



# SWAN Fireside Chat

September 28, 2021

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## Agenda

- Policy Recap
- SWAN Technology Update
- Patron Records
- Aspen Update
- Beanstack Reading Challenge
- WorldCat Discovery v2
- SHARE IL sunset
- Book Club Kits
- BLUEcloud Staff
- Sharing some stats
  - Fine Free
  - Pseudo libraries
  - Aspen holds
  - EBSCO full year usage

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## Policy Recap

- Completed prior to September:
  - ✓ 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
- Completed in September:
  - ✓ Libraries Fine Free For Now – decide on pre-pandemic or Fine Free rules (September 1)
  - ✓ 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)
- Scheduled:
  - Reinstated 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](#)

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## SWAN Technology Update Meeting September 23<sup>rd</sup> 2021

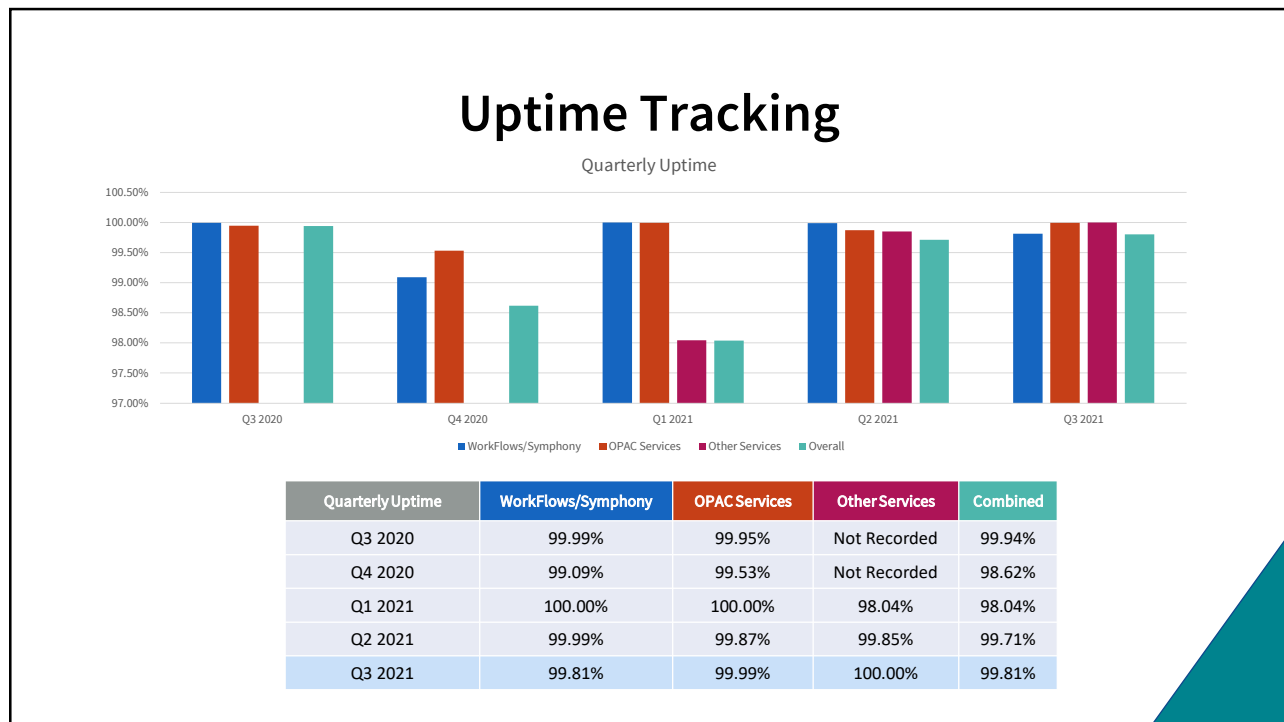
- New Meeting Format:
  - Meets biannually (March & September)
  - All library staff are welcome, IT staff encouraged to attend
  - Technology-oriented project updates and best practices
  - Continued discussion at [SWAN Community Forums / Technology](#)
- Topics Addressed on 9/23:
  - Detailed uptime report (last 6 months)
  - Windows operating system version support
  - Sonicwall firewall end of support (EOS) replacements
  - Securities initiative / risk assessment project
  - “How do we do that?” – Open sourcing a project
- See Meetings & Documents
  - <https://support.swanlibraries.net/meeting/82103>

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## ProPay Credit Card Swipes

- Effective 10/1/2021, the cost per swipe is \$85
- Submit a request via:
  - <https://support.swanlibraries.net/forms/66138>



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# Web Services Upgrade on October 6<sup>th</sup>

• Wed, Oct 6<sup>th</sup>  
2AM to 3AM

<https://support.swanlibraries.net/news/2021-09/88054>

• Services impacted during upgrade:

