



SWAN Fireside Chat

January 25, 2022

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Agenda

- Aspen
 - Cohort 2 Update
 - Fines Payment
- BLUEcloud Staff Pilot
 - Overview Session – Feb 8
 - Circ Adv findings & activity
 - Plans for Cataloging
- OCLC Reclamation Email – SWAN implications
- E-Resources Updates
- NCOA & Patron Purge
- SWAN Online Learning
- Statistics - 2021
- Committee of the Whole – Feb 1
- Recap on 2022 Meetings & Training

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Aspen Catalog

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Cohort 2 Reminders

Complete your configuration forms by **January 31st!**

<https://support.swanlibraries.net/news/2022-01/90189>

You should be using [your Aspen catalog](#) and [completing the all-staff trainings](#).

If you don't have an Aspen staff login, ask your director!



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Aspen Catalog Links

Not sure how to find your Aspen catalog?

It is linked on every page of the support site!

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Second Cohort Schedule

| DATE | WHAT |
|--|---|
| January 10 th , 2022 | Kickoff Meeting |
| Every other Monday, 10 a.m. | Aspen office hours |
| January 18 th , 2022 11 a.m. | Aspen Admin Training: Themes & Library Settings |
| January 31 st , 2022 | Aspen Administrators should have completed the All Staff trainings Configuration form due |
| February 1 st , 2022 11 a.m. | Aspen Admin Training: Browse categories, Spotlights, & Adding Covers |
| February 8 th , 2022 11 a.m. | Aspen Admin Training: Placards & System Messages |
| February 15 th , 2022 11 a.m. | Aspen Admin Training: Purchase Suggestions |
| March 1 st , 2022 11 a.m. | Aspen Admin Training: Record Grouping |
| February 28 th , 2022 | All staff should have completed the All Staff trainings |
| March 8 th , 2022 | Soft Launch |

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Fines/Bills Payment

If you missed the Aspen/PayPal Information Session, you can view the recording online:

<https://support.swanlibraries.net/news/2022-01/90266>

Please complete the configuration form as soon as you can, so we can get you set up! We'll start rolling go live with online fines payment starting **Feb 1st**.



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PayPal limit now set to \$1

Like Enterprise and BLUEcloud Mobile app, bills over \$1.00 can now be paid in Aspen using PayPal.

- No changes required by library
- We have also updated statement text to show:
PAYPAL *SWAN

| Description | Unit price | Qty | Amount |
|--|------------|-----|------------|
| FOR_SALE | \$1.00 USD | 1 | \$1.00 USD |
| FAX | \$0.60 USD | 1 | \$0.60 USD |
| Subtotal | | | \$1.60 USD |
| Total | | | \$1.60 USD |
| Payment | | | \$1.60 USD |
| Charge will appear on your credit card statement as "██████████" | | | |
| Payment sent to payments@swanlibraries.net | | | |
| Payment sent from ██████████ | | | |

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Online payment – isn't just for fines

Even if your library is fine-free, patrons will want to be able to make payments online for:

- Lost items
- Damaged items
- For fee services
- Charges assessed

Take advantage of bill creation in WorkFlows to allow patrons to pay for online.

See [Cashless Transaction Management – Billing for Services/For-Sale](#)

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BLUEcloud Staff Pilot

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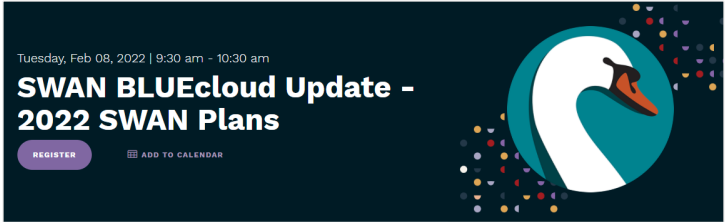
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BLUEcloud Update

Sign up to hear specifics about SWAN's BLUEcloud plans for 2022 and work underway in advisory, pilot, and production.

