

September 3, 2020

SWAN Quarterly Meeting



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Agenda

- Welcome & Business
- Introduction of new library directors
- Tactical Plan Review
- Parallel Discovery Platform Project: Aspen Discovery
- EBSCO Group Purchase: Early Use & Next Steps
- Cataloging & Acquisitions
- Data Security & System Reliability
- SWAN100: Welcoming Glenside, Roselle, and Warrenville

Next meeting: December 3, 2020



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Board Appointment

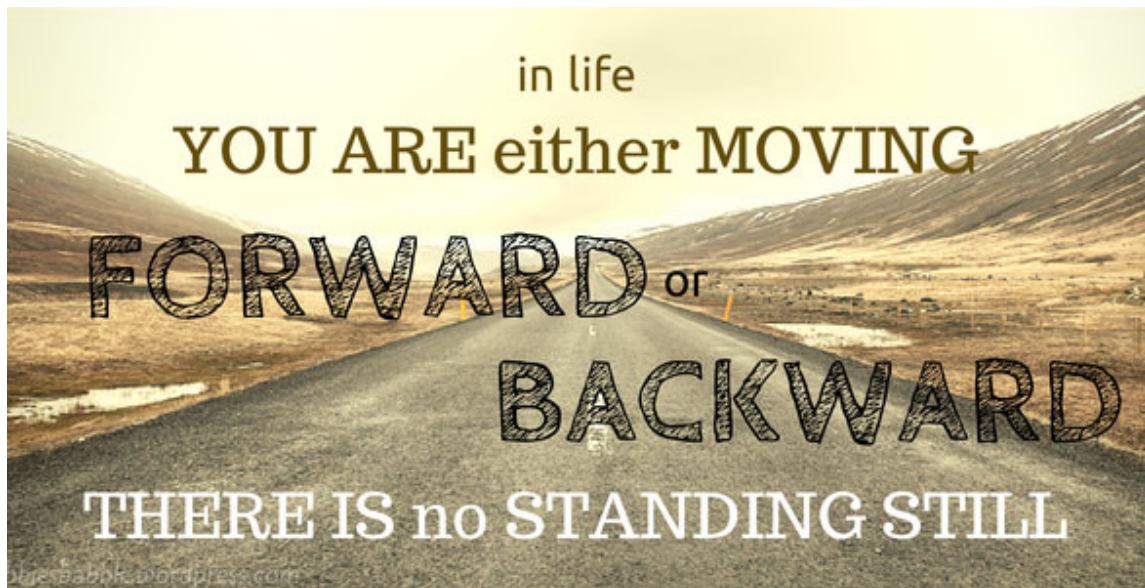
- Jesse Blazek
Library Director at Palos Heights Public Library
- Robin Wagner at South Holland Public Library
retirement



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From Pandemic to Progress



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2019 Tactical Plan completed goals

Objective 1: Develop a Shared and Accurate Diagnosis of Member Dissatisfaction Around the Existing ILS and OPAC (Staff Interface and Online Catalog)

- ✓ Form Operational Think Tank, AKA Clarity Task Force
- ✓ Create a Curriculum of Training for Library Staff
- ✓ Conduct ILS Processing Inefficiencies Evaluation
- ✓ Create More Online Documentation
- ✓ Assess the Discovery Platform for SWAN & Provide Recommendation

Objective 2: Deliver on the Solutions that Can Be Readily Implemented, While Focusing on Long Term Solutions

- ✓ Complete Infrastructure Migration
- ✓ Membership Implementation Schedule
- ✓ Offer Library Patrons Mobile Application through BLUEcloud Mobile
- ✓ Create New OCLC Holdings Update Process for SWAN: OHM
- ✓ Study & Offer E-Content Consortia Purchases
- ✓ Evaluate BLUEcloud Staff Interface
- ✓ Perform an Assessment of BLUEcloud Acquisitions
- ✓ Automated Delivery In-Transit Label

- ✓ Negotiate Extension of SirsiDynix Agreement
- ✓ Negotiate Long Term Agreements with EBSCO & OCLC
- ✓ Determine Community Driven Software Initiatives within FY21 Operations Budget

Objective 3: Reconstitute as a Mission Driven 501c3 with Clear Representative Governance Practices

- ✓ Evaluate Organization Legal Entity
- ✓ Revise SWAN Budget Structure

Objective 4: Increase Presence of Patron Experience

- ✓ Develop & Deploy Online Patron Registration
- ✓ Develop & Incorporate Patron Help into Public Catalog

Objective 5: Strengthen the Collective Identity

- ✓ Pilot Online Membership Forums
- ✓ Plan SWAN Expo 2019 Event
- ✓ Clarify Role of SWAN Advisory & User Groups



2020 Tactical Plan Highlights

April – June 2020

- ✓ Implement parallel discovery platform
- ✓ Develop audio-visual (AV) Item Type recommendations for SWAN100
- ✓ Establish uniform parameters for fine free
- ✓ Continue BLUEcloud Staff interface pilot & targeted deployment

Continuing work

- ❑ Standardize the management of holds for New Items (Clarity Recommendation)
- ❑ Pilot BLUEcloud Acquisitions + Baker & Taylor rental

July – September 2020

- ❑ Support & Promote EBSCO group-purchase
- ❑ Add three libraries to SWAN– “SWAN100 Project”
- ❑ Build “your library statistics” monthly report