- OPAC:
  - Aspen & Enterprise My Account functions
  - Aspen & Enterprise holds
  - Enterprise Payment Services
  - Enterprise item availability statuses
  - SWAN App (BLUEcloud Mobile App)
- MobileCirc/Mobile Staff
- BLUEcloud Central, Circ, Cat, Acq

• 3<sup>rd</sup> Party Vendor Integrations:

- Communico
- Demco
- NovelList
- Quipu
- Springshare
- Capira
- Kanopy
- Plymouth Rocket
- Patron Point
- OpenAthens (and associated reference tools)

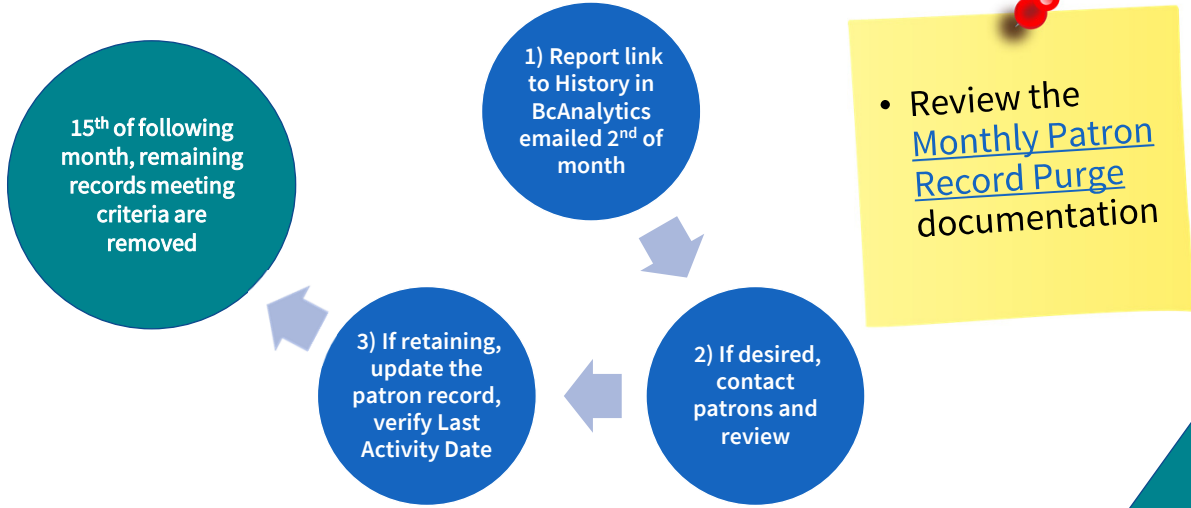
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## Patron Records

Updates on patron record clean-up, NCOA, special use patron

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# Patron Record Purge: Monthly Report



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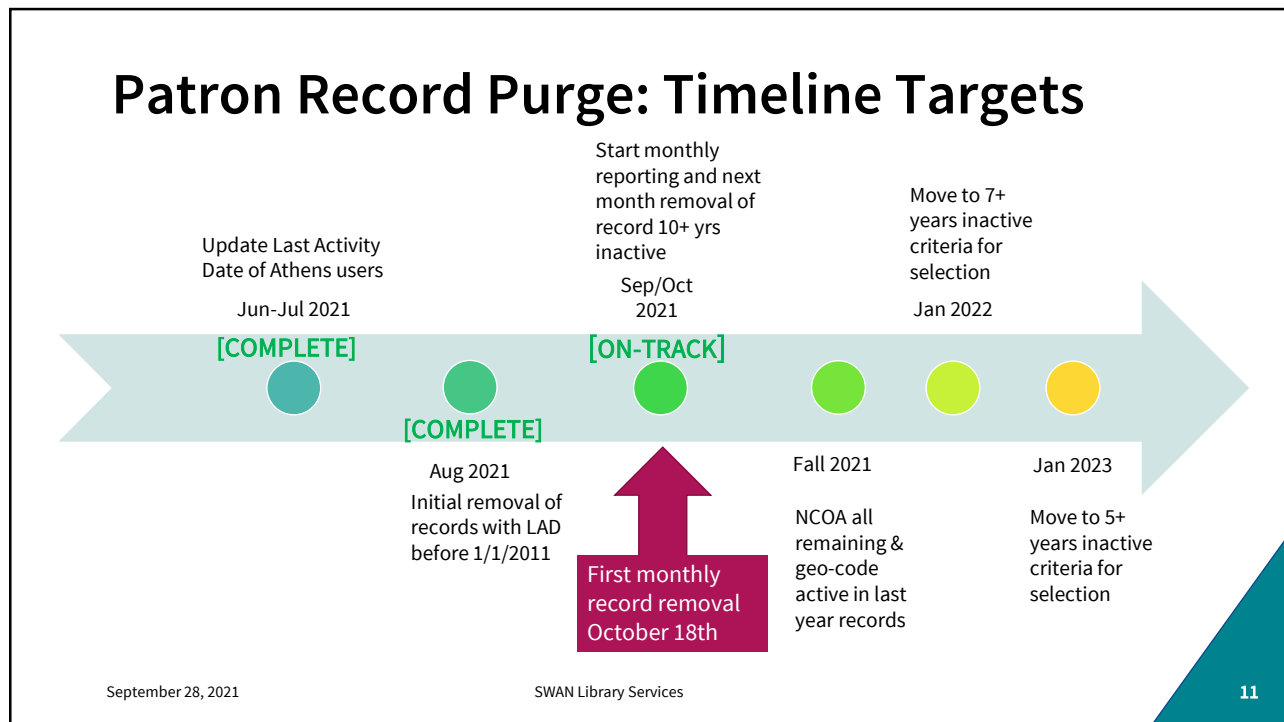
# BLUEcloud Analytics – Inactive Patron Review

