



SWAN Fireside Chat

August 31, 2021

1

Agenda

- Recap of September 1st Changes
- Fine Free Update
- Patron Record Purge
- Pseudo Library Update
- User Category Confusion & Clean-up
- Diversity, Equity, Inclusion (DEI)
- Aspen Update
- E-Resources
- Upcoming Events & Meetings

2

2

Reminder for September 1st Policy Changes

- Completed:

- ✓ Elimination of print overdue notices – now only sent via text, voice message, or email (between 65-70% Fine Free)
- ✓ Consolidation of hold pick-up notices and accommodation for pseudo-library hold pick-up notices (sent once a day around 2:00 PM)
- ✓ Return to pre-pandemic notice wording
- ✓ Return to pre-pandemic grace periods
- ✓ Default SWAN processing fee set to \$0, previous default was \$5 (Libraries can request local processing fee charges.)
- ✓ COVID related online catalog banners removed
- ✓ Flexibility in blocking for Fine Free based on criteria of library choice

- Scheduled:

- ❑ Libraries Fine Free For Now – decide on pre-pandemic or Fine Free rules (September 1)
- ❑ Reinstate 90-day removal of temporary patron records created through Online Patron Registration that have not been reviewed and updated/extended by home library (September 1)
 - ❑ Please see our support site [news post](#)
- ❑ Revert to pre-COVID hold pickup notices for all libraries
- ❑ Remove COVID Outreach Circ Rule
- ❑ Remove remaining temporary hold map adjustments
- ❑ Overdue 1st notices return to 7 days (from 14)

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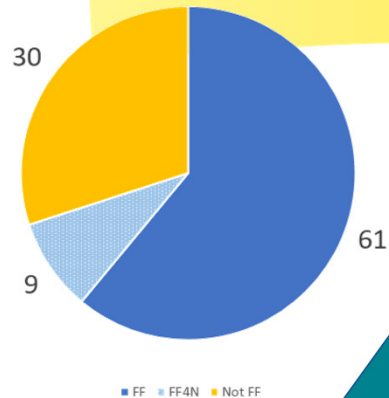
3

3

Fine Free Decisions & Numbers

September 1, 2021

Return to pre-covid circ rules, or fine free permanently



September 2, 2021

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■ FF ■ FF4N ■ Not FF

4

4

Patron Record Purge: Monthly Report



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5

5

BLUEcloud Analytics – Inactive Patron Review



Monthly email with History List link to review (sent 2nd of month)

