

# SWAN ~~Fireside~~ Poolside Chat



June 23, 2020

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## SWAN Poolside Chat

June 23, 2020



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## Topics

- Action Recap:
  - Timeline for restarting reports
- PPE
- Notices & Notifications
- Online Patron Registration
- Managing Holds
- Optional workflows
  - QUARANTINE in-house user (check-in before quarantine)
  - CURBSIDE in-house user (checkout after quarantine)
- Curbside Update
- L2 Update
- Resuming Resource Sharing
- REALM Study – Phase 1 Results
- RAILS Delivery Resumes
- Illinois Phase 4 - Reopening
  - PPE Needs?
- EBSCO Update
- By the numbers
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## Action Recap & Reminders

- **[ALERT]** Local Holds Only (phased resumption starting 7/7)
  - Holds placed by CHICAGO\_P & NONSWAN\_RB profiles will no longer be automatically suspended after 7/7 (local decision on whether to fill)
- **[NEW]** Patron records with expiration dates between 1/1/2020-9/7/2020 extended to 9/8/2020 (some libraries excluded specific profiles)
- **[NEW]** 1<sup>st</sup> Overdue notices now sent at 14-days overdue instead of 7
- Overdue notices started June 9
- Courtesy, autorenewal notices started June 1
- Suspended holds now active (previously extended to June 8)
- Online-only cards extended to August 31, 2020
- Unfilled holds with an expiration date of March 16 – September 6, updated to 9/7/2020

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## Notices & Notifications

<https://support.swanlibraries.net/documentation/64674>

For Fine Free libraries who are blocking patrons based on number of items immediately overdue, review impact of quarantine. If desired, limits can be modified.

### 1<sup>st</sup> Overdue (send at 14 days instead of 7 days overdue)

#### Text Notice:

You have overdue library item(s). Please disregard this notice if you returned your material in the past week; items are quarantined before checkin.

#### Email Notice:

**\*\*1ST OVERDUE NOTICE\*\***

Please disregard this notice if you returned your material in the past week. All material is held in quarantine before being checked in.

The following item(s) are now overdue. Please return the item(s) below to avoid potential fines.

Thank you!

**\*\*Do not reply to this email\*\***

#### Print Notice (will not be printed/mailed until at least August):

Please disregard this notice if you returned your material in the past week. All material is held in quarantine before being checked in.

The following item(s) are now overdue. Please return the item(s) below to avoid potential fines.

Thank you!

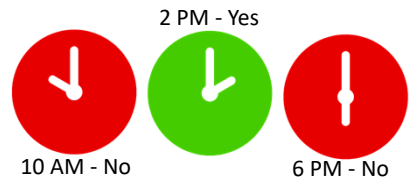
Did you know that you can opt in to receive notices like these via email or text? Contact your library for additional information, or to change your preferences.

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## Restarting Hold Pick-Up Notices

<https://support.swanlibraries.net/forms/75250>



- Opt-in to restart your hold pick-up notices
- Hold pick-up notices can resume on Wednesdays starting 7/1
- Hold pick-up notices will run once a day at 2:00 PM (plan your processes to either take advantage or avoid notifications)

### Restart Hold Notifications Date Selection Form

[Print](#) [Download PDF](#)

This form is used by SWAN member libraries to notify the SWAN support team of the library's preference for reenabling hold notifications via email, SMS/text and phone during the COVID-19 reopening process. Notifications will be reenabled for items picked up at your library on the chosen date.

Director or Authorized Administrator \*

Your Email Address \*

Your Library \*

#### Hold Notifications Start Date \*

On which date would you like to resume hold notifications for items to be picked up at your library?

#### Comments (Optional)

Please provide any additional comments regarding your library's hold notices.

We would like to resume text, phone, and email notification of hold pick-up on July 1st.

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# Managing Holds – “We are swamped”

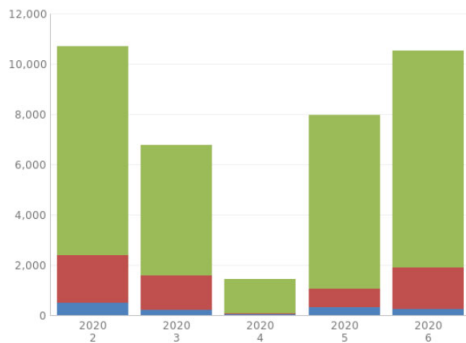
Strategies for managing long hold queues.

- Process hold queue daily; but consider a rotation on patron last name range to process per day, reducing the number of patron pick-up days/bags.
- Consider reasonable number of items patron can use within check-out period.
- Reduce number of holds patron can place. While this will not impact the backlog, it will slow hold placement a bit moving forward.

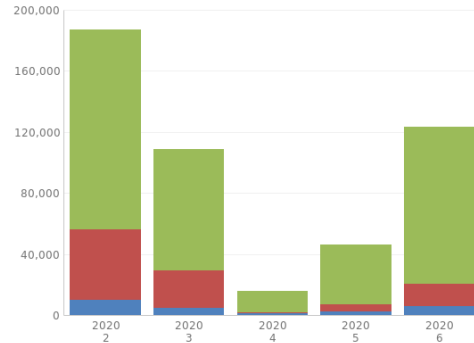
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## Holds Backlog Examples – Holds Placed



Hold Client	Hold Created Year	Hold Created Month	2020						Total
			2	3	4	5	6		
BC_MOBILE	Number of Holds		499	226	45	322	266	1,358	
WORKFLOWS	Number of Holds		1,898	1,358	18	721	1,639	5,634	
WS_DS	Number of Holds		8,304	5,181	1,380	6,924	8,622	30,411	
	Number of H		10,701	6,765	1,443	7,967	10,527	37,403	