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L2 registration:
<https://librarylearning.org/event/2022-02-08/swan-bluecloud-update-2022-swans-plans>
 GoToMeeting link:
<https://www.gotomeet.me/SWANLibs/bluecloud-office-hours>



About This Event

Join SWAN staff in an overview of BLUEcloud including:

- What is BLUEcloud
- SWAN Product Managers
 - Samantha Diebel, Acquisitions
 - Claudia Nickson, Cataloging
 - Crystal Vela, Circulation
- Dave Pucin, Central account management

- How are SWAN libraries using BLUEcloud
- Plans for 2022
- Research and development process

When

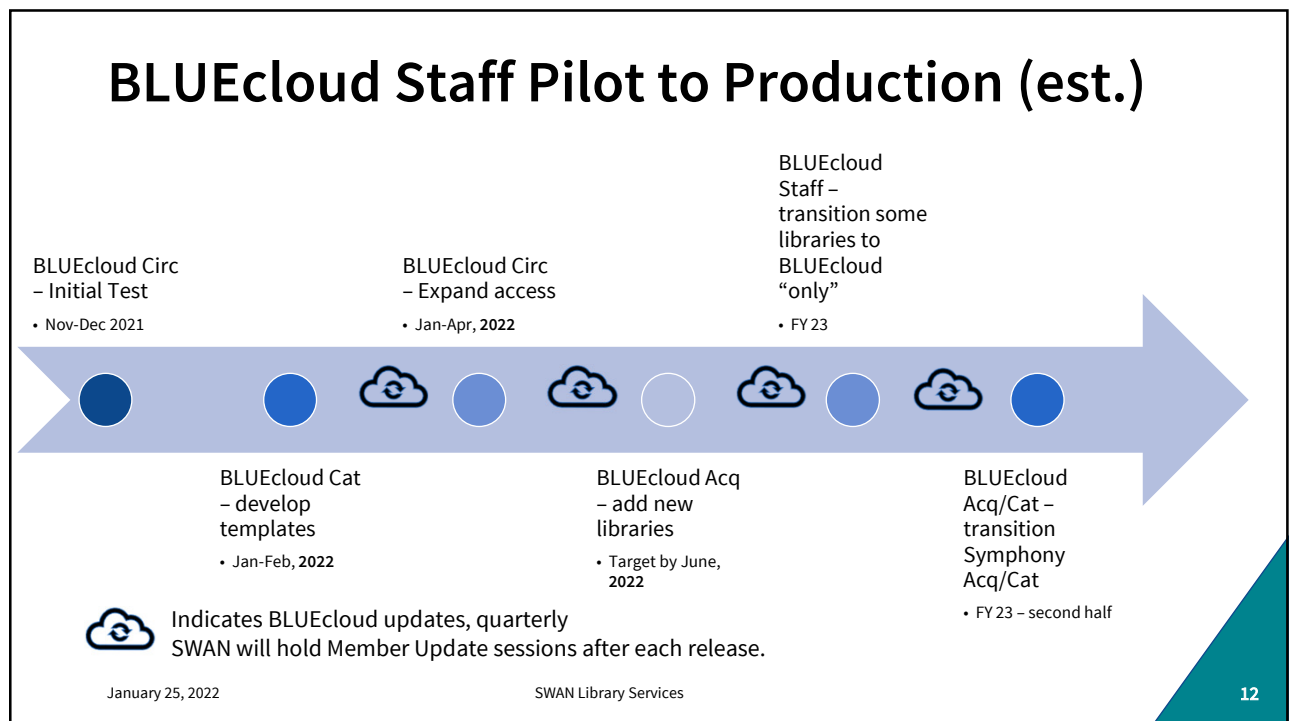
Tuesday, Feb 08, 2022 | 9:30 am - 10:30 am

Where

GoToMeeting
See event details.
Online

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OCLC Reclamation Email

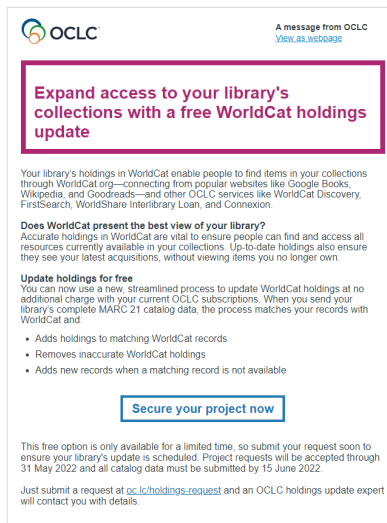
SWAN maintains OCLC holdings for all member libraries

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OCLC A message from OCLC [View as webpage](#)

Expand access to your library's collections with a free WorldCat holdings update

Your library's holdings in WorldCat enable people to find items in your collections through WorldCat.org—connecting from popular websites like Google Books, Wikipedia, and Goodreads—and other OCLC services like WorldCat Discovery, FirstSearch, WorldShare Interlibrary Loan, and Connexion.