Monthly email with History List link to review (sent 2<sup>nd</sup> of month)

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

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## NCOA

- Export of data targeted after October 18<sup>th</sup>
- Request for geo-location based on activity since 1/1/2019 or 1/1/2020 (pending analysis and cost projection)
- All existing BADADDRESS status and patrons with notes from 2018 NCOA run not updated will be removed prior to submitting 2021 NCOA run

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## Online patrons – digital only

- Digital only, ONLINE patron profile cards (created through the SWAN Online Patron Registration tool) are 90-day only use
- Libraries must convert to full-use card or verify as digital-only <https://support.swanlibraries.net/documentation/68769>
- Expired cards will be removed – we have postponed this removal so as not to conflict/confuse with monthly patron record removal process
- Please review and update or allow expiration/automatic removal of these cards

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## Reminder: Special Use Patron Cards

- Non-Resident Cards
  - <https://support.swanlibraries.net/documentation/86701>
  - Cards for Kids
  - Disabled Veterans
- School Partnerships
  - <https://support.swanlibraries.net/documentation/74798>
  - Student Cards
  - Teacher Cards

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# Non-Resident IPLAR Reporting

REPORT DETAILS

View Filter:  
{User Attribute Category3} = NONRESIDENT, CARDS4KIDS, VETERAN\_NF

VIEW FILTER    Auto-Apply changes

User Attribute Category3 In List (NONRESIDENT, CARDS4KIDS, VETERAN\_NF)

User Library	User Attribute Category3	CARDS4KIDS	NONRESIDENT	VETERAN_NF
Blue Island Public Library	Number of Users		2	
Batavia Public Library District	Number of Users		2	
Berwyn Public Library	Number of Users		1	
Calumet City Public Library	Number of Users		82	
Clarendon Hills Public Library	Number of Users		25	
Carol Stream Public Library	Number of Users		31	
Crestwood Public Library District	Number of Users		55	
Downers Grove Public Library	Number of Users		203	
Elmwood Park Public Library	Number of Users		1	
Glen Ellyn Public Library	Number of Users	8	9	
Green Hills Public Library District	Number of Users		4	
Grande Prairie Public Library District	Number of Users		17	
Geneva Public Library District	Number of Users		6	

Shared Reports > SWAN Reports > **IPLAR**

**ILLINET Traffic Survey**  
 Owner: SWANLIBSdtortorella  
 Modified: 7/16/21 2:39:28 PM  
 Reports to pull data required for the Illinois State Library ILLINET Interlibrary Loan and Reciprocal Borrowing Statistical Survey. Data is pulled from 7/1/2017 - 6/30/2018. Reporting deadline: March 31, 2019

**16.2 - Number of Non-resident Cards**  
 Owner: SWANLIBSdtortorella  
 Modified: 6/3/21 3:47:23 PM  
 In 2021, IPLAR reporting asks for Non-resident cards, Cards for Kids, and Disabled Veterans card counts. If your library is using User Category 3 to reflect this information, this report provides counts for all SWAN libraries.

