SWAN Fireside Chat

February 22, 2022

Agenda

- Annual Rebuild & Offline – April 17 (Tentative)
- L2 Annual Update
- Joining the SWAN Forums
- Communicating Closures
- Teacher Cards & Loan Policies

- NCOA Results
- Unique Referral Fee Increase
- Damaged & Unusable Materials
- Aspen Updates
- Quarterly Meeting – March 3
- 2022 Meetings & Training

Annual Symphony Database Rebuild

- Sunday, APRIL 17th

- ***Tentative*** Sunday, April 17th, 2022 (Easter Sunday)
  - Downtime of WorkFlows and other services required throughout
  - Process will begin Saturday night after libraries close
  - Date/time to be confirmed at the Quarterly meeting
- [WorkFlows Offline](#) required for open libraries on the 17th
- Watch for the news post!

- **Impacted Services:**

  Enterprise & Aspen Catalog
  - *Intermittent* My Account functions (holds, payments, lists, etc)
  - *Intermittent* Inaccuracies of Item location and availability

  Symphony WorkFlows
  - *Intermittent* External SIP2 & Web Services integrations (including external vendor subscriptions, digital materials access)
  - Internal SIP2 integrations for library self-checkout, AMH, and PC reservation
  - WorkFlows - Offline mode must be used for all checkouts

  BLUEcloud Applications
  - BLUEcloud Analytics April 16/17th transactions - harvest will be delayed an extra day
  - BLUEcloud Mobile, MobileCirc, BLUEcloud Circ and Cataloging will be unavailable

L2 Annual Update

- **Library Directors** - Don't forget to update your library's Annual Certification in L2!

- Required by the Illinois Administrative Code

- Ensure all library staff are correctly listed

- **Due by March 31st!**
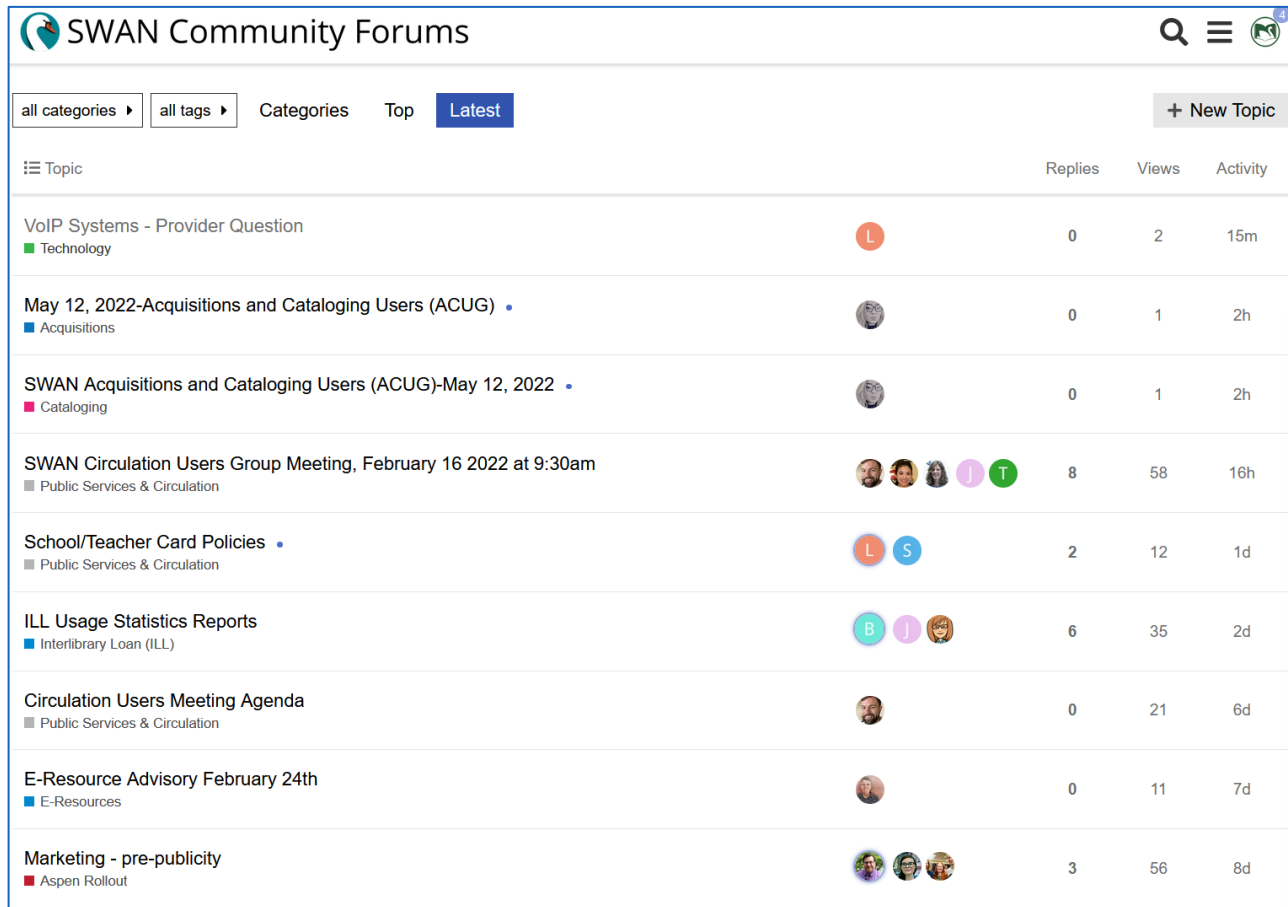
https://librarylearning.org/annual-certification