Hold Client	Hold Created Year	Hold Created Month	2020						Total
			2	3	4	5	6		
BC_MOBILE	Number of Holds		9,800	4,597	1,235	2,601	6,026	24,259	
WORKFLOWS	Number of Holds		46,661	24,577	381	4,628	14,316	90,563	
WS_DS	Number of Holds		130,418	79,426	14,232	39,091	102,802	365,969	
Total	Number of H		186,879	108,600	15,848	46,320	123,144	480,791	

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## Optional Workflows

If your library wants to use either of these in-house users, please submit a help ticket and a unique user for your library will be created

### QUARANTINE in-house user

- Use to clear items off patron records
- Checkout to user when emptying book drops
- Quarantine items
- Check-in items post-quarantine

QUARANTINE items do not appear on holds list

### CURBSIDE in-house user

- Use to remove hold pickup status
- Checkout to user when hold is trapped to remove My Account messaging that hold is ready for pickup
- Either reshelve or put in temporary location to wait for holds list

CURBSIDE items appear on holds list

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## Updating Online Patron User Records

<https://support.swanlibraries.net/documentation/68769>

Fun Fact: 52 ONLINE accounts created yesterday

### Online User Only Card

- Do not update barcode or create a new record
- Update privilege expiration date in the existing record to match normal library policy, (ex. 3 years, NEVER)
- Do not issue a physical card

Online records (Profile = ONLINE) will be removed 60 days after the privilege expiration date.

### Full Access Library Card

- Check for duplicate record - duplicate accounts are not permitted unless they are a child with dual residency or a student with an academic card
- Modify existing record
  - Update patron profile
  - Update privilege expiration date
  - Fill in all fields required by local library practice
- Create a physical card - Do NOT mail card prior to contacting the patron

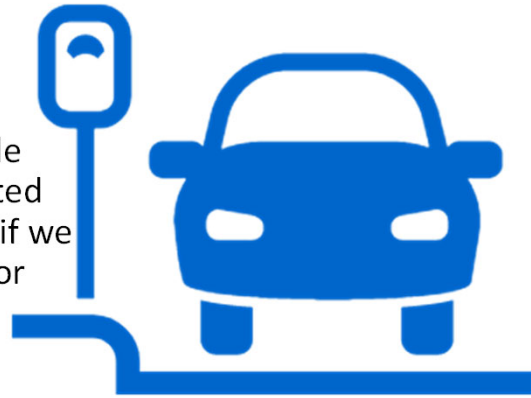
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## Curbside

<https://support.swanlibraries.net/members/curbside-information>

- 56 libraries currently configured for Curbside Communicator
- 19 libraries using another method of communication
- If you initially opted in to use Curbside Communication, but have implemented another solution, please let us know if we can cancel Curbside Communicator for your library to save on costs.



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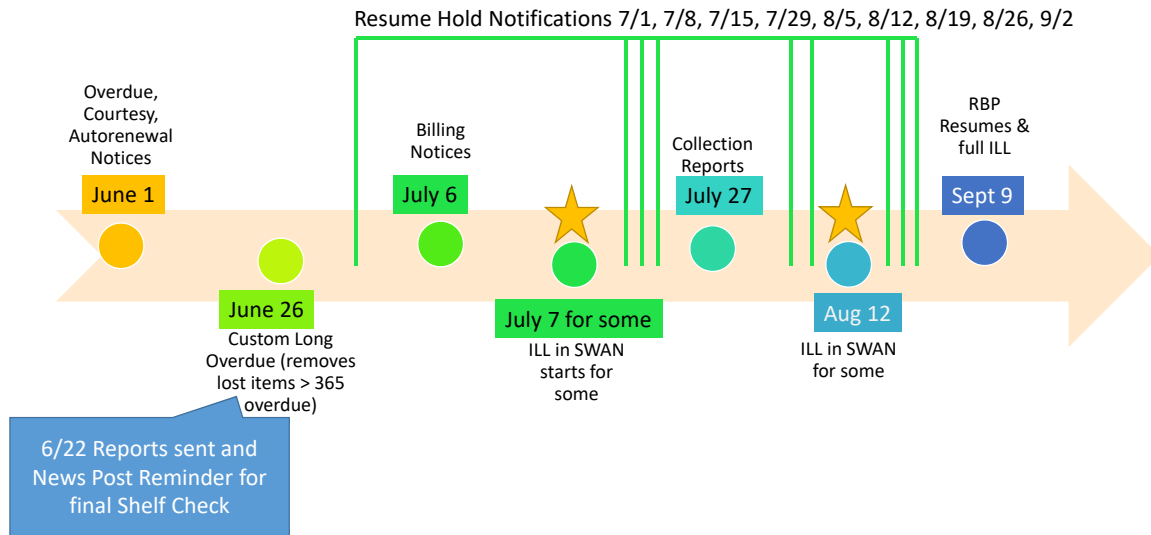
## L2 – RAILS Relaunch in mid-August

- All SWAN events through end of December have been moved to virtual spaces
- GoToWebinar will handle registrations – be sure to register in advance for personal link to event and receive reminders
- Library staff and directory information must be reviewed/updated by July 31<sup>st</sup> (we recommend by July 15<sup>th</sup>)
  - Request removal of erroneous/duplicate staff accounts if you are not able to update
  - If you have maintained learning logs, those must be saved as a print or PDF (My Events)
- SWAN events will still be visible on the SWAN Support Site