Read full Tactical Plan on SWAN support site
About > Mission, History, Objectives > Strategic Objectives > Tactical Plan
<https://support.swanlibraries.net/tactical-plan>



Parallel Discovery Platform Project: Aspen Discovery

Tara Wood, SWAN User Experience Manager



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Background

- Clarity Task Force identified our discovery platform as a source of dissatisfaction in the membership, especially around relevancy
- Aspen was the highest-scoring platform in the Discovery Platform Evaluation, conducted with DUX February 2019 – March 2020
- Exploratory research and testing with Aspen began in mid-May 2020, in partnership with ByWater Solutions

<https://support.swanlibraries.net/aspn>



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Milestones

Milestone	Target Start	Target Complete	Done?
Aspen Test System Installation	May 2020	June 2020	✓
Create Personas & User Stories	May 2020	June 2020	✓
Search Query Set	May 2020	June 2020	✓
Expert Review & Configuration	June 2020	TBD	
Usability Testing – Library Staff	May 2020	TBD	
Usability Testing – Library Patrons	Dependent on test system configuration	TBD	
Recommendation to SWAN Board		Q4 2020	
Phase 2 - Pilot Phase	Dependent on Board discussion & decision		

Features

- Grouped records (FRBR)
- Improved relevancy
- Theme and branding features
- Public service features
- Combined results
- Bonus features

Grouped Records (FRBR)

1) **A gentleman in Moscow: A Novel**

Author: Towles, Amor
Language: English

Choose a Format

Format	Status	Action
Book	Available from another library	Place Hold
Audio CD	Available from another library	Place Hold
eAudiobook	Checked Out	Place Hold OverDrive
eBook	Checked Out	Place Hold OverDrive
Large Print	Available from another library	Place Hold

From the New York Times bestselling author of Rules of Civility—a transporting novel about a man who is ordered to spend the rest of his life inside a luxury hotel. With his breakout debut novel, Rules of Civility, Amor Towles established himself as a master of absorbing, sophisticated fiction, bringing late 1930s Manhattan to life with splendid atmosphere and a flawless command of style. Readers and critics were enchanted; as NPR commented, “Towles...

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Relevancy – Known Item Searches

- In the July 2020 meeting, DUX and cataloging advisory compared keyword searches in Aspen and Enterprise
- Used a set of patron personas to develop keywords
- Recorded the position of known items in the results (e.g. 2nd result)
- Recorded the number of relevant results in a topic search (e.g. 10/25)

Relevancy scores for known item searches (position in results)

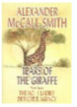

Measure	Enterprise	Aspen
Mean	11.5	1.9
Median	2	1
Below 1st	66.7%	39.4%
Below 5th	25%	6.1%
Below 10th	19.4%	0%

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Series = "ladies detective agency"

Enterprise

115

115.  **Tears of the giraffe**
Series No. 1 Ladies Detective Agency series ; 2.
by McCall Smith, Alexander, 1948-
Publication Date 2003
 **Book**
Holds: 0 **Copies at All Libraries:** 11

Aspen

2

2) **Tears of the giraffe**
 Author: McCall Smith, Alexander
 Series: No. 1 Ladies' Detective Agency volume 2
 Accelerated Reader: No. 1 Ladies' Detective Agency volume 2
 Language: English
 Choose a Format
Book Available from another library Place Hold
Audio CD Available from another library Place Hold
Large Print Available from another library Place Hold
Mma "Phoooi!" Ramotsoe is now engaged to Mr. J. L. B. Matekoni, the kind owner of Tailoring Road Speedy Motors. This new development provokes a hostile reaction from Mr. Matekoni's unscrupulous maid, who quickly begins plotting the disintegration of the engagement. Despite all this, duty calls, and Mma Ramotsoe is asked to help find an American woman's son who has been missing in Africa for 10 years.

Keywords: "ladies detective agency", format book, looking for the 2nd book in the series

Relevancy – Topic/Author Searches

Measured precision by ranking the top 5 results in the search

- Relevant
- Near
- Misplaced
- Irrelevant

...and feeding through a fancy spreadsheet formula

Precision scores for topic searches

Measure	Enterprise	Aspen
Strict (Rs)	52%	67%
Loose (Rs, Ns)	62%	74%
Permissive (Rs,Ns, Ms)	82%	87%

Author/Director = "steven spielberg"

Enterprise

0 movies in top 5

Steven Spielberg : interview
Series: Conversations with filmmakers series.
by Spielberg, Steven, 1946-
Publication Date: 2000
Book
Holds: 0 Copies at All Libraries: 1

Steven Spielberg : a biography
by McBride, Joseph, 1947-
Edition: Second edition.
Publication Date: 2010
Book
Holds: 0 Copies at All Libraries: 2

Steven Spielberg : master storyteller
by Powers, Tom (Tom J)
Publication Date: 1997
Book
Holds: 0 Copies at All Libraries: 3

Aspen

5 movies in top 5



1) War horse
Language: English
Choose a Format: [Book] [DVD] [Blu-ray] [Audio] [eBook] [eAudiobook]
Available from another library: [Book] [DVD] [Blu-ray] [Audio] [eBook] [eAudiobook]
[Add to Shelf] [Add to Favorites] [Share]

2) Jurassic Park
Language: English
Choose a Format: [Book] [DVD] [Blu-ray] [Audio] [eBook] [eAudiobook]
Available from another library: [Book] [DVD] [Blu-ray] [Audio] [eBook] [eAudiobook]
[Add to Shelf] [Add to Favorites] [Share]

