Committee members present: Sandra Leyva (AMS), Julie Lombardo (WRS), Cynthia Maiello-Gluecklich (MPS), Victoria Muraiti (RFS), Debbie Sheehan (INS), Cheryl Pawlak (DGS), Jessica Nawrocki (FRS), Roberta Richter (LPS), Brittany Smith (WMS), Peggy Tomzik (ESS), and Sue Feddersen (BVD)

SWAN staff present: Crystal Vela, Dave Pacin, Dawne Tortorella, Joseph Miller, Kate Boyle, Samantha Dietel, Rudy Host, and Vickie Totton

Visitors present: Marla Wieringa (MTS), Thomas Webb (MTS), Juan Estrada (LSS), Francisco Cruz (CIS), Sandra Baumgartner (CIS), Leigh Ann Voss (RGS), Felipe Altamirano (MWS), Irene Emmanuel (FPD), Mary Zappa (FPD), Nate Hare (OLS), Bonni Ellis (SCD), Kortni Springer (ADS), Pat Sincere (WCS), Sharon Shoyer (RSS), Bridgetter O’Halloran (STS), Mary Moss (EPS), Carrie Jeffries (GED), Sandy Frank (TFS), Leslie Hartoonia (LGS), Norma Rubio (CTS), Debbie Weishaar (CTS), Kandice Krettler (VPD), Mehan Moran (OLS), Martha Kennedy (HDS), Elizabeth Dejong (SHS), Carla Hibbard (GVD), Emily Cotterman (ITD), Claudia Corzine (FPS), Laura Sonnek (FMS), Christine Sporleder (BDD), Stephanie Deyoung (BLD), Laura Tabor (GED), Jeri Cain (CSD), Michael Szarmach (MAGIC)

Treats: Thank you to Sandra for bringing treats.

Fields in the Addresses Tab
- New fields

After migrating the New19 libraries, several new fields were created and are now visible in patron records. Library staff have expressed that there are way too many fields now and that they would like them removed if that can be accomplished safely. They also asked if all libraries need to be all fields or if this can be customized based on login.

Dave from SWAN explained that this is an “all or nothing” setting and that all must display in order for one single library to use them. If we want to do data cleanup and move things around, then we can pare down that list, but that would be our only option. SWAN pointed out that we do want to do some cleanup of fields in patron records, including phone numbers.

The group briefly discussed sending out a survey to see which fields are being used in order to safely remove a few of the new fields. Even if there is no data in the field, the fields must display, per SirsiDynix. SWAN suggested sending out a survey to see if there are fields that libraries not using. If libraries are truly not using a field, then it can safely be removed.

Dawne explained that these fields were created because the LINC and MAGIC libraries had data in these fields. They needed to be created in order to house the data and bring it over. Once this was done, we need to have a discussion about what we truly need and establish some
standardization and simplifying. We need to have these decisions made before we do the UMS cleanup. She recommended a work group or small committee to make recommendations rather than a survey.

Sue Feddersen (BVD), Cheryl Pawlak (DGS), Stephanie De Young (BLD), Victoria Muraiti (RFS) offered to be on the sub-committee.

- **Which fields display in the Display User wizard**

Dave from SWAN explained that we can change the way address fields display in Display User. In particular, we can display email address. Only four fields can show, so we propose removing state in place of email.

A library asked if we can display the address in the Charge/Checkout wizard. SWAN expressed that this is a privacy issue and this is the reason why this is not displayed. SWAN demoed the display of Address 1 in the Identify User section of Charge/Checkout, Display User, Modify User. The first five that have data in them will display. [Correction: all fields configured in the full display list will appear, if data is present.]

There was some confusion as to whether you can display address in the User Search window, and SWAN explained that you cannot.

SWAN will turn this on in the test server and locate a user with a photo, signature, charges, bills, and holds and send out some information.

**Additional Circ Rule for ILL_BOOK – open a ticket to select a circ rule**

A library asked why you would use ILL-BOOK and NS_ILL_PRT when both indicate print. SWAN explained that this was merely an announcement and that if you would like a third circulation rule, we can now accommodate that. This may be used, for example, for a book with a shorter loan period than typically expected.

**Patron Cleanup Project - Unique National Change of Address**

UMS will be cleaning up our patrons this summer and running the file through the National Change of Address. The database will be updated.

A library asked if they will get a report of users that were changed and what they can expect. SWAN noted that you can request a list, but you will not get one automatically. SWAN reported that we have recently discussed whether Unique can access our server and make changes to user records, and the consensus is that they are not able to do so. UMS gives the file to SirsiDynix who then makes changes to the database.
A library asked if certain user profiles for academic libraries can be excluded from UMS patron cleanup. SWAN will follow up with other academic libraries to see if they also want to be excluded.

Libraries expressed wanting to have the users that have bad addresses barred so they have the opportunity to follow up with the patrons and troubleshoot. We will look into this.