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# 6/23 - Timeline for restart of ILL/RBP



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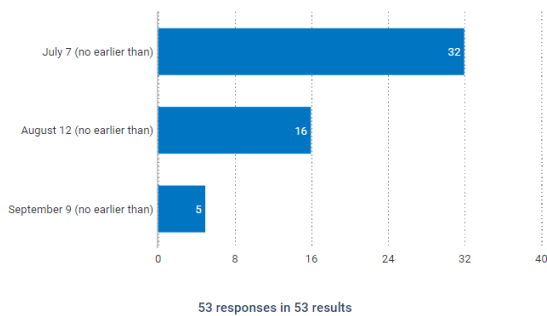
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**NOTE: 39 libraries did not respond**

## Resuming Resource Sharing

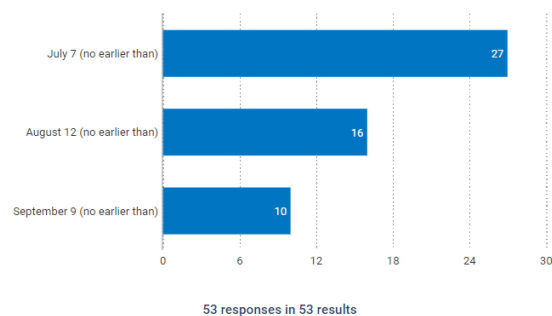
### Interlibrary Loan

Given the choices below, which date would you prefer to resume full resource sharing? This means your items would return to pre-COVID holdability rules within the consortium and you would be willing to share your collections through interlibrary loan to other SWAN libraries.



### Reciprocal Borrowing

When would your library like to provide reciprocal borrowing privileges to other patrons? This means patrons would be able to place holds for pick-up at your library who are outside your service area.



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## REALM Study – Phase 1 Results

### Phase 1 research tested:

1. Hback book cover (buckram cloth)
2. Softback book cover
3. Plain paper pages inside a closed book
4. Plastic book covering (biaxially oriented polyester film)
5. DVD case

**Results show that the SARS-CoV-2 virus was not detectable on the materials after three days of quarantine.**

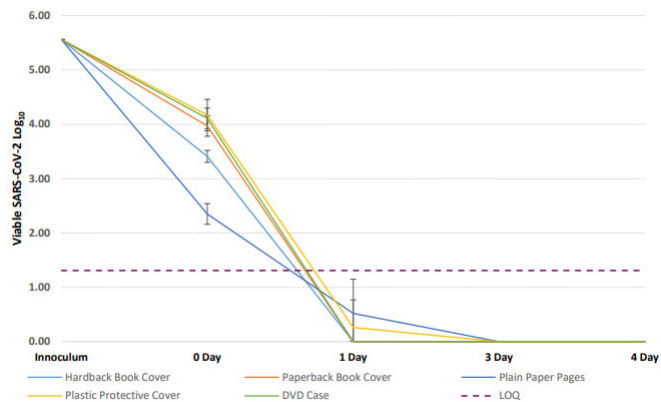


Figure 3. Natural attenuation of SARS-CoV-2 at days 1, 3, and 4 during test 1.2.

<https://www.webjunction.org/news/webjunction/test1-results.html>

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## RAILS Resumes Delivery Schedule June 29

- Blue bins only (request additional, if needed)
- Every item labeled
- Contactless delivery (not within staff areas)
- Items quarantined before pick-up (look for RAILS announcement) – staff wearing PPE to handle items is considered “clean” and does not require additional quarantine time.
- Empty bins immediately upon receipt, follow local practice.
- Wipe down bin before returning to delivery.



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## Illinois – Phase 4, June 26th

Service/Access Tier	Phase 1	Phase 2	Phase 3	Phase 4	Phase 5
Facilities	Library Facilities Closed to the Public	Library Facilities Open for Limited Staff-Provided Services	Library Facilities Open for Limited Patron Services	Library Facilities Open & Majority of Library Services are Reintroduced	Libraries Return to 100% Pandemic Free Services
Delivery	ILL delivery between libraries suspended	ILL delivery between libraries suspended	ILL delivery between libraries suspended	ILL & Reciprocal Borrowing active	ILL & Reciprocal Borrowing active
Services	Library facilities closed, virtual services	Library facility provides curbside, home delivery, open limited hours, PPE supplied to staff, virtual services	Same as phase 2, with library staff checking out locally available materials, limited facility Wifi use, limited access to open stacks	Library staff are checking out local and transited materials	Same as phase 4, with home delivery migrated into Outreach Services model
ILS Days Closed	Days Closed set for libraries	Days Closed updated to limited days libraries open	Same as phase 2	Days Closed schedule returns to normal	Same as phase 4
ILS Holds/Requests	Patrons can place requests but are suspended via automated script	Patrons can place requests but only on local library material; requests denied on other library collections	Same as phase 2	Return to patron requests on all permitted library collections	Same as phase 4
Patron Notification	Patron notifications and billing via email, text, telephony, and print remain suspended	Same as phase 1	Hold notification enabled for libraries that allow patron self-service of requested items, e.g. open hold shelf	Notices, billing, collection reports return to normal schedules	Same as phase 4
Material Due Dates	Due dates are extended to a single fixed date for all closed libraries	Due dates are extended per library based on reopening plan	Same as phase 1	Circulation rules return to normal processing (no system-wide extensions)	Same phase 4
Library Cards	Card expirations are extended to a single fixed date	Same as phase 1	Same as phase 1	Card expirations return to normal processing (non system-wide extensions)	Same as phase 4
OCLC ILL	OCLC set as non-supplier	Same as phase 1	Same as phase 1	OCLC returns to supplier status	Same as phase 4
Patron Status	Patrons with a status of either delinquent or blocked who owe less than \$100 have their status changed to OK through a nightly scripted task	Same as phase 1	Same as phase 1	Patron blocks and limits are put back in place	Same as phase 4

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## Libraries Reopening

**Let us know!** Submit a help ticket to indicate date opening for patrons.

Questions we will ask:

- Are you continuing curbside?
- Do we need to adjust FF4NOW rules?
- Special Enterprise banner changes?
- Did you shadow collections that you want to unshadow?
- Did you open up browsing collections for holds that now should be restricted?