3) Ready player one
Language: English
Choose a Format: [Book] [DVD] [Blu-ray] [Audio] [eBook] [eAudiobook]
Available from another library: [Book] [DVD] [Blu-ray] [Audio] [eBook] [eAudiobook]
[Add to Shelf] [Add to Favorites] [Share]



Theme and Branding

- Customizable theme and branding for the library
- Placards
- Website indexing

Theme Name: eps

Extends Theme: default

Logo (500px x 100px max)
Elmwood Park PUBLIC LIBRARY
explore. connect. create.
logoName.png [Remove image]
[Choose File] No file chosen

Favicon (32px x 32px max)
[Choose File] No file chosen

Page Background Color: #89b3c1 [Use Default]

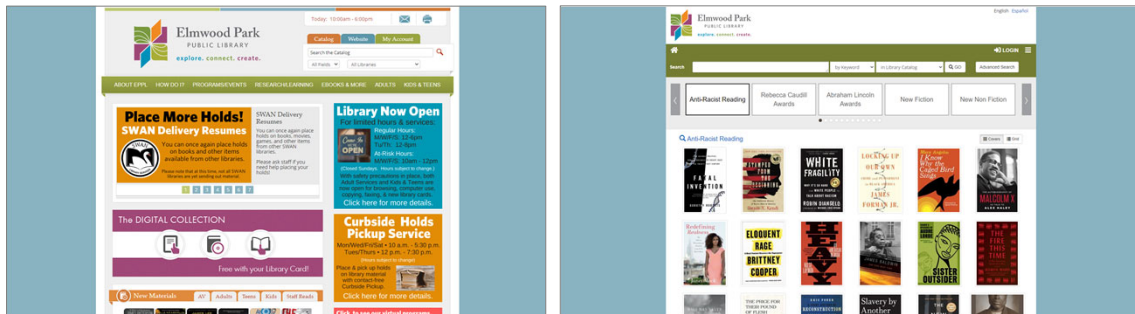
Body Background Color: #ffffff [Use Default] Contrast Ratio: 5.33

Body Text Color: #404040 [Use Default] Contrast Ratio: 10.37

Link Color: #1565c0 [Use Default] Contrast Ratio: 5.75

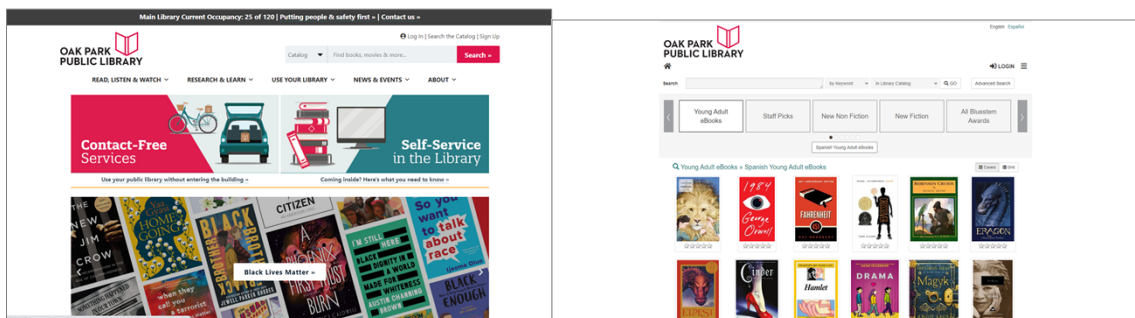


Elmwood Park



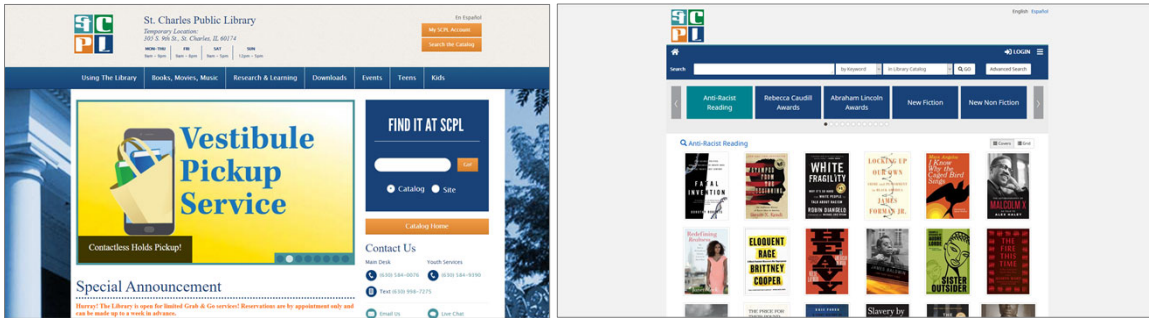
17

Oak Park



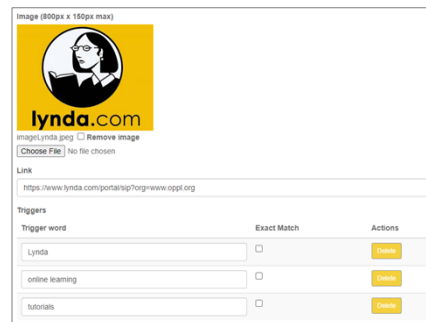
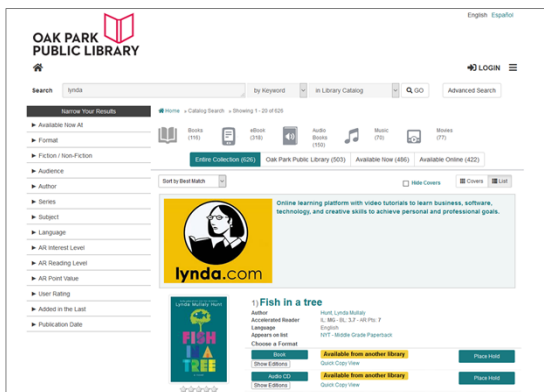
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St. Charles