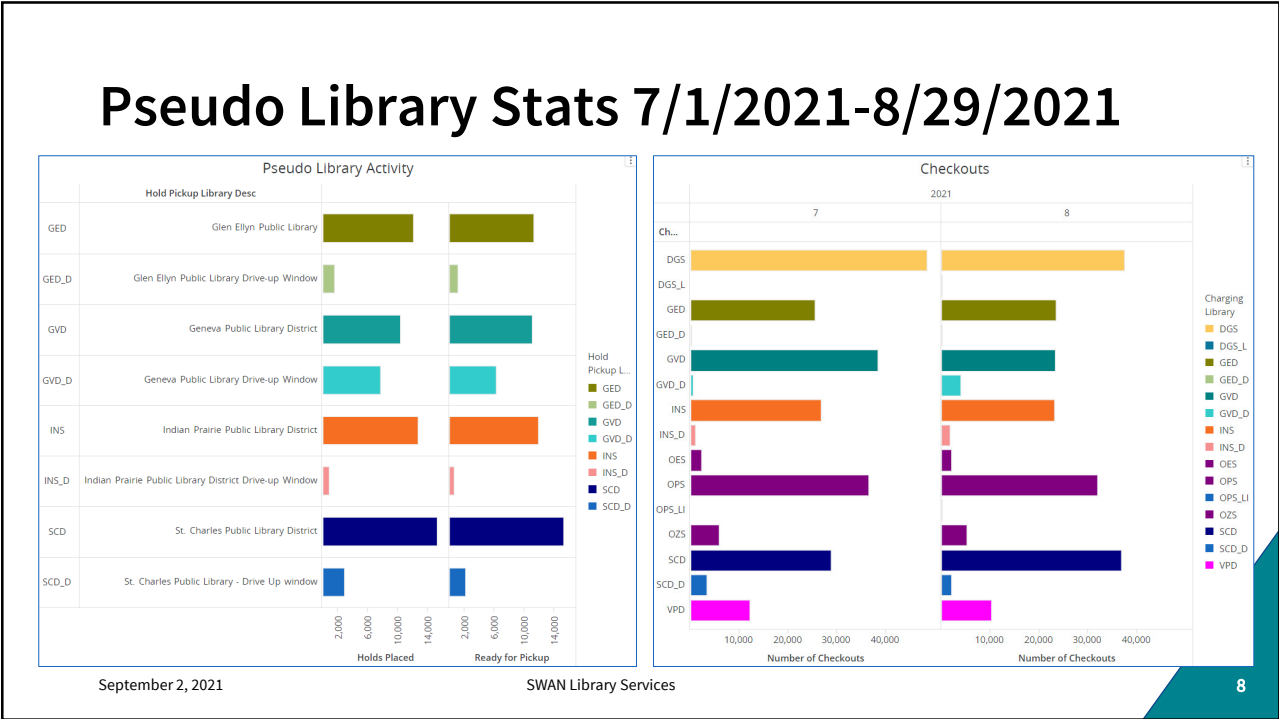
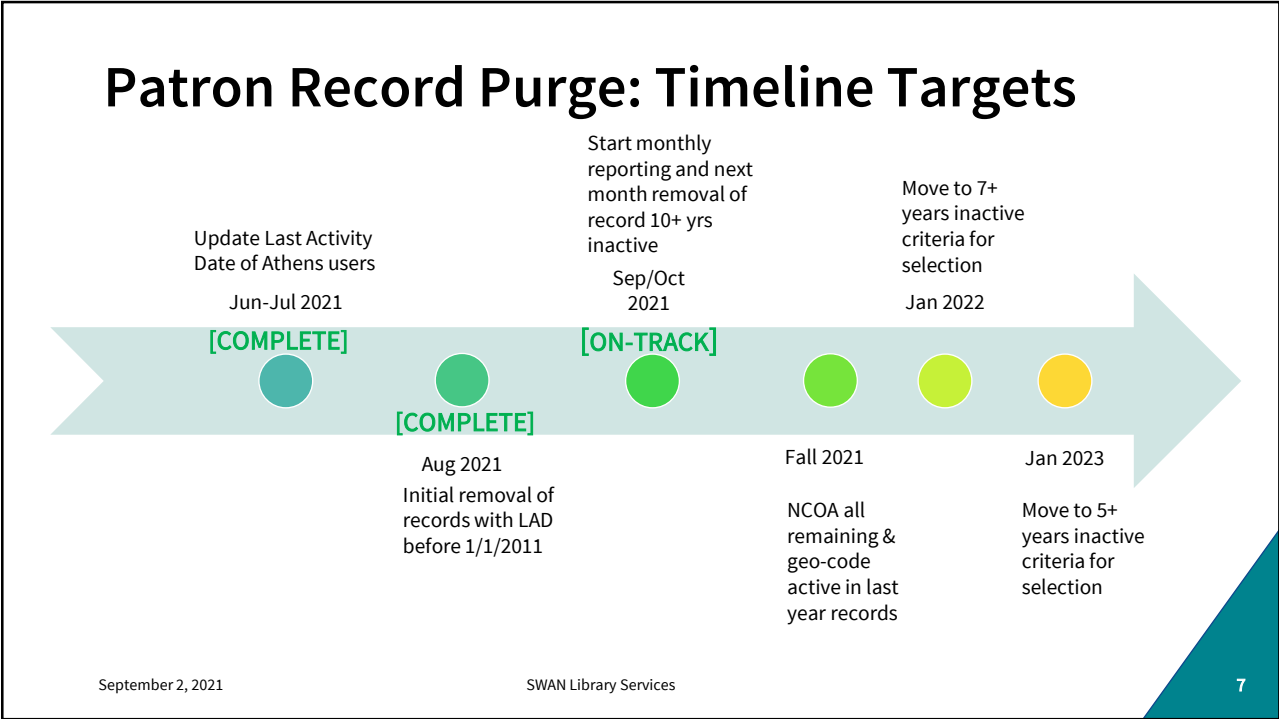
Name	Status	Message Creation Time	Actions	Remove
Review Inactive Patrons	Ready (mark as "unread")	8/30/21 7:52:35 AM	abi	<input type="checkbox"/>

Patrons listed are selected based on eligibility of inactivity in determining record removal.
 If a patron owes \$100 or less in total fees/fines, those bills will be removed and then the patron record removed. Patrons with more than \$100.00 in bills will be retained in the system. If the library wishes to remove these patrons, they will need to process bills and remove the patrons individually. This is up to the library's discretion.

