries leave the consortium so that outstanding fines/fees are properly accounted and transferred with the exiting library.

Related to these efforts is development of school year end-of-term and start-of-term processing to properly handle holds and material in transit.

1.4   OCLC TRAINING WORKSHOPS

A series of workshop and open labs were conducted to assist libraries in OCLC configuration and use of WorldShare ILL - https://www.librarylearning.info/tags/?SWANILL

- 4/4 – OCLC WorldCat Discovery and WSILL
- 4/5 – Open Lab – OCLC Configuration & Setup
- 4/10 – Resource Sharing Overview
- 4/22 – OCLC WorldShare ILL – Setting up Groups and Deflection
- 4/29 – Open Lab – OCLC Configuration & Setup
- 5/22 – Open Lab – OCLC Configuration & Setup

In review of external (non-SWAN) reciprocal borrowers, we are examining patrons affiliated with Elmhurst and Orland Park still in our system with bills. When these libraries left SWAN, their patron records and fees/fines were migrated to their standalone systems, however these bills remained in the SWAN system. As patrons pay their fees/fines at their home library there is no method of updating the SWAN records. This information has been found to be outdated leaving some patrons unable to reregister if they have moved to a SWAN library or eligible for reciprocal borrowing. Part of this review

includes development of a process when libraries leave SWAN to fully transfer and remove the patrons. Of course, these patrons would be eligible to register as reciprocal borrowers after the transition out of SWAN.
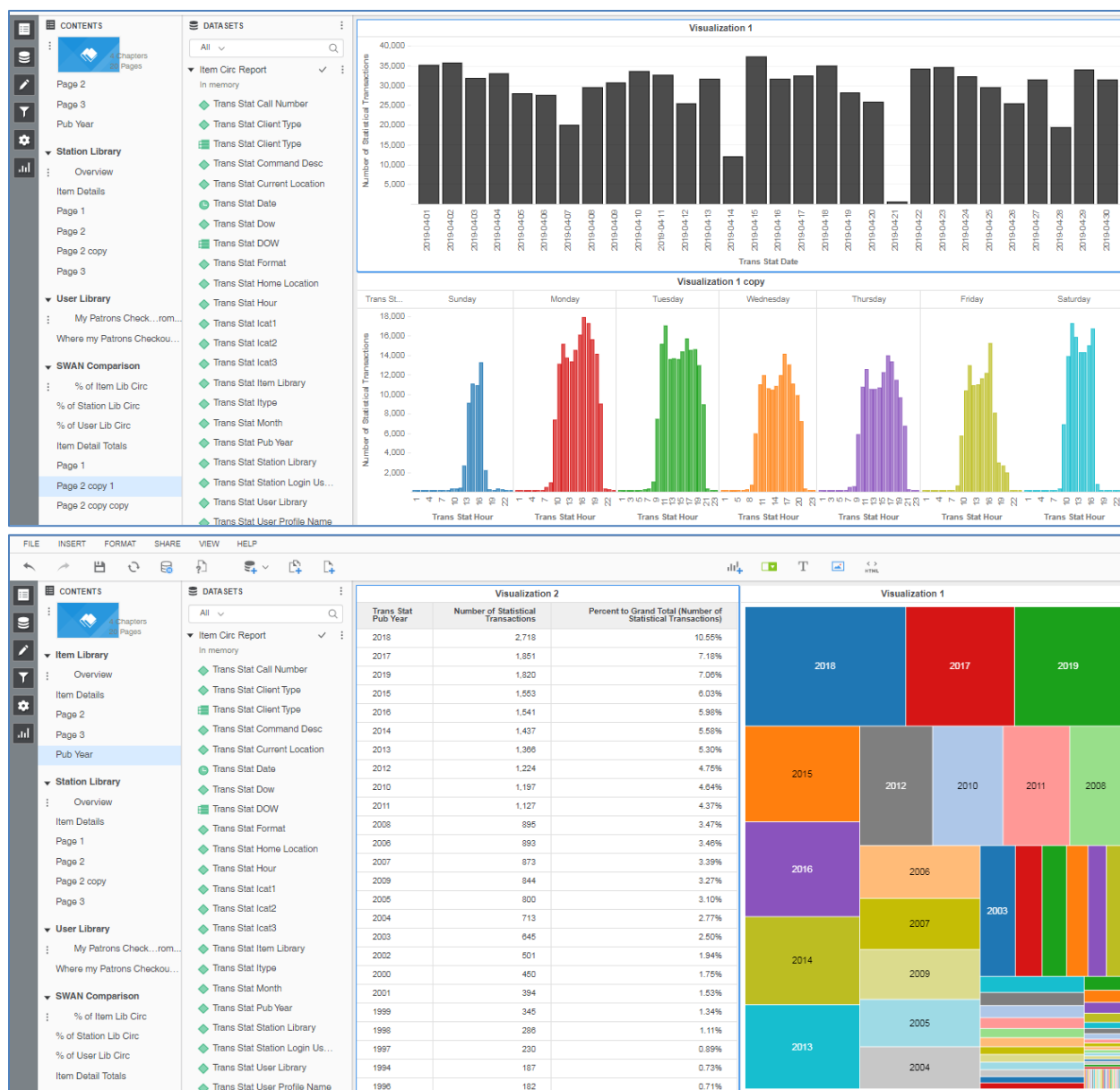
1.5   BLUECLOUD ANALYTICS

Grant Halter is working on a monthly snapshot which will provide a consistent view of circulation related activity for each library, including visualization of that data at both the library level and within the full SWAN consortium (in Analytics, these visualizations are called dossier). This dossier of reports will be presented at the Clarity Task Force meeting in June. The following examples help illustrate the progress we are making on providing more meaningful composite data to our members. We will be conducting focused training sessions, quarterly written reports for the membership, and dossier/dashboard tools for members to query data directly.

1.5.1   Preview of Monthly Snapshot

In addition to the individual library and SWAN-wide data reporting, we will be presenting various forms of visualizing data to see which methods are most useful in snapshot form.
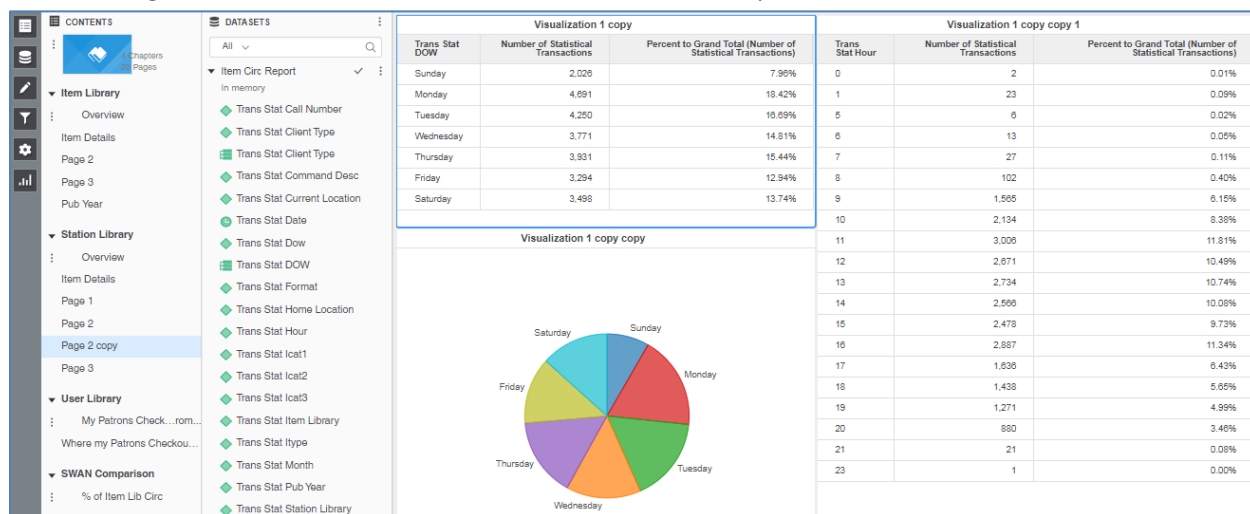
1.5.2   Preview of High Demand Holds

We are working on documentation for the BLUEcloud Analytics High Demand Holds report which Michael and Grant have been enhancing. This report has been piloted by four libraries, but feedback has been minimal. While these BLUEcloud Analytics dossiers provide valuable information, we realize that the interface to selecting filters, sorting, and modifying views is not intuitive. Therefore our efforts are in documenting these options and providing training to assist libraries in effective use of the information the report surfaces.

Table of Holds and Items For Any Title With a Hold at the Pickup Library

Catalog Flex Id	Catalog Title	Catalog Author	Catalog Pub Year	Pickup Library Holds	Pickup Library Copies	Pickup Library Hold/Item Ratio	Consortium Holds	Consortium Copies	Total Holds/Total Items Ratio
a2065674	Game of thrones.		2015	7		0.00	95	2	47.50
a2770485	Bohemian rhapsody /		2019	7		0.00	46	1	46.00
a2757632	Grace and Frankie.		2017	2		0.00	34	1	34.00
a2743395	The reckoning	Grisham, John	2018	3		0.00	33	1	33.00
a1624319	Ed Slott's retirement decisions guide : 125 ways to save & stretch your wealth.	Slott, Ed.	2017	4		0.00	31	1	31.00
a2780248	Green book /		2019	2		0.00	31	1	31.00
a2782750	Spider-man.		2019	4		0.00	29	1	29.00
a2727632	Life Itself		2018	3	1	3.00	85	3	28.33
a2793452	Marvel's Avengers - Endgame		2019	22	1	22.00	28	1	28.00
a2778216	Captain Marvel		2019	36	1	36.00	195	7	27.86

BLUEcloud Analytics can assist us in analysis of SWAN-wide trends and characteristics to better understand patterns of circulation. For example, the following charts show a peak usage of patrons aged 32 to 42, but under closer examination, the material they are checking out is largely juvenile, illustrating that usage patterns can be deceiving. Without including analysis of the material circulated we would have made incorrect assumptions (e.g. 32-42 year olds are most active readers). On closer examination we find that these most active users are parents checking out material for their children.

The SWAN-wide view of the data shows a smoother graph.