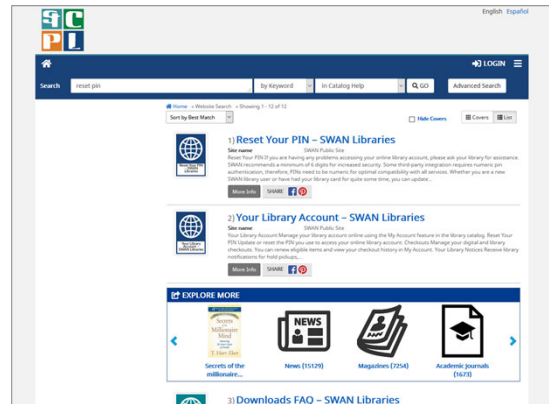
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Placards



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Website Indexing



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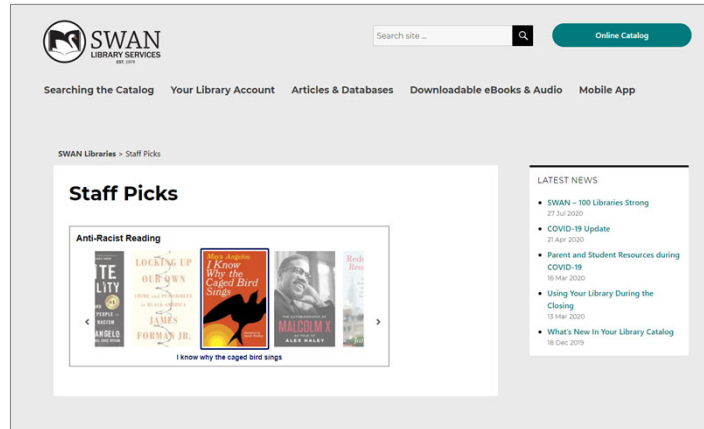
Public Service Features

- Spotlights
- Browse categories
- Searchable lists
- Masquerade mode

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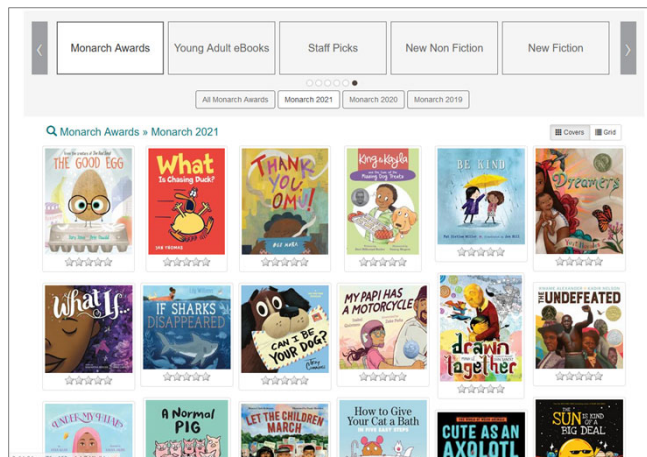
Spotlights

Embed staff lists or searches into your website.

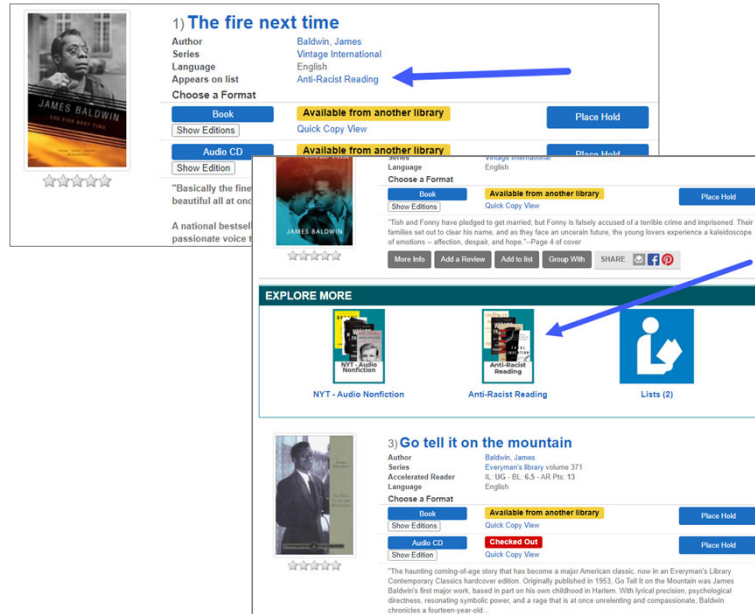


Browse Categories

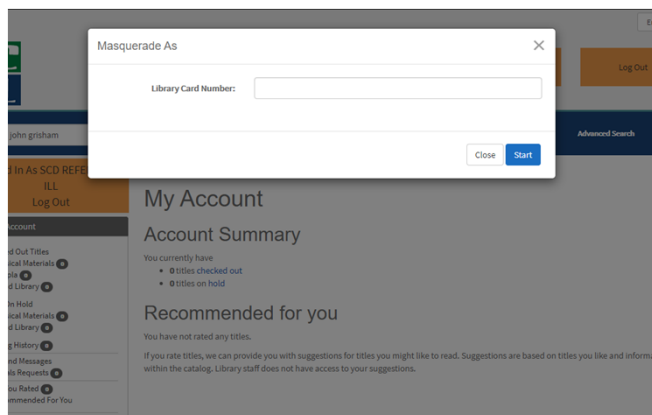
Add featured lists or searches to your catalog home page