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# Aspen Rollout

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## 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: Purchase Suggestions
October 12th, 2021 11 a.m.	Aspen Admin Training: Record Grouping
October 18th-29th, 2021	Go live

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## Second Cohort Schedule

DATE	WHAT
January 10 <sup>th</sup> , 2022	Kickoff Meeting
Every other Monday, 10 a.m.	Aspen office hours
January 18 <sup>th</sup> , 2022 11 a.m.	Aspen Admin Training: Themes & Library Settings
February 1 <sup>st</sup> , 2022 11 a.m.	Aspen Admin Training: Browse categories, Spotlights, & Adding Covers
February 8 <sup>th</sup> , 2022 11 a.m.	Aspen Admin Training: Placards & System Messages
February 15 <sup>th</sup> , 2022 11 a.m.	Aspen Admin Training: Purchase Suggestions
March 1 <sup>st</sup> , 2022 11 a.m.	Aspen Admin Training: Record Grouping
March 7 <sup>th</sup> – 18 <sup>th</sup> , 2022	Go live

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## Aspen 21.12 Release Highlights

- Staff with masquerade mode permissions can masquerade as any patron
- Fixes to diacritics displaying in grouped records
- Ability to display placards based on language
- Improvements to Hoopla grouping, using the subtitle

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## On Deck Priorities

Aspen research and development priorities through the end of the year.

Set in our bi-monthly DUX meetings.

Includes:

- Fines payment
- PIN resets for cards that have not previously logged in
- Format improvements for “library of things” records
- Better color contrast validation

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

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# Resource Sharing Updates

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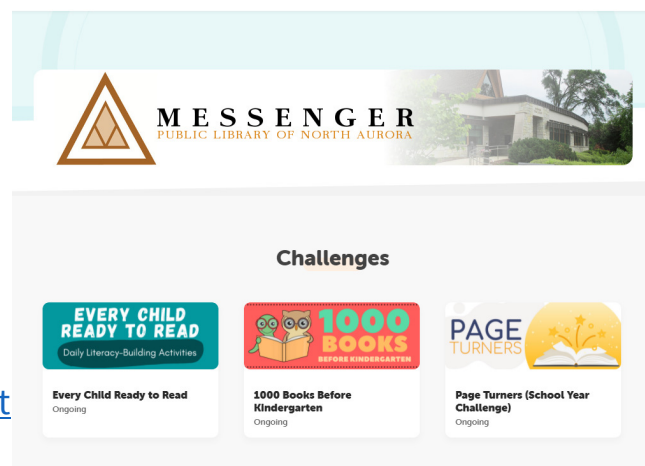
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## Beanstack Reading

- Over 45 SWAN libraries currently using Beanstack
- New SWAN libraries signing up before 9/30 receive a 15% discount
- Grant application submitted to fund Beanstack for 2 years for all SWAN public libraries
- News post/pricing - <https://support.swanlibraries.net/news/2021-09/87915>



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## WorldCat Discovery v2

- Updated interface
- Met with developers to outline SWAN consortium needs
- Reconfiguring availability display
- Tested with OCLC developers  
“automatic no” based on availability



[The golem and the jinni : a novel](#)

Authors: [Helene Wecker](#) (Author)

[Print Book](#) 2013, First edition.  
New York : Harper, [2013]

Summary: Chava, a **golem** brought to life on the streets of New York until a fateful choice

At Batavia Public Library District

BLD			1 Available at this Location
Shelving Location	Call Number	Status	
	FIC Wecker, Helene	FICTION_A	

Results per Page: 10 1-1 of 1

Access Options

At Batavia Public Library District

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## SHARE IL sunset

- Only 19 SHARE IL profiles for libraries have activity in 2021
- SWAN will reach out to these libraries to share how to request material from SWAN libraries via OCLC
- Workshop 9/29 to assist these libraries – recording will be shared
- This program was developed to facilitate direct holds as interlibrary loan requests between consortium – this is handled more equitably through WorldShare ILL

NOTE: Statement from RAILS in RAILS Report for Consortia Committee Meeting, July 19, 2021

Pursuant to a recent conversation with the Consortia Committee regarding the future of SHARE Illinois, a legacy cooperative project intended to facilitate staff-initiated interlibrary loans among participating Illinois library automation consortia, RAILS will sunset our support for this program effective October 30, 2021. We will reach out to participating consortia with specific details regarding termination of agreements and taking down the website and email list.

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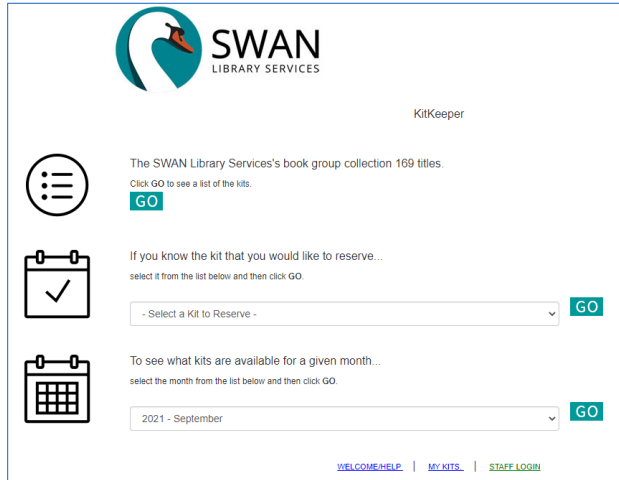
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# Sharing Book Club Kits

- KitKeeper Pilot has completed – Geneva and Downers Grove are using KitKeeper to manage their book club kits.
- Program is open to any SWAN libraries wishing to share/request full book club kits.
- Doesn't require all book club management to be in kits – just those entered into KitKeeper
- Session on October 1<sup>st</sup> will share the process and steps to join the program.



