

SWAN ~~Fireside~~ Poolside Chat



July 7, 2020

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SWAN Poolside Chat

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We sprung a leak! Turning on the resource sharing hose...

- Pull items for your patrons, pick-up at your library first.
- Do not pull other libraries unless they are participating in resource sharing, and then only at end of day when a local copy may have come in to satisfy the hold.
- If item not pulled today, it will either on your list tomorrow, or someone else's if a local copy becomes available.



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Topics

- Action Recap:
 - Timeline for restarting reports
- Notices & Notifications
 - Poll (1st Overdue)
- Managing Holds
 - Poll (Resource Sharing Restart)
- Optional workflows
 - QUARANTINE in-house user (check-in before quarantine)
 - CURBSIDE in-house user (checkout after quarantine)
- Online Patron Registration – Reminder on updating patron records
- L2 Update
- EBSCO Update
- By the numbers

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Action Recap & Reminders

- **[NEW]** 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)
- **[DISCUSS]** 1st Overdue notices now sent at 14-days overdue instead of 7
- **[DISCUSS]** Clean Hold Shelf processing will resume 7/7 (nightly processing)
- Patron records with expiration dates between 1/1/2020-9/7/2020 extended to 9/8/2020 (some libraries excluded specific profiles)
- 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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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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Library Services Recap

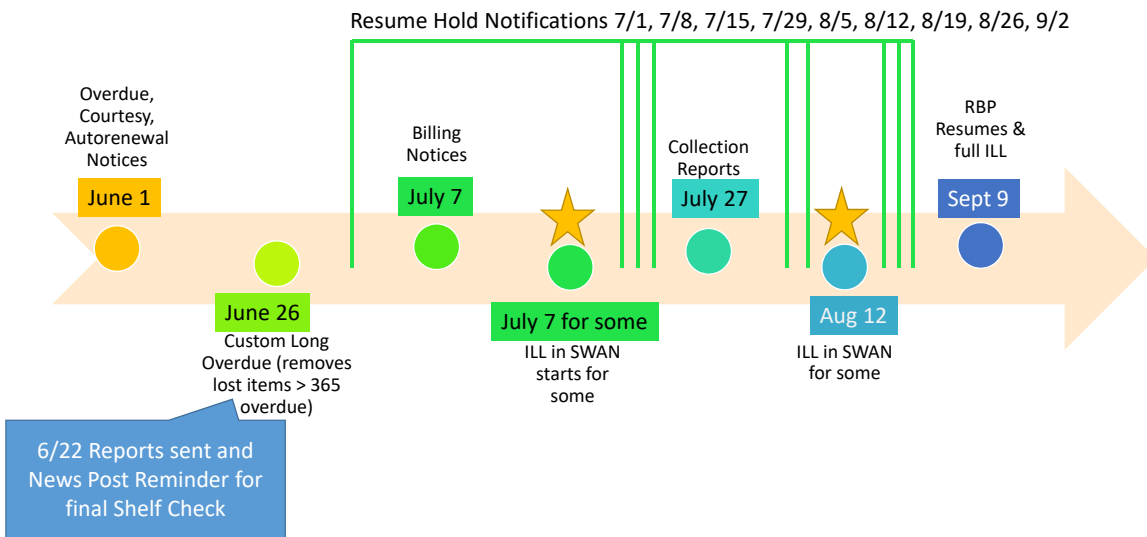
<https://support.swanlibraries.net/node/75665>

- 50 SWAN Libraries resuming resource sharing 7/7/2020
- 38 SWAN Libraries have building open to the public in some capacity
- 88 SWAN Libraries resumed delivery service

If the data on your library is incomplete or incorrect, please submit a support ticket – help@swanlibraries.net

Library	RAILS Delivery	Restart ILL	Doors Open
River Forest Public Library	Yes	7/7/2020	7/27/2020
River Grove Public Library District	Yes	7/7/2020	6/15/2020
Riverdale Public Library District			
Riverside Public Library	Yes	7/7/2020	7/8/2020
Saint Charles Public Library District	Yes	8/12/2020	
Schiller Park Public Library	Yes	7/7/2020	
South Holland Public Library	Yes	7/7/2020	7/13/2020
Steger-South Chicago Heights Public Library District	Yes	7/7/2020	
Stickney-Forest View Public Library District	Yes		
Sugar Grove Public Library District	Yes	7/7/2020	7/13/2020
Summit Public Library District	Yes		
The Morton Arboretum	Yes	7/7/2020	
Theosophical Society in America		8/12/2020	
Thomas Ford Memorial Library	Yes	7/7/2020	7/1/2020
Thornton Public Library	Yes		
Tinley Park Public Library	Yes	8/12/2020	

6/23 - Timeline for restart of ILL/RBP



Notices & Notifications

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

1st 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.

