

SWAN Clarity Task Force

Agenda

Wednesday, February 12, 2020, 10:00 a.m. – 12:30 p.m.

SWAN Headquarters
800 Quail Ridge Dr
Westmont, IL 60559

1. Introductions & Welcome
2. Recap December Quarterly Meeting Presentation/Discussion
3. Review additional feedback and follow-up
4. Discussion on Advisory Groups and shared topics (Review notes from Cataloging Advisory, Circulation Advisory, DUX)
5. Review SWAN Tactical Plan & Next Steps
6. Thank you lunch

Task Force Membership:

- Kerry Halter, Technical Services Manager, Batavia Public Library District
khalter@batvaiapubliclibrary.org
- Kristina Howard, Adult Reference Manager, Tinley Park Public Library
khoward@tplibrary.org
- Michelle Kurczak, Head of Youth and Young Adult Services, Messenger Public Library of North Aurora, MKurczak@messengerpl.org
- Amy Prechel, Head of Access Services, Downers Grove Public Library aprechel@dglibrary.org
- Angela Romano, Fiction and Reference Librarian, Oak Lawn Public Library aromano@olpl.org
- Ahren Sievers, Reference Technology Librarian, Elmwood Park Public Library
asievers@elmwoodparklibrary.org
- Colleen White, Cataloging Librarian, Oak Park Public Library cwhite@oppl.org

SWAN Staff:

- Dawne Tortorella, Assistant Director, Chair
- Aaron Skog, Executive Director
- Scott Brandwein, Bibliographic Services Manager
- Steven Schlewitt, Information Technology and Support Services Manager
- Tara Wood, User Experience Manager



SWAN Cataloging Advisory Notes

Thursday, January 09, 2020, 01:30 PM – 04:00 PM
SWAN Quail Ridge Conference Room

Members:

For Circ Adv and Cat Adv, list members (elected/appointed) - for all other groups list attendees at the end and remove this section

1. Joy Anhalt (Tinley Park Public Library)
2. Victoria Bitters (Eisenhower Public Library)
3. Mary Clapp (Sugar Grove Public Library)
4. Kerry Halter (Batavia Public Library)
5. Susana Leyva (Palos Hills Public Library)
6. Jim Lindt (Wood Dale Public Library)
7. Nora Mastny (Downers Grove Public Library)
8. Melissa Siddiqui (Oak Brook Public Library)
9. Julie Tegtmeier (St. Charles Public Library)
10. Amy Weiss (Woodridge Public Library)
11. Colleen White (Oak Park Public Library)

Facilitators:

- Scott Brandwein (SWAN)

Agenda/Notes:

- I. Welcome and introductions

This inaugural meeting of the Cataloging Advisory Group in its new format got off to a strong start. The topics of cataloging standards, expectations of OCLC Cataloging Libraries, and providing feedback on cataloging quality dominated the discussion. As such, the conversation did not cleanly follow the agenda since each topic informed discussion on the other topics. This was primarily a high-level discussion of what this group sought to achieve this year.

II. Group Goals and Membership Responsibility

Being a new group, we discussed a definition of the group's overall mission and what the membership hoped to accomplish in the coming year. We agreed that the general purpose of this group is to leverage the expertise of the cataloging staff of SWAN libraries to confront and solve problems related to the SWAN catalog including quality of cataloging and adapting our cataloging to meet the needs of the SWAN membership and patrons. We will raise and discuss issues brought to the table by SWAN staff and Cataloging Advisory members as well as those raised during Cataloging User or other membership meetings.

The group also expressed a willingness to assist SWAN with cleanup and quality control projects on a volunteer basis.

For 2020, the group's priorities are:

- 1) To reassess and clarify the roles and expectations of OCLC Cataloging Libraries with the intention of rewriting the agreement and application process and conferring with OCLC Cataloging Library staff that the framework is acceptable.

- 2) To establish a process of auditing and feedback to member libraries on catalog record quality.