Searchable Lists
 Lists appear in
 multiple places in
 search results



Masquerade Mode
 Staff can log in to
 patron accounts to
 assist them with just
 a barcode



Combined Results

The screenshot shows a library search interface with the search term 'james baldwin'. The results are divided into 'Catalog Results' and 'Lists'. Under 'Catalog Results', three items are listed: '1) The fire next time' by Baldwin, James; '2) If Beale Street could talk: a novel' by Baldwin, James; and '3) James Baldwin' by Baldwin, James. Under 'Lists', two items are shown: '1) NYT - Audio Nonfiction' and '2) Anti-Racist Reading'. A 'DP.LA' section also lists '1) James Baldwin' and '2) James Baldwin'. The interface includes a search bar, a 'LOGIN' button, and a language selector for 'English' and 'Español'.

Reviews, Lists, and Recommendations

The screenshot shows a 'Recommended for you' section with three quilt-related items: '1) Lucky charm quilts: 17 delightful patterns for precut 5" squares', '2) Wonderful one-patch quilts: 20 projects from triangles, half-hexagons, diamonds & more', and '3) Patchwork: 25 sewing projects for fabric lovers'. Each item includes a book cover, author information, and a 'Check Out' button.

The screenshot shows a 'Fiber Arts' collection page with three items: '1) On Weaving' by Albert, Ann; '2) Bauhaus' by Schröder, Herta; and '3) A life made by hand: the story of Ruth Asawa' by Ehrlich, Andrea. Each item includes a book cover, author information, and a 'Check Out' button. The page also features a 'Records Per Page' dropdown and a 'Hide Covers' option.

Export

Home > My Account > Reading History >

My Reading History (What's This?)

Export To Excel ← Delete All Stop Recording My Reading History

Sort By Last Used Filter Hide Covers

- 1) Modern weaving : learn to weave with 25 bright and brilliant loom weaving projects**
Author: Smith, Laura, 1979-
Format: Unknown
Last Used: In Use
Times Used: 3
Delete
- 2) Inventive weaving on a little loom : discover the full potential of the rigid-heddle loom, for beginners and beyond**
Author: Mitchell, Syne, 1970-
Format: Book
Last Used: In Use
Times Used: 1
Rating: ★★★★★
Delete
You Might Also Like
- 3) Modern minimal : 20 bold and graphic quilts**
Author: Carlton, Alissa Haight, 1976-
Delete

More Info Add a Review Add to List SHARE

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Aspen: What's Next?

- Testing and development
 - Availability issues
 - Serials and format issues
 - Performance and load testing
 - Accessibility improvements
- Usability testing with patrons and library staff
- Pilot project with 5-7 libraries

<https://support.swanlibraries.net/aspen>

Test links:

- catalogbeta.swanlibraries.net
- opsbeta.swanlibraries.net
- scdbeta.swanlibraries.net
- epsbeta.swanlibraries.net
- nudbeta.swanlibraries.net

Also checkout:

- [Arlington Public Library \(VA\)](#)
- [AspenCat \(CO\)](#)
- [Anne Arundel \(MD\)](#)

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EBSCO & E-Resources Goals

Robin Hofstetter, SWAN Electronic Resources Consultant

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EBSCO SWAN Group Purchase Update

- Partnership with RAILS for 2021-2022 to continue with the same package.

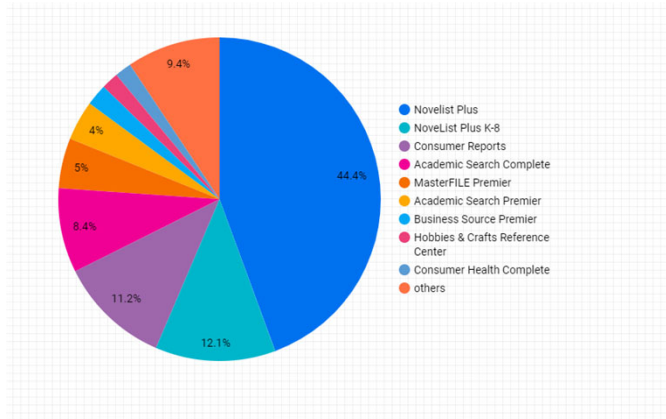


- New price details coming by December 2020.
- SWAN statistics training on COUNTER 5 Reports for EBSCO databases on October 7, 2020 from 1:00-2:00 PM.

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EBSCO Statistics

- Early stats show popular databases for July 2020
- Find stats on the SWAN-Wide Monthly Statistics Page
- <https://support.swanlibraries.net/documentation/64729>



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
- Promotional materials including graphics

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.