Does WorldCat present the best view of your library?
Accurate holdings in WorldCat are vital to ensure people can find and access all resources currently available in your collections. Up-to-date holdings also ensure they see your latest acquisitions, without viewing items you no longer own.

Update holdings for free
You can now use a new, streamlined process to update WorldCat holdings at no additional charge with your current OCLC subscriptions. When you send your library's complete MARC 21 catalog data, the process matches your records with WorldCat and:

- Adds holdings to matching WorldCat records
- Removes inaccurate WorldCat holdings
- Adds new records when a matching record is not available

[Secure your project now](#)

This free option is only available for a limited time, so submit your request soon to ensure your library's update is scheduled. Project requests will be accepted through 31 May 2022 and all catalog data must be submitted by 15 June 2022.

Just submit a request at [oclc/holdings-request](#) and an OCLC holdings update expert will contact you with details.

PLEASE IGNORE -

Update holdings for free in OCLC messages from:

- OCLC
- Illinois State Library e-News

SWAN maintains holdings in OCLC for all SWAN libraries.

SWAN manages monthly update of holdings through our OCLC Holdings Manager for CCS, Pinnacle, PrairieCat, RSA, SHARE, and SWAN.

Meeting with these partners to examine if consortium holdings updates can be included and coordinated with our monthly processing.

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E-Resources Update

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Kanopy & EBSCO group deals

Kanopy currently at 5% discount with \$45,364 commitments

- \$50,001 commitments that discount increases to 10% for all SWAN Kanopy customers
- \$4,637
- August 31, 2022

EBSCO Year 3

- Currently at a 3% increase but likely to go down once negotiations with RAILS and EBSCO are complete
- Please join us at the COW on February 1st

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Digital Archives Landscape Survey

We are interested in your digital archives projects and want to hear about your current or planned projects.

Please fill out this survey by February 1st.

<https://support.swanlibraries.net/news/2021-12/89387>

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Patron Management: NCOA, Monthly Removal

National Change of Address and geo-location data, Review of inactive patrons

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NCOA – Address change counts

Processing records:

1. Address changes reflected in Address 1
2. Previous address written in note with SWAN NCOA 2021
3. Address 3 fields (not viewable or editable) used for Longitude, Latitude, Census Tract, Census Block
4. Address 1 County populated
5. User Category 6, currently unused with be used to track NCOA updated records

And:

- Special and Academic libraries will receive list of changes, but their student and member records will not be automatically updated.
- No change in status to BADADDRESS or any other status.
 - Library discretion on how they wish to handle updates to status which may result in limiting services.

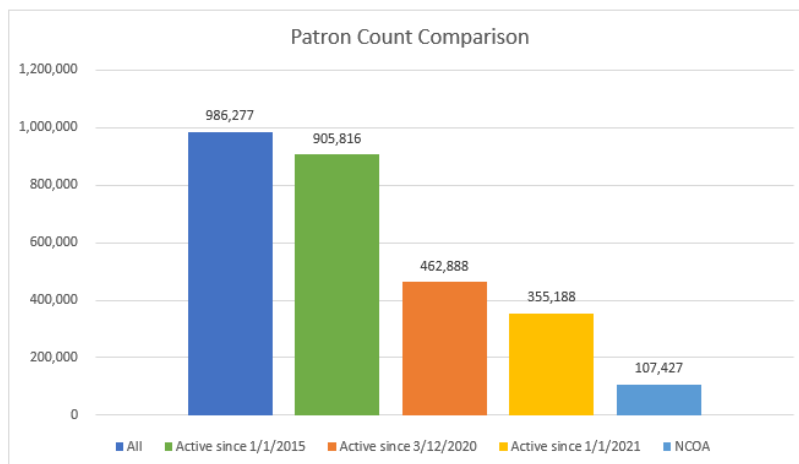
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From 10 to 7 years of inactivity