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.

With libraries reopening, do we want to move back to 7 days?

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1st Overdue Poll – what is your preference?

1st overdue back to 7 days.

Use Quarantine user to check in items prior to quarantine so eliminate patron miscommunication.



1st overdue at 14 days until COVID quarantining is no longer required.

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Clean Hold Shelf

- The Clean Holdshelf report will update the current location to a new location, HOLD_PROC - Holds Processing, when it runs.
- The report will no longer put the item in transit.
- All items removed from the hold shelf must be scanned manually.

This will eliminate problems with items missing on the holdshelf being put in transit automatically.

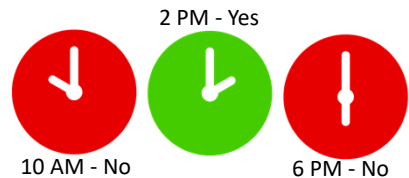


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Restarting Hold Pick-Up Notices

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



- Opt-in to restart – Wednesdays
 - 27 libraries 7/1
 - 13 libraries 7/7
- 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 – progress is being made

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.

Holds Placed (Sample Library & All SWAN)



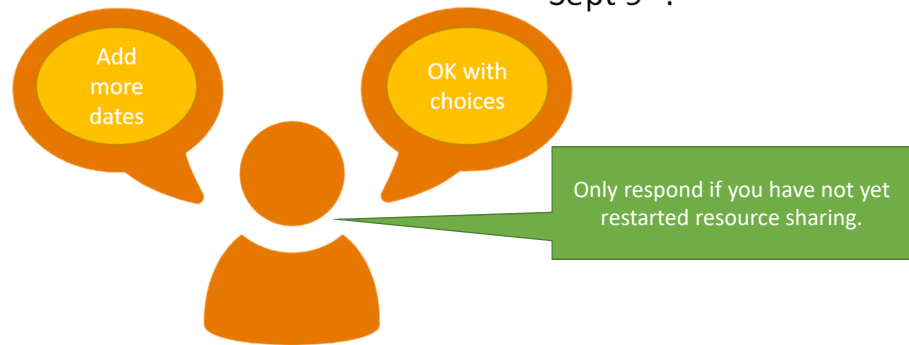
Hold Client	Hold Created Year	Hold Created Month	2020							Total
			2	3	4	5	6	7		
BC_MOBILE	Number of Holds		499	226	45	322	356	69	1,519	
WORKFLOWS	Number of Holds		1,888	1,358	18	721	2,098	171	6,264	
WS_DS	Number of Holds		8,307	5,181	1,380	6,924	11,311	1,120	34,223	
	Number of H		10,704	6,765	1,443	7,967	13,767	1,360	42,006	

Hold Client	Hold Created Year	Hold Created Month	2020							Total
			2	3	4	5	6	7		
BC_MOBILE	Number of Holds		9,800	4,597	1,235	2,601	8,557	1,140	27,930	
WORKFLOWS	Number of Holds		46,661	24,577	381	4,628	20,051	2,078	98,376	
WS_DS	Number of Holds		130,418	79,426	14,232	39,091	139,859	16,485	419,511	
Total	Number of H		186,879	108,600	15,848	46,320	168,467	19,703	545,817	

Resource Sharing Poll – do you want an option before August 12 or Sept 9?

Please add some additional dates between current opt-in dates.

OK with choosing date of Aug 12th or Sept 9th.



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Optional Workflows Tools for Quality Control