**Bounced Emails**

Rudy from SWAN talked about how a lot of people have been missing bounced emails from the old system. He demoed the new bounced email tool. Libraries can expect to get emails daily for patrons (name, barcode, email address) that had a bounce. SWAN IT is looking for ways to break this down further and provide the kind of notice that bounced, but IT wanted to release the tool as is so that libraries can begin to reap the benefits.

For now, emails go to the aliased email addresses XXX@notices@swanlibraries.net and will go to the home library of the patron(s) that experienced a bounce. Libraries will receive one email per day per bounced email address, so if a patron had twelve bounces, they will get one email for that patron. They will, however, receive one email *per bounced email address*, so they can very well get multiple emails in one day.

Someone asked about non-SWAN patrons with a home library of ILL_LIBS. SWAN will have to look into this.

There is also a BCA report where libraries can take the email address that had the issues and can get some more information about that user. It is located at BCA SWANLIBS>Shared Reports>SWAN Reports>Users>Lookup Bounced Email Address.

Libraries can expect this to be rolled out next week.

**Updates**

**New19 Migration**

How was the migration for the “original” SWAN libraries?

A number of libraries gave a shout out to Rudy from SWAN IT and his Patron Lookup Tool. It is a lifesaver during downtime and helped during the New19 migration.

Libraries reported that the migration went smoothly and the job was done well and efficiently. A New19 library reported that it went smoothly as well.

A library asked if we can include expired patrons as a “flag” in the Patron Delinquency file for Offline. The consensus was that this would be a very nice idea.
A library asked if the Clean Holdshelf report will always come so late, about 10:45 am. SWAN needs to look into this and see if it is possibly an issue with email aliases. For example, WMS got theirs at 8am and WRS got theirs at 10:45pm. Rudy reported that an email server is rate-limiting us and SWAN IT will address the problem with the delayed emails, so the problem is largely an email issue and not a problem with the Symphony Clean Holdshelf report itself.

A library reported that some libraries are not following the Circulation policy and processing their Clean Holdshelf each day and leaving things on there for exactly seven days. SWAN asked libraries to send in examples so we can follow up with those failing to comply with policy.

Can the patron barcode be put in the Clean Holdshelf report? Yes, with custom work from SirsiDynix. Once implemented, it will be across the board for all libraries.

**Days Closed Calendar – How’s it going?**

Libraries reported that it is going well and they like having access to this wizard. Kate mentioned the video that Lauren at SWAN Member Services made regarding the Days Closed Calendar and asked for requests for additional videos.

An update on sticky labels: Dawne reported that we are working on that as a priority as soon as the major migration-related issues are resolved, such as a way to determine exceptions so labels are being generated properly. It is moving forward and we will be working with SirsiDynix on custom work. Someone asked if we will release the feature before all issues are thoroughly resolved so they can begin using it, and SWAN shared that we need to complete the entire process before it is released to all libraries. We do not yet have a date of release.

It will not be required for libraries to use these labels, and we recognize the expense of the printers and paper, although we have priced out the paper, have a good quote, and are looking into working this into the budget to help libraries initiate the process.

**What’s new:**

Patron Lookup Tool: SWAN is looking into reciprocity so that libraries outside of SWAN can do something similar. A library asked for address to be included, and SWAN pointed out that street number is required for the search.

SWAN shared that the goal is to have the SWAN support site revamped by December 2018.

BVD: Asked which slips to use for certain libraries for delivery. Outgoing to non-SWAN libraries, e.g. Elmhurst, use ILDS. Incoming from Elmhurst, they will use RAILS labels.

BDD: Asked for clarification from RAILS regarding pre-sorting or not pre-sorting. SWAN said we were told SWAN libraries did NOT need to pre-sort. If you are told this by RAILS drivers, please
submit a support ticket to RAILS delivery letting them know that SWAN was advised during pre-migration planning that this would not be necessary. Ideally it would help SWAN libraries if we were all on one route which would eliminate this question altogether.

MPS: Asked if frequent support site users will get input for the revamping of the website. Dawne said that we will be doing a usability study.

WRS: Asked about Outreach and for a date when it will be available. SWAN is working on it.

DGS: Seconded the desire to provide input about the SWAN support site, especially the search feature.

MWS: Is going to start processing passports starting early summer.

GVD: How do people feel about bubble wrap on CDs? Resoundingly, people said “do not use”. Questioned why there are very old fines on SWAN for their patrons. SWAN explained that the patrons might have been RBs in SWAN, and those may be valid fines accrued at other SWAN libraries as an RB, pre-migration.

LSS: Went fine-free and is no longer linking patrons with User Groups.

VPD: Wasn’t seeing “make first in queue” in Place Hold wizard. SWAN turned it on for her during the meeting.

WCS: Is there a list of generic users or special users that they can print and supply to new staff? SWAN can generate a list and provide it.

EPS: Received a Live and Learn construction grant and is going to redo the circulation and lobby area.

SHS: Summer Reading Kickoff June 2nd and they are in the final states of an elevator project.