User Barcode	User Profile	User Last Name	User First Name	User Address Street	User Address City	User Address State	User Address Email	User Age	User Last Activity Date	User Status	Sum (Bill Amount)
Count											6
Total											\$249.00
229570C						IL		29	2011-08-19	COLLECTION	\$69.00
229570C						IL		45	2010-08-17	BADADDRESS	\$1.00
229570C						IL		28	2011-01-20	COLLECTION	\$53.00
229570C						IL		41	2011-06-03	BLOCKED	\$70.00
229570C						IL		31	2011-08-23	BLOCKED	\$19.00
229570C						IL		37	2011-04-21	OK	\$37.00

6

6



User Category Confusion/Clean-Up

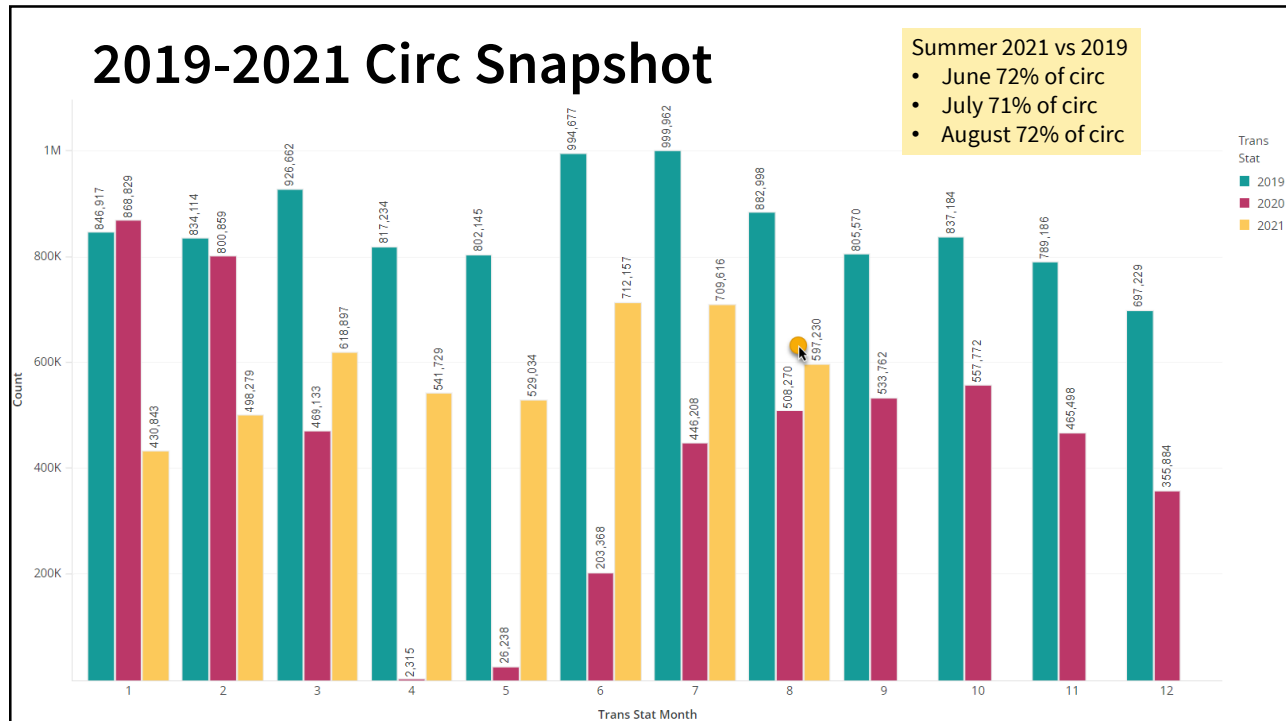
- Pickup Preference (User Cat 11)
 - BOOK_DISC
 - CURBSIDE
 - DESK
 - ~~DRIVEUP~~-(replaced by Pseudo)
 - HOME_DEL
 - ~~LOCKERS~~-(replace by Pseudo)
 - OPEN
 - OUTREACH
 - XPRESS_CKO
- Notice Preference
 - EMAIL
 - **PHONE** (only setting that notice logic follows)
 - TEXT
 - ~~PRINTED~~-(will be deprecated and replaced with MANUAL)

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9

9



10

DEI Task Force Update

Subject heading changes
Future networking group

- Subject headings will be updated to supplement the terms
 - Sexual minorities
 - Transsexual
- Proposed adoption of Homosaurus subject vocabulary
- Leadership:
 - Co-conveners: Scott Brandwein (SWAN), Rachel Fischer (CCS)
 - Administrative Support: Nincy George (RAILS)