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

Q - 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

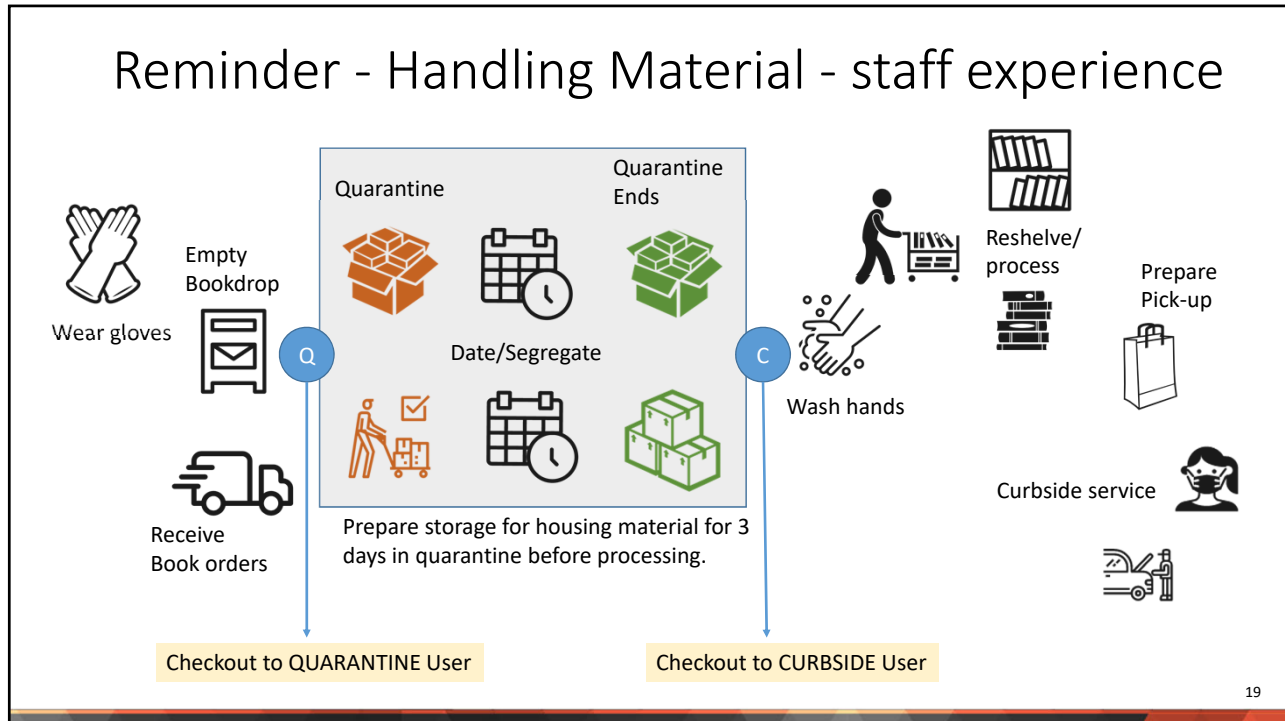
C - CURBSIDE in-house user

- 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

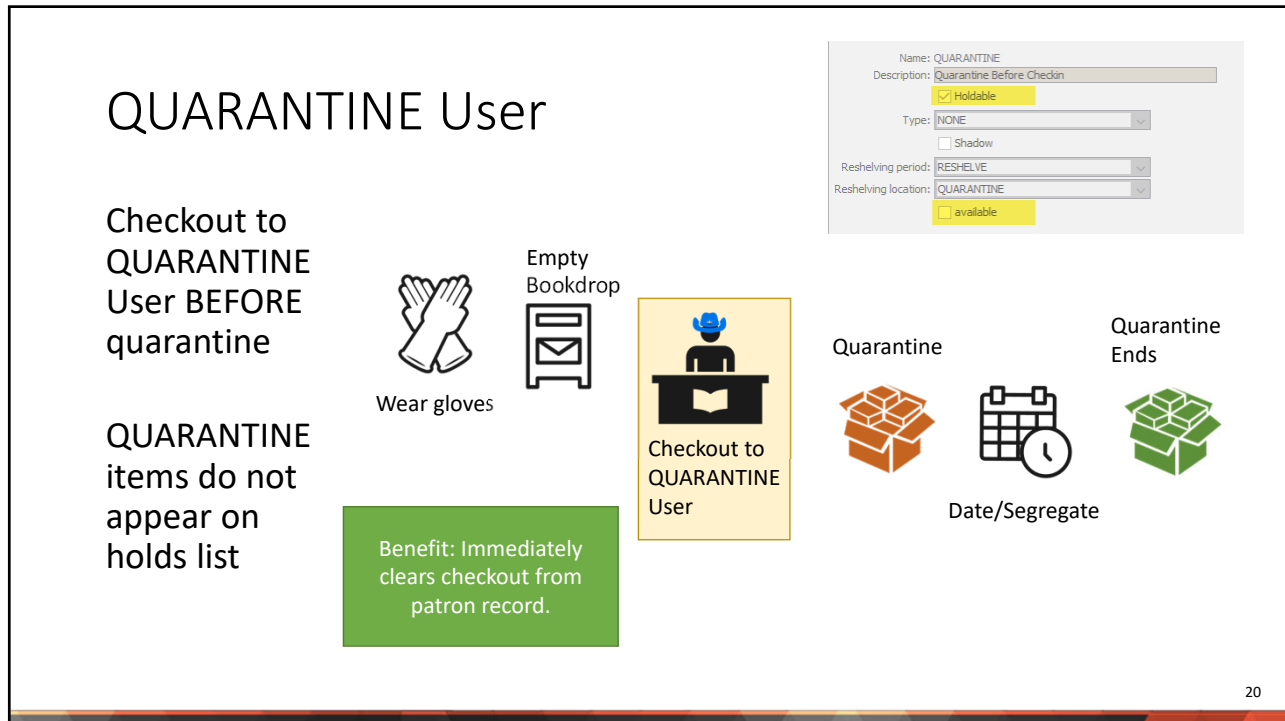
CURBSIDE items appear on holds list (maybe? – working with SirsiDynix)