- 3) Continue work on SWAN Cataloging Standards. Now that the initial push is complete, we intend to refine the expectations and simplify the documentation to make it more SWAN-specific and user-friendly.

III. Meeting Locations

Due to the size of the group, SWAN asked members about the possibility of hosting meetings at member libraries. We received some offers and will follow up privately. As of now, all meetings are planned to take place at SWAN's Quail Ridge office.

IV. Quality Control – Auditing and feedback

Before discussing this topic, we discussed the need to clarify the expectations of being a cataloger in the SWAN membership. It was agreed that cataloging at an OCLC Cataloging Library mean more than just bringing in full records and that a certain degree of editing and refinement can be expected but that this might not be fully understood at the moment.

This led to us setting the goal of clarifying these expectations and communicating with Cataloging Libraries to ensure full buy-in.

We then discussed the idea of quality control auditing and feedback. It was agreed that some framework needs to exist and that SWAN staff will take the reins in administering it, but what that will look like is still to be determined. For our next meeting in March, SWAN staff as tasked with developing a prototype system including methods for gathering and evaluating bibliographic records, tracking errors and missing data, and communicating these back to

member staff.

The group differed on the topic of consequences for repeated instances of low-quality cataloging. While it was generally understood that there may come a time when intervention is required, it was difficult to determine a threshold for action. Concern was also raised about the harshness of action taken. This is an ongoing discussion.

This portion of the meeting also touched on smaller issues such as the reporting and resolution of duplicate records, the challenges of running reports on MARC data to identify clean-up opportunities, an interest in getting SWAN cataloging staff involved in a discussion forum, and the possibility of a distribution list for cataloging topics and reminders. All of these topics will coalesce in what this group produces later this year with regard to quality control recommendations and auditing processes.

V. Cataloging Standards – Continued refinement?

Now that the Cataloging Standards have been available for a few months and members have started using them as training materials, we've gotten some feedback that they need further refinement. The density of the documentation was a major concern, so this group will be tasked with refining these documents. For the next meeting, SWAN will take an example portion of our Standards documentation and rewrite it per the conversation at this meeting. When originally constructing the standards, the task force cast a wide net. Generally, we wish to pare it down to just the guidelines unique to SWAN.

SWAN will also provide a prototype document for a cataloging "cheat sheet" that can be distributed to member staff summarizing highlights of the standards in an easily-digestible form.

Both of these drafts will be the focus of our next meeting, and once we come up with a model the group likes, SWAN can apply it to the remainder of our support site documentation.

VI. President's Day Weekend Index Rebuild

Since this meeting, the bibliographic index rebuild has been rescheduled to Monday, February 24th instead of President's Day.

SWAN presented the list of bibliographic changes we intend to make before the bibliographic index rebuild later this month. Members of the group suggested refinements to the list, adding and removing items for various reasons. The current draft of this list can be found in as the "Packet" for this meeting.

The primary changes are the implementation of new processing of Invalid Standard Numbers (ISBNs, ISSN, UPCs). Any numbers marked "invalid" with a subfield |z in the bibliographic record will no longer be used for matching by bibliographic load processes including Acquisitions reports. This will help incoming items and orders target the correct bibliographic record and

prevent them from attaching to, for example, records for book club bags or kits.

We will also be cleaning up a good deal of junk data including 9xx fields remaining from acquisitions processing and bibliographic migrations, subject headings that are not a part of the SWAN core cataloging standards, and other fields that are already filtered from our current bibliographic import settings but find their way into our catalog nonetheless.

We will also be cleaning up call number analytics, GMDs, URL fields, and Title Control Numbers.

The list of changes is ambitious, and time and the abilities of the Symphony API may prevent a couple of the cleanup points from being implemented. SWAN will send a final list of achievable changes prior to the rebuild.