Total Lifetime Checkouts by Patron Age
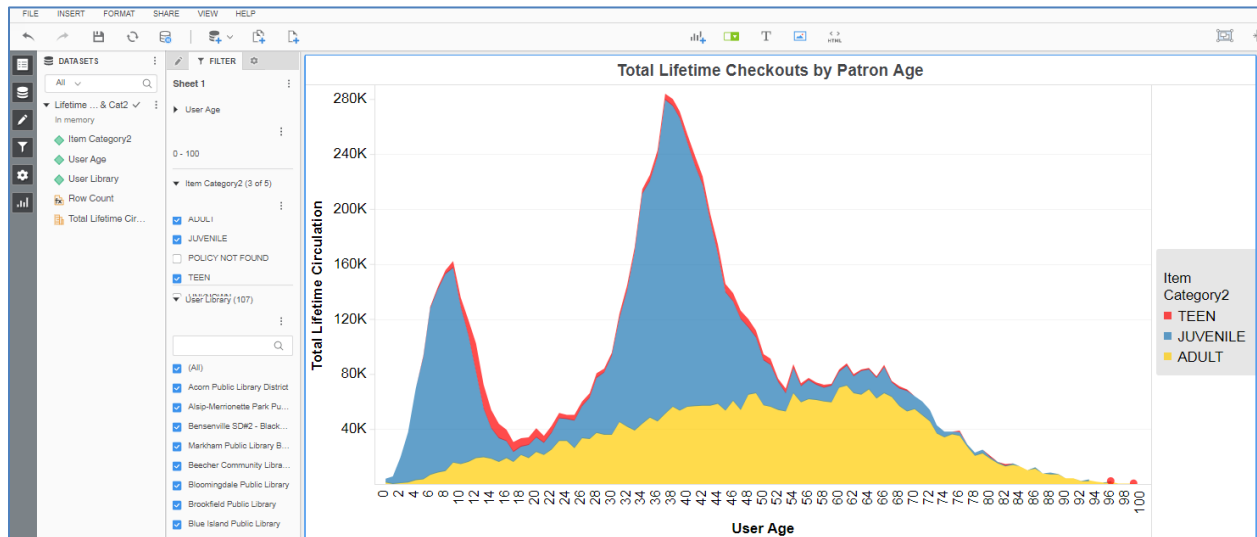
An individual library may show more peaks based on impact of some patrons, but still indicates the overall pattern of 30-40s as peak age usage, with large juvenile material checkouts.
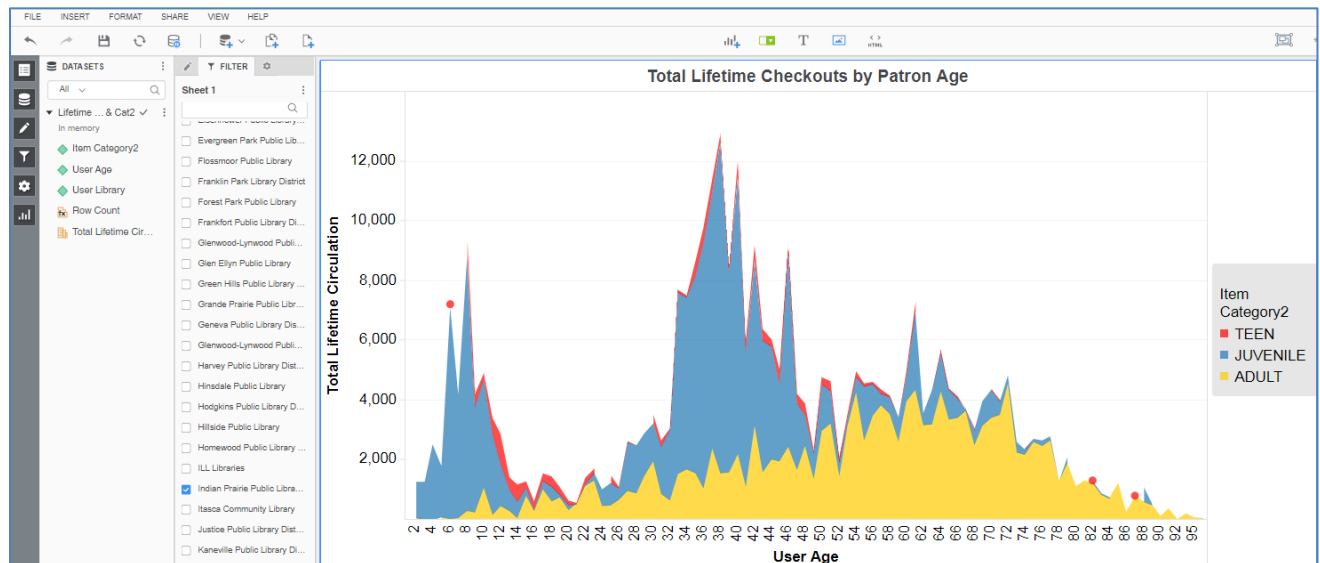
1.6 BLUEcloud Staff Client Collaboration Project

We officially launch our BLUEcloud Staff Client project on Tuesday, May 14th with a staff meeting to define scope and timeline. BLUEcloud is the platform SirsiDynix has created for its future software solutions. It is a web interface that has a central configuration for administration, but a new staff interface is being created. The BLUEcloud Staff interface will eventually replace the WorkFlows client.

We have scheduled a meeting for our member library collaborators the week of May 21st (list of libraries follows). Dawne will manage the project and work across functional teams.

This evaluation will include the following components:

- BLUEcloud Central – account management and roles (will be managed by SWAN staff)

- BLUEcloud Circulation – will include SWAN staff and members evaluating readiness for BLUEcloud Circulation usage in specific use-cases

- BLUEcloud Cataloging – will include SWAN staff and members evaluating how BLUEcloud Cataloging can support specific use-cases and functional areas (e.g. copy cataloging)

- BLUEcloud Acquisition Pilot – Phase III – SWAN staff, LGS and SCD will be working on a controlled pilot through the summer to provide product development feedback to SirsiDynix and assess readiness of the product for our membership

Our work will be focused on functional use of these staff interfaces and begin some initial work in usability testing of the staff client. Team members will receive detailed resources to review and

assignments once we have our kick-off meeting. Members are expected to contribute no more than 4 hours per week during this evaluation and in many cases, it may be less. The Acquisitions Pilot group will be performing more rigorous testing and evaluation.

<u>BLUEcloud Central</u>
Steven Schlewitt, SWAN
Rudy Host, SWAN
Ian Nosek, SWAN
Dave Pacin, SWAN
Michael Szarmach, SWAN
Vickie Totton, SWAN

<u>BLUEcloud Circulation</u>
Tara Wood, SWAN
Crystal Vela, SWAN
Peggy Tomzik, ESS
Ridgeway Burns, HDS
Bonni Ellis, SCD
Cindy Maiello Gluecklich, MPS

<u>BLUEcloud Cataloging</u>
Scott Brandwein, SWAN
Samantha Dietel, SWAN
Claudia Nickson, SWAN
Diane Nickolaou, SWAN
Joy Anhalt, TPS
Amanda Kaiser, SCD
Julie Tegtmeier, SCD

<u>BLUEcloud Acquisitions Pilot</u>
Scott Brandwein, SWAN
Samantha Dietel, SWAN
Claudia Nickson, SWAN
Vickie Totton, SWAN
Rebecca Bartlett, LGS
Linda Ertler, LGS
Amanda Kaiser, SCD
Julie Tegtmeier, SCD

We thank our volunteers for their time and expertise in this work. Their input and voices are important to the application development efforts by SirsiDynix and to SWAN as we assess product readiness and work to increase efficiencies and ease of use in your daily work.

2 SWAN IT & SYSTEM SUPPORT SERVICES

Steven Schlewitt, IT & System Support Manager

2.1 SUPPORT TICKETS

SWAN is taking some steps internally on how we manage support tickets from our membership. With the staffing changes we made in March 2019, IT & System Support Services will provide written updates on ticket counts and trends.

While April showed an increase in tickets opened, the pace of closing tickets continues to outpace new issues. During the month of April 748 tickets were opened and 773 closed. As of May 10th, 77 tickets were unresolved.

SWAN Support Tickets 2016-2019

	Jan-16	Feb	March	Apr	May	Jun	Jul	Aug	Sep	Oc	Nov	Dec	Jan-17	Feb	Ma	Ap	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan-18	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan-19	Feb	Mar	Apr
Opened	425	426	593	459	554	670	514	662	548	551	613	523	674	560	699	614	572	552	609	519	490	566	479	404	626	644	630	667	1,2	925	829	860	752	806	702	716	920	780	644	748
Closed	398	452	712	420	563	592	475	711	507	488	709	513	628	565	698	625	576	590	591	533	449	620	773	442	609	670	588	749	1,1	960	881	869	788	850	722	680	967	798	667	773

One of the reasons for this rise in opening of tickets is increased internal oversight in creating tickets submitted to individuals via email. These direct email requests are passed into the ticketing system. SWAN's preferred path is to report all issues and questions through the ticketing system. We have staff dedicated to monitoring tickets and researching/routing to appropriate staff, as needed.

Ticket categories have been updated this past month to provide better internal tracking of trends and severity of issues.

2.2 IT TEAM SITE VISITS, TRAINING, AND NETWORKING

During the past reporting period:

- 2/20 – Circulation Users Group meeting (Steven)

- 2/27 – BDD Acquisitions Roll-over Review & Preparation (Vickie)

- 2/28 – Discovery & User Experience (DUX) Advisory Group Meeting at OBD (Ian)

- 3/5 – TPS visit to register MobileCirc client device (Rudy)

- 3/7 – SWAN Quarterly Meeting presentation, recap of Azure migration (Steven)

- 3/12 – WMS visit for Acquisitions Pre-Rollover Meeting (Vickie)

- 3/14 – Cataloging Advisory meeting (Vickie)

- 3/20 – Circulation Advisory meeting (Vickie, Michael, Steven)

- 3/21 – SWAN Technology Users Group Meeting (Steven, Ian, Rudy, Michael, Dave, Vickie)

- 3/25-3/27 – COSUGI annual conference in Minneapolis, MN (Steven & Rudy)

- 3/28 – BLUEcloud Analytics (BCA) Open Lab Training (Vickie & Michael)

- 3/28 – Discovery & User Experience (DUX) Advisory Group Meeting at OBD (Ian & Michael)

- 4/1 – CSD visit to register MobileCirc client device (Ian & Michael)

- 4/10 – GED transit label project follow-up (Rudy, Steven, Vickie)

- 4/17 – SFS firewall install (Ian & Michael)

- 4/17 – Circ Users Group Meeting (Steven & Vickie)

- 4/19 – RAILS L2 Town Hall Meeting (Steven)

- 4/25 – RFID Users Group Meeting (Ian, Steven, Michael, Vickie)

- 4/30 – TPS MobileCirc device registration (Rudy)

- 5/7 – SLUI event (Ian, Michael, Vickie, Dave)

- 5/10 – Steven presents on IT service models in SWAN libraries at LACONI (Steven)

2.3   SWAN RFID USERS GROUP MEETING

Ian and the IT Team hosted the RFID Users Group meeting on April 25th at the Downers Grove Public Library. Eight libraries were represented at the meeting, where St. Charles's implementation of the PV Supa RFID system was discussed, along with satisfaction of support with RFID vendors and various RFID best practices throughout our libraries.

2.4   SWAN ONLINE COMMUNITY FORUMS

Steven, alongside Dawne, Tara, Scott and Aaron held a kickoff meeting to discuss prospects for the SWAN online community forums. While this project will be limited in scope initially, the intention is to create a web-based discussion board to facilitate the sharing of knowledge and best practices throughout the SWAN membership. In the upcoming weeks, Steven and Tara will continue the investigation of viable forum solutions, ideally seeking an option with Drupal integration for either a unified web experience or, at a minimum, single sign-on authentication.

2.5   MOBILECIRC LOGIN ISSUES

As of February 25th, MobileCirc login issues have been resolved. Following extensive investigation with SirsiDynix, it was determined that the core issue impacting MobileCirc was a daily-updated offline delinquency file that is queried with each login but only referenced when MobileCirc or WorkFlows are operated in Offline mode. Over time, the volume of delinquent patrons recorded to this file became unmanageable for the MobileCirc app, causing slowness, crashing, or login timeouts. By temporarily reducing this daily query to only track delinquent patrons with activity within the last two years, the resulting offline delinquency file size was reduced, minimizing the impact to the MobileCirc login process. Ideally, SirsiDynix plans to develop a new MobileCirc version that allows the offline delinquency file to be loaded optionally. SirsiDynix has asked SWAN to participate in testing this enhancement, when available (expected no earlier that summer 2019). When that version becomes available, the offline delinquency file will again be updated to reflect the full listing of users.

2.6   DELIVERY TRANSIT LABEL PROJECT

Rudy completed a pilot with Green Hills, St. Charles, and Melrose Park libraries and created documentation to assist with generating the printed labels through a variety of internet browsers. We announced on May 28, 2019 that the transit label generator is ready for general usage. Thank you to everyone who tested the tool during the pilot phase and provided feedback. The most common feedback we received was that the login requirement presented a barrier to adoption. Upon review of current and planned functionality, we have determined that no personally identifiable information (PII) can be gathered and have removed the requirement to login to the support site.

The transit label generator currently generates labels for in transit materials going to and from SWAN member libraries. We expect that functionality will be expanded to handle all items sent through RAILS delivery. We will make further announcements as new features are added.

2.7 SYMPHONY REPORT CONSOLIDATION

Michael is working with libraries individually to migrate any remaining reports that can be run in BLUEcloud Analytics to this interface. Removing unnecessary reports in the Symphony report queue opens the processing window needed for reports updating data that require real-time data access within Symphony.