September 2, 2021 SWAN Library Services 11

11

RAILS DEI in Metadata Networking Group

- Group discussions, resource sharing, and consensus
- Early meetings will focus on subject vocabulary
 - What are Illinois libraries are choosing to do?
 - Recommendations
- Proposed first meeting date: Wednesday, 11/17, 1:00-2:30

September 2, 2021 SWAN Library Services 12

12

Aspen Rollout


September 2, 2021

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13

13

First Cohort Schedule

DATE	WHAT
August 30th, 2021	Kickoff Meeting 
Every other Monday, 10 a.m.	Aspen office hours
September 7th, 2021 11 a.m.	Aspen Admin Training: Themes & Library Settings
September 14th, 2021 11 a.m.	Aspen Admin Training: Browse categories, Spotlights, & Adding Covers
September 21st, 2021 11 a.m.	Aspen Admin Training: Placards & System Messages
October 5th, 2021 11 a.m.	Aspen Admin Training: Record Grouping
October 12th, 2021 11 a.m.	Aspen Admin Training: Purchase Suggestions
October 18th-29th, 2021	Go live

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14

14

Second Cohort Schedule

Dates coming soon! For now, save these dates January - March:

- Tuesdays at 11 a.m. for Aspen Admin trainings
- Mondays at 10 a.m. for Aspen Office Hours

September 2, 2021

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15

15

Aspen 21.10 Release Highlights

- Better handling of items checked out to generic users (for display, etc.)
- Added item barcodes to checkouts in My Account
- Using uniform titles to improve record grouping
- ProPay (fines payment) integration *still testing

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16

16

Kanopy Update

- Current and new SWAN subscribers will receive a 5% discount beginning September 1st.
- If your library adds Kanopy over the next year, you could increase the discount to 10% for all libraries.

<https://support.swanlibraries.net/news/2021-08/87475>

September 2, 2021

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17

17

Webinar on Web Accessibility

- September 21, 1:00 – 2:00 pm
- Web Accessibility Fundamentals for Libraries presented by Deque and SWAN

<https://librarylearning.org/event/2021-09-21/web-accessibility-fundamentals-libraries#main-content>

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18

18

Beanstack Presentation – Info Sessions

- Sept 14th 10:00 am
- Sept 15th 1:30 pm

About This Event

See Zoobean's Beanstack for supporting winter, school-year, and summer reading programs, as well as monthly reading challenges. This opportunity is for SWAN libraries to learn more about the program and explore opportunities to work together to develop shared programs and resources.

Beanstack's web service and 4.7-star mobile app help SWAN librarians create, manage, and measure summer and year-wide reading challenges that drive engagement and provide better data. SWAN libraries will customize their reading challenges -- making it easy for patrons to register, track reading, and earn incentives while gaining data-driven insights that help show the value a library plays in the community. Beanstack's content team also creates timely reading challenge templates each month and offers a premium paper log and sticker book, called the Badge Book, for challenges like 1,000 Books Before Kindergarten.



September 2, 2021

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19

19

Other Upcoming Meetings

[See SWAN's events on L2](#)



SWAN Cataloging Advisory
GoToMeeting
Event Type(s) Meeting
Sponsor SWAN - System Wide Automation Network



SWAN Circulation/LL Office Hours
GoToMeeting
Event Type(s) Training
Sponsor SWAN - System Wide Automation Network



Web Accessibility Fundamentals for Libraries
Zoom
Event Type(s) Training
Sponsor SWAN - System Wide Automation Network



SWAN Aspen Admin Training: Themes & Library Settings
Zoom
Event Type(s) Training
Sponsor SWAN - System Wide Automation Network



SWAN Aspen Admin Training: Browse categories, Spotlights, & Adding Covers
Zoom
Event Type(s) Training
Sponsor SWAN - System Wide Automation Network



SWAN Technology Users
GoToMeeting
Event Type(s) Meeting
Sponsor SWAN - System Wide Automation Network



SWAN Cataloging Office Hours
GoToMeeting
Event Type(s) Training
Sponsor SWAN - System Wide Automation Network



SWAN Aspen Office Hours
Zoom
Event Type(s) Training
Sponsor SWAN - System Wide Automation Network



SWAN Discovery and User Experience Advisory
GoToMeeting
Event Type(s) Meeting
Sponsor SWAN - System Wide Automation Network



SWAN BLUEcloud Analytics Office Hour
GoToMeeting
Event Type(s) Training
Sponsor SWAN - System Wide Automation Network



SWAN Aspen Admin Training: Placards & System Messages
Zoom
Event Type(s) Training
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September 2, 2021

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20

20