If your doors are open, you can circulate anything to anyone you allow into your building. The system is ready now to support reopening when your doors open.

We will turn on resource sharing in groups on set dates.

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# SWAN PPE Curbside

## Order PPE Supplies from SWAN

SWAN now has a supply of personal protective equipment (PPE) for libraries to request and arrange for curbside pickup. The pick up days are Tuesday and Thursday 12-3pm. We are unable to ship any of these orders, and you will be able to schedule the pickup time at our Westmont headquarters within the online order form. Your library will be invoiced by SWAN after July 1st.

[Online PPE Order from SWAN](#)

<https://support.swanlibraries.net/documentation/71395>

- Complete supply order form
- Supply preferred date for pick-up & time
- Wait for confirmation from Ginny

## SWAN Libraries - PPE Order Form

### Supply of Personal Protective Equipment (PPE) for Curbside Pickup at SWAN

SWAN is acting as a group purchase for specific PPE supplies below. You can order the supplies and select a time for picking up your order at the SWAN headquarters at 800 Quail Ridge Drive, Westmont IL 60559.

Your Name: \*  Your Library \*

Email: \*

Phone: \*

Enter the number of items you would like and click on the calculate button

<input type="text"/>	Face shields (\$6.50)
<input type="text"/>	Disinfectant 1 gallon (\$29.00)
<input type="text"/>	Pack of 5 Surgical masks (\$5.50)
<input type="text"/>	Box of 100 Nitril Large disposable gloves (\$7.50)
<input type="text"/>	ZEP Hand Sanitizer Gel 500ml bottle (\$12.00)

Current Total:

\$0.00

Your Pickup Day \*

- Tuesday, May 19 12-3pm
- Thursday, May 21 12-3pm
- Tuesday, May 26 12-3pm

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# EBSCO Group Purchase Go Live July 8th

<https://support.swanlibraries.net/news/2020-06/75030>

Search Article Search for most of your databases.

Consumer Reports, Consumer Health, Novelist, and Auto Repair are not integrated into Article Search, but will be shown as "Also See..." references in Enterprise.

Standard SWAN-wide database will also be included as search recommendations.

The screenshot shows a search result for the article "SPIKE LEE WE MUST KEEP HOPE ALIVE". The interface includes a sidebar with "Content Provider" options like NewsBank, Gale General, and Gale Academic. The main content area displays the article title, author (Spike Lee), publication date (2020), and source (People, 6/22/2020, Vol. 53 Issue 25, p68-71, 4p, 15 Color Photographs). A "Full Text" button is visible. Below the article, there is a "Select All" option and a "Send To" dropdown menu. An "Also See..." section is highlighted with a blue box, listing "Auto Repair Source", "Consumer Reports", "Consumer Health Complete", and "Novelist Plus & Novelist K-8".

The screenshot shows a search result for the book "Auto repair". The interface includes a top navigation bar with "Books, eBooks, & Media" and "Articles" tabs. The search results show "261 Results Found" and a "Send To" dropdown menu. A blue box highlights a recommendation: "Looking for Auto Repair Source Online? Go To Auto Repair Source". Below this, the book "Auto repair" is listed with a "Place Hold" button. The book details include: "Series --For dummies.", "by Sclar, Deanna, author.", "Edition Second edition.", "Pub Date 2019", "Format Book", and "Holds: 0 Copies at All Libraries: 12".

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## EBSCO Databases SWAN Group Purchase Update

- Sign up on L2  
<https://www.librarylearning.info/events/?eventID=31583>

Don't miss the buzz....



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## EBSCO Resources on the SWAN Support Site

- Documentation > E-Resources > SWAN EBSCO Databases  
<https://support.swanlibraries.net/documentation/70949>
- Tutorials and training from EBSCO Connect listed by interface



### What databases does my library have?

Starting in July, a list of your EBSCO database package and links will be available on the SWAN patron site, which you can share directly with your patrons or use to manage your own database directory for your patrons.

### Tutorials and training

EBSCO Connect offers:

- Tutorials for specific databases.
- Live training via WebEx.

Article Search training presented by SWAN staff can be found in the [Meetings and Training](#) section of this support site.

### Promotional materials

- EBSCO Connect provides a set of printable, social media, and other promotional material for individual databases.
- New databases graphic with text, 1200px by 630px (PNG) - sized for Facebook and web
- New databases graphic square with no text, 630px by 630px (PNG) - sized for Facebook, Twitter, Instagram, and web
- New databases graphic large with text (PNG) - sized for you to crop for your website
- New databases graphic large with no text (PNG) - sized for you to crop for your website

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# Patron Resources & Access to Databases

<https://swanlibraries.net/articles-databases/>

The screenshot shows the SWAN Libraries website interface. On the left, there are four sidebar options: 'Starting an Article Search', 'Full Text', 'Limiting Results', and 'Save, Email, & Print Articles'. The main content area is titled 'Databases' and includes a sub-section 'Databases Included' with links to 'Academic Search Premier' and 'Auto Repair Source'. The URL <https://swanlibraries.net/articles-databases/databases/> is highlighted in the address bar.