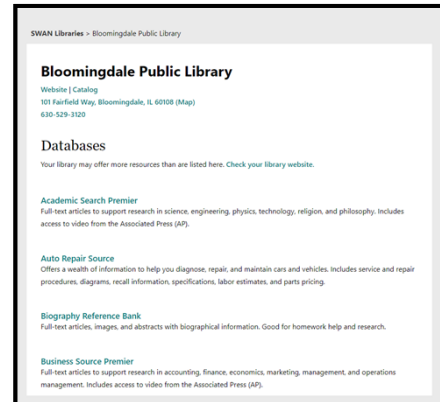
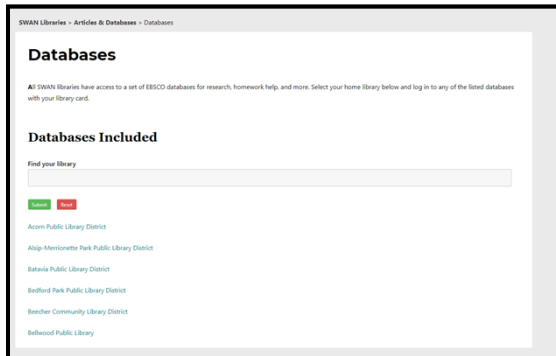
Article Search training presented by SWAN staff can be found in the Meetings and Training section of this support site.

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

EBSCO Resources on the Patron Site

- SWAN Patron site > Articles & Databases > Databases
- <https://swanlibraries.net/articles-databases/databases/>



EBSCO for Schools

- Students in school with public library cards can use the EBSCO databases either remotely or at the school.



What next?

- Vendors knocking on our door
- ProQuest
 - Ancestry
 - Chicago Tribune



Cataloging & Acquisition Goals

Scott Brandwein, SWAN Bibliographic Services Manager

Baker & Taylor Rental Collection (R&D)

Baker & Taylor

Goal: B&T configuration and processing expertise to assist member libraries

- Consistency in recommendations for carts/holding codes
- Guidelines for processing procedures

Symphony ILS

Goal: Extend holdability for new items through open SWS collection

- Titles will be selected from high demand holds
- Sent to members in ILL to fulfill holds
- Experiment with floating collections

BLUEcloud Acquisitions

Goal: Test functionality and gain expertise in BLUEcloud Acquisitions

- Collection managed through BLUEcloud Acquisitions
- Develop expertise and documentation

BLUEcloud Acquisitions

Fall 2020

- SWAN Headquarters testing in production (B&T Rental)
- New Libraries will be using BLUEcloud Acquisitions (Glenside, Roselle, Warrenville)

2021

- Phased migration of existing Acq SWAN libraries to BLUEcloud Acquisitions
- Invitation for other non-Acq libraries to use

The screenshot shows the BLUEPRINTS BLUEcloud Acquisitions 20.07.0 interface. It includes a header with the logo and version, a sub-header 'Importing Invoices using EDIFACT Standard', and a 'Did you know?' section. The main content is a 4-step process for importing invoices, accompanied by screenshots of the software interface. Step 1 shows the navigation path: Staff > Acquisitions > Invoicing. Step 2 shows the 'Import Invoices' button. Step 3 shows the 'Import New File' dialog box with fields for file location and vendor. Step 4 shows the 'Import Invoices' view displaying a table of imported invoices.

Do you know what OHM is and that SWAN built it?

- **OCLC Holdings Manager**
- Replaces OSMOSIS (TMQ) 20 year process for Illinois libraries
- Updates OCLC holdings in WorldCat through api set/unset holdings, based on comparison of consortium's bibliographic catalog
- Bibliographic Expertise/Design: Scott Brandwein
- Developer: Rudy Host

Processed:

- ✓ SWAN
- ✓ CCS
- ✓ PrairieCat

Up next:

- RSA
- Pinnacle
- SHARE (IHLS)

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WorldCat Holdings

The screenshot shows the WorldCat Holdings search results for the query "blue dog george rodrigue". The search results are displayed in a list format, with each item showing a book cover, title, author, and publication information. The first three items are:

- Are you Blue Dog's friend?** by George Rodrigue. Print Book 2009. A companion title to "Why Is Blue Dog Blue?" celebrates friendship in all its shapes and sizes, introducing readers to the funny, strange, loyal, and unique qualities that make fri... [Read More](#). Held by Libraries in SWAN.
- Blue dog man** by George Rodrigue. Print Book 2003. Held by Libraries in SWAN.
- Blue dog love** by George Rodrigue, Wendy Wolfe Rodrigue, David McAninch. Print Book 2001. Offers fans of the Blue Dog a new celebration of love that features the artist's own account of his life and work. Held by Libraries in Illinois.

The fourth item is **The Cajuns of George Rodrigue** by George Rodrigue. Print Book ©1975. George Rodrigue (March 13, 1944- December 14, 2013) was an American artist who was born in New Iberia, Louisiana, and lived along the banks of the winding...