L2 account is required for:
- Accessing members-only content on SWAN support site
- Approval of learning account registration

Joining the SWAN Forums

1. Ensure you're associated with your library in L2 (see previous slide)

2. Email help@swanlibraries.net and request a login

3. Watch for the emailed invitation to join
   - We recommend including your library code in your username
   - Ex: DGS-JohnSmith

Get the most out of your SWAN Forums experience – join us for the upcoming office hours session! (**March 17th**)

https://librarylearning.org/event/2022-03-17/swan-how-improve-your-swan-community-forums-experience

Communicating Closures to Patrons

Aspen Catalog Message Banners

https://support.swanlibraries.net/documentation/64894

- System messages can be scheduled, posted, and modified at any time
- Use this for any type of closure

Text / Email Blasts

https://support.swanlibraries.net/documentation/64894

- Texts should be sent on a one-off, "manual message" basis to avoid spamming patrons
- Emails should be sent using the library's email campaign service, such as:
  - MailChimp
  - SendGrid
  - MailMan

Communicating Closures to Patrons

SWAN Library Services

Additional Pseudo Libraries

Welcome our latest locker and drive-up libraries!

- La Grange Drive-Up
- Matteson Area Lockers
- Stickney Forest-View Lockers

Agency Code	Route To	Description
DGS_L	DGS	Downers Grove Public Library Locker
GED_D	GED	Glen Ellyn Public Library Drive-up Window
GVD_D	GVD	Geneva Public Library Drive-up Window
INS_D	INS	Indian Prairie Public Library District Drive-up Window
LGS_D	LGS	La Grange Public Library Drive_up Window
MTS_L	MTS	Matteson Area Public Library Locker
NRS_L	NRS	North Riverside Public Library Locker
OPS_LI	OPS	Oak Park Public Library Main Branch Indoor Locker
OPS_LO	OPS	Oak Park Public Library Main Branch Outdoor Locker
SCD_D	SCD	St. Charles Public Library District Drive-up Window
SFS_LC	SFS	Stickney-Forest View Public Library Central Stickney Locker
SFS_LO	SFS	Stickney-Forest View Public Library District Locker
VPD_L	VPD	Villa Park Public Library Locker

Teacher Cards & Loan Policies

Teacher Cards

- Local public library decision on whether to issues Teacher Cards

- Should not be issued without a pre-existing valid public library card record in SWAN

- Formal Intergovernmental Agreement may supersede requirement for record in SWAN

System Wide User Profile

- Checkout Limit = 200

- Hold Limit = 50

- Bill Threshold = $10

- Expiration Date – August 15 20xx, will be updated annually - card can checkout at any SWAN library

- Follows your local circulation rules – you can request a special rule

Patron Management: NCOA

National Change of Address

NCOA Results

- 970,826 patron records submitted to UMS

- COUNTY added to address

- Address fields hidden in WF, visible in BCA:
  - GPS Latitude
  - GPS Longitude
  - Census Tract
  - Census Block

- 107,427 (11%) flagged as having moved
  - 12,699 moved out of Illinois

- New address written over existing address

- Old address moved to note field with "NCOA 2021" message

- User Cat 6 enabled and set to NCOA2021

- NO status change!