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## Promotional Graphics Available

- EBSCO provides graphics on EBSCO Connect and you can find a link to those on the SWAN EBSCO Databases page of the Support Site
- SWAN created graphics can be found there as well.



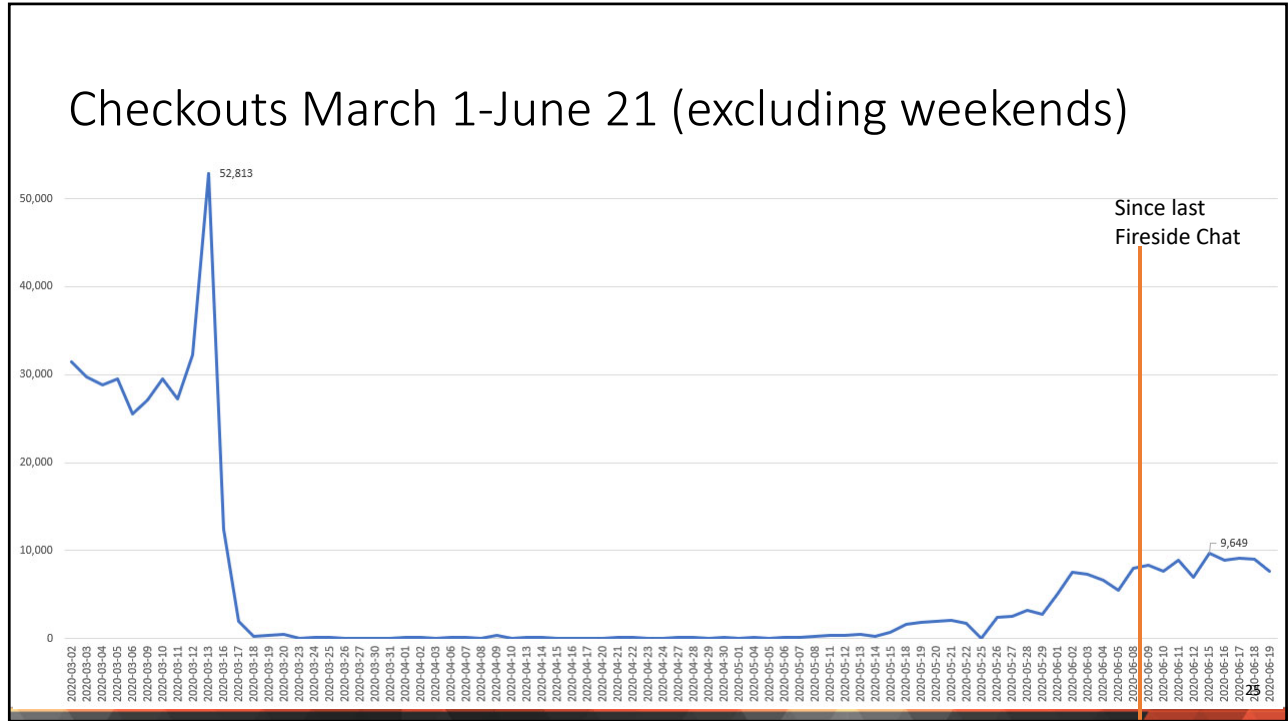
Sized for social media banners



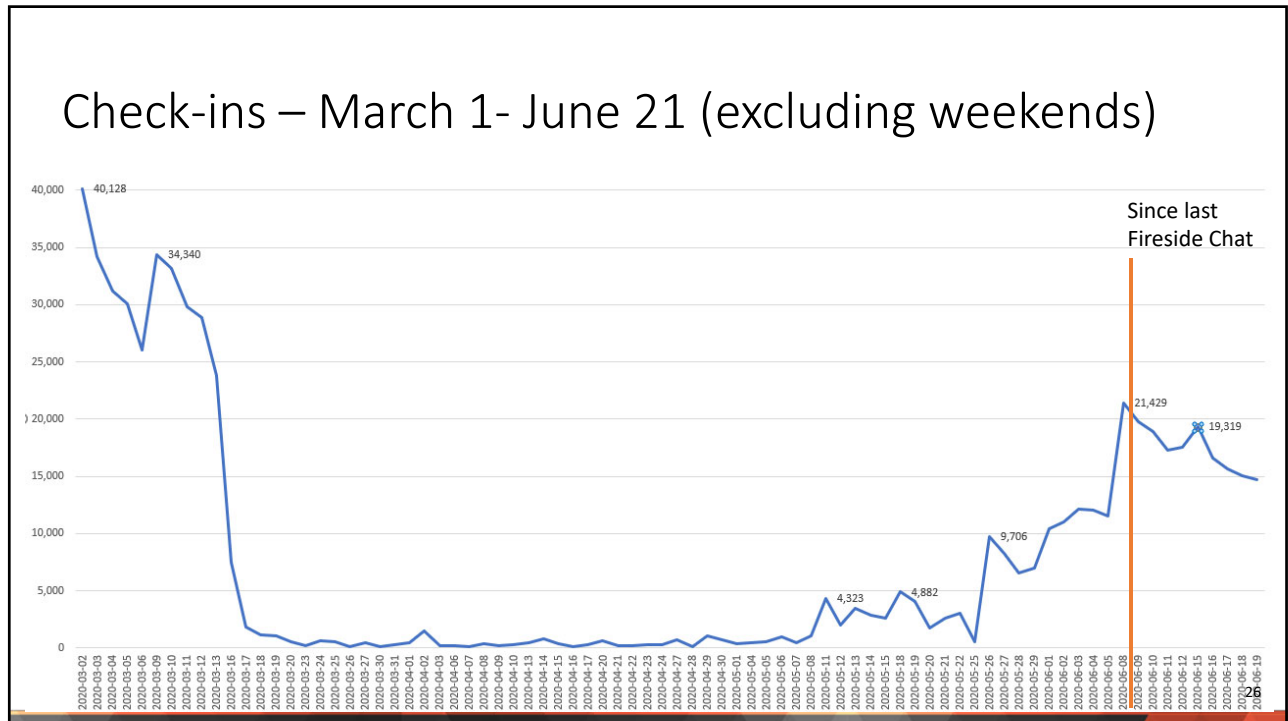
Sized for Facebook,  
Twitter, Instagram