On the right side of the screenshot, there is a detailed view of the first item, "Are you Blue Dog's friend?". It shows the book cover, author, and publication information. Below this, there are options to "View Description", "Explore Editions and Formats", and "Check Availability". The "Check Availability" section is highlighted with a blue bar. Below this, there is a "Libraries Worldwide" section showing 230 libraries. A search location is set to "600 Quail Ridge Drive, Westmont, US-IL". A table lists the following libraries and their distances:

Institution	Libraries	Distance
Justice Public Library District		7.70 mi Map
Oak Park Public Library		9.34 mi Map
Fountaindale Public Library District		10.74 mi Map
Wareville Public Library District		11.74 mi Map

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Data Security Goals

Steven Schlewitt, SWAN IT & Systems Support Manager



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SWAN Securities Initiative

Identifying and evaluating security/privacy vulnerabilities

- Within our libraries
- Within the ILS
- Internal to SWAN
- Interfacing with 3rd party vendors

Advocating security and privacy within our libraries

- Use a PIN on self-checkout
- Limit handling and storing of patron data
- Protect personally identifiable information
- For more examples, watch the SWANx Web Series – [Security & Patron Privacy Tips](#)

Advocating security and privacy with our vendors

- Ensuring 3rd parties are transmitting data and authenticating in a secure manner, following current standards and acceptable protocols

Ensuring our development follows industry standards

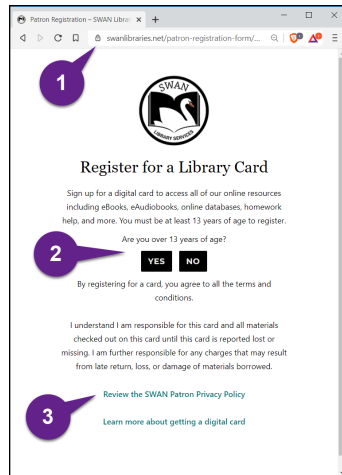
- Use of SSL certificates to ensure proper form encryption
- Reducing the "hops" of PII (Personally Identifiable Information)
- Encrypting transmission of this data

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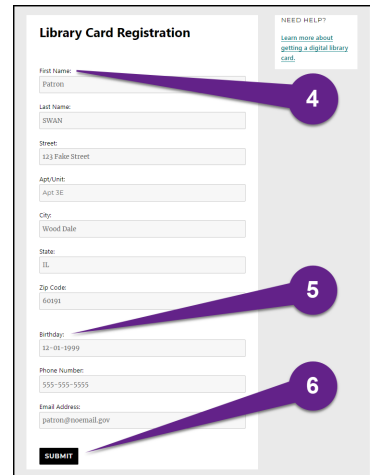
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Example: Online Patron Registration

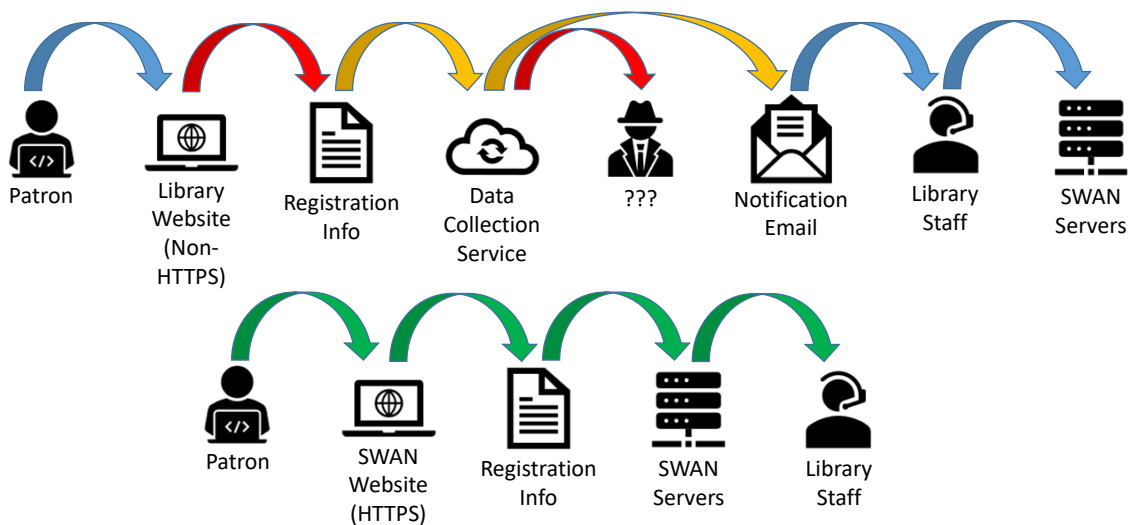
- 1. SSL encrypted sites ensure patron data is securely entered and transmitted
- 2. Age verification for Children's Online Privacy Protection Rule (COPPA) compliance
- 3. Privacy policy for further web compliance



- 4. Duplicate patron checking, based on name and birth date
- 5. Birth date does not permit underaged user entry, following COPPA
- 6. Submission transmits directly to Symphony server, avoiding mishandling of data



Reducing the Hops



SWAN Securities Initiative

- Associated Projects:

- Sunsetting of external SIP2 connectivity by end of 2021, transition vendors to:
 - TLS-wrapped SIP2 OR
 - Web Services OR
 - OpenAthens
- Exploration of TLS-wrapped (encrypted) internal WorkFlows and SIP2 connections
- SonicWall End of Life (EOL) hardware upgrades for SWAN-managed libraries
 - Prices range from \$500 (smaller installations) to \$2,000 (high-end installations)
 - We will reach out to affected libraries directly to plan/budget

These vendors have already made the switch!