- 8% of total user records have been inactive since 1/1/2015 (7 yrs)
- ~1% of total user records have been inactive for 10 yrs
- 47% of users have been active since 3/12/2020 (start of pandemic closures)
- 39% of users have been active since 1/1/2021
- 11% of users had address change in NCOA 2021 run

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Course catalog

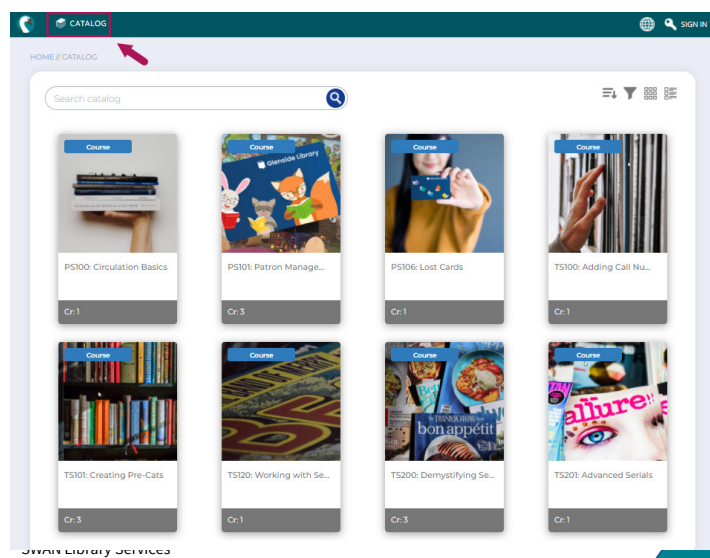
Public Service

- Circulation Basics
- Patron Management
- Lost Cards

Technical services

- Adding Call Numbers & Items
- Creating Pre-Cats
- Working with Series
- Demystifying Serials
- Advanced Serials

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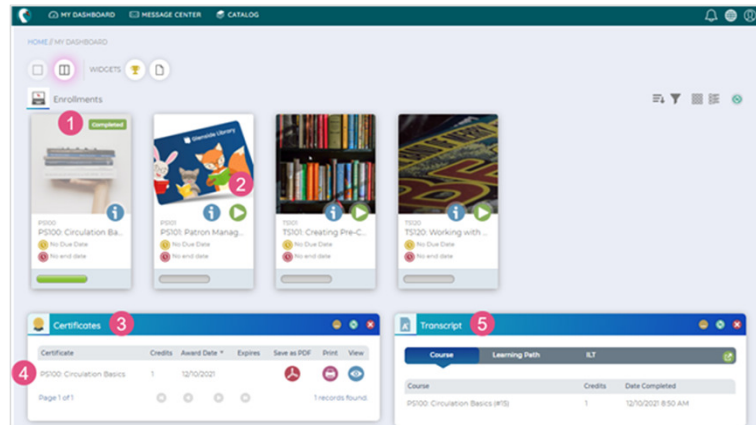


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Learning Dashboard

1. Course status
2. Play button to continue
3. Certificates
4. Save as PDF or print Certificate of Completion
5. Full transcript list



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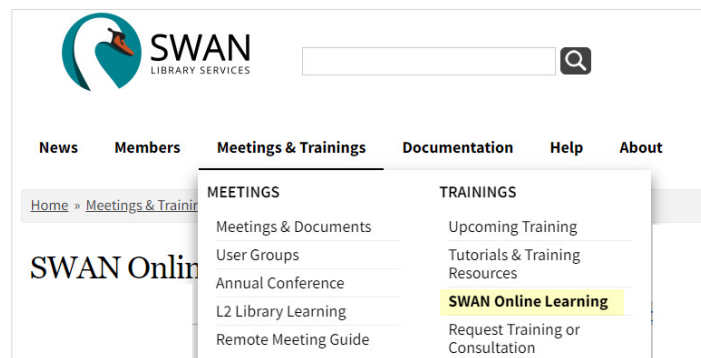
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Start at SWAN Support