2.8 PROJECT MANAGEMENT INSTITUTE (PMI) COURSEWORK

With hopes to improve the strategy and efficiency of IT and SWAN-wide projects, Steven began a five-week course in February to obtain a Project Management Professional (PMP) certification through the Project Management Institute (PMI). He intends to complete this certification on behalf of SWAN by mid-summer.

2.9 EMAIL NOTICE TRACKING

SWAN sent 422,568 email notifications from the SWAN Symphony server over the past 30 days. SWAN observed a delivery success rate of 98.89% (417,874), with 0.15% (637) of those emails bouncing due to a patron email issue and 0.01% (52) of those emails reported as SPAM by the patron. The remaining amount is currently in a "delivering" status. While the bulk of these emails are patron notifications, some of the emails are to library staff for Symphony reports/statistics.

2.10 OUTAGE TRACKING

Date	Time	Elapsed (Min)	Service	Planned?	Lib Hours?	Reason
4/7/2019	18:30	10	Symphony	Yes	No	Planned Symphony server outage to perform reconfiguration
4/7/2019	18:30	10	Enterprise	Yes	No	Web Services outage relating to Symphony planned outage
4/9/2019	16:42	50	Symphony	No	Yes	Symphony server outage and redeployment due to hardware failure in Azure environment
4/9/2019	16:42	50	Enterprise	No	Yes	Web services outage relating to Symphony server outage
4/10/2019	9:00	5	Symphony	Yes	Yes	Symphony services cycle to correct issue with label templates
4/10/2019	9:00	5	Enterprise	Yes	Yes	Web services outage relating to Symphony server outage
4/15/2019	10:12	5	Enterprise	No	Yes	Intermittent Enterprise outages caused by an outage of Syndetics cover art provider
4/16/2019	2:15	30	Enterprise	Yes	No	Enterprise 5.0.0.9 upgrade

Date	Time	Duration	System	Planned	Resolved	Description
4/17/2019	9:45	15	Enterprise	No	Yes	Intermittent Enterprise outages caused by an outage of Syndetics cover art provider
4/23/2019	13:30	20	Enterprise	No	Yes	Intermittent outages of Web Services due to search load spikes in Enterprise

3 SWAN BIBLIOGRAPHIC SERVICES

Scott Brandwein, Bibliographic Services Manager

3.1 BIBLIOGRAPHIC SERVICES TEAM SITE VISITS, TRAINING, AND NETWORKING

During the past reporting period:

- 2/27 – RAILS Webinar "Cataloging Non-Traditional Resources" (Bib Services & Cataloging Library staff)

- 2/28 – Frankfort Public Library Pre-Cat & Serials Training (Claudia, Angela)

- 3/7 – SWAN Quarterly Meeting presentation of Cataloging Advisory work (Claudia)

- 3/8 – Consortia Cataloging Meeting with Illinois Consortia Catalogers (Scott, Dawne)

- 3/14 – Cataloging Advisory Group (Full Team)

- 3/18 – ESS Cataloging Library Interview (Scott, Claudia)

- 3/20 – Circulation Advisory Group (Sam)

- 3/28 – NUD Serials Discussion and Troubleshooting (Claudia, Sam)

- 4/4 – ESS Cataloging Library Orientation (Scott, Claudia)

- 4/5 – Consortia Cataloging Meeting with Illinois Consortia Catalogers (Scott, Dawne)

- 4/5 – FRS Pre-Cat/Serials Training (Claudia)

- 4/8 – Cataloging Automation Discussion OLS (Scott, Claudia, Sam)

- 4/22 – GWS Pre-Cat/Serials Training (Claudia, Sam)

- 5/2 – Acquisitions Overview for BWS & FPS (Scott, Claudia, Sam)

- 5/3 – Cataloging Standards Task Force (Full Team)

- 5/3 – LLSAP Catalogers Meeting (Scott)

- 5/7 – SLUI Annual Meeting (Scott, Angela, Diane, Sue, Sam)

- 5/9 – Cataloging Advisory/Acquisitions User Group (Full Team)

3.2 CATALOGING ADVISORY MEETING

The March 14th Cataloging Advisory Meeting generated a lot of topics for discussion. Most of the meeting was devoted to reviewing SWAN's drafts of two documents: *SWAN Core Minimum Cataloging Standards* and *Fields to Delete in Copy Cataloging*. The discussion raised a lot of questions to answer and

ambiguities to resolve, so we will be continuing this conversation in a smaller-group format with staff from our cataloging libraries.

We also proposed a couple of options for dealing with Blu-Ray/DVD combo packs in the future. Both involved changes to our format vocabulary (590 field) and accompanying changes to how the search facet works in Enterprise. We will work out the details and present a completed proposal and plan of action at the next Cataloging Advisory Meeting on May 9th.

With the growth SWAN has experienced in the past year, we are rethinking our cataloging discussion group structure. In particular, we'd like to elicit more feedback from our Cataloging Libraries, a group that has tripled in size. We will announce any changes in the future, but for now, the Cataloging Advisory Group will meet as scheduled.

3.3   CATALOGING ADVISORY GROUP & ACQUISITION USERS GROUP MEETING: COMBO PACKS

The May 9th Cataloging Advisory meeting was combined with the Acquisitions User Group to discuss some crossover issues. The primary agenda topic of this type was SWAN's final proposal for a new method of processing Blu-Ray/DVD combo packs, including a set of standards and a new format term. The proposal was met with generally positive response, but member staff raised a couple of questions requiring follow-up. Bibliographic Services will seek those answers, and we plan to go forward with this plan with a soft start date of July 2019.

The new format term is "COMBO PACK" and will be used in SWAN's custom 590 MARC field. Instead of mapping to a search facet in Enterprise, however, these items will appear under faceted searches for Blu-Rays or DVDs. Patrons will not see the new format itself, but they will benefit from more robust search results. Enterprise records for these materials will display both the Blu-Ray and DVD format icons. Tara Wood was instrumental in setting this up.

3.4   CATALOGING STANDARDS TASK FORCE

Following the discussion of cataloging standards at the March Cataloging Advisory meeting, it became clear that further expert-level discussion was needed before committing to a set of standards. We reached out those member catalogers who had participated in the discussion or followed up afterwards to invite them to a series of meetings to flesh out these document drafts.

Our first meeting was May 3rd, and we discussed the Fields to Delete draft. The discussion was productive, and we will continue to meet monthly until we are happy with the resulting set of standards. We hope to be finished with these meetings by September.

3.5   DATA CLEANUP

Joy Anhalt of Tinley Park Public Library has been assisting with a cleanup project of bibliographic records lacking an OCLC number. These records go through a matching process during OCLC holdings upgrades that attempts to find the correct record in OCLC using other bibliographic markers, but this is not always possible. Furthermore, the lack of an OCLC number can often signal that a record may be outdated or require further bibliographic cleanup. Joy has been helping us overlay these records as well as flag those

that we may require follow-up with member libraries. Her contribution has been extremely valuable to the integrity of the SWAN bibliographic database.

We have been taking steps to clean up bibliographic data in small ways that hopefully will have a big impact. We have implemented a fix to heading authorization in WorkFlows, which allows Library of Congress Genre/Form Terms to be "authorized". This should help catalogers spot errors in genre terms.

Claudia Nickson is spearheading a second phase of an audit of periodical volume information. The first phase of this project took place in February after the release of new standards, and it resulted in a great deal of communication between SWAN and member libraries on this issue. This phase will involve follow-up on new items from those libraries as well as a broader audit of periodical titles not included in the first phase.

3.6   ERROR RESOLUTION

SWAN has been experiencing two unusual recurring problems with our bibliographic data for quite some time now, but we've had breakthroughs on both. The first problem involved Dates Cataloged being removed from bibliographic records, seemingly at random. The Date Cataloged value helps us track errors and manage our pre-cat list. We discovered the source of this was a misleading setting in some bibliographic load report templates. They have been corrected, so this should not continue.

The second problem involved missing signature fields from full records. Cataloging Library and SWAN staff sign and date all records in this field, so we can track the source of cataloging, but these have been disappearing, also seemingly at random. The source of this issue is an Acquisitions report using settings required by Midwest Tape. We are currently in conversation with Midwest Tape to devise a workaround and stop this from happening. We hope to have it fully resolved in the coming days.

3.7   ACQUISITIONS/EDI TROUBLESHOOTING

Sam has created process flow diagrams and shared the acquisitions processing overview with a cross-functional group of SWAN staff. A collaborative team is working to identify areas in the processing cycle where errors may occur, cause of these problems, and remediation. Vickie is working with libraries to help them in the steps required for a smooth fiscal close/roll-over, as well as reviewing areas of report consolidation. She has also reached out to Midwest Tape who has corrected configuration errors on their end related to order acknowledgement files.

3.8   EISENHOWER PUBLIC LIBRARY

As of April 8th, SWAN would like to welcome Eisenhower Public Library as the newest member of our OCLC Cataloging Libraries group. Eisenhower's Head of Technical Services, Victoria Bitters, has a history of valuable contributions and error-reporting within our catalog already. We believe she and her team will be a good fit for the group.

3.9   TRAINING OPPORTUNITIES

Bibliographic Services staff attended a RAILS webinar led by Karen Snow entitled "Cataloging Non-Traditional Resources", which covered interpreting RDA standards to describe a "Library of Things."

Though description of these items is often left to the discretion of member libraries, this presentation tied into a discussion that took place at the last Cataloging Advisory meeting about possibly consolidating these types of records. Bib Services encouraged our Cataloging Library staff to attend, and about half a dozen catalogers were able to.

3.10 CATALOGING COUNTS: SWAN BIBLIOGRAPHIC SERVICES

Counts do not include nineteen 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 February, there were 176 upgrades of minimal level records in OCLC to full records.
For March, there were 156 upgrades of minimal level records in OCLC to full records.
For April, there were 140 upgrades of minimal level records in OCLC to full records.

	Jan	Feb	Mar	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Total
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	194	92	**1,591**
Copy 2018	3,896	3,348	5,157	4,614	2,851	1,493	2,138	2,459	2,010	1,866	1,376	2,056	**33,264**
Orig 2019	126	82	106	211									
Copy 2019	2,565	1,952	1,939	2,352									

4   SWAN USER EXPERIENCE

Tara Wood, User Experience Manager

4.1   USER EXPERIENCE TEAM SITE VISITS, TRAINING, AND NETWORKING
During the past reporting period:

- 2/13 – ILL Users Group Meeting at RAILS (Dawne, Vickie, Crystal)

- 2/14 – BLUEcloud Analytics Open Lab (Vickie, Michael, Crystal)

- 2/20 – SWAN Circulation Users Group (Crystal, Sam, Vickie, Michael, Dawne)

- 2/27 – Discovery & User Experience (DUX) Advisory Group Meeting at OBD (Michael, Dawne)

- 3/5 – BLUEcloud Analytics Open Lab (Vickie, Michael, Crystal, Sam)

- 3/7 – SWAN Quarterly Meeting presentation of Circulation Advisory work (Crystal)

- 2/27 – Discovery & User Experience (DUX) Advisory Group Meeting at OBD (Tara, Robin, Lauren, Ian, Scott, Michael, Dawne)

- 3/7 – SWAN Quarterly Meeting presentation of DUX work (Robin)

- 3/7 – SWAN Quarterly Meeting presentation on Enterprise updates and BLUEcloud Mobile (Tara)

- 3/12 – UX Team Learning Launch (Tara, Robin, Lauren, Crystal)

- 3/20 – Circulation Advisory (Crystal, Sam, Vickie, Tara, Dawne, Steven, Michael)

- 3/28 – Discovery & User Experience (DUX) Advisory Group Meeting at OBD (Robin, Lauren, Crystal)

- 4/9 – Outreach Consultation GED (Crystal)

- 4/17—Circulation Users Group Meeting (Crystal)

- 4/23 – 4/24 –Usability Testing at ESS and INS (Tara, Robin)

- 4/25—Discovery and User Experience (DUX) Meeting (Tara, Robin, Lauren, Crystal)

- 4/26—Outreach Users Group Meeting (Crystal, Tara)

- 5/2—Clarity Task Force Meeting (Tara)

- 5/7 – SLUI Meeting (Tara, Robin, Lauren, Crystal)

- 5/15 – Completion of Introduction to User Experience Principles and Processes Course (Tara, Robin, Lauren, Crystal)

4.2   BLUECLOUD MOBILE

SWAN received the BLUEcloud Mobile test app on April 25th, and we divided up the 97 library profiles among SWAN staff to test with a testing script that Lauren developed. A big thank you to our testers: Ian, Michael, Claudia, Sam, Aaron, Dawne, Lauren, Crystal, and Robin.