VII. Next Meeting

Thursday, March 05, 2020, 01:30 PM – 04:00 PM (SWAN Quail Ridge Conference Room) - Register on L2 [<https://www.librarylearning.info/events/?eventID=30247>]

Attendees:

1. Joy Anhalt (Tinley Park Public Library)
2. Victoria Bitters (Eisenhower Public Library)
3. Mary Clapp (Sugar Grove Public Library)
4. Kerry Halter (Batavia Public Library)
5. Susana Leyva (Palos Hills Public Library)
6. Jim Lindt (Wood Dale Public Library)
7. Nora Mastny (Downers Grove Public Library)
8. Melissa Siddiqui (Oak Brook Public Library)
9. Julie Tegtmeier (St. Charles Public Library)
10. Amy Weiss (Woodridge Public Library)
11. Colleen White (Oak Park Public Library)
12. John Bradford (Villa Park Public Library)

SWAN staff in attendance:

1. Angela Puckett (SWAN)
2. Claudia Nickson (SWAN)
3. Diane Nickolaou (SWAN)
4. Samantha Dietel (SWAN)
5. Sue Stupar (SWAN)

February 24th Rebuild Cleanup

1. Invalid ISBN/ISSN/UPC Implementation – This is the change that will prevent invalid numbers (preceded by \$z) from being used to bibliographic matching.
2. GMD purge
 - a. GMD/590 Report to verify agreement.
3. Call Number Analytic Tweaking - Removing or adding \$z indicators as necessary. Call number will remain otherwise unchanged.
4. 001 Cleanup – Removal of 001 fields with vendor prefixes.
5. 9xx Cleanup
 - a. 999
 - b. 947
 - c. 948
 - d. 949
 - e. 936
 - f. 938
6. LINC/MAGIC/GHS Title Control Number Standardization
7. Fields to Delete Cleanup
 - a. BISAC
 - b. 263 field (catalog date only)
 - c. [fast headings]
 - d. Sears
 - e. 653
 - f. 6xx _3, _4, _5(?)
 - i. 6xx _1 – Language and Children’s materials flip to 650? Do this manually?
 - g. 020 \$c(?)
8. 856 Cleanup (based on \$3) (?)
9. MARCIVE Comprehensive Notification Service
10. Update of St. Charles & Woodridge locations to facilitate collection moves



SWAN Circulation Advisory Notes

Wednesday, January 22, 2020, 9:30 AM – 12:00 PM

Location

Members:

1. Jeri Cain (Carol Stream Public Library)
2. Stephanie DeYoung (Batavia Public Library District)
3. Sue Feddersen (Bensenville Community Public Library District)
4. Sandra Leyva (Alsip-Merrionette Park Public Library District)
5. Victoria Muraiti (River Forest Public Library)
6. Cheryl Pawlak (Downers Grove Public Library)
7. Debbie Sheehan (Indian Prairie Public Library District)
8. Brittany Smith (Westmont Public Library) – joined after break
9. Christine Sporleder (Bloomingdale Public Library)
10. Peggy Tomzik (Eisenhower Public Library District)
11. Thomas Webb (Matteson Area Public Library District)

Facilitators:

1. Crystal Vela, Consultant, User Experience, SWAN
2. Sam Dietel, Consultant, Bibliographic Services, SWAN

Agenda/Notes:

I. Welcome and introductions

23 libraries from the membership were represented by Advisory members and attendees.

II. Circulation Policy [Exhibit A]

Correction in Section 4.C. Remove period in second sentence “replacement costs.”

The updated Circulation Policy will be forwarded to the SWAN Executive Director for inclusion in

SWAN Board review and approval.

III. Charge [Exhibit B]

Updated charge was reviewed. Correction of missing Advisory member names has been made.

IV. Notices

Vickie shared notices update regarding 2nd overdue notices via SVA. We have removed notice preference of PHONE from email and print selection for 1st and 2nd notice. This removal now ensures that phone messages selected for SVA are properly sent.

After further looking at the reports, no one has been receiving a phone notice for bills. They have been receiving those via email and print. SVA bill report is being removed completely. Will be updating all documentation to reflect that bills will not be sent via SVA.

Patrons are getting correct notices now.