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## BLUEcloud Staff

Reigniting our BLUEcloud staff pilot groups: Circulation Advisory focus for 2022; increased work with SirsiDynix product team on Acquisitions and Circulation  
 Team Leads: Crystal Vela, Circulation; Samantha Dietel, Acquisitions; Claudia Nickson, Cataloging

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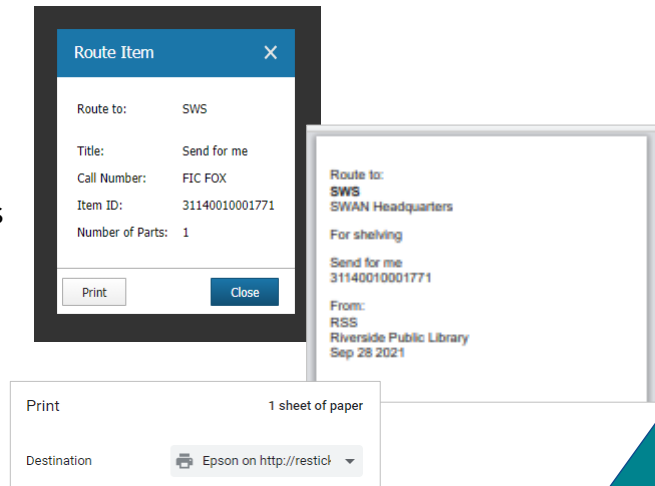
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## BLUEcloud Staff Release 21.03

- Released 9/21
- Staff circulation functions expanded including:
  - Permissions to restrict functions (e.g. edit patrons, pay bills, place/modify hold for patron)
  - Circulation receipts
  - Check Item Status
  - Receive item from transit



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## Statistics & such

A look at some interesting numbers

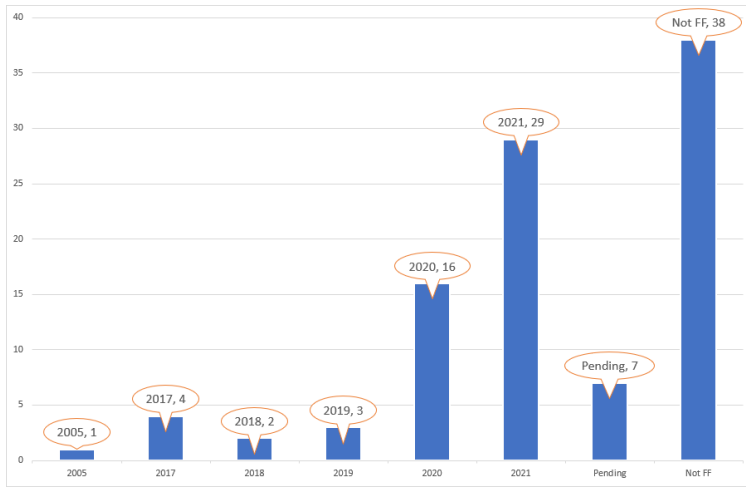
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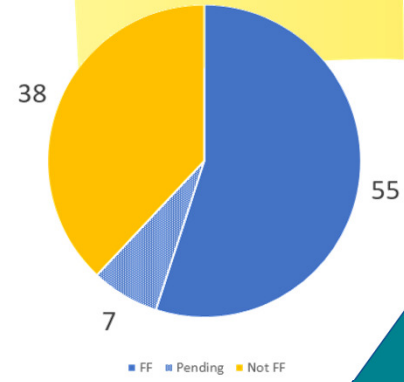
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# Fine Free Decisions & Numbers