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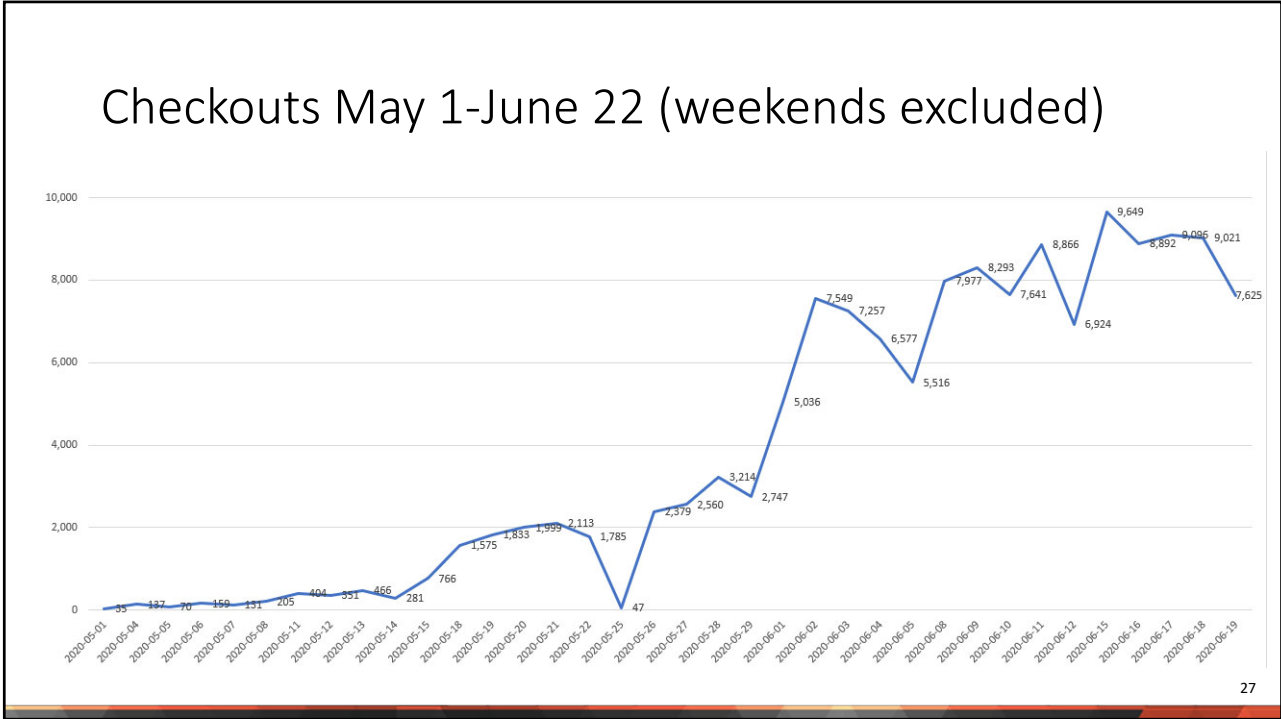
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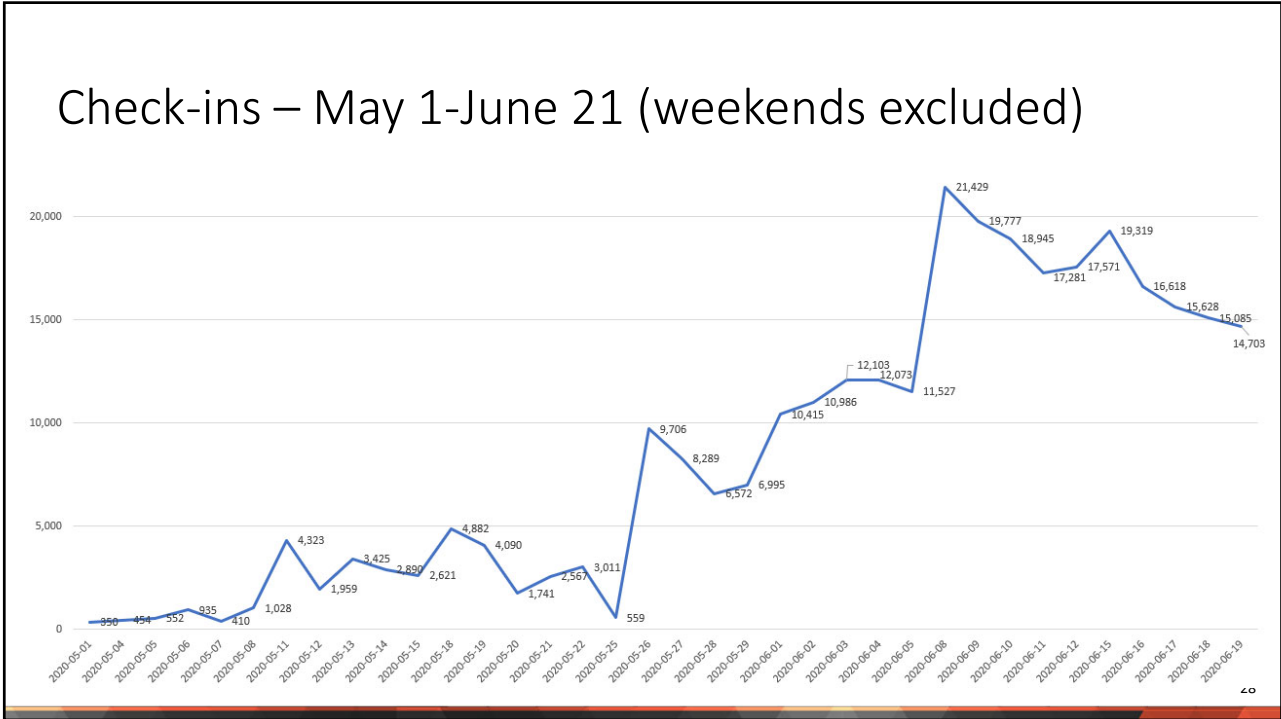
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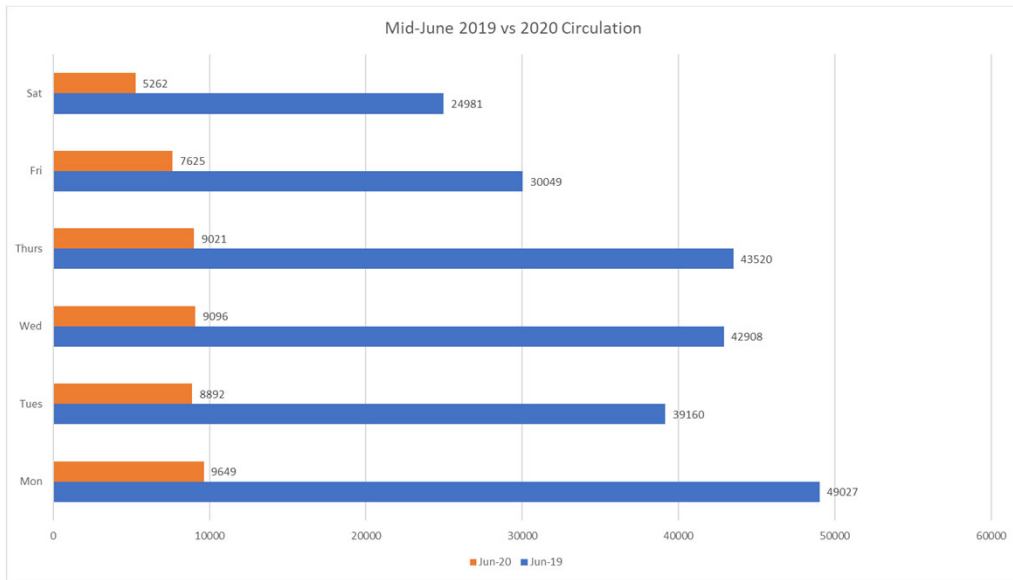