V. Patron Purge

Process is ongoing. We are accumulating a list of patrons that meet criteria and removing those patron records. BADADDRESS records, if they meet criteria, will be removed. If they do not meet the criteria they will remain in the system.

Will start seeing more patron records removed next week. At any time, you can submit a list of barcodes to be removed and SWAN support will process those removals.

VI. System Updates

a. 3.6.2

3.6.2 went live last Thursday. Upgraded overnight and tested early, allowing libraries to be online Thursday. All new features are activated with the exception of the OCLC Connexion import which will be activated on a library-by-library basis working with Bib Services.

Libraries have a month to verify that the new client is installed. Fill out a form to indicate your library has made the changes.

Link to webinar and news updates:

Member Update Recording - <https://support.swanlibraries.net/tutorial/67057>

12/20 News Post - <https://support.swanlibraries.net/news/2019-12/67030>

1/17 News Post - <https://support.swanlibraries.net/news/2020-01/67100>

b. Rebuild (offline)

Feb 23-24 – Monday morning Feb 24th libraries will be using offline circulation. Enterprise will be up, but item availability and my account features will be limited. This is the first rebuild we are doing on the Azure server. It used to take up to 36 hours to do a rebuild; on the new infrastructure we are planning a much faster rebuild.

Expect Monday Feb 24th to be an offline day. Ian posted a webinar on how to use offline, as well as documentation.

Link to webinar and news updates:

Training Recording: Using WorkFlows in Offline Mode -

<https://support.swanlibraries.net/tutorial/67031>

1/21 News Post – Database Rebuild & Scheduled Downtime on February 23rd/24th -

<https://support.swanlibraries.net/news/2020-01/67116>

1/21 News Post – February Rebuild, Summary of Bibliographic and Item Record Updates

- <https://support.swanlibraries.net/news/2020-01/67128>

There was discussion on communication and timing of the upgrade to 3.6.2. Some felt additional SWANcoms and discussion prior to the upgrade would have been helpful. Others felt the Member Update session provided the information needed and shared with their staff.

SWAN IT will work with libraries who have problems with the value statement now available on receipts.

When using Offline, the recommendation is to leave the Due Date blank so that the system correctly and automatically calculates the due date when the transaction is loaded to the system. Some libraries prefer to enter the due date so that it prints on the receipts. If your library fills in due date, verify that the date is correct. If incorrect dates are entered, it is possible that patrons will immediately be billed (e.g. wrong year entered). SWAN typically encounters a couple of libraries with this problem after offline transactions are loaded.

Stephanie has a spreadsheet that they use at Batavia which calculates due dates. They use this to print bookmarks and share with patrons when they are in offline. She will share this spreadsheet.

Also note that checkin is disabled in Offline mode.

VII. Card Renewal through Enterprise

Crystal shared functionality that allows patron card renewal through Enterprise. This feature can be enabled upon request; it will be an opt-in configuration which can be customized based on patron profile allowed to renew cards online.

Discussion included ongoing need for NCOA to help ensure accurate addresses. A question was

asked whether renewals through Enterprise could be pulled from BLUEcloud Analytics versus renewals through WorkFlows. SWAN staff will review this possibility.

Peggy shared that a similar process is in place at Chicago Public Library and that we had this capability in Millennium. Concern was raised over the parameters and time frame of these renewals (e.g. 3 months vs 3 years). Of course, libraries that have a NEVER expiration date on patron records have no need for this functionality.

Currently there is no documentation on the support site, but SWAN will work on updating documentation to include this feature.

If your library is interested in the functionality, submit a help ticket to enable.

VIII. Patron site demo

The SWAN patron facing website is getting a facelift and is scheduled to be available March 2nd. This site is intended for libraries to share with their patrons or use the content directly, if desired.

A link will be provided from the Enterprise catalog and will replace the current SirsiDynix help for patrons which is linked from the catalog via the “?” icon at the top and in the footer. Providing SWAN-specific patron tutorials and help is intended to better address patron questions in using the catalog.

SWAN staff will look into the possibility of providing a preview link for review prior to launch.