October 1, 2021  
55% fine free  
7% in progress



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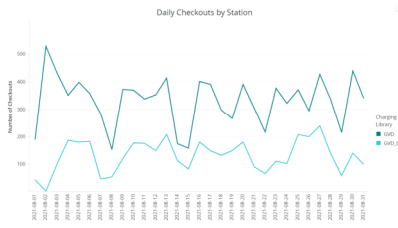
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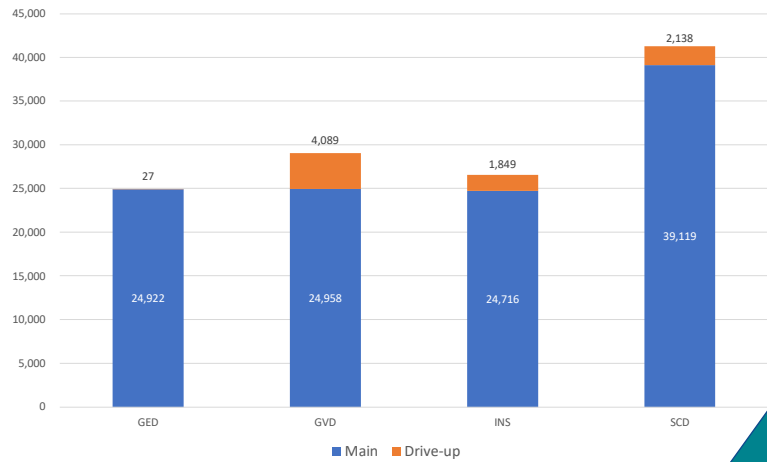
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# Pseudo Libraries – Drive-up Windows

Library	Main	Drive-up	Total	% Drive-up
GED	24,922	27	24,949	0.11%
GVD	24,958	4,089	29,047	14.08%
INS	24,716	1,849	26,565	6.96%
SCD	39,119	2,138	41,257	5.18%