After testing, we concluded that there are several features that SirsiDynix needs to configure before we can set a go-live date. These include:

- Reviewing and correcting eResource Central (eRC) integrations for each library

- Resolving issues with viewing holds, and suspending and unsuspending holds

- Configuring the 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

Tara submitted a detailed testing report to SirsiDynix outlining the issues found, and we have a consulting call with SirsiDynix scheduled for May 22nd to plan next steps and discuss remaining issues in more detail.

We will update the membership when a go-live date is scheduled, or we have more news about the progress of our app configuration.

4.3   CONTINUING EDUCATION CLASS ON USER EXPERIENCE & RESEARCH DESIGN

The entire UX team (Tara, Robin, Lauren, Crystal) is working on a rigorous certification program in User Experience and Research Design. The program consists of 6 courses, each approximately 6 weeks in duration, culminating in a capstone project.

We are currently working on week 3 of the User Experience Research and Design course offered in Coursera from the University of Michigan. The courses are 100% online and the team has engaged in sessions together and on our own. The most recent homework included sketching design interfaces and a peer graded assignment.

4.4   ARTICLE SEARCH – EBSCO DISCOVERY SERVICE

Robin has configured 70 libraries for full text research in Article Search. They are working steadily to finish the remaining libraries. The configuration includes: search limitations and expanders, full text retrieval only from library specific database subscriptions, OpenAthens authentication integration within Enterprise, additional library branding, detailed record landing page in EBSCOhost, SmartText link resolver, and additional tools on the sidebar.

Below is an example of the EDS landing page for the Crete Public Library where a search for "water" was initiated in Enterprise.

Searching: Discovery Service for Crete Public Library

Crete Public Library

Keyword ▾   AN 135342882   [×]   Search ?

Basic Search   Advanced Search   Search History

Detailed Record

HTML Full Text

PDF Full Text (590KB)

Find Similar Results using SmartText Searching.

◄ Result List   Refine Search   ◄ 1 of 1 ►

Water 4.0 Lessons in Innovation from History.

Authors:	O'CALLAGHAN, PAUL[1]
Source:	China Business Review. Feb2019, p30-32. 3p.
Document Type:	Article
Subject Terms:	*INFRASTRUCTURE (Economics) *WATER security MUNICIPAL water supply WATER distribution CHLORINATION WATER pollution WATER shortages
Reviews & Products:	WATER 4.0: The Past, Present & Future of the World-s Most Vital Resource (Book)
NAICS/Industry Codes:	221310 Water Supply and Irrigation Systems 237110 Water and Sewer Line and Related Structures Construction
People:	SEDLAK, David
Abstract:	The article explores how the urban water systems' historical development can inform the distribution channels of water supply as of March 2019. It cites the book "Water 4.0: The Past, Present, and Future of the World's Most Vital Resource" by David Sedlak that highlights the historical development of the systems and the various phases of rapid change undergone by the urban water systems. Also mentioned are the importance to know the origination of infrastructure, the introduction of chlorination and sand filtration, the concerns about surface water contamination that led to the next revolution in water technologies, the issue of water shortage and urban drainage changes and the attention given to water insecurity that expands to climate change, population and competition for water supply.
Author Affiliations:	[1]Founder and CEO of BlueTech® Research
Full Text Word Count:	1536

Tools

Google Drive

Add to folder

Print

E-mail

Save

Cite

Export

Create Note

Permalink

Share

Listen

Translate

4.5 Usability Testing on Article Search and EBSCO Discovery Service

Robin and Tara visited Eisenhower Public Library and Indian Prairie Public Library for usability testing. Thanks to Molly Bitters and Tony Lucarelli for assisting us with recruitment and set up for testing.

We conducted usability testing on the following interfaces:

- Searching in the Enterprise Article Search interface
- Searching in the EBSCO Discovery Service interface
- Logging in through OpenAthens
- Searching for articles from the library website
- Searching for articles from the Chicago Public Library website (BiblioCommons)

We tested with a total of 6 participants, who we recruited through an online survey posted on each library's Enterprise catalog.

A full usability testing report is available and was presented at the May meeting of Discovery and User Experience (DUX) Advisory Group. The report is also included in the June 6, 2019 SWAN Quarterly meeting packet.

4.6 Patron Site & Videos

Lauren is working on updating the patron website so there is more focus on new patrons and patron help. In addition to this, she is currently reorganizing and updating patron videos, and exploring more professional video hosting services outside of YouTube.

4.7 BLUEcloud Circulation Evaluation

Tara and Crystal participated in training sessions from SirsiDynix on BLUEcloud Circulation, and we planned our initial research steps. Crystal is currently developing a feature matrix, which will outline the features available in BLUEcloud Circulation and potential features that would be needed for this application to be useful to our libraries. We also plan to conduct desk observations to identify potential use cases for BLUEcloud Circulation.

4.8 Continuing Education Class on User Experience Research and Design

The UX Team will complete the Introduction to User Experience Principles and Processes, the first course in the User Experience Research and Design Specialization from the University of Michigan, on May 15th. As part of the course, the team completed sketching activities and a heuristic analysis. The next course is Understanding User Needs, and the team will learn more about conducting interviews and observations and analyzing results through affinity diagramming.

4.9 Circulation Advisory Group

Crystal led the Circulation Advisory Meeting on March 20th. Highly Discussed topics were, hold wrappers, Book Club groups best practices; and checking out patrons without library cards practices. Crystal also presented at Quarterly earlier in March; where she gave an overview of topics covered at Circulation Advisory.

A "book club working group" representing cataloging, discovery/Enterprise, and circulation has been formed internally (Crystal, Scott, Tara, Sam, Vickie) to codify examples of how libraries are cataloging, surfacing, and circulation book club titles. This information will be shared at the advisory groups of each (Circulation Advisory, Cataloging Advisory, and DUX). We will work with member representatives to help develop uniform recommendations on how to best facilitate book club requests within our consortium. These recommendations will include how to catalog book club sets, when and what is appropriate when making requests for multiple copies within the consortium, and circulation loan guidelines.

4.10 Discovery and User Experience (DUX) Advisory Group

In the last DUX meeting, representatives from Gale gave a demo of Gale Courses. The group also discussed holds from a patron experience perspective. We looked at several different holds scenarios and discussed the advantages and disadvantages of each. This will likely be an ongoing discussion that SWAN staff will take to additional advisory groups.

4.11 Outreach Users Group

Dawne, Crystal, Vickie, Sam, and Tara attended the April Outreach Users Group meeting. The group shared the initiatives they are working on in their communities and had a show-and-tell of the fidget aprons and conversation props they use in their programs. Training covered how to setup an outreach patron account and user profile using SWAN best practices. Based on feedback from the group, SWAN

developed another BLUEcloud Analytics report to report on items checked out by facility for easier tracking when staff visit facilities for collection of material to return.

4.12 CIRCULATION USERS GROUP

Under Crystal's leadership, Circulation Advisory has transitioned to a more formal structure where agenda, packets, and minutes are detailed for group work at meetings. Part of this transition to a more formal working group for Circulation Advisory relies on Circulation Users Group being more focused on library staff networking and sharing practices. The Circulation Users Group is now member-led with Peggy Tomzik, ESS, serving as chair. Crystal serves as primary SWAN liaison for resource support, with the entire SWAN team providing support, participation, and engagement with the membership.

Crystal attended the Circulation Users Group meeting in April, which was led by Peggy Tomzik. Topics discussed included how to properly delete data from a patron record, helpful circulation reports, handling expired holds on the holds shelf and missing hold shelf items, and what to do with items coming from a home or facility that has recently had a norovirus outbreak.

Spring 2019 Usability Test Report

Prepared by Tara Wood, May 2019

Summary

A total of 6 people participated in usability testing at the Indian Prairie Public Library and the Eisenhower Public Library District in April 2019. Tara Wood, SWAN UX Manager, and Robin Hofstetter, SWAN Electronic Resources Consultant, prepared and conducted the tests with assistance from Molly Bitters at the Eisenhower Public Library District and Tony Lucarelli at the Indian Prairie Public Library.

Participants performed tasks in several interfaces, including their library catalog; EBSCO Discovery Service (EDS); and Article Search, the EDS integration in Enterprise.

Testing revealed that users struggle to find Article Search in the catalog and from their library websites. In addition, users expect to be able to search everything and narrow down, but library resources are very segmented and do not support this behavior.

In the short term, we recommend facilitating easier navigation between these segmented library resources through visual design changes in Enterprise; improved linking between EDS and the catalog and library website; and testing an EDS search bar embedded into the library website. In the long term, further research is needed to identify how to better integrate online resources to the library catalog. It is clear from testing that the current EDS integration is still a very separate interface that may introduce more issues than it solves. Further research is needed to find out if directly linking out to EDS would be a better user experience.

Methods

Usability testing

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]
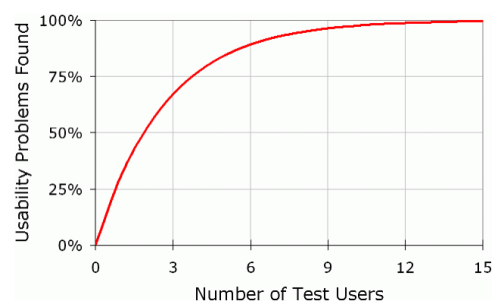
Competitive testing

Competitive testing or comparative testing evaluates the usability of your "competitor's" services and platforms. We may not see other libraries as competition, but we can use competitive testing to

---

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

evaluate services from different library vendors and to learn from other libraries' platforms and services to their patrons.

Participants

We recruited 3 participants from each library through an online survey posted to those libraries' catalogs. For this test, we sought participants that had some experience using online resources from their library and would potentially have a use case that could be met through Article Search. Through a brief recruitment survey, we asked potential participants:

- Have you ever used online resources from your library? For example, to do a homework assignment, for genealogy research, or to read newspaper and journal articles.
- (If yes) What online resources did you use from the library?
- Have you ever seen this screen before? (with a screen shot of the Article Search results screen)

We selected a mix of participants who had and had not seen the Article Search interface before.

Participant	Online Resources Used	Familiar with Article Search?	Use Cases & Interests
A – Indian Prairie	Access World News, Chicago Tribune Historical Archive	No	Browses library databases for news
B – Indian Prairie	Morningstar, Ancestry.com	No	Personal research in investing and genealogy
C – Indian Prairie	Newspaper articles for historical research, journals related to MBA program	Yes	Research for a community group focused on environmental issues
D – Eisenhower	EBSCO	Yes	Research for college papers
E – Eisenhower	None	No	Would be interested in knitting resources through a database like Creativebug
F – Eisenhower	Consumer Reports, Morningstar	No	Personal research in investing

Interfaces Tested

SWAN has three interfaces associated with our e-content platform. They are (1) library catalogs through Enterprise, (2) EBSCO Discovery Service, aka EDS, and (3) Article Search, which is a search through Enterprise that returns EDS results in a separate search interface/tab.