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CURBSIDE User

Checkout to CURBSIDE User
AFTER quarantine

Segregate those CURBSIDE items for processing

Schedule around hold pick-up notifications (2 pm)

Name: CURBSIDE
Description: Curbside

Holdable

Type: NONE


Shadow

Reshelving period: RESHELVE


Reshelving location: CURBSIDE

available


Quarantine




Date/Segregate





Quarantine Ends




Wash hands








Checkout to CURBSIDE User





Benefit: Removes hold available status from patron record, allowing staff time to prep curbside.

Curbside checkout processing – staff experience



- 

1 Check Onshelf Items List
Sort by Patron Last Name



Items checked out to CURBSIDE should appear on list – we are working with SirsiDynix on this



- 

2 Pull items from shelves




- 

3 Checkout to Patron
Email Receipt
Contact Patron




- 

4 Print receipt
Staple to bag
- 


5 Move to holding area


- 

6 Items not picked up are checked back in


- 

Order Pick-up



Example: CURBSIDE Checkout Process

1. Patron has hold for item

Display User -
Notes
Name: TORRELLA, DANIEL
Id: 2114000
Group ID:
Profile name: SWS_STAFF...
Identify user
User ID: 2114000
Summary Addresses Extended Info SMS Notice Contact Info Bills Checkouts Holds Routings Bookings Suspension Charge History User Groups
Total holds: 1
Title Item ID Level Status Placed Pickup at Pickup by Expires Suspend... Unsuspe...
SWS inflatable swan SWS SWAN 2 TITLE (unavailable) 7/6/2020 SWS 7/6/2021

2. Check-in, traps hold

Item Checked in - SWS SWAN 2
Hold is available
Item ID: SWS SWAN 2
Call number: SWS SWAN 2
Copy: 1
Title: SWS inflatable swan
Routing Information
Make Hold Available
Item on hold for:
User ID: 2114000
Name: TORRELLA, DANIEL
OK

3. Checkout to CURBSIDE, override

Available Hold Block Override
Item has available hold
This item is now being held for 2114000 TORRELLA, DANIEL Address
SWS SWAN 2 Copy: 1
SWS SWAN 2 KIT (HOLDS)
SWS inflatable swan
Available hold block override:
Override & Checkout Item Do Not Checkout Item

4. Shows checkout to CURBSIDE User

Charge/Checkout -
User Information
Name: SWS CURBSIDE PICKUP Status: DELINQUENT Library: SWS
Profile name: CURBSIDE... Amount owed: \$0.00 Available holds: 0
User categories: NONE Overrides: 1 Checkouts: 1 Active IDs: CURBSIDESW
Group ID: Privilege expires: NEVER
Identify user
User ID: CURBSIDESWS
Identify item
Item ID:
List of checkouts: 1
Title Call number Item ID Date Due Billed Amount Paid A... Type Set ID
SWS inflatable s... SWS SWAN 2 SWS SWAN 2 7/27/2020,23:59 KIT

5. Hold shows unavailable for patron

Display User -
Notes
Name: TORRELLA, DANIEL
Id: 2114000
Group ID:
Profile name: SWS_STAFF...
Identify user
User ID: 2114000
Summary Addresses Extended Info SMS Notice Contact Info Bills Checkouts Holds Routings Bookings Suspension Charge History User Groups
Total holds: 1
Title Item ID Level Status Placed Pickup at Pickup by Expires Suspend... Unsuspe...
SWS inflata... SWS SWAN 2 TITLE (unavailable) 7/6/2020 SWS 7/6/2021

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Updating Online Patron User Records

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

Still popular! 47 new accounts created on 7/6/20

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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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 31st (we recommend by July 15th)
 - 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

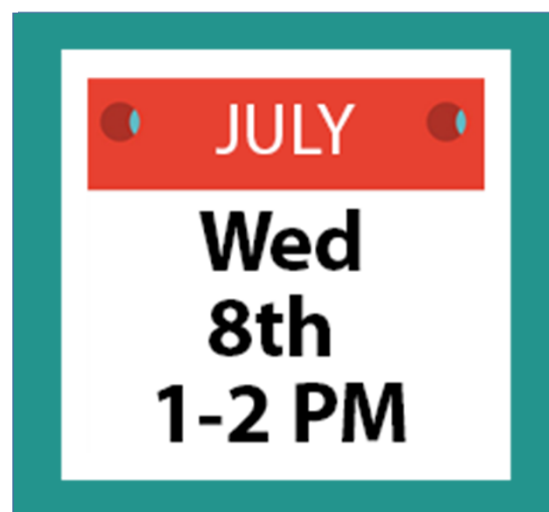
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EBSCO Databases SWAN Group Purchase Update