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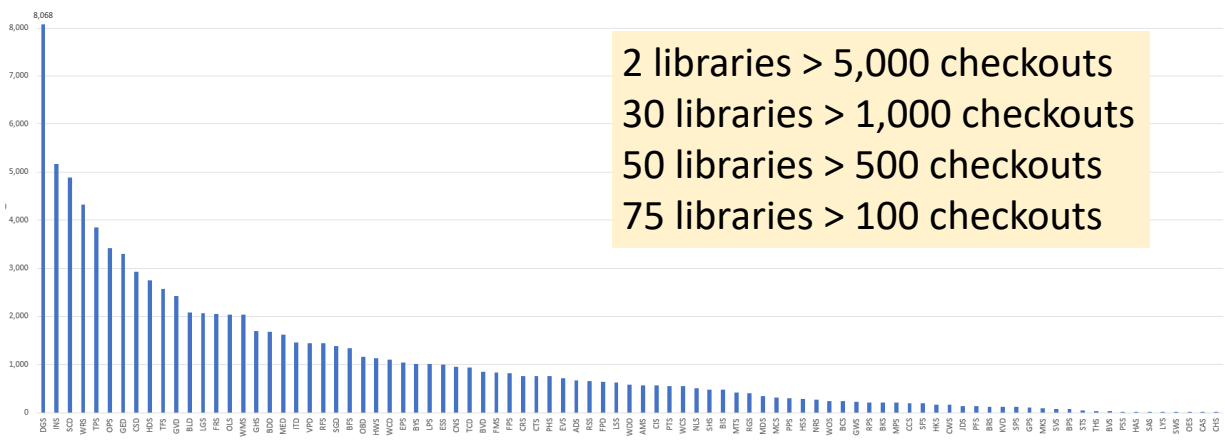
## Circulation Comparison 2019 vs 2020 (~20%)



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## Checkouts in last 14 days