IX. Trainings

a. Outline activity

Circulation Advisory members received a request for feedback related to SirsiDynix training content. Crystal has incorporated this feedback into plans for web-based trainings.

The group brainstormed on critical content to include in training which will be offered online and recorded.

Training Outline Activity

Circulation Basics – class outline

Audience – Sunday, part-time clerk, new hires

- Navigation
 - Login
 - Wizards
 - Helpers

- Checkin
 - Checkin bookdrop
 - Backdate
 - Checkin alerts – what do they mean
 - Hold alerts
 - Fine-free checkin
 - Routing ILLs
 - Warning – this item is... what is next step
- Checkouts and Renewals
 - Glossaries
 - Modify due dates
 - Overrides
- Users
 - Lookup
 - Display
 - Summary
 - Statuses
- Paying Fines (part of checkout) – just the basics

Reports for Circulation (Peggy & Debbie)

Audience: Circulation Manager/Department Head

Which ones are automatic, which are scheduled for delivery via subscription

- CLR – Custom Long Overdue
- Failed Calls
- Monthly Stats – ones on the website
- Patron Clean-up
- Shelf Check – In Transit 10-30 Days
- Prebilling Shelf Check
- Last Copy Hold (Tuesday report)
- Clean Holds Report
- Bounced Emails
- On Shelf Items – Pick List
- Pending Transits
- List Users with Holds on Shelf Yesterday (N19)
- Documentation

Patron Management

Audience: Circulation Staff

- Searching for a user
- Issuing library cards
- Renewing
- SMS Contact tab

- Identifying entire user record
- Duplicate records – what to do
- Reregistering a user
- Modifying a user; properly modifying extended user info
- For Supervisors only:
 - User ID Manager - Supervisor functions [disclaimer – check with your supervisor if this is a function]
- Lost cards (don't use user lost card wizard – is it banned)
- Claims Returned (part of billing?)
- Reciprocal borrowers
 - Registering
 - Hometown (5 digit code), Lemont – what is best practice for non-standard barcodes?
 - Right library, user profile
 - Reciprocal borrower verification

Holds

- Cancellation
- Holds list

Transactional Billing

- Damaged item

Additional Topics/Discussion:

During the past year and for 2020, several new users groups have been convened. Sharing common goals in 2020 and cross-discussion between groups is a goal for 2020.

So, what goals does Circulation Advisory have for 2020? We want goals that can be accomplished this year, working within limits. We do not want to say “no to Nirvana”, but we do want to be realistic and open-minded.

Brainstorming – Goals for 2020

- Find a way to get more SWAN member libraries involved (make sure best practices are actually practiced) Members of Advisory get buddies of libraries who don't show and call to touch base and let them know what happened at last meeting
 - Think of neighbors that don't come
 - Spread the SWAN message and increase engagement
 - Identify people who could benefit with more information
 - Get contact info of each Circ Manager contact at each meeting – send notes to full group after each meeting. Email with a smack in the face with information
 - Record meetings, log in real time and live stream
- Peggy – everybody is forgetting to do x – what if 2 times a month we had “thought of the month” from Circ Adv – would be cool to allow people to leave a comment. Tip/trick/heads-up

- What happens when a library bills something incorrectly? We typically suggest reaching out to the other library, sometimes just forward the email from SWAN.
- Goal – Billing literacy
- Continue to have conversations about a threshold at which we don't bill libraries at; additional research
- Develop new trainings and have them available online
- Develop Circulation Managers training, assign a mentor, welcome packet
- Education email out to all Directors about what the user groups are so that Directors can determine what they should be sending staff to.
- “Back in the day” – there was a person (Heidi) who went through everything with me. And Renee used to do site visits/training. Does SWAN still do that?
 - Let us know who new staff are.
 - Monthly Operational Report in Board report lists all consultation and training, including site visits that SWAN staff make to member libraries.
- What should our theme of the year be? Teach and Communicate
- Fine Thresholds across SWAN
- Circ Map/Hold Map/User Profile audit – Circ and Hold Map training and move out to the full membership. Cross train in Cat Adv and DUX.
- Bring all players into the room – DUX, Cataloging Adv, Circ Adv – item types and how they drive everything (cross-advisory)