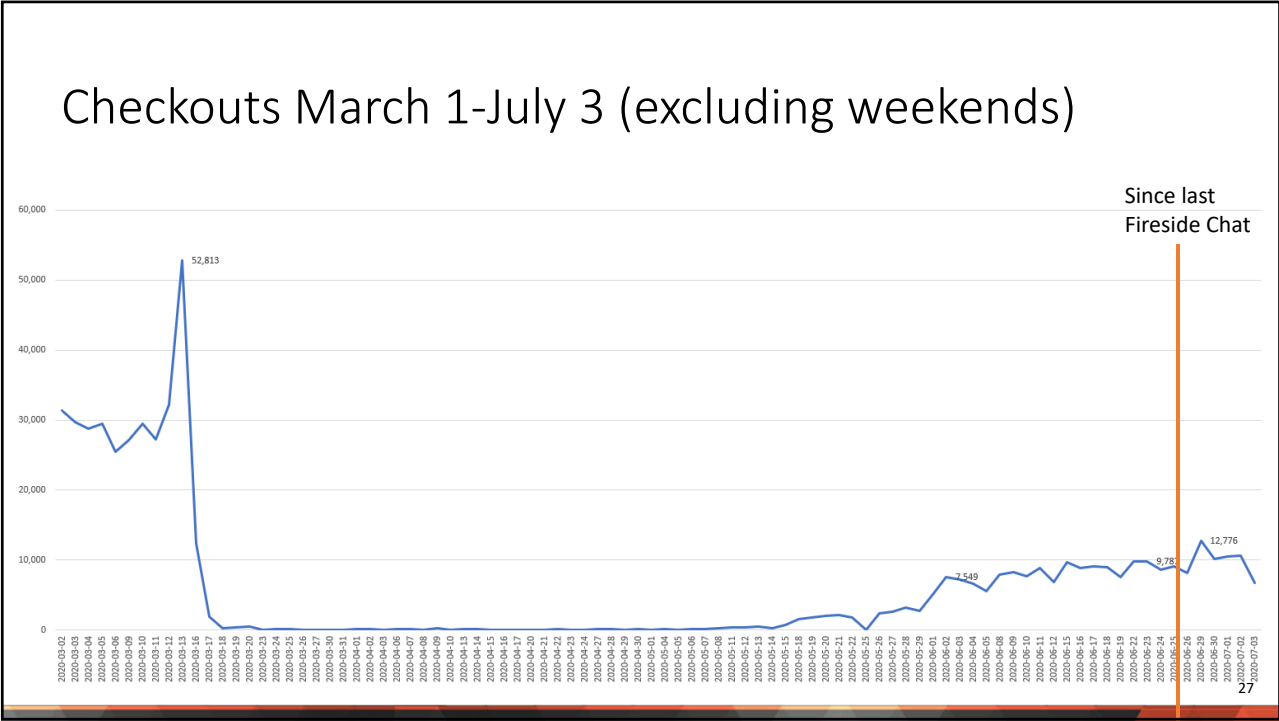
- Sign up on L2
<https://www.librarylearning.info/events/?eventID=31583>

Don't miss the buzz....