Library Catalogs

We tested with the Indian Prairie Public Library catalog and the Eisenhower Public Library catalog, both on the SirsiDynix Enterprise platform.
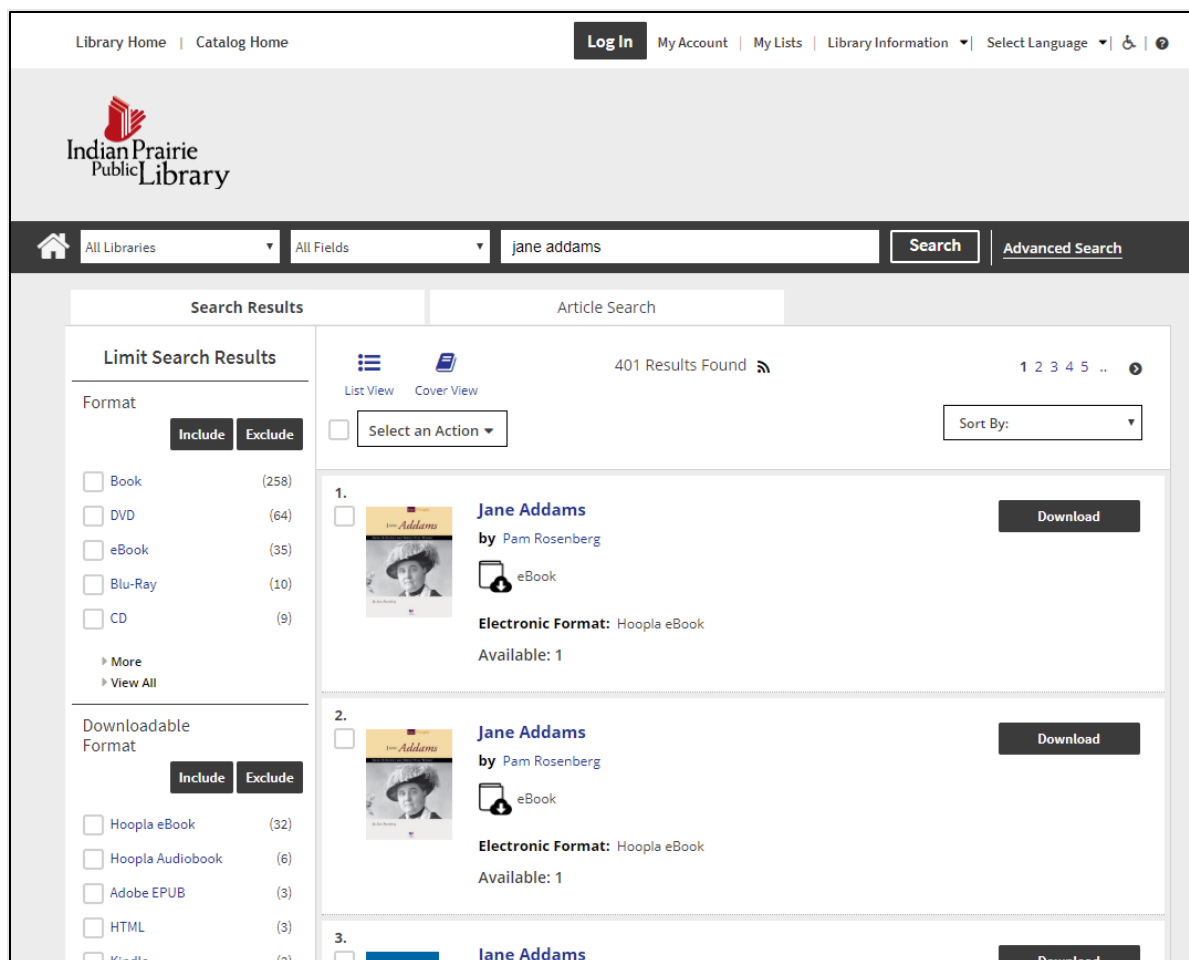
Figure 1 Indian Prairie Public Library catalog in Enterprise

EBSCO Discovery Service (EDS)

EBSCO Discovery Service provides a discovery interface to search multiple databases at once. Some databases –notably ProQuest databases – cannot be included in EDS.

Figure 2 EDS search results for Eisenhower Public Library District

Article Search

Article Search incorporates results from EDS into the Enterprise library catalog through the EDS API. Currently, Article Search is accessible by selecting "Article Search" from the search limit dropdown menu next to the search bar. Or, an "All Libraries" search will display results for Article Search in a separate tab.

Figure 3 Article Search accessed from the search limits dropdown menu in the Eisenhower Public Library District catalog

Alternate Catalog

We also tested a slightly different visual design of the current library catalogs that did not include the Article Search EDS integration, and instead linked out to the separate EDS interface.

Figure 4 Alternate version of the Indian Prairie Public Library catalog, with links to search results in the EDS interface

Chicago Public Library Catalog

The Chicago Public Library catalog uses the BiblioCommons BiblioCore platform. It does not offer an EDS integration, but it does offer database and online publication recommendations. We tested how this different method of integrating online resources worked for our users.
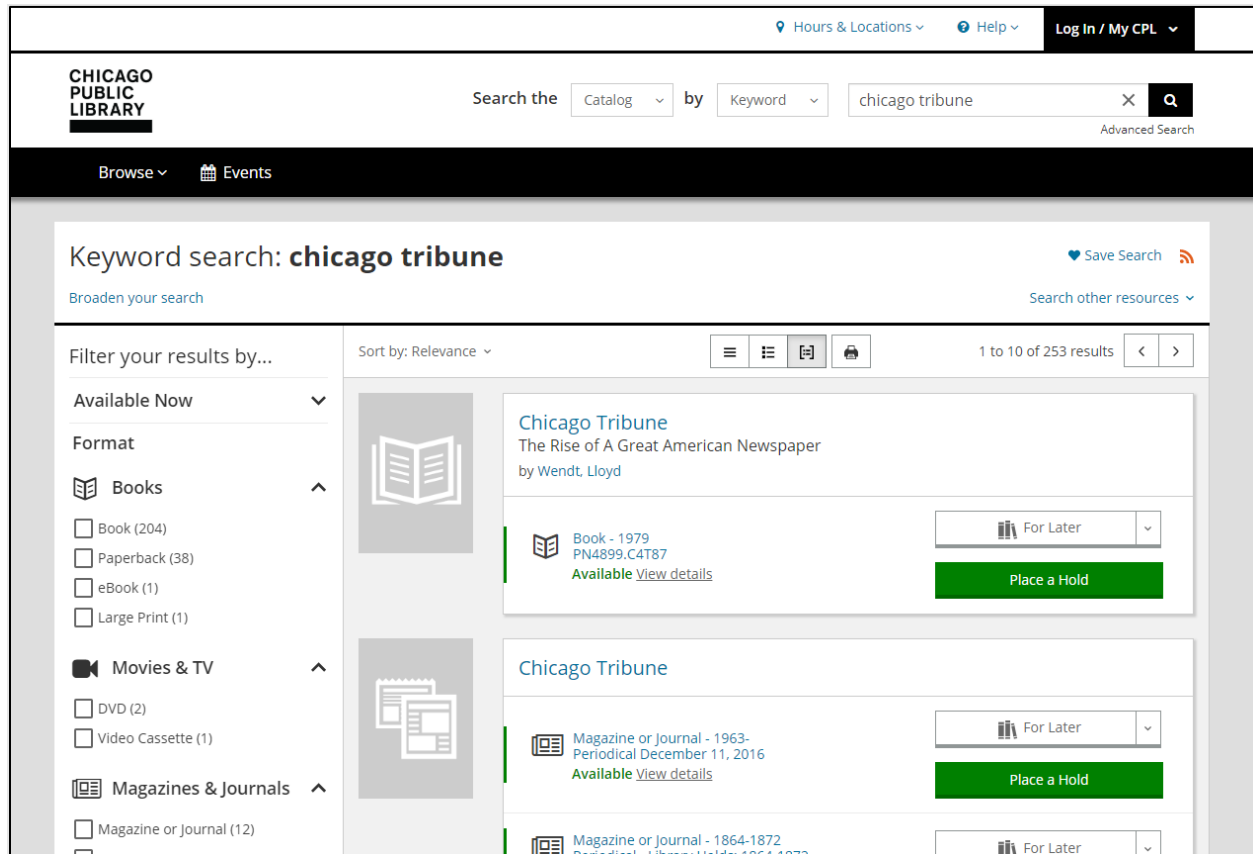
Figure 5 Search results in the Chicago Public Library catalog

Findings & Recommendations

Confusion with Separate Interfaces

Participants struggled with the separation between search results in the catalog and search results in Article Search.

5 out of 6 participants initially thought they were searching the catalog and seeing results for books and media. One participant had used Article Search extensively and was familiar with the interface. Another realized after briefly scrolling through the results that they were seeing results for "periodicals". Some of the confusion is due to the display of formats in Article Search results. Icons for formats display, but no label. Participants were looking for formats, but the icons weren't helpful. One asked, "is this a book?" referring to a "reference" format icon.

The two results screens didn't match participants' mental models of how a search works. One participant said, "I would think I could search All Libraries and fine tune from there" using the format

facets – not realizing article results were in a separate tab or screen. Another specifically noted their frustration with the separation between library resources – he wanted to search everything and narrow down, citing Amazon and Google. However, several participants also said, when asked to find online articles in the catalog, "I wouldn't expect to find that here -- this is what is in the library." They expect a search-all-and-filter search experience, but they also know the catalog doesn't deliver on that expectation.

Recommendation

In the short term, adding clear format labels would help users to clearly see the format of the results they are looking at.
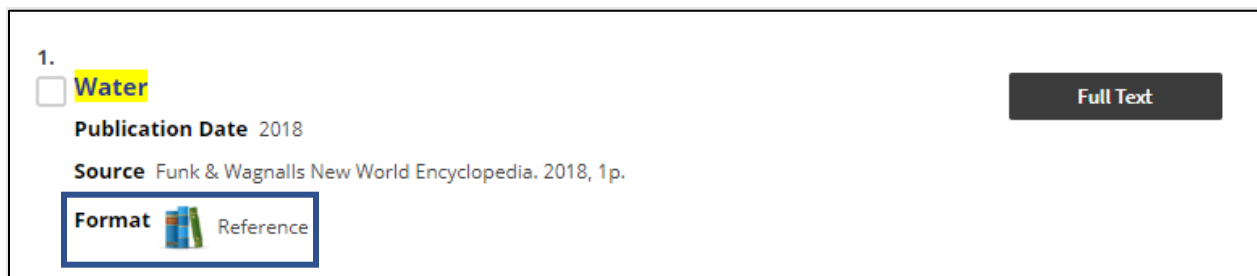
Figure 6 Proposed change to format labels in Article Search

Even if results need to be presented in separate screens for technical reasons, navigation between those screens could be improved. The current "tab" display appears on an "All Libraries" search, but using other limits, including "All Libraries (no eBooks)" and the "Article Search" limit, removes the tabs. A persistent tabbed display would provide consistent navigation between groups of results and follow web standards. In addition, persistent tabs would communicate the types of results available, helping to reshape the idea that "the catalog has this but not this."
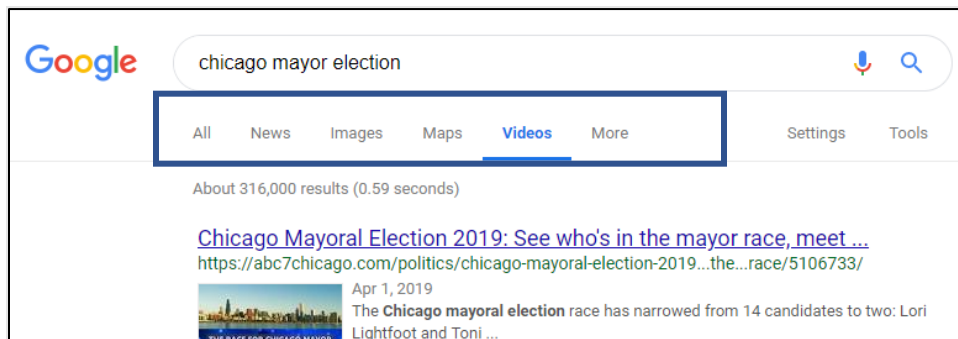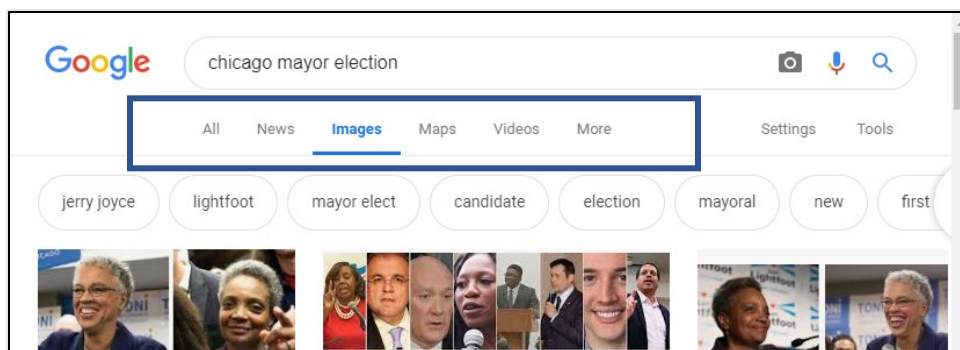

Figure 7 Google search results in the Video tab

Figure 8 Google search results in the Images tab

In the long term, more research is needed to determine how to best accommodate a "search-all-and-filter" search behavior.