Meetings & Trainings >
[SWAN Online Learning](#)

New Courses:

- PS106: Lost Cards
- TS100: Adding Call Numbers & Items



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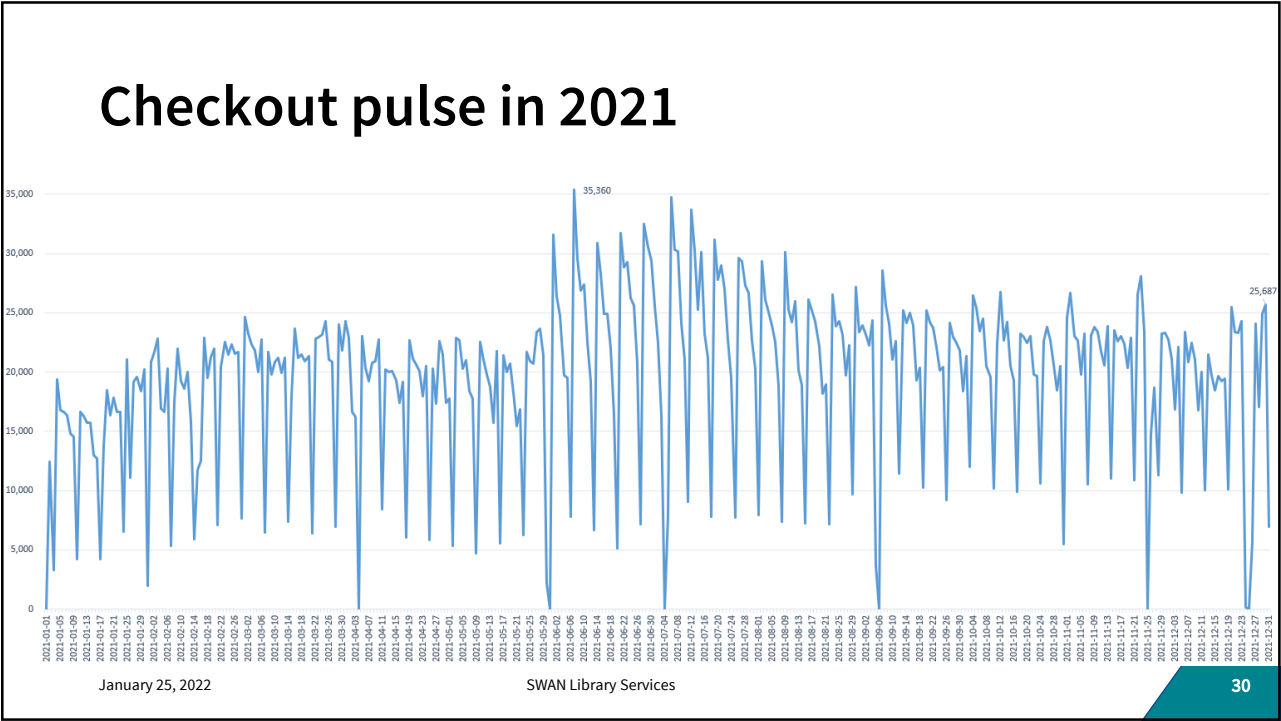
Statistics