August 2021 - Check-outs

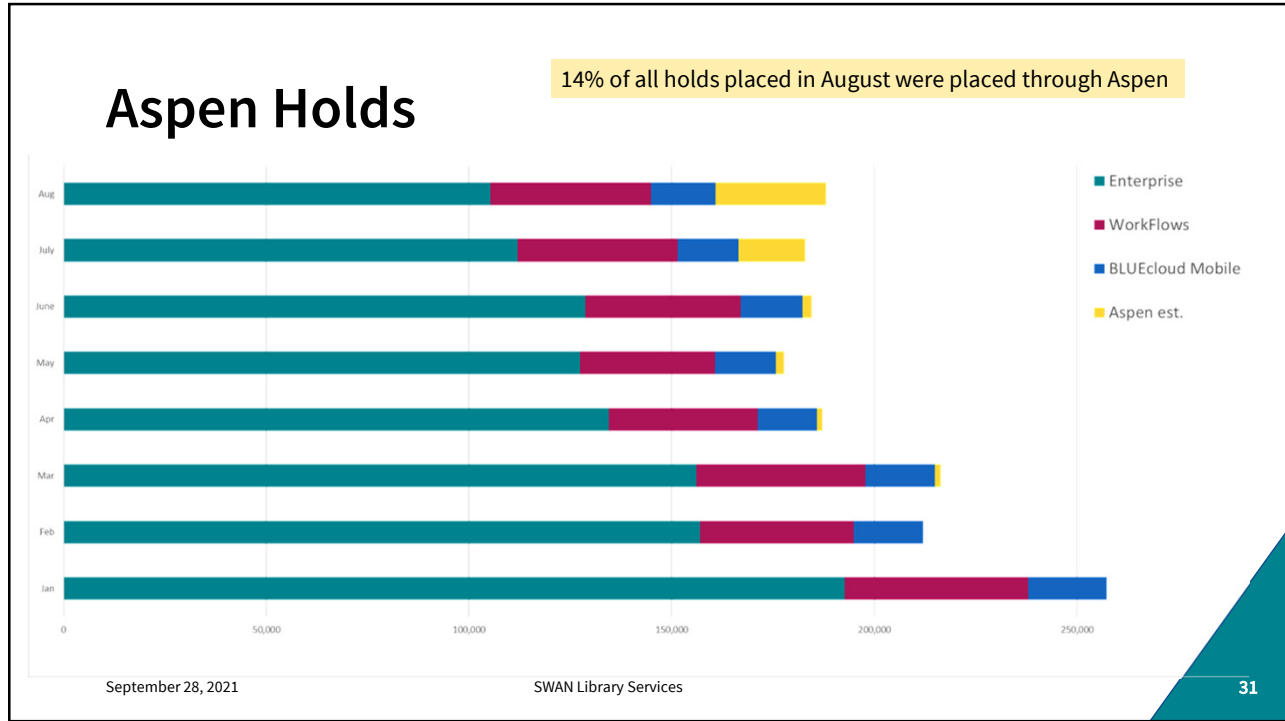


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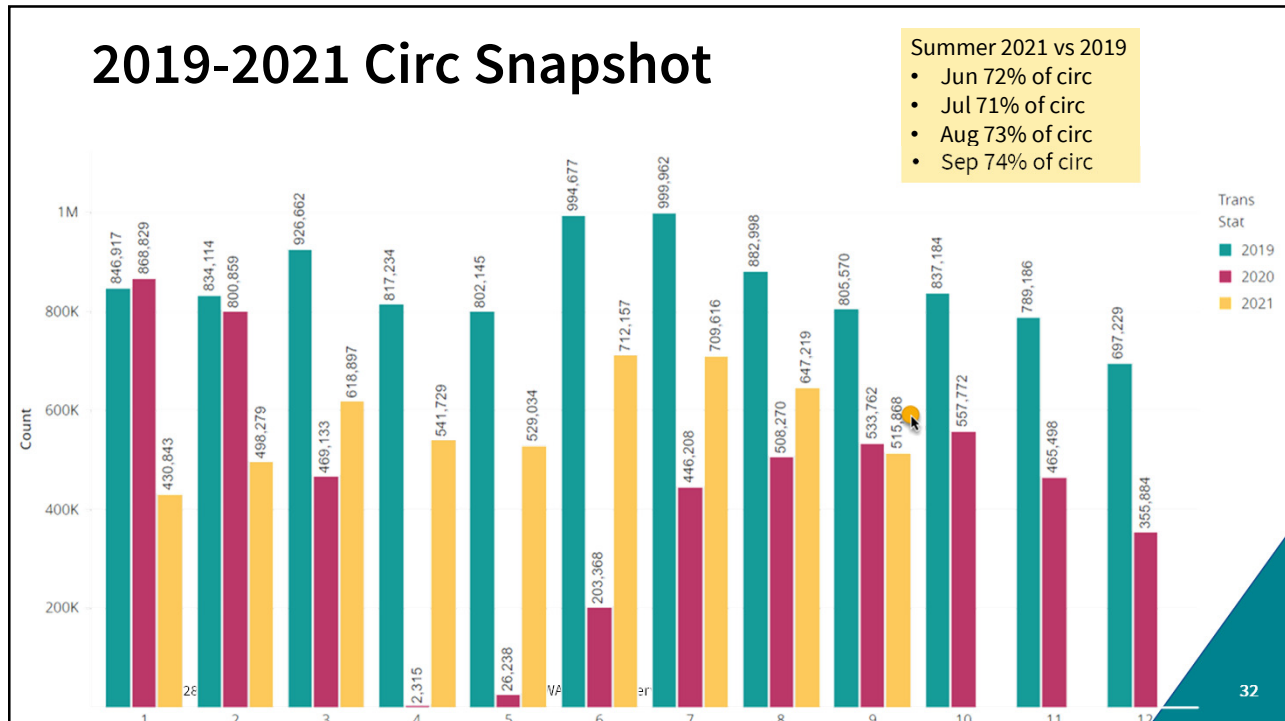
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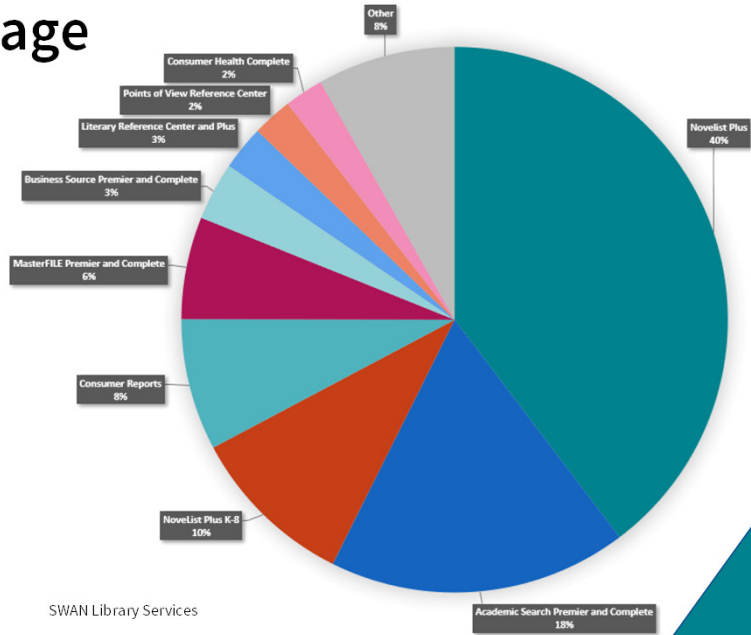
# EBSCO FY21 Usage

EBSCO package cost-per-use: \$1.65

SWAN book item types cost-per-use (items created since 1/1/2015): \$2.32



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# Web Accessibility

Thank you for attending Web Accessibility Fundamentals for Libraries!