Difficulty Navigating to Article Results

Patrons were presented with Article Search at the beginning of the test, then they were asked to find it again from the library website later in the test. 4 of the 6 participants that tried to search from the library website were unable to find it.

One participant wouldn't search for articles from the library website, noting "I know when I have gone there, I will find books media." Two participants found it again after struggling for several minutes; one of these participants had used Article Search before the test, but couldn't recall how to get back to it.

Expectations for format facets

4 of the 6 participants looked in the "Format" facet of the catalog for an "Article" format limit. One patron used the "Newspapers" facet. Another limited to "Other Video". These facets return results for physical materials.

Figure 9 Format filters in search results

2 of the 6 participants tried to use Advanced Search in Enterprise to find articles and were unable to successfully find them. One limited to a format of eVideo and another limited to Newspapers, which prevented articles from being returned as those facets return results for streaming video and physical newspapers.

Figure 10 Format filters in Advanced Search

Confusion over "website" vs. "catalog"

We also tested navigating to article results from patrons' library website and the Chicago Public Library website. Several participants thought if they chose to search "website" from their library website or the Chicago Public Library website, it would return newspaper articles.

Figure 11 Website search limit in the Chicago Public Library catalog

Finding articles without the EDS integration

In a test of an alternate version of the Enterprise catalog, 5 of the 6 participants were able to navigate to article results. They were presented with three possible ways to navigate to Article Search:

- "Article Search" link below the search bar, linking to the EBSCO Discovery Service home screen

- Link below the number-of-results-found label, linking to results in EBSCO Discovery Service
- Embedded search results for articles from EDS

One participant found the embedded results, one participant found the link below the number-of-results-found label, and 3 found the link to Article Search below the search bar.
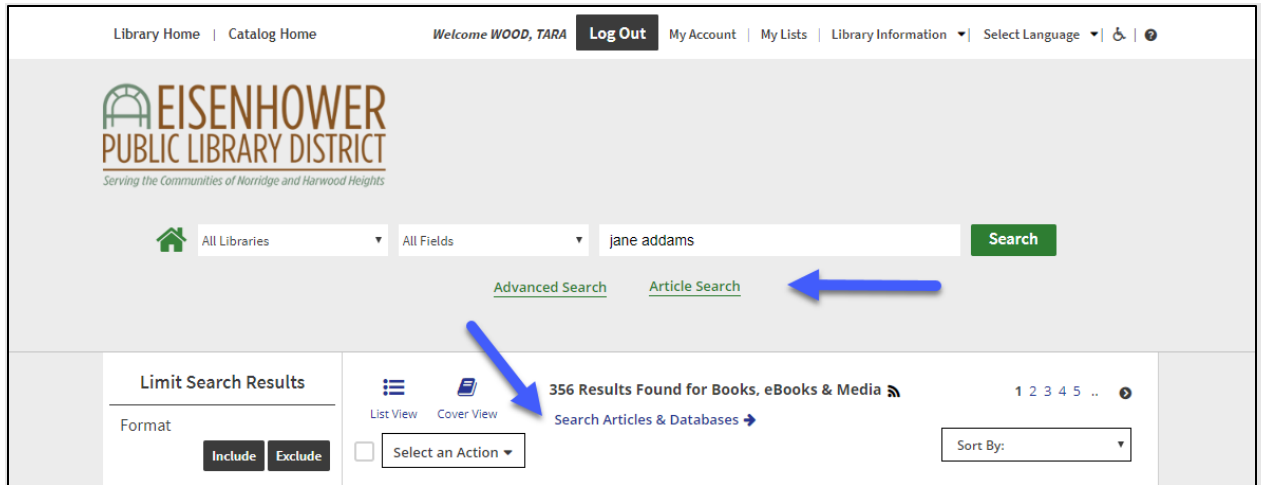

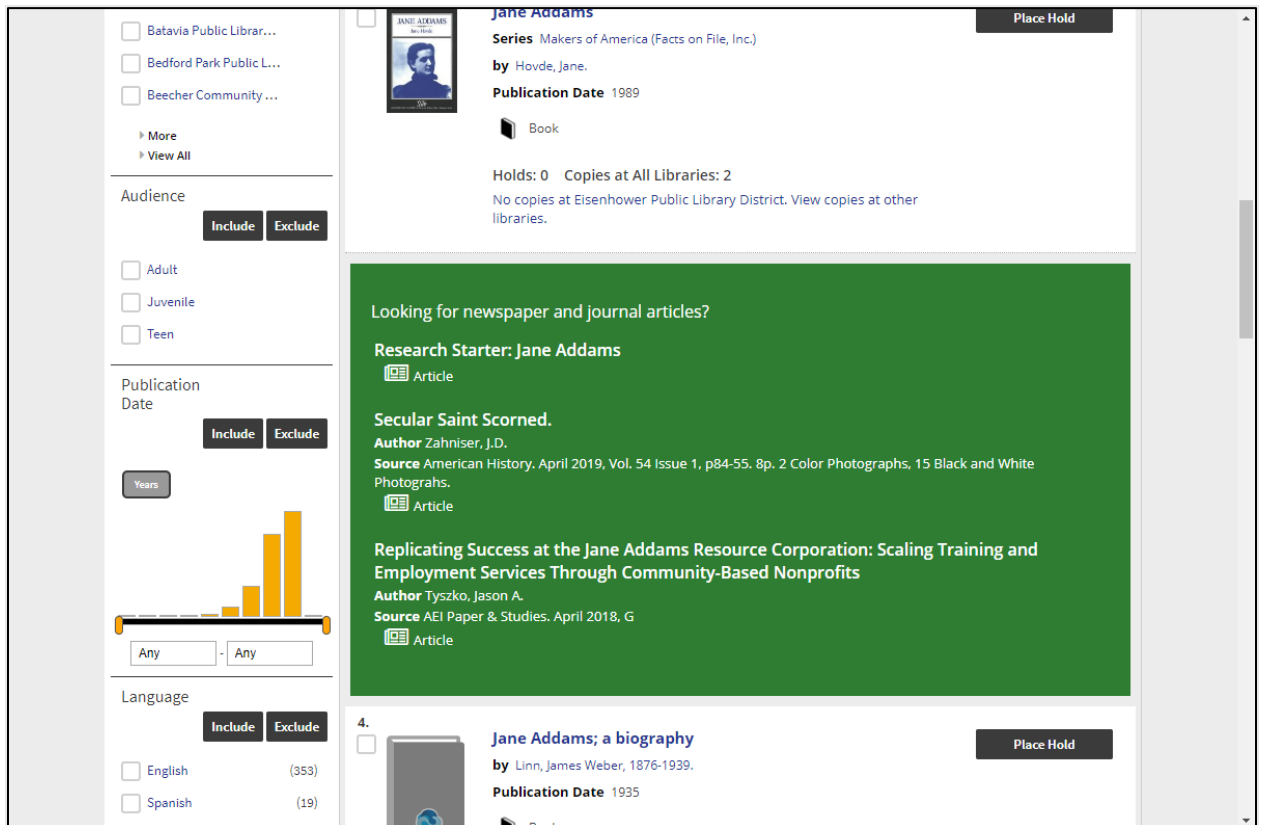*Figure 12 Alternate view of search results with links to Article Search*

Figure 13 Alternate view of the catalog with embedded article results

While participants had a higher success rate using this version of the interface, they still had to "scroll and hunt" before finding a path to article results. Several participants also looked first in the format facets in this interface.

Finding articles in the Chicago Public Library catalog

The Chicago Public Library includes embedded results for online databases and publications by title. A search for "Chicago Tribune" will return with recommendations for online resources.
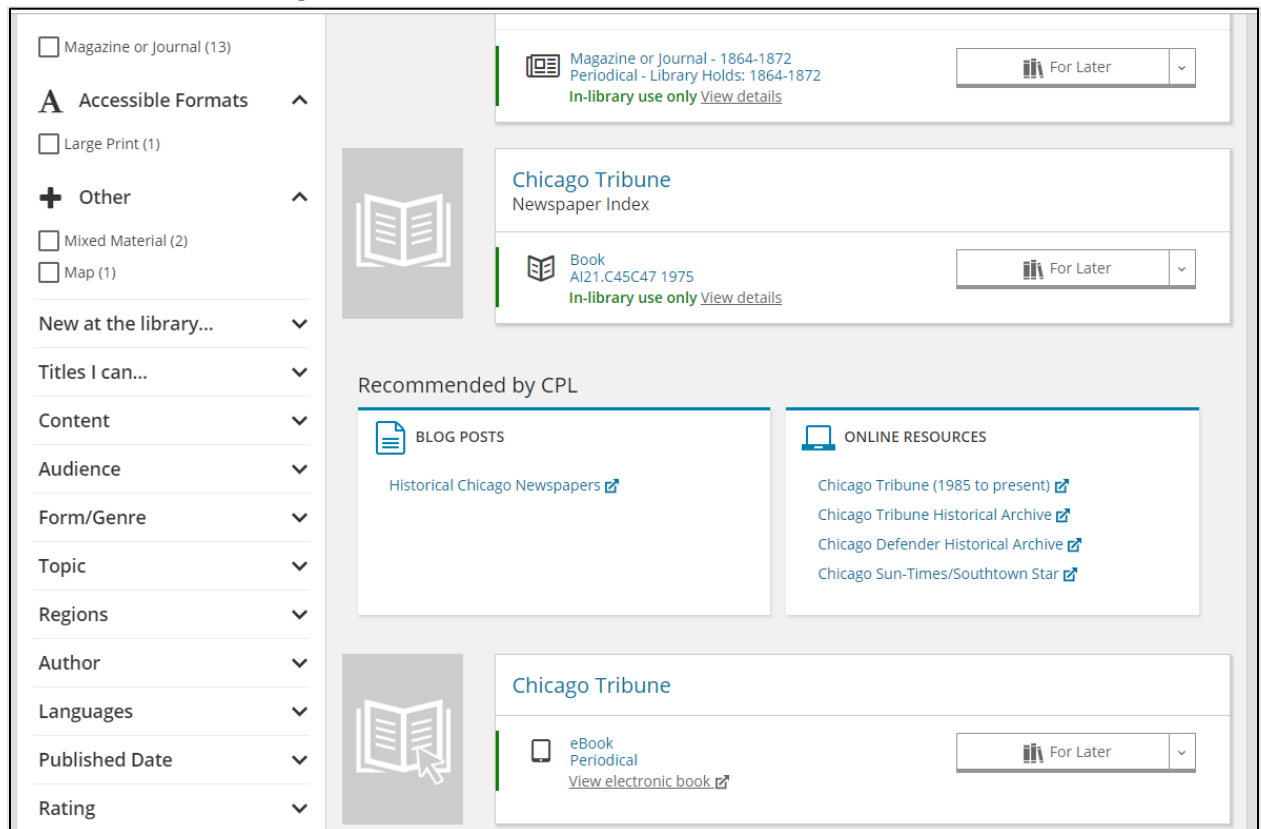

Figure 14 Online resource recommendations in Chicago Public Library

When participants were prompted to find articles from the Chicago Tribune about the recent mayoral election, all participants initially searched by topic, e.g. "Chicago mayor election" and did not return results or get a recommendation for the Chicago Tribune online.