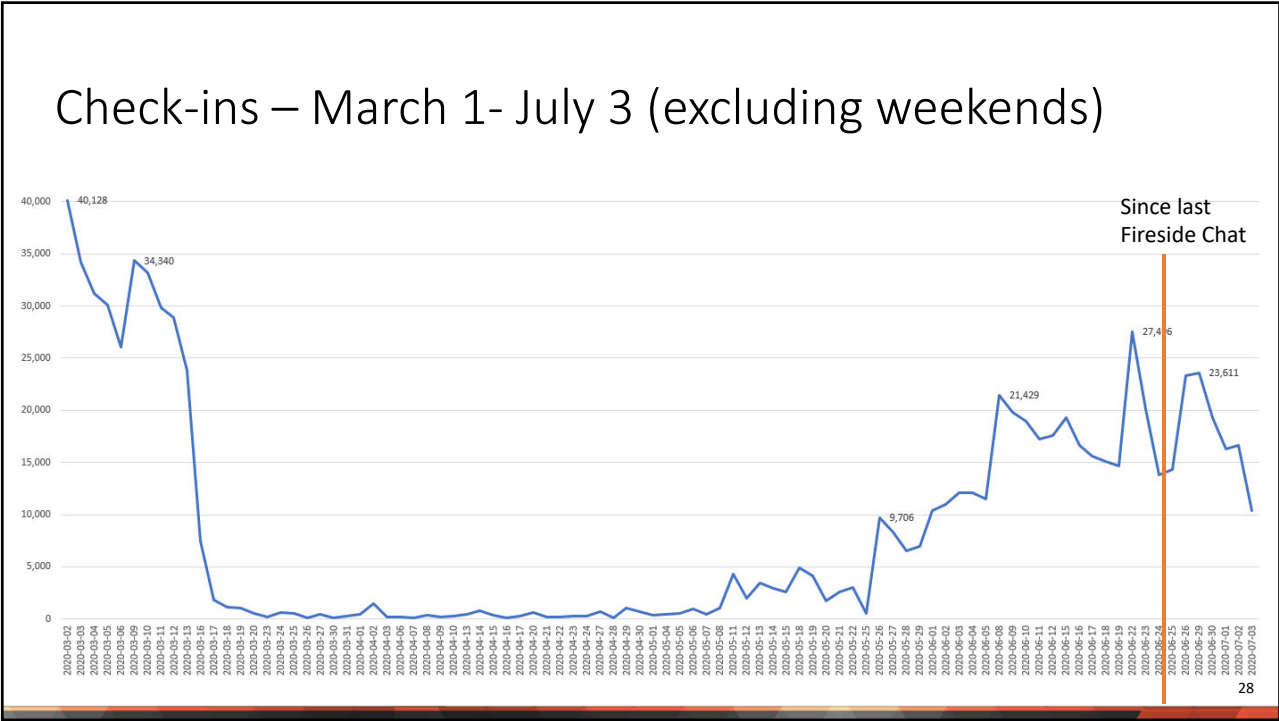


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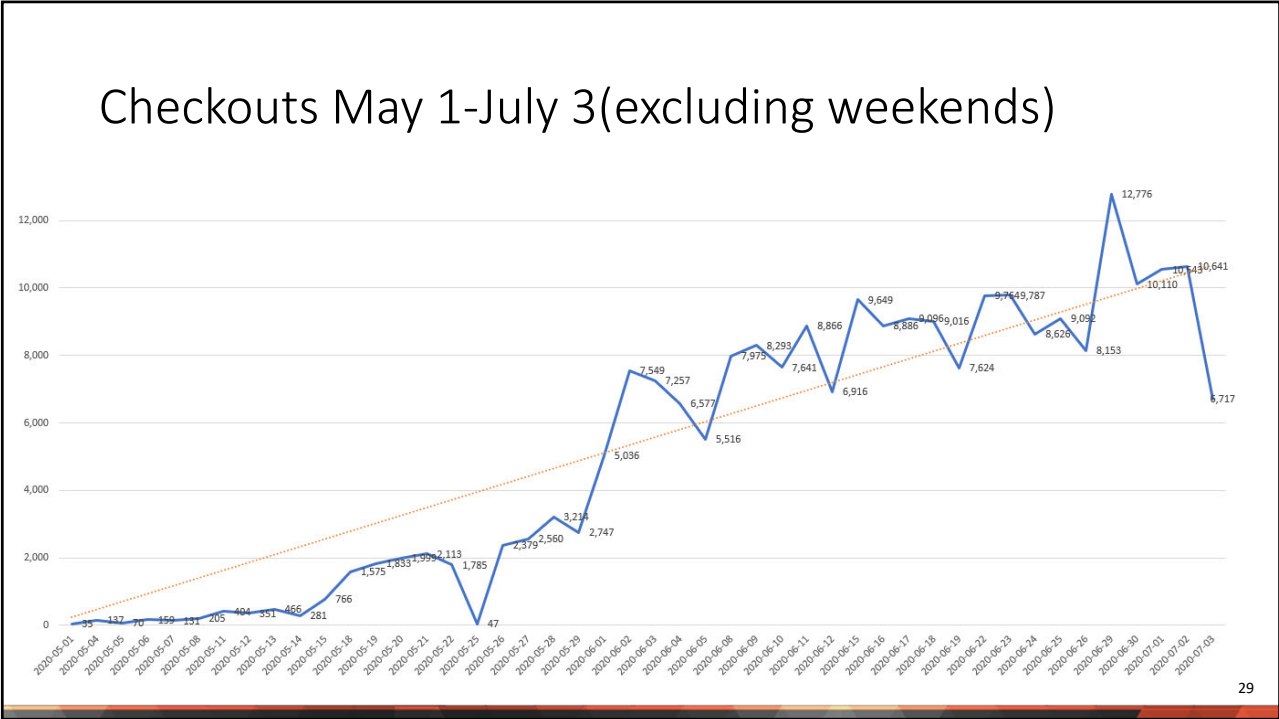
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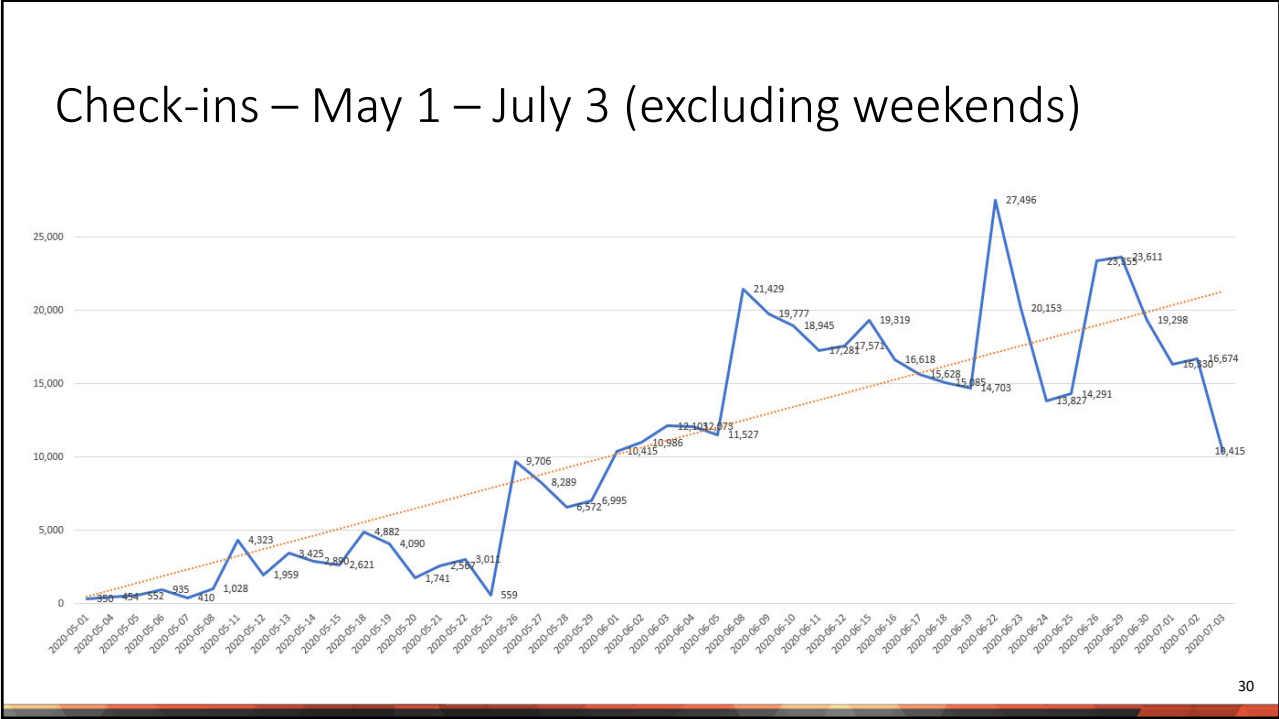