Please see the RAILS page dedicated to evaluating resources with a VPAT <https://www.railslibraries.info/vpat>

For more info, please check out this webinar Intro to Screen Readers <https://youtu.be/y0m7VEHoXMI>

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# Other Upcoming Meetings


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

- Requesting Items from SWAN Libraries – 9/29
- Book Club Kit Sharing: KitKeeper – 10/1
- Monthly Office Hours
  - Aspen – 10/4
  - Circulation & ILL – 10/4
  - Cataloging – 10/13
  - BLUEcloud Analytics – 10/4
  - Directors' Coffee Hour – 10/15




**Requesting Items from SWAN Libraries (SHARE Illinois Sunsetting)**  
 Oct 29  
 Outtakeeting  
 Event Type(s) Meeting  
 Sponsor SWAN - System Wide Automation Network

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**SWAN Book Club Kit Sharing: KitKeeper**  
 Oct 01  
 Outtakeeting  
 Event Type(s) Meeting  
 Sponsor SWAN - System Wide Automation Network

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**SWAN Circulation/ILL Office Hours**  
 Oct 04  
 Outtakeeting  
 Event Type(s) Training  
 Sponsor SWAN - System Wide Automation Network

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**SWAN Aspen Office Hours**  
 Oct 04  
 Zoom  
 Event Type(s) Training  
 Sponsor SWAN - System Wide Automation Network

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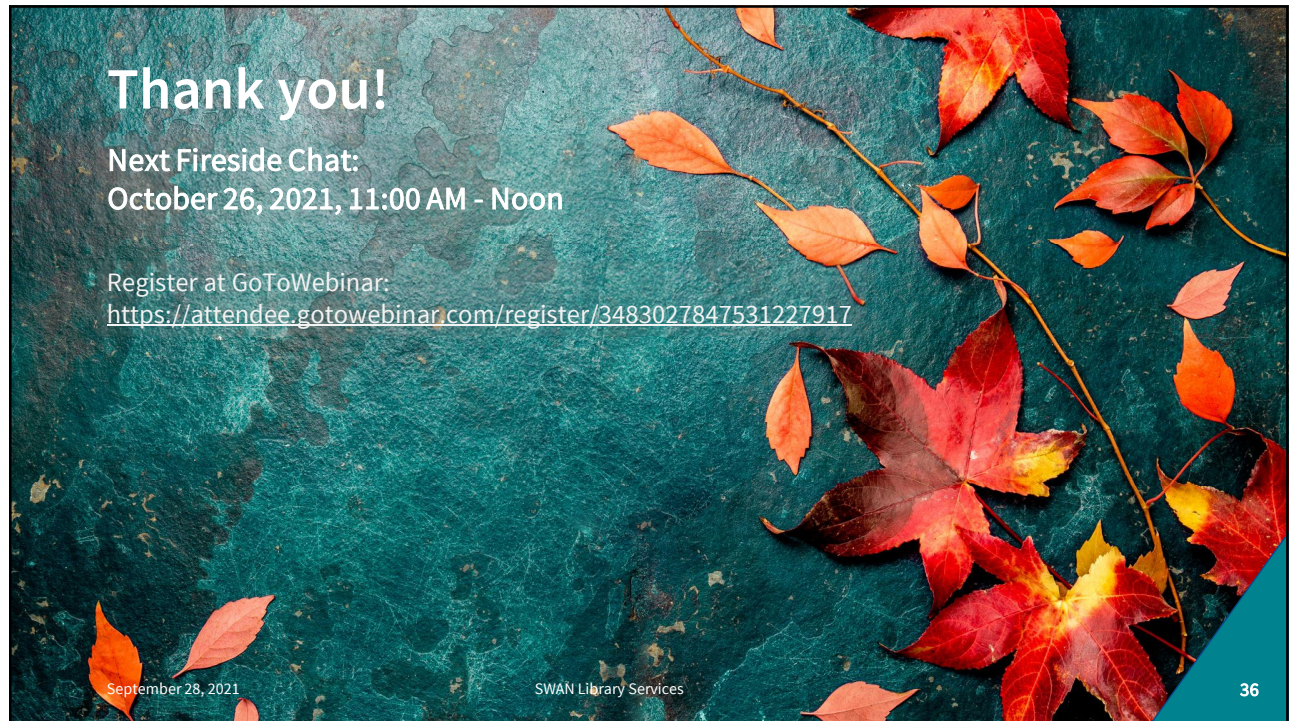
**SWAN BLUEcloud Analytics Office Hour**  
 Oct 04  
 Outtakeeting  
 Event Type(s) Training  
 Sponsor SWAN - System Wide Automation Network

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**Thank you!**

Next Fireside Chat:  
 October 26, 2021, 11:00 AM - Noon

Register at GoToWebinar:  
<https://attendee.gotowebinar.com/register/3483027847531227917>

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