SWAN Circulation Advisory Committee  
Wednesday, July 18, 2018  
9:30 am – 12:30 pm  
RAILS Main Meeting Room  
125 Tower Drive, Burr Ridge, IL 60527

AGENDA

1. Introductions  
   a. Housekeeping (facilities, next meeting snacks)

2. ILA Luminary Nomination, Kathleen Boyle [Exhibit A]

3. Review of Notes, May 16, 2018 [Exhibit B] (action requested)

4. Circulation Advisory Committee Charge [Exhibit C]  
   a. Role of Circulation User Group
   b. Recommendation for Note Taker and process of review
   c. SWAN Chair – Crystal Vela, Co-Chair – Vickie Totton

5. Patron Information Display in Workflows (continued action from May meeting)  
   a. Display User: Identify user > Addresses  
      State field has been removed in field list, allowing Email field to display (complete, implemented 7/13/18)
   b. Identify User section to display address field information [Exhibit D] (action requested)  
      Approve inclusion of selected address fields (Care Of, Street, City, Zip, Phone, Email, Home phone) in display of Identify User section in Workflows.
   c. Address and Extended Info Field consolidation – assigned to Sub-Committee (discussion)

6. Best Practice – ILL (discussion)  
   a. Items sent through ILL require a machine readable barcode
   b. Packaging material is not considered part of a circulating item piece
   c. Packaging material is not billable as part of an ILL circulation

7. Billing Notice wording [Exhibit E] (discussion and possible action)  
   a. Modify bill notice wording at bottom of bill  
      Approve change in bill wording at bottom of individual bill from “TOTAL AMOUNT DUE” to “TOTAL AMOUNT DUE FOR THE ABOVE.”

8. SWAN Updates & Discussion
a. BLUEcloud Analytics Tracking [Exhibit F]
b. BLUEcloud Analytics Report – Cancelled Holds Notice
   SWAN Reports > Holds > Dynamic Dates > List Holds Cancelled Within Past Seven Days
   SWAN Reports > Holds > Dynamic Dates > List Holds Cancelled Within Past Two Days
c. Report Scheduling Review
   i. Combined Clean Hold Shelf Report, including update to include barcode
   ii. 9 AM SMS and Email Hold Pick-up Notices consolidated
   iii. 9 PM Hold Pick-up Notices cancelled (notices are picked up with 9 AM runs)
   iv. SMS Bill Notice (discussion)
d. Creation of new bills (not linked to item) for old overdue fines before an item is removed (discussion)
e. Bounced Email processing – Best Practice for updating user records and notifying patrons with bounces (discussion)

9. SWAN Support Website Project
   a. User Interviews [Exhibit G]
   b. Next steps in member feedback
   c. Documentation

10. Agenda Building for Next Meeting

11. Open Forum and Library Updates