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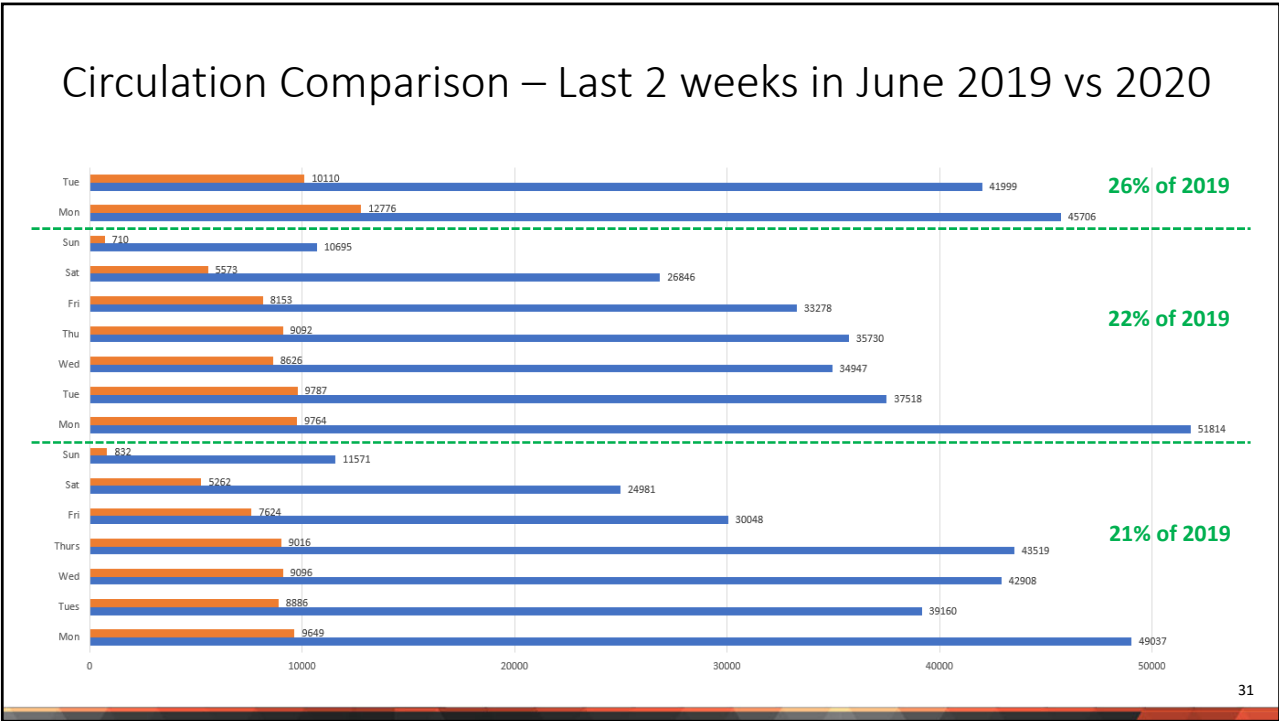
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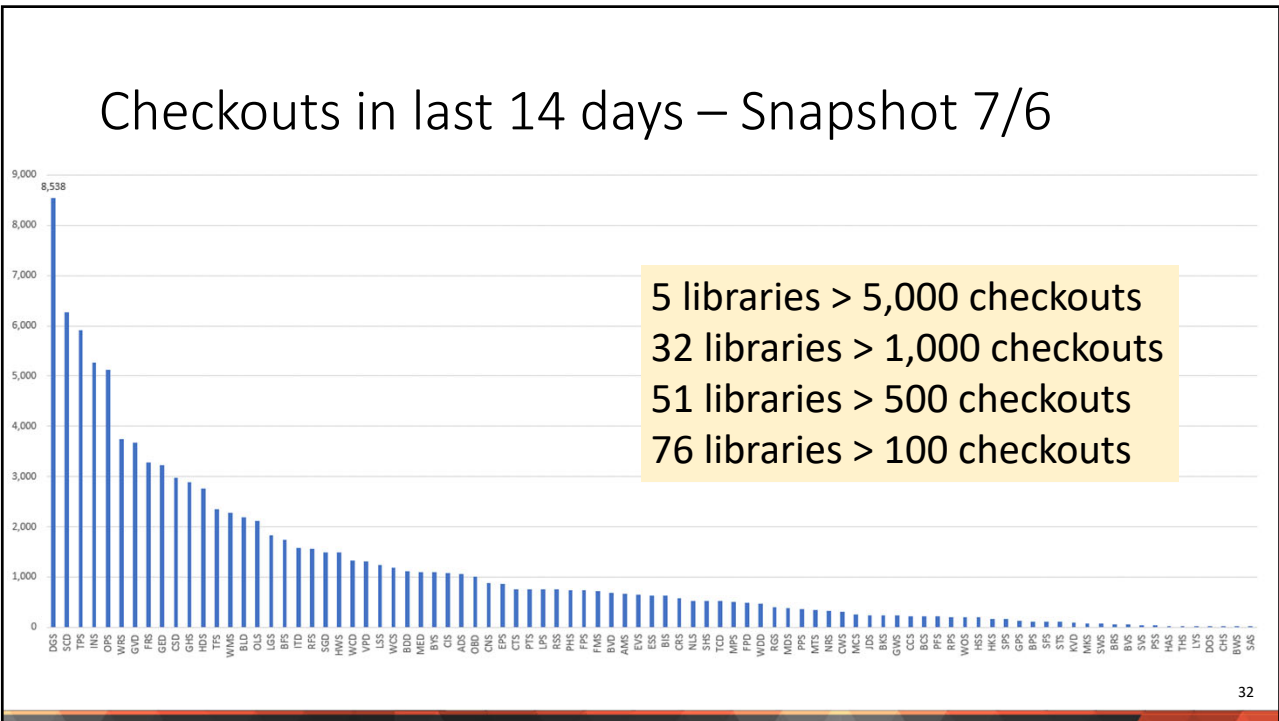
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Library Check List

<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

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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