NCOA Recommended Next Steps

Review the documentation & reports:
https://support.swanlibraries.net/documentation/66540

1. Purge records of patrons no longer in your service area
   - Submit a support ticket:
     - Bill forgiveness threshold
     - Criteria for geographic removal
     - Criteria for Last Activity Date

2. Update records of patrons still within your service area
   - Remove user notes associated with NCOA
   - Update User Category 6 to blank

3. Manually remove long-inactive patrons
   - Ensure they do not have outstanding activity

4. Review patrons that have moved from one SWAN library to yours
   - Welcome them to the area and invite them to your library!
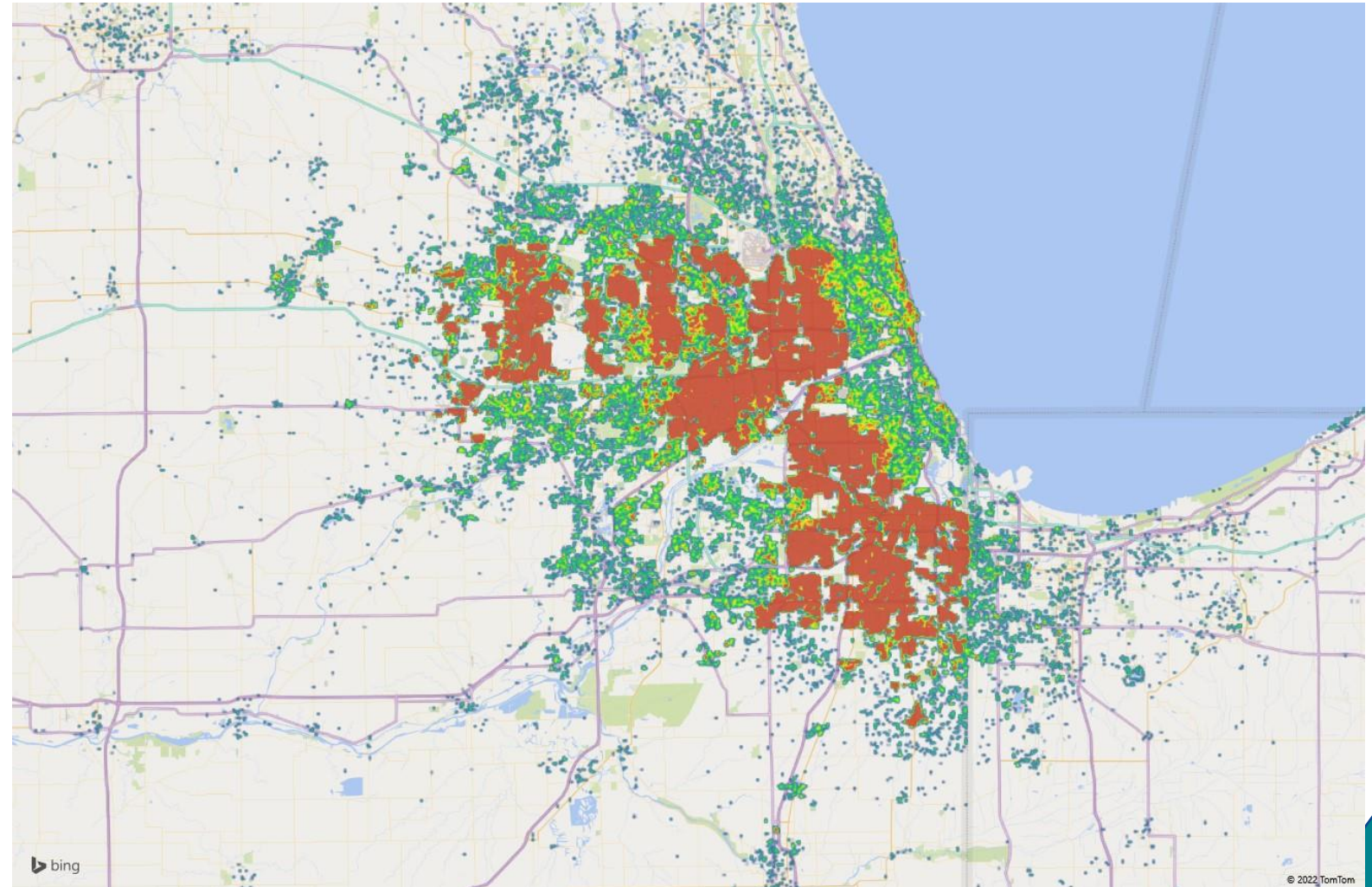
Patron Moves, By the Maps
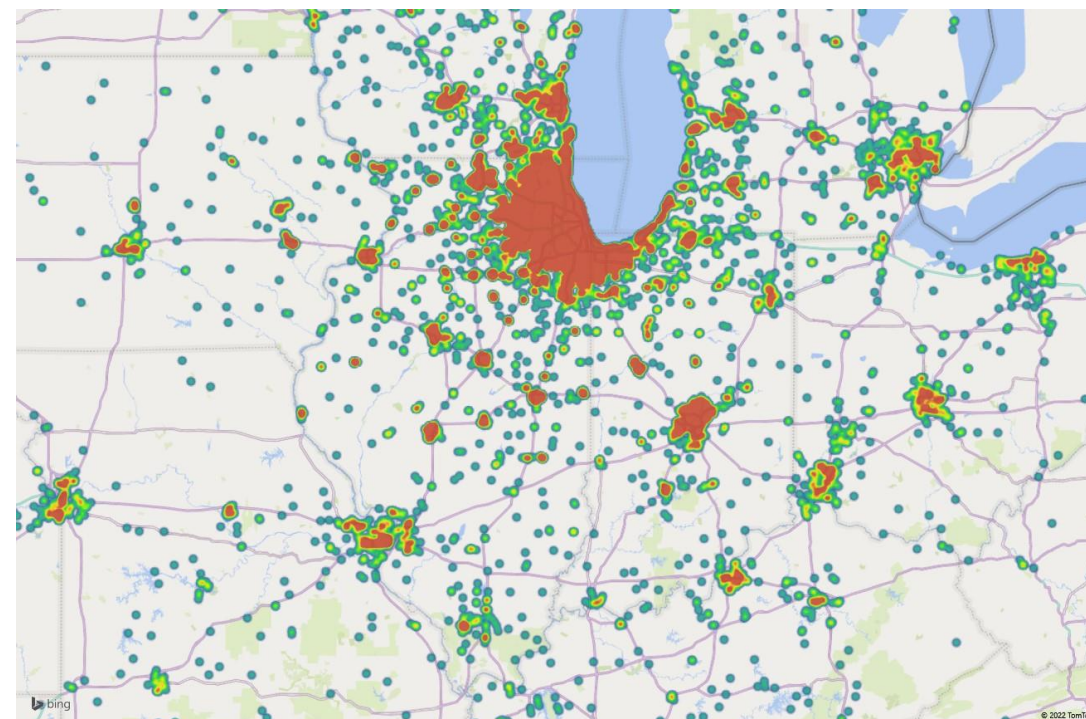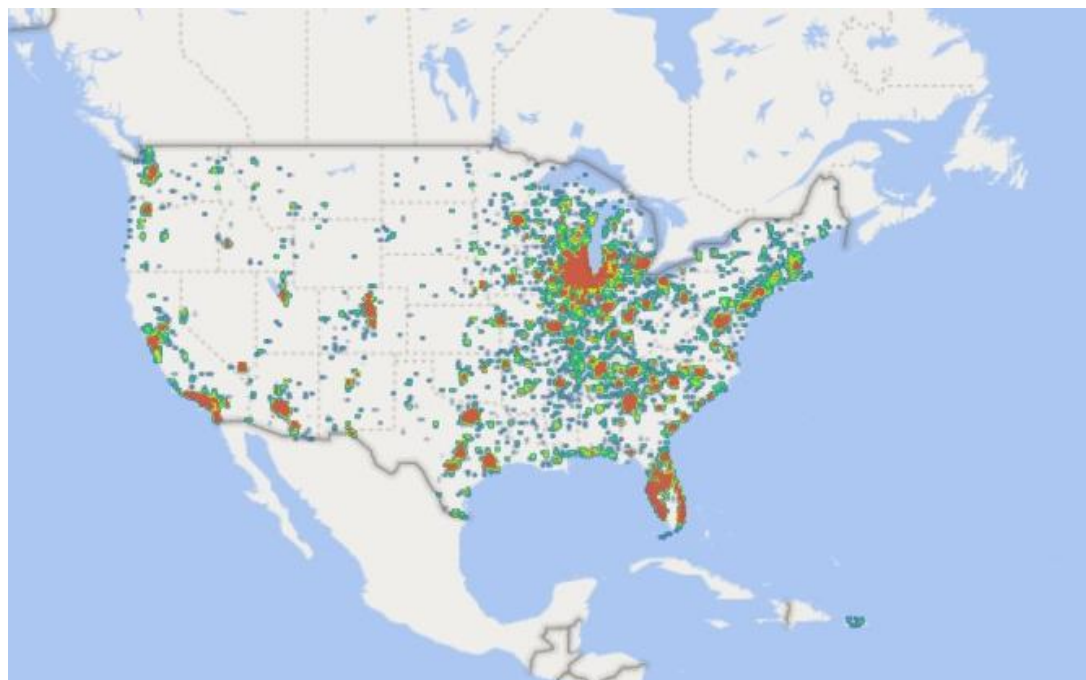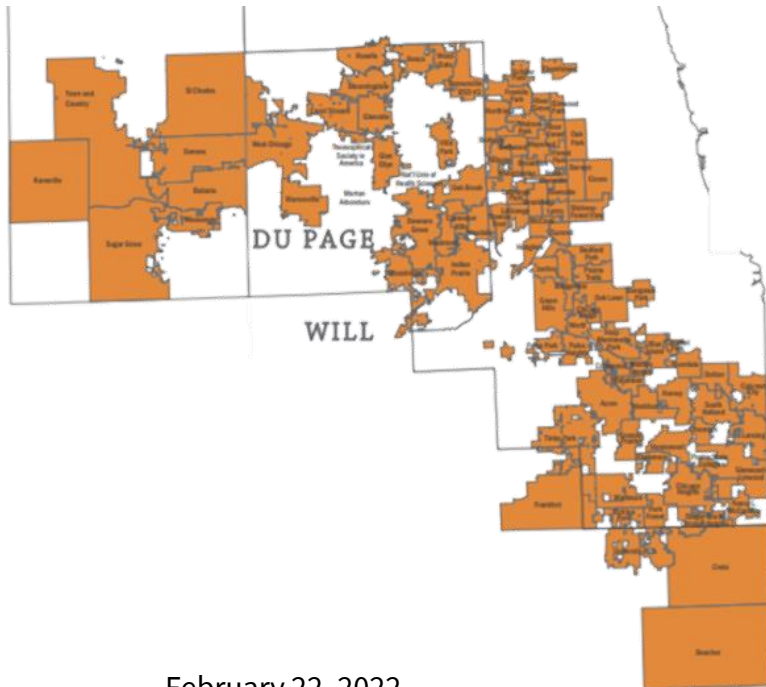

