

Chat Log C:\Users\dawne\OneDrive - System Wide Automated Network\Documents\ChatLog SWAN Quarterly Meeting 2021_06_03 11_42.rtf

Stacy Wittmann (to Everyone): 10:04 AM: It's been an honor! Congratulations to Tim and Charity and thank you to everyone who ran!

Julie Milavec (she/her) (to Everyone): 10:05 AM: As Stacy said, it was an honor to serve!

SWAN - Dawne Tortorella (to Everyone): 10:09 AM:

<https://www.ila.org/advocacy/covid-19-resources/arpa-funding-for-illinois-libraries>

Julie Milavec (she/her) (to Everyone): 10:18 AM: Everyone move one chair to the left!

SWAN - Dawne Tortorella (to Everyone): 10:19 AM:

<https://www.ila.org/advocacy/covid-19-resources/arpa-funding-for-illinois-libraries>

colleen waltman (to Organizer(s) Only): 10:23 AM: Can you share the link for the session sign-ups please? I am on the support site but not finding it easily. Please and thank you!

SWAN - Dawne Tortorella (to Everyone): 10:24 AM:

<https://support.swanlibraries.net/news/2021-05/86043>

Diane Foote, ILA (to Everyone): 10:25 AM: I'm sure the Illinois Humanities one will be recorded.

colleen waltman (to Organizer(s) Only): 10:25 AM: Thank you!

SWAN - Aaron Skog (to Everyone): 10:32 AM: Legal opinions shared:

<https://support.swanlibraries.net/documentation/66923>

SWAN - Aaron Skog (to Everyone): 10:33 AM: SOPPA is a law pertaining to student data

Juanita Durkin (to Everyone): 10:44 AM: Dawne, you said that only digital only users were not showing activity on their SWAN records. Does that mean you've solved the issue where any changes we make to their records (exp date, address, phone, etc.) don't update the LAD?

Tiffany Verzani (to Everyone): 10:44 AM: Dawne at the earlier meetings you had on this topic, you mentioned libraries needing to test other products to see if they update LAD, such as our computer management software or program registration software. I need to check and see if they go through SIP2, but if not does SWAN have a recommendation on how each individual library should do this, deadlines, and if the LAD isn't updated through these processes, then what can a library do to update these on a monthly basis?

Patricia Genardo (to Everyone): 10:47 AM: at the university, the students have a hold on their records if they owe money. They can not request transcripts until accounts are paid. Some students return for a new program and have to pay any prior bills before registering again.

Tiffany Verzani (to Everyone): 10:47 AM: Thank you!

Juanita Durkin (to Everyone): 10:49 AM: I have the same concern. Patrons can sign a new agreement regarding being responsible with library materials, but if they weren't responsible before, they likely won't be now. I'm concerned about issuing new cards to those patrons and if we purge them, we have no way to track that.

SWAN - Steven Schlewitt (to Everyone): 10:49 AM: Supported Third-Party Vendor list on the support site should provide an idea of which services are authenticated via SIP2, Web Services, or OpenAthens: <https://support.swanlibraries.net/documentation/64766>

Tiffany Verzani (to Everyone): 10:50 AM: Thank you Steven!

Juanita Durkin (to Everyone): 10:52 AM: For us, the usual scenario is that they didn't return 10 books at a cost of \$200+.

Jennifer Cottrill (Private): 10:57 AM: Love the "kick the can" graphic, Dawne! :)

Jennifer Cottrill (to Everyone): 11:00 AM: Past Jan 2023, is there any consideration of going finally to the original proposed 3+ inactive removal criterion?

Juanita Durkin (to Everyone): 11:01 AM: Will the new version of Workflows go back and capture LAD that was made prior to that update? In other words, if we renewed a library card six months before the Symphony update, will the patron now be active if they haven't used it since? Or is that activity only updated going forward?

Mary Clemens (to Everyone): 11:03 AM: To confirm it will be a monthly process starting in August 2021 with adjustments made to 7+ and 5+ years at timeframe specified.

Jill Grosso (to Everyone): 11:03 AM: For the monthly automatic review, will we get a monthly report, than have a month to review it? Kind of like the timeline for Long Missing in Transit Lists.

Juanita Durkin (to Everyone): 11:03 AM: Any idea how will we guarantee that our active patrons won't be purged?

Tim Jarzemky (to Everyone): 11:03 AM: if a patron is inactive but does log into their account - does that update LAD

Juanita Durkin (to Everyone): 11:04 AM: I don't have staffing to go through the 1500+ patrons on the current report.

Juanita Durkin (to Everyone): 11:06 AM: That was the first report, for 3 years. Sorry.

Tim Jarzemky (to Everyone): 11:07 AM: enterprise to say look at old circulation record

Juanita Durkin (to Everyone): 11:07 AM: Tim, currently, not unless they actually make a change to their personal info. Placing holds does not.

Yvonne Beechler Bergendorf (to Everyone): 11:08 AM: We use Communico and don't require a library card to register for a library program. Will that update the LAD?

Juanita Durkin (to Everyone): 11:09 AM: It does update if they even look at their personal info. But NOT if they search for books and place holds. This is on the current system and from testing at my library.

Juanita Durkin (to Everyone): 11:10 AM: I'm refewring to Enterprise.

Tiffany Verzani (to Everyone): 11:24 AM: I may be ahead of your slides, but will you be

touching on any marketing materials, training videos or other ideas you have for promoting change to the public and to assist in staff training. We'd certainly like to have that ahead of time. Thank you for any info you have to share or that you have already (in which case, I have forgotten :-)

Juanita Durkin (to Everyone): 11:26 AM: Will you be posting these meeting slides, in addition to the recording?

SWAN - Aaron Skog (to Everyone): 11:27 AM: Yes, slides and recording will be posted! :)

Juanita Durkin (to Everyone): 11:27 