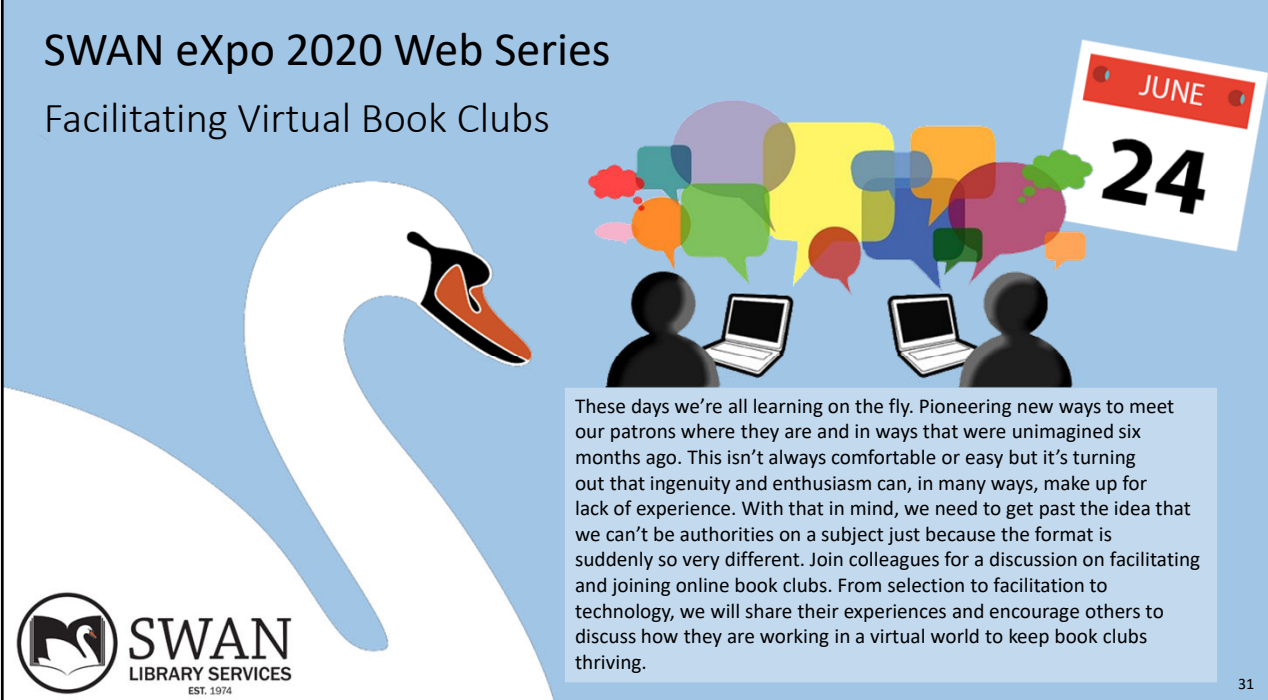


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## SWAN eXpo 2020 Web Series

### Facilitating Virtual Book Clubs



These days we're all learning on the fly. Pioneering new ways to meet our patrons where they are and in ways that were unimagined six months ago. This isn't always comfortable or easy but it's turning out that ingenuity and enthusiasm can, in many ways, make up for lack of experience. With that in mind, we need to get past the idea that we can't be authorities on a subject just because the format is suddenly so very different. Join colleagues for a discussion on facilitating and joining online book clubs. From selection to facilitation to technology, we will share their experiences and encourage others to discuss how they are working in a virtual world to keep book clubs thriving.

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## Library Check List

<https://support.swanlibraries.net/documentation/71031>

- ✓ Submit help ticket – Let us know you are reopening for patrons in the building.
- ✓ [Restart Hold Notifications](#) - Hold Notifications will restart on Wednesdays. Select your date for requesting restart.
- ✓ Check IL Dept of Commerce Guidelines
- ✓ [Online PPE Order Form](#) - SWAN can help with some supplies required for readiness in offering services.

### Reopening Plans

[Print](#) [Download PDF](#)

Added by Dawne Tortorella (04/23/2020 - 16:43), last updated by Dawne Tortorella (06/22/2020 - 17:14)

#### Illinois moves to Phase 4 on June 26, 2020

As Illinois moves into Phase 4, many SWAN libraries are opening their doors for patrons to visit the library. If your library is reopening for patron access to the building, please let us know by [submitting a help ticket](#). Also refer to the following work request forms to prepare for return to service.

- [Restart Hold Notifications Work Request](#) - indicate which date (Wednesday through September 9th) you wish to have hold pick-up notifications turned on for your libraries. Once turned on, patrons will be notified via a daily run at 2:00 PM that they have holds ready for pick-up.
- Review procedures from the [Illinois Department of Commerce on Phase 4 guidelines](#). Pay particular attention to [Service Counter Preparedness](#).
- Verify that you have adequate PPE for staff. If you have not already secured a continuous source for PPE supplies, SWAN can help with some supplies. See our [Online PPE Order form](#).

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## Questions & Follow-up

Send questions to our online ticketing system at [help@swanlibraries.net](mailto:help@swanlibraries.net)

Visit the SWAN Support Site for access to recorded sessions.

<https://support.swanlibraries.net>

Submit a request for additional training topics.

Help > Request Forms > Request Training or Consultation

Check the [SWAN training calendar](#) for upcoming trainings. If you don't see what you're looking for, request a training or an onsite consultation for an in depth review of your library's work processes.

**Name \***

**Email address**

**Library**

**I'd like to request ... \***

Training  
 Consultation

**Training details**  
 Describe what you topics you would like to learn about.



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