Concentration of Patrons Who Have Moved

Patron Moves, By the Maps

Concentration of WHERE patrons have moved since 2018 according to the United States Postal Service National Change of Address (NCOA)

Patron Moves, By the Maps

Overlay of SWAN service area map shows the concentration of patrons moving within our SWAN library boundaries.

SWAN Library Services

# Unique Management Services

Client Name (Top 10 ROI)	Cash	Material	Invoice	Asset ROI
Downers Grove Public Library	$1,261.64	$4,107.15	$171.40	31:1
St. Charles Public Library	$4,541.73	$7,953.91	$429.60	29:1
Glenside Public Library District	$461.00	$1,955.00	$98.45	25:1
La Grange Public Library	$5,350.23	$3,803.94	$393.80	23:1
Indian Prairie Public Library District	$3,761.62	$3,608.54	$435.90	17:1
Oak Park Public Library	$10,072.94	$56,029.19	$4,555.55	15:1
Berwyn Public Library	$1,647.60	$4,134.15	$429.60	13:1
Tinley Park Public Library	$3,994.60	$4,777.44	$689.15	13:1
South Holland Public Library	$848.05	$3,229.75	$340.10	12:1
Westmont Public Library	$2,123.03	$4,434.06	$537.00	12:1
Worth Public Library District	$263.95	$734.90	$80.55	12:1

Client Name (Bottom 10 ROI)	Cash	Material	Invoice	Asset ROI
Calumet City Public Library	$1,405.70	$3,095.29	$1,020.30	4:1
Chicago Ridge Public Library	$906.30	$2,211.78	$733.90	4:1
Green Hills Public Library District	$3,986.30	$3,528.24	$1,852.65	4:1
Melrose Park Public Library	$777.07	$1,626.58	$581.75	4:1
Steger-South Chicago Heights Library District	$1,044.77	$1,178.56	$563.85	4:1
West Chicago Public Library District	$2,256.03	$1,603.98	$966.60	4:1
Chicago Heights Free Public Library	$553.20	$1,172.99	$617.55	3:1
Hodgkins Public Library District	$436.90	$779.50	$384.85	3:1
Justice Public Library	$432.93	$917.98	$456.45	3:1
Lyons Public Library	$618.60	$566.00	$393.80	3:1
Markham Public Library	$415.90	$1,013.00	$447.50	3:1