- Demco
- Kanopy
- CenTec
- Midwest Tape
- Plymouth Rocket
- Patron Point
- MeeScan (TLS-SIP2)
- Library Market (TLS-SIP2)

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Disaster Recovery / ILS Platform Reliability

- Associated Projects:

- Scheduled Disaster Recovery tests
- Review of security/data breach plan
- Scheduling of Annual Rebuild
 - Completed February 23rd
 - Additional rebuild for SWAN100 in December (more info coming soon!)
- Audit/Review of Symphony and User Access policies
- Annual/monthly record purging and cleanup

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SWAN100 Project

Dawne Tortorella, SWAN Assistant Director

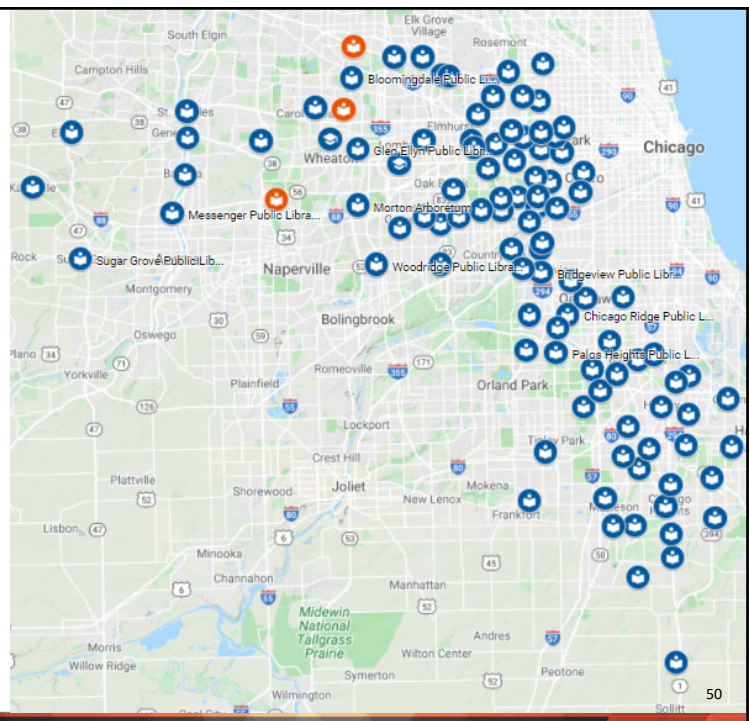


SWAN 100 Strong

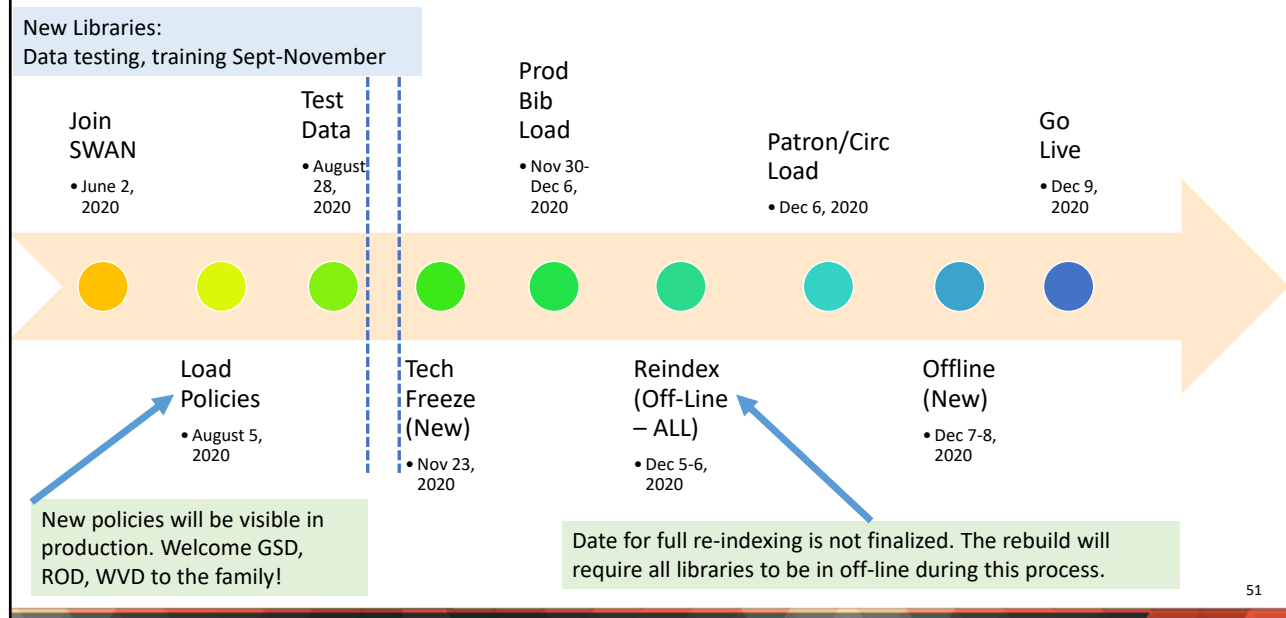
GSD - Glenside Public Library District
Tom Bartenfelder, Director

ROD- Roselle Public Library District
Samantha Johnson, Director

WVD - Warrenville Public Library District
Sandy Whitmer, Director



SWAN100 Migration Timeline



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Changes/Impact

Immediate - Now

- Policies are appearing in Symphony (GSD, ROD, WVD)
- Model policies for item type consolidation (e.g. video)
- Added to SWAN group in OCLC (ILL requests deflected)

During Migration (Dec)

- Off-line during bibliographic database re-indexing (targeted for: Dec 5-6)
- Assistance from SWAN member library staff as real-life experts (rely on expertise of user/advisory groups)

Post Migration

- First production use of BLUEcloud Acquisitions – will help development training, documentation, and procedures
- By Jan 2021, full resource sharing
- Consistent use of transit labels

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Announcements & Questions



SWAN
LIBRARY SERVICES
EST. 2014