One participant who had used EBSCO for school eventually found the link to "EBSCO Magazines and Journals". Two participants found a link from the Chicago Public Library website to "Online Resources" and found the Chicago Tribune from there. One participant tried a link to WorldCat from the "no results" page.
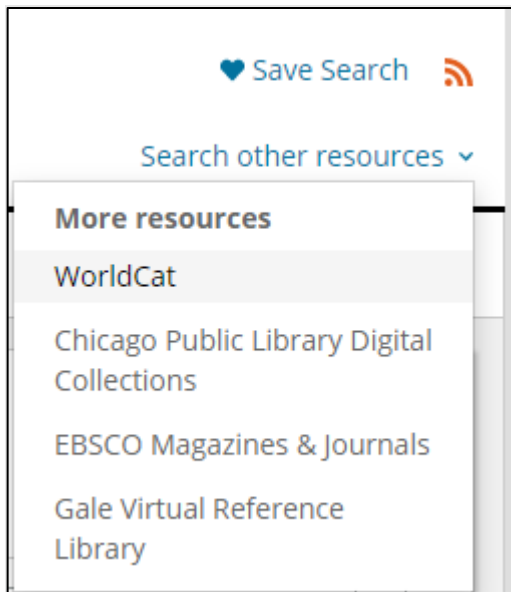
Figure 15 Link to EBSCO from the Chicago Public Library Catalog

Recommendations

Currently, searching for articles from the library website does not fit with users' mental models. This is partly because users have not been able to find online resources from the catalog in the past, and partly because it is difficult to navigate to these tools from the catalog currently.

Access to the EDS search interface from the library website would help to connect users already using databases to an alternate way to search these resources, meeting them where they are. Libraries could include Article Search as an option in their website search:
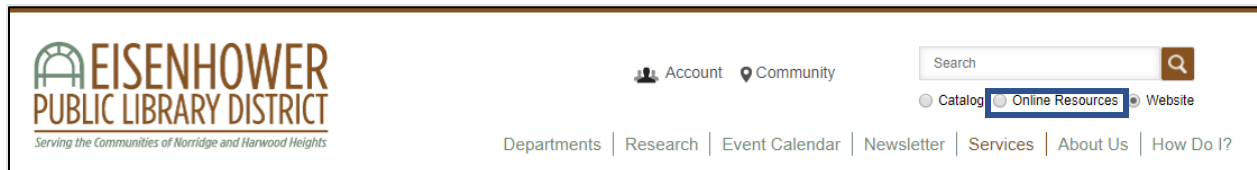

Figure 16 Mockup of the Eisenhower Public Library website, with an 'Online Resources' option in the search bar

Alternately, libraries could embed an EDS search box on their online resources and databases page:
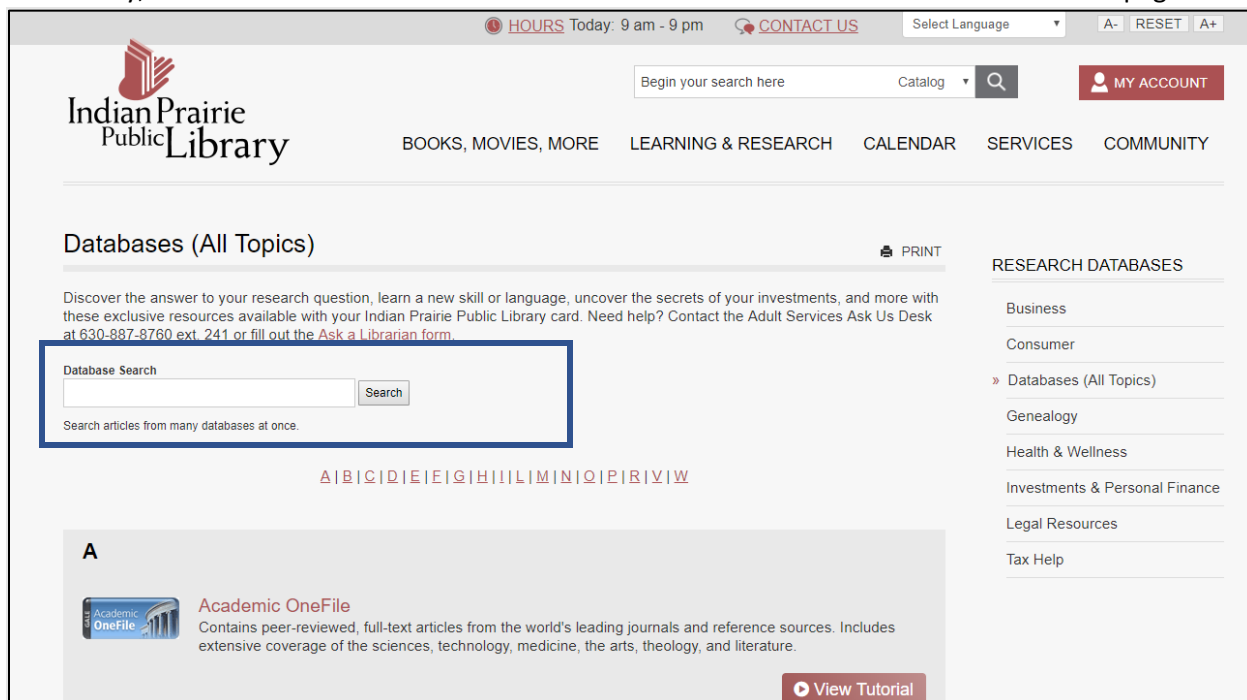

Figure 17Mockup of the Indian Prairie Public Library website, with a search bar on the Databases page

In the Enterprise catalog, a few minor layout changes could help direct potential new users to article search and over time, reshape the idea of "what I can get in the catalog."

Currently, the search bar receives the strongest visual priority in the interface, yet it is the easiest element for users to find. De-emphasizing the search bar in the alternate catalog display drew users' attention to even very subtle links to Article Search. Applying these visual changes to the current tabbed display of article search results, along with some label changes to clarify what each tab contains, could increase visibilty of the current EDS integration into the catalog:
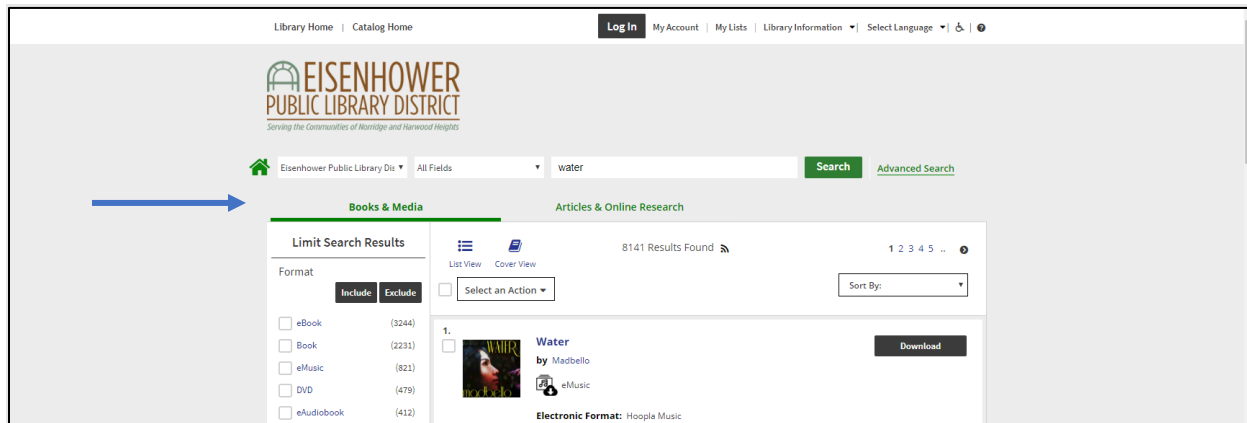

Figure 18 Mockup of the Enterprise catalog, with an alternate design for the search bar and search results tabs

In addition, a link from the format facet in search results and in Advanced Search could help direct users to article results.

Additional research is needed to determine what the best label for Article Search results would be, and if the EDS integration in Enterprise, currently named Article Search, is a better user experience than linking out directly to the EDS search results interface.

If later research does determine that the Article Search EDS integration is not the best experience, these visual changes will lay the groundwork for an elegant handoff – or in other words, a noticeable and clear link – out to search results in EDS.

Issues with the EBSCO Discovery Service (EDS) "Result List" link
When a patron navigates to the EDS interface from the Article Search interface in Enterprise, the "Result List" link in EDS to return to results does not work as patrons expect. The link takes the patron to a search for the unique identifier for that article, which is usually one result, and not to the keywords they used to find results.

Figure 19 Link to Result List from EDS

Recommendation

Ideally, the "Result List" link should link to the results the user was previously browsing.

Using two possible search results interfaces complicates this simple interaction – which interface does the link go to? In addition, when a user is passed off from the Article Search integration in Enterprise to the EDS interface, their search terms aren't passed along and the "Result List" link does not link to any additional results.

Using the EDS interface without the Article Search integration would eliminate this issue.

Confusion with Logos in EBSCO Discovery Service (EDS)
Participants expected their library logo to take them to their library website. Users often use a logo link as a "reset", to clear their search and start over. Clear paths and labels back to this interface from the library website would be needed to accommodate this behavior, but participants could not return to article search results from their library websites.

Figure 20 Logos and links in EDS

Recommendation

The logo used in the upper-left of the EDS interface (1) should allow users to reset their search and start over, and (2) it should clearly communicate to the user where they will go.

The library logo tells users they will go back to their library website, so it shouldn't be used as a link to another location (e.g. the library catalog or EDS).

A logo elsewhere on the site – e.g. in the upper right, the footer—doesn't have the same "reset" connotations as a logo in the upper left. A simple solution may be to create an "Article Search" logo that can serve as the reset button in the upper-left of the screen. Library logos could appear elsewhere to provide branding and a recognizable link back to the library website. One option is in the right side of the screen.
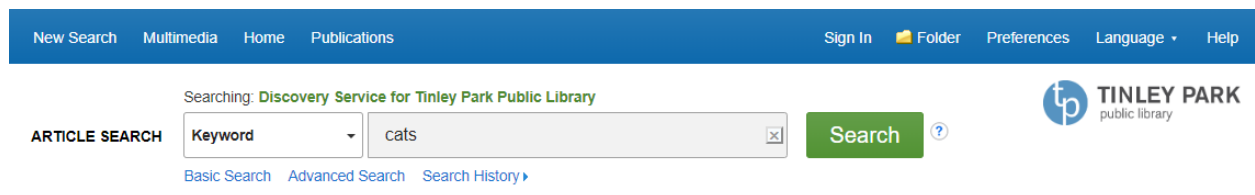
A small pilot test would be needed to ensure the new logos and layout improve navigation between the EDS interface and the library website.