Consensus: Themes for 2020

Teach and Communicate

Library updates:

- Liz, Chicago Ridge – finalizing renovation, began in October
- Juan, Lansing – renovating youth services area; got rid of fees for guest passes
- Stephanie, Batavia – Working with St. Charles to help during St. Charles' month closure in March; Batavia will serve as holds pick-up point for SCD patrons
- Pat, Westchester – demolition of circulation desk is happening, hope to have new service desk within 1 week to 10 days
- Peggy, Eisenhower – wanted to acknowledge Mary Moss' last day and appreciate for Mary's knowledge and willingness to help colleagues was noted by all

Next Meetings

Circulation Users: Wednesday, February 19, 2020 9:30 AM – Noon (RAILS Burr Ridge) – Juan Estrada from Lansing will co-chair with Peggy Tomzik. That afternoon there will be a fine-free discussion/panel. See L2 to register for these events.

Circulation Advisory: Wednesday, March 18, 2020, 9:30 AM – Noon (RAILS Burr Ridge)

Attendees:

1. Juan Estrada (Lansing)
2. Elizabeth Wald (Chicago Ridge)
3. Carla Hibbard (Geneva)
4. Candice Krettler (Villa Park)
5. Julie Lombardo (Woodridge)
6. Manuel Vasquez (Grande Prairie)
7. Crissy Barnat (Clarendon Hills)
8. Pat Sinacore (Westchester)
9. Martyn Churchouse (Oak Park)
10. Norma Rubio (Crete)
11. Marla Wieringa (Matteson)
12. Teri Wilson (Green Hills)
13. Meghan Moran (Oak Lawn)

SWAN staff in attendance:

1. Rudy Host (SWAN)
2. Steven Schlewitt (SWAN)
3. Dawne Tortorella (SWAN)
4. Vickie Totton (SWAN)
5. Tara Wood (SWAN)



Discovery & User Experience (DUX) Notes

Thursday, January 23, 2020, 1:30 PM – 3:30 PM
RAILS Burr Ridge

Facilitators:

1. Tara Wood, Manager, User Experience, SWAN

Agenda/Notes:

I. Welcome and introductions

Some new faces have joined the group and Molly will be joining less often, but does threaten to come if snack announcement is made in advance and is worthy. Molly will be active in the e-Resources Advisory so we are not losing her voice or expertise.

II. Enterprise 5.01. upgrade post-mortem

- What went well (both features and communication)?
- What could be better?
- What are the next steps?

Generally agreed that preparation time and communication was good. Adequate notification and access to test site gave members an opportunity to discuss at staff meetings.

Some issues surfaced regarding descriptions associated with display locations. Nick suggested that current and home location displaying is actually confusing. Just having current location provides a clearer message. This suggestion was readily agreed by all and implemented after the meeting. See news post - <https://support.swanlibraries.net/news/2020-01/67137>

Problems associated with On Order items were reported and resolved. The discrepancy related to difference in how libraries create on order items.

Patron and staff usability at Elmwood Park and Eisenhower prior to launch did surface some problems that were corrected before go-live. At Elmwood Park, using iPads as OPACS has always

been rather unstable. This has improved since the upgrade and may also be related to the automatic timeout that was deactivated. This timeout was deactivated due to change in accessibility mode on Enterprise. With this upgrade accessibility mode is on by default resulting in an automatic timeout after 15 minutes. See news post - <https://support.swanlibraries.net/node/67023> where this change in behavior and problem is being tracked. For libraries using Public Web Browser (PBW), that timeout feature still functions as expected.

The problem of default scope to my library being persistent, even when changing scope to all libraries, was noted. When initiating a new search, default scope reinitializes.