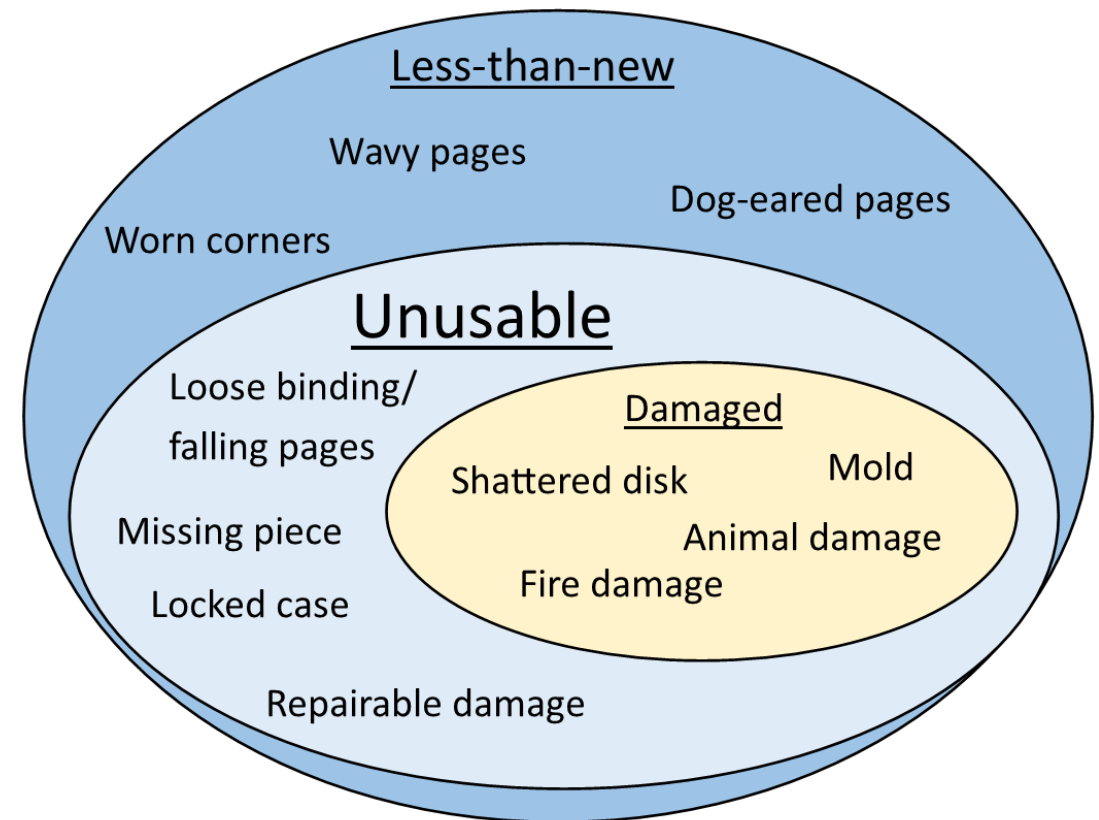Placement fee increasing from $8.95 to $9.85 effective April 1st

- Most libraries assess a $10 Referral Fee
- ROI for SWAN libraries range from 3:1 to 31:1
- Open a ticket if you would like your Referral Fee modified

Cash and Material Recovery by Library
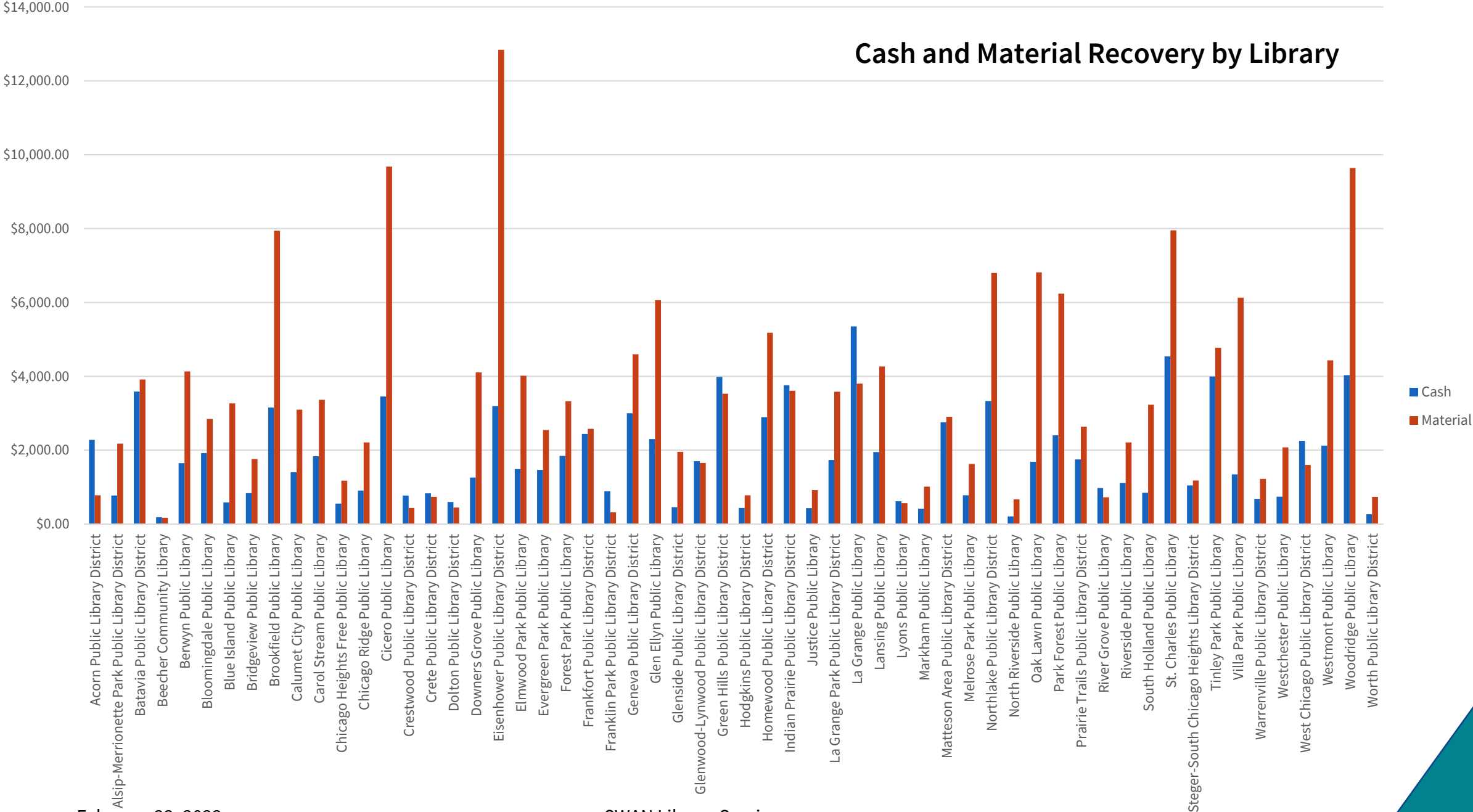
Damaged & Unusable Materials