Figure 21 Example of a generic logo on the left, with a library logo on the right

Difficulty Finding Full Text Links to Gale Resources

Gale resources integrated into EBSCO Discovery Service display with a link to "View in General One File." 4 of the 6 participants that saw this link struggled to find it, though they usually clicked on it. One noted, "I can find this but I don't think other people could."
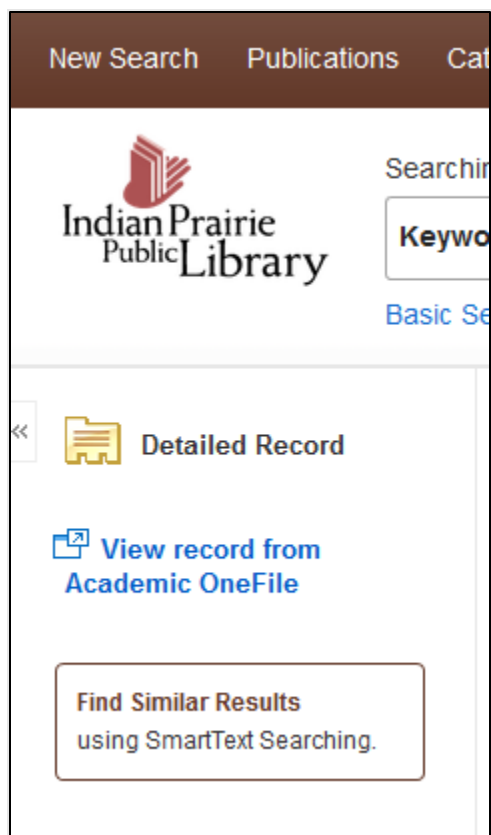
Figure 22 Links to Gale resources in EDS

Recommendation

Request that EBSCO change the label to reflect that full text is available. For example, to "Get full text from Academic OneFile".

Logging in Through OpenAthens

Several participants had seen the OpenAthens login screen before. One participant noted that the OpenAthens login screen asks for a "username" and "password," when a library barcode and PIN are the terms she usually sees in the catalog and at the library. Another participant seemed to confuse the OpenAthens login screen and the Enterprise My Account login screen.

Recommendation

Request that OpenAthens allow customization of the login screen labels, so the labels can match the library catalog login labels.

Using Limits and Facets

Almost all patrons noticed the limit for "All EDS fields" and asked, "What does EDS stand for?" and offered several theories.
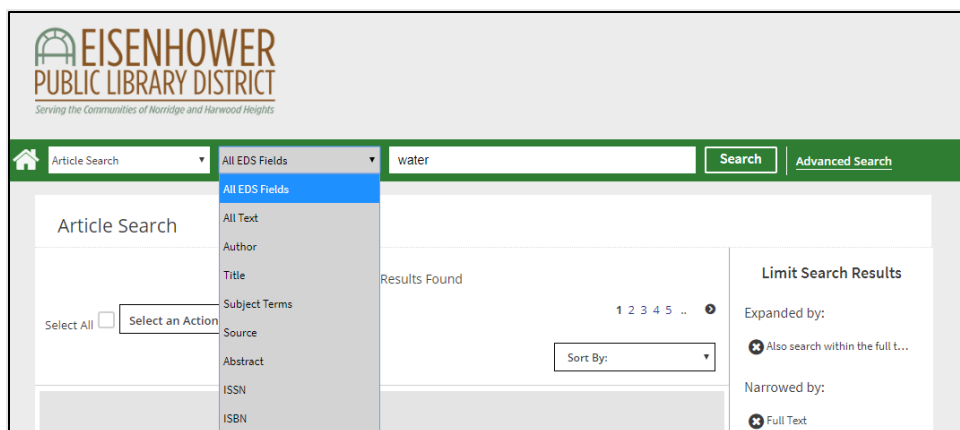
Figure 23 Field limits in Article Search

Some patrons expected that selecting an option in a dropdown menu limit would automatically apply the limit, and they did not realize their screen had not changed after selecting a limit and failing to click the "Search" button.

For example, one patron selected "Article Search" after typing in a search term into the general catalog screen and expected to see a change in results. Another selected limits from the "All EDS Fields" dropdown and expected to see a change in the results.

Participants struggled with identifying what facets were applied to their search, in both the Article Search interface and the EBSCO Discovery Service interface. They were not sure what "Available in Library Collection" meant, noting that everything in the catalog is available in the library.
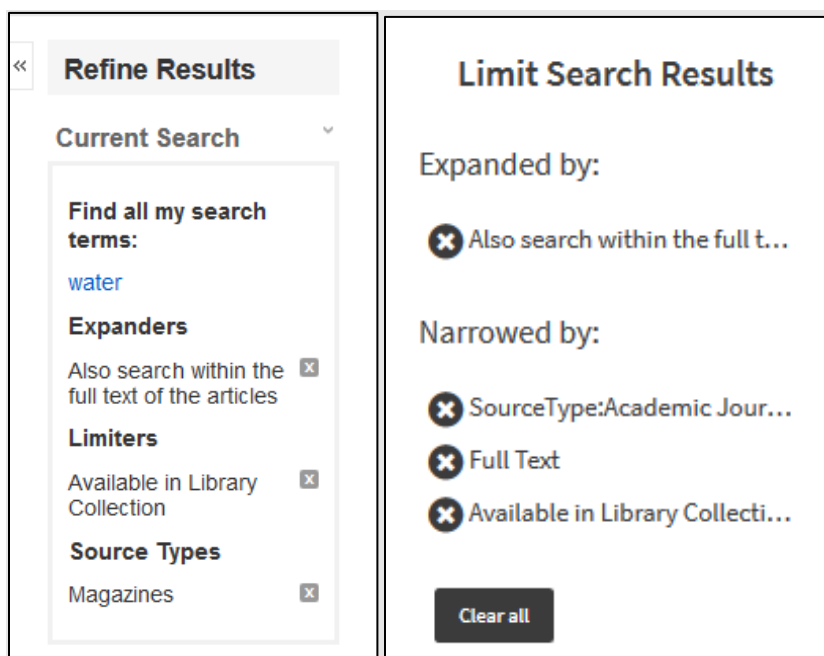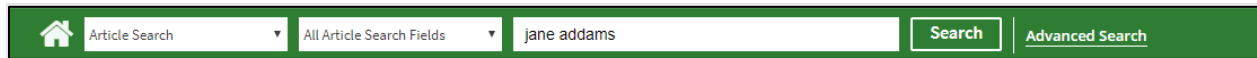

Figure 24 Facets in the EDS interface and Article Search interface

One participant looked in the EDS interface for an age group facet, as the task was to find information for a 7th grader working on a homework assignment. However, there are no age facets.

Recommendations
Change the "All EDS fields" label in Enterprise to "All Article Fields"

Suggest to EBSCO that they consider age-group facets for EDS and an alternate label for "Available in Library Collection."

Facet labels in Article Search are cut off with ellipses (…), and users should be able to see the full label.

Additional Research

A/B Testing for Article Search labeling
SWAN would like to try alternate labels for the "Article Search" tab in Enterprise and track which labels increase use.

Library instruction session observations
Research success depends on a complex combination of users' information literacy, digital literacy, and the learnability of research tools. Observing library instruction sessions would provide insight into how learnable our current interfaces are within the context of the instruction and support libraries provide.

Analysis of EDS use
Over the next year, SWAN will collect usage statistics to track use of the Article Search tab and link from the format facet. In addition, we would like to pilot an embedded EDS search bar with any interested libraries and work with them to track usage.

Appendix: Usability Testing Script

Bookmarks
- A – Article Search in Enterprise
- B – EDS home page
- C—Library website
- D—Development profile in Enterprise, with direct links to EDS
- E—Chicago Public Library catalog

Introduction
- **Have laptop open to google.com**
- **Have all bookmarks ready**

Hi, _____. My name is _____, and I'm going to be walking you through this session today.

Before we begin, I have some information for you, and I'm going to read it to make sure that I cover everything.

You probably already have a good idea of why we asked you here, but let me go over it again briefly. We're asking people to use the library catalog so we can see whether it works as intended. The session should take about an hour.

The first thing I want to make clear right away is that we're testing the catalog, not you. You can't do anything wrong here. In fact, this is probably the one place today where you don't have to worry about making mistakes. There might be times during the test that something may not work and we will need to reset, and that is just the catalog and not you

As you use the catalog, I'm going to ask you as much as possible to try to think out loud: to say what you're looking at, what you're trying to do, and what you're thinking. This will be a big help to us. Also, please don't worry that you're going to hurt our feelings. We're doing this to improve the catalog, so we need to hear your honest reactions.

If you have any questions as we go along, just ask them. I may not be able to answer them right away, since we're interested in how people do when they don't have someone sitting next to them to help. But if you still have any questions when we're done I'll try to answer them then. And if you need to take a break at any point, just let me know.

With your permission, we're going to record what happens on the screen and our conversation. The recording will only be used to help us figure out how to improve the site, and it won't be seen by anyone except the people working on this project. And it helps me, because I don't have to take as many notes. If you would, I'm going to ask you to sign a simple permission form for us. It just says that we have your permission to record you, and that the recording will only be seen by the people working on the project.

- ∉ **Give participant the permission form**
- ∉ **START the SCREEN RECORDER**

Pre-Test Questions

Do you have any questions so far? OK. Before we look at the catalog, I'd like to ask you just a few questions.

A. What do you like to use from your library? (services, types of things to borrow)
B. What online resources do you use? How do you get to them?
C. Tell me what these terms mean to you:
   o Research
   o Online Resources
   o Research & Articles
   o Full Text Databases
   o Articles, Databases, & Journals

Open Bookmark A: Article Search

D. Have you ever used something like this before? (Article Search)

        a. What do you call this?

        b. What have you looked for here? (Or if never used) What would you expect you could find here?

E. Finally, what is something you were recently trying to learn about?
(Okay if no topics)

Testing Tasks

On Article Search Screen (Bookmark A)

1. You said you were recently trying to learn about _____. How would you find information from your library about that?

   Backup topic: Let's say you have a family member who has seasonal allergies. You want to help them find some trustworthy information about this. How would you find information from the library about that?)*

   a. Tell me about what you see? What are these results for? What do you expect you see when you click on them?
   b. Tell me about these things on the right (limits)
   c. Now go ahead and select an article to read (Log in with OpenAthens)
   d. Have you ever seen a screen like this before?

In EDS

   e. Tell me about what you are seeing.
   f. Are you able to read the whole article?
   g. How would you send this to your family member you're helping?
   h. Now how would you go back to your search results?
        i. Is this what you were expecting to see?

Open Bookmark B: EDS home screen

2. Now let's try a new search from here.
   a. Have you ever seen this before?
   b. Pretend you're helping a 7th grader with their homework assignment. They have to research Jane Addams, and they need two articles about her for their assignment. How would you find those?
   c. Tell me about the results you are seeing?
   d. The teacher said specifically you need journal articles. How would you narrow down to just journal articles?
   e. Where do you think these links go?
        i. Library logo
        ii. Library name

Open Bookmark A in a new tab

   f. Which results did you like better?

Open Bookmark C: Library website

3. Now I'd like you to show me how you would search for articles from your library home page. You can search for articles about Jane Addams again.

Open Bookmark D: Alternate catalog

4. Let's pretend you just did that same search from the library website and you ended up here.

      a. Tell me about what you see?

      b. How would you see results for articles about Jane Addams?

      c. What was easier to use? (Bookmark C or D)

In Alternate Catalog (Bookmark D)

5. From here, let's say you want to find articles about the Chicago mayor election in 2019 from this newspaper: (washington post or daily herald in arlington heights). How would you find those?

Open Bookmark E: Chicago Public Library

6. Now let's try to find articles about the Chicago mayor election in a different catalog. This time let's find articles from the Chicago Tribune.

      a. Was that easier or harder?

Wrap Up

Thanks, that was very helpful.

I have one last follow up question. If you could wave your magic wand and make the library catalog just like your favorite website, what website would it be?

- **Prompt notetaker and observer to ask any question they have**
- **Ask their questions, then ask any follow up questions you have**

Do you have any questions for me, now that we're done?

- **Give the participant the incentive**
- **STOP the SCREEN RECORDER**
- **Close the browser and clear cookies**