Some additional locations may still not be accurately reflecting appropriate language and whether they are on shelf or not. Tara will post the logic from the location analysis script showing which locations are reformatted in label displays to properly show they are available even if checked out (e.g. using a display user to check out item – item is really on display shelf and should show as on shelf).

Next steps after 5.0.1 is 5.0.2 which will include some accessibility improvements, but otherwise likely not impactful.

The 5.0.1 upgrade did not address relevancy, so no changes are noted there. The 5.1 Enterprise update will include the latest version of SOLR which should provide more options for relevancy tuning. We do not know what additional metrics will be included/factored into the results (e.g. number of holds, holdings).

III. Clarity Task Force report and findings

a. Full report available here:

https://support.swanlibraries.net/system/files/Public/201912/SWAN_Clarify_Task_Force_Report.pdf

Ang shared that the Clarity Task Force was formed to help clarify the source and specifics examples of the dissatisfaction amongst the membership identified in the strategic planning process. Several issues were identified and 5 major clusters of issues:

- Holds
- Discovery
- Acquisitions
- Reports
- Support/Communication/Training -> Trust

Screen capture, focus groups, journaling, and circulation desk interviews were used to collect input in various formats and from multiple sources.

Key points uncovered which relate to work of DUX:

Searching and discovery covered both Enterprise and WorkFlows.

- Differences due to editions and formats – grouped records in the discovery system (e.g. CPL has grouped results)
- Search results don't favor your copy
- Filters and facets aren't response or persistent
- Want to search and sort by currently available
- Series searching
- Unforgiving with one-word, misspellings, and punctuation – stop words
- E-content appears to rank higher in results than physical material – we did work a little with SirsiDynix to improve (this would be solved by grouped records)
- Multiple barriers to entry in use of e-content

Review corrective action –

- FRBRized display
- Filter on availability and on-order
- Conduct usability testing on e-content usage and access
- SimplyE research (rated as adult content app, can't use hoopla yet)
- Develop online patron registration process
- More frequent harvests of Enterprise
- Evaluate OPAC and Discovery options

IV. Break

V. Discovery platform evaluation

- a. New developments with the Aspen Discovery platform
- b. Activity – Evaluating discovery platforms with a System Usability Scale (SUS)

The Pika open source discovery platform developed and previously supported by Marmot under the development leadership of Mark Noble, has strategically partnered with ByWater Solutions under Aspen Discovery - <https://bywatersolutions.com/projects/aspen-discovery>.

Attendees participated in the System Usability Scale (SUS) evaluation. Results have been compiled and are available in a report soon to be shared with the group.

VI. Next Meeting

- E-Resource Advisory, Thursday, February 27, 2020 1:30 PM – 3:30 PM (RAILS Burr Ridge)
- DUX, Thursday, March 26, 2020 1:30 PM – 3:30 PM (RAILS Burr Ridge)

Attendees:

1. Nicolas Ayala (Itasca Community Library)
2. Molly Bitters (Eisenhower Public Library District)
3. Abigail Budzynski (Bloomington Public Library)
4. Chris Clark (Eisenhower Public Library District)
5. Susan DeRonne (Glen Ellyn Public Library)
6. Graham Dostal (Tinley Park Public Library)

7. Doug Ferrini (Tinley Park Public Library)
8. Amanda Ghobrial (West Chicago Public Library District)
9. Jean Jansen (Villa Park Public Library)
10. Sarah Kovac (Carol Stream Public Library)
11. Michelle Kurczak (Messenger Public Library of North Aurora)
12. Joy Matteson (Downers Grove Public Library)
13. Kelly Mueller (Itasca Community Library)
14. Angela Romano (Oak Lawn Public Library)
15. Sarah Slack (Saint Charles Public Library District)
16. Christine Sporleder (Bloomingdale Public Library)
17. Jason Stuhlmann (Elmwood Park Public Library)
18. Valerie Zulevic (Tinley Park Public Library)

SWAN staff in attendance:

1. Lauren Levaggi, SWAN
2. Aaron Skog, SWAN
3. Michael Szarmach, SWAN
4. Dawne Tortorella, SWAN