- Detailed instructions and definitions can be found on the support site

- Wear should be expected and will naturally result from normal use.

- Communicate with counterparts to coordinate processing

Less-than-new
Wavy pages
Dog-eared pages
Worn corners

Unusable
Loose binding/ falling pages

Damaged
Shattered disk
Mold
Animal damage
Fire damage

Missing piece

Locked case

Repairable damage

Aspen Catalog

Soft Launch is Tuesday March 8th!

- Banner on your Enterprise catalog
- List copying available in Enterprise to copy lists to Aspen

Additional Key Dates

Redirect catalog.swanlibraries.net to Aspen
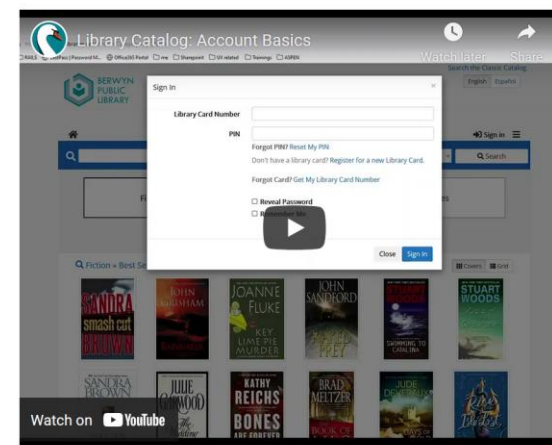
24 Apr.