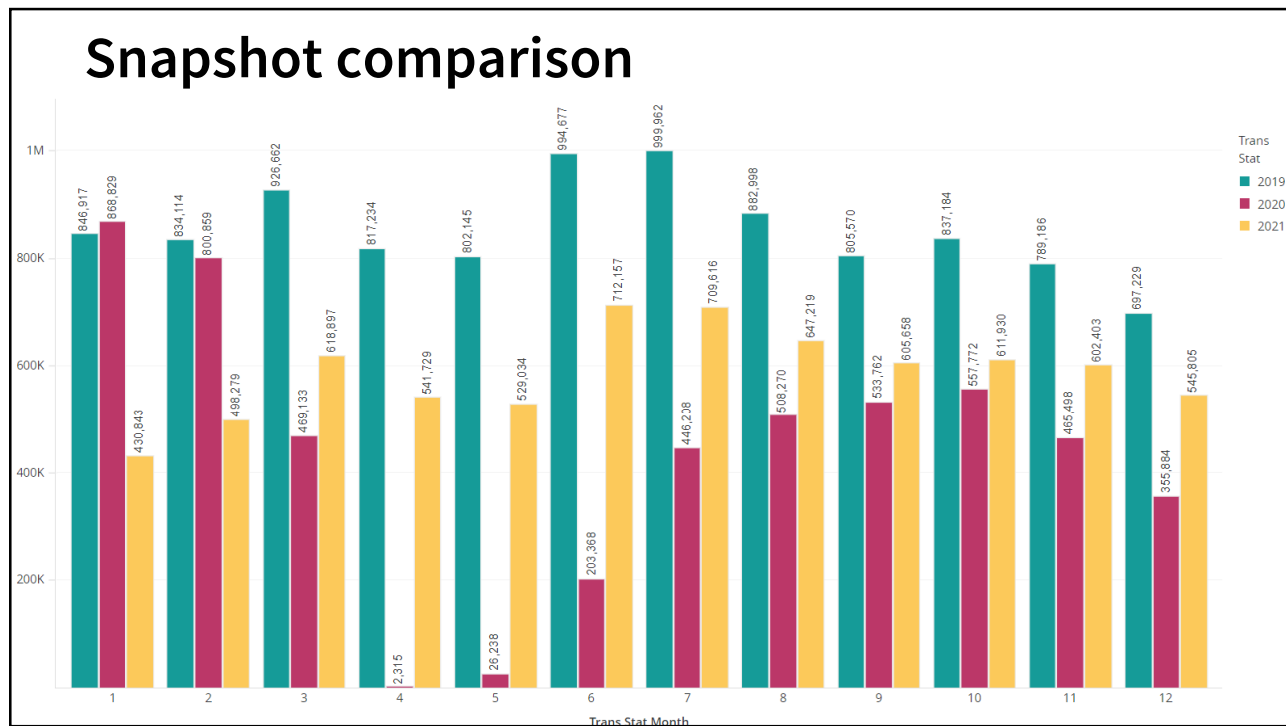
A final look at 2021

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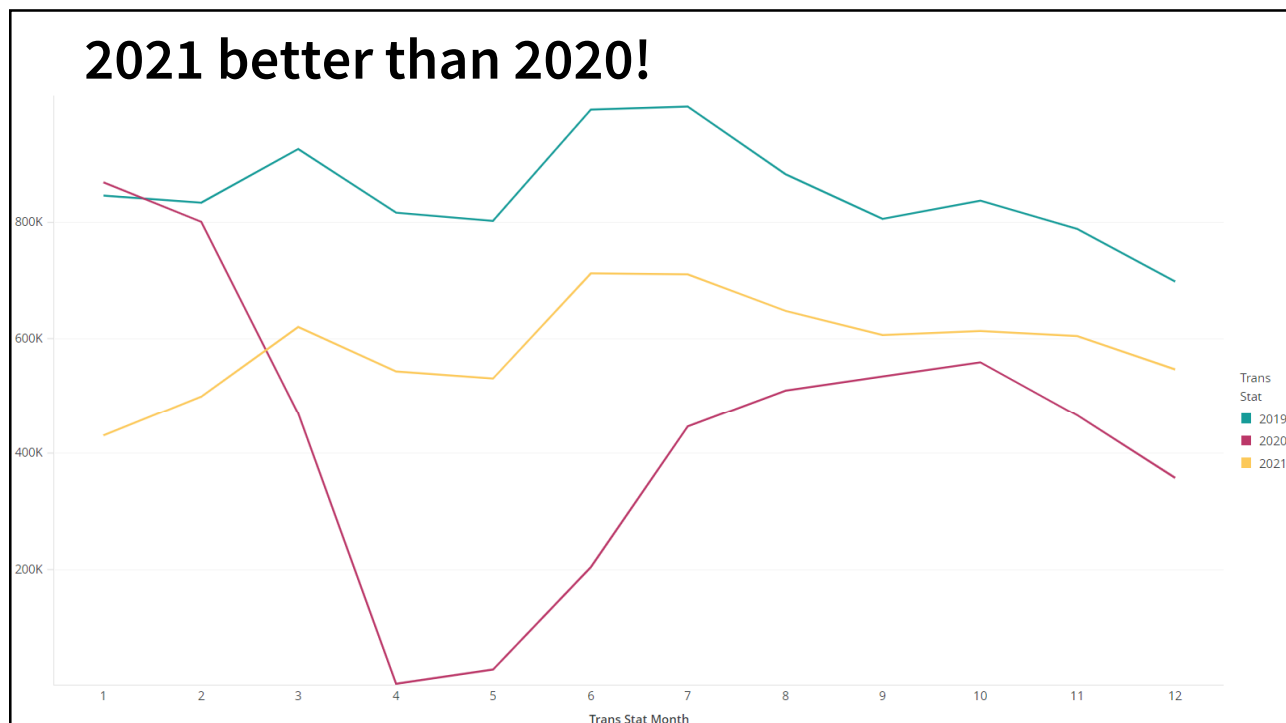
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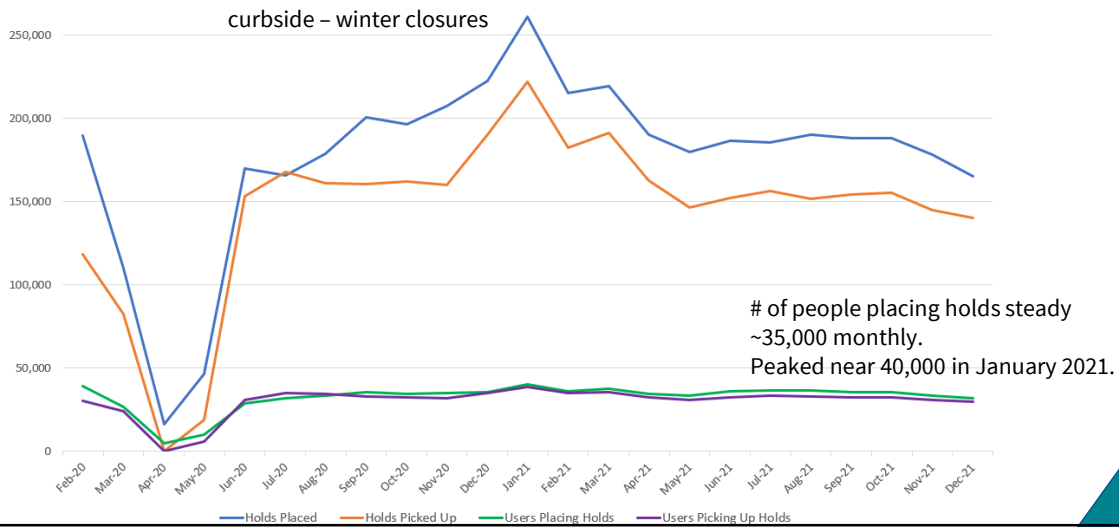


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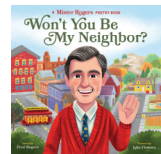
Holds – the steady ship in this storm



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Users created in 2021 – 62,009 new users!



4,388 of those
62,009 (7%)
were non-SWAN
reciprocal
borrowers

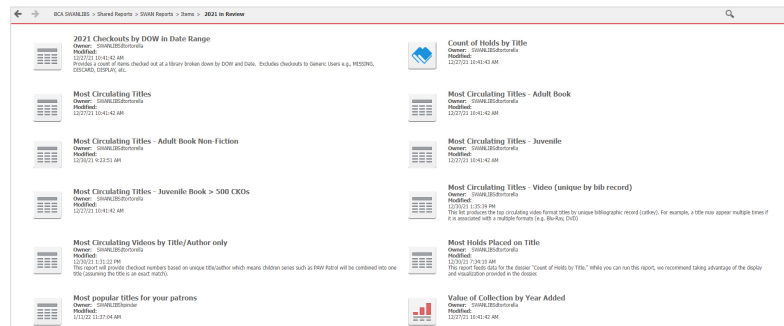
Yes, we'll be
your neighbor!

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From December Fireside – Top 10

If you want to run some of your own Top 10 lists from 2021, go to:
[BLUEcloud Analytics > Shared Reports > SWAN Reports > Items > 2021 in Review](#)



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Other Upcoming Meetings

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

- Committee of the Whole – 2/1
- Board Meeting – 2/18
- Monthly Office Hours
 - Circulation/ILL/Outreach - 2/2
 - Aspen – 2/7 (Browse Categories)
 - Circulation & Hold Map – 2/16
- Let's talk...
 - Billing – 2/10
 - Holds Management – 2/17
- OCLC Training on L2
 - WorldShare ILL Borrowing – 2/22
 - WorldShare ILL Lending – 2/24
 - Introduction to OCLC Interlibrary Loan – 3/15



SWAN Committee of the Whole Meeting
 GoToMeeting
 Event Type(s) Meeting
 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 ILL Users
 GoToMeeting
 Event Type(s) Meeting
 Sponsor SWAN - System Wide Automation Network



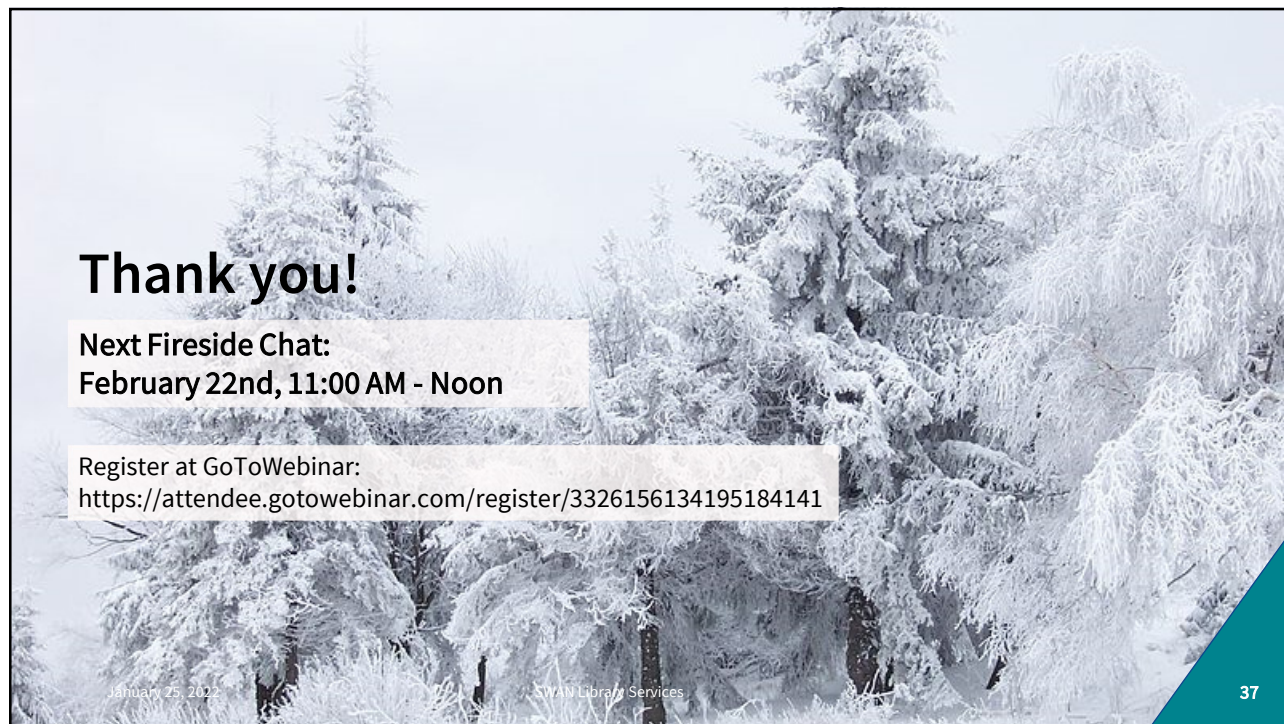
SWAN Circulation/ILL/Outreach Office Hours
 GoToMeeting
 Event Type(s) Training
 Sponsor SWAN - System Wide Automation Network

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Thank you!

Next Fireside Chat:
February 22nd, 11:00 AM - Noon

Register at GoToWebinar:
<https://attendee.gotowebinar.com/register/3326156134195184141>

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