30 Apr.

Enterprise contract ends

SWAN Library Services

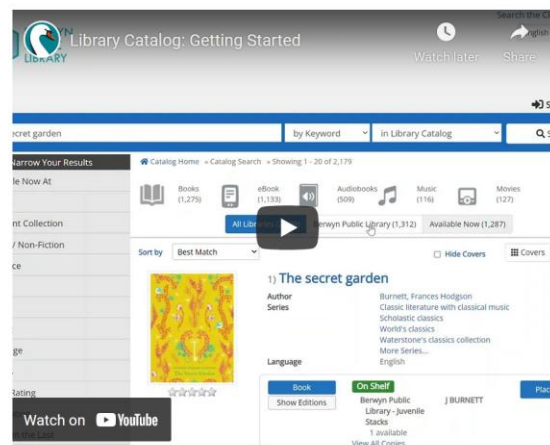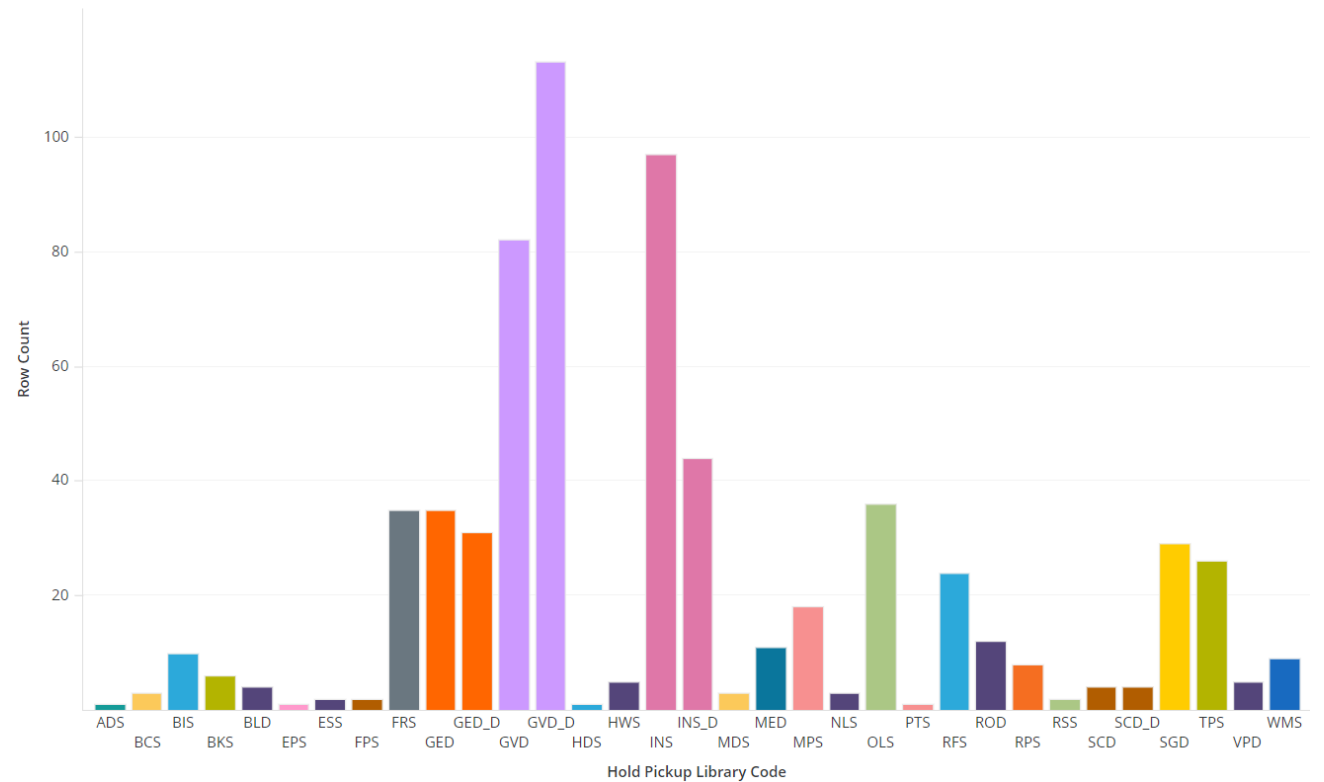# Videos & How-Tos for Patrons

https://swanlibraries.net/using-the-new-catalog/

Who's using masquerade mode?

Data for the month of February 2022

Aspen Holds by Staff - Masquerade Mode

SWAN Library Services

SWAN Quarterly Meeting

Thursday, March 3rd

10:00am – 12:00pm

Budget approval

Live vote during meeting

Aspen Discovery final countdown

Presentation on SWAN pilot with Baker & Taylor rental collection

https://librarylearning.org/event/2022-03-03/swan-quarterly-meeting

SWAN Library Services

Other Upcoming Meetings

- Quarterly – 3/3

- Board Meeting – 3/18

- Monthly Office Hours
  - BLUEcloud Staff – 2/23
  - Circulation/ILL/Outreach - 3/2
  - Aspen – 3/7
  - Cataloging – 3/8
  - Analytics – 3/9
  - Circulation & Hold Map – 3/16
  - Aspen (Search Strategies) - 3/21
  - BLUEcloud Staff – 3/23

- Technology Update – 3/24

- OCLC Training on L2
  - WorldShare ILL Borrowing – 2/22
  - WorldShare ILL Lending – 2/24
  - Introduction to OCLC Interlibrary Loan – 3/15

- User Groups:
  - E-Resource Advisory – 2/24
  - Book Club Users – 3/9
  - Circulation Advisory – 3/16

- Trainings
  - SWAN ILL Bootcamp – 2/24
  - IPLAR Stats – 2/28
  - Aspen Admin: Record Grouping – 3/1
  - SWAN Generic Accounts – 3/3
  - SWAN Community Forums – 3/17
  - SWAN ILL Bootcamp – 3/22

Thank you!

Next Fireside Chat:
March 29th, 11:00 AM - Noon

Register at GoToWebinar:
https://attendee.gotowebinar.com/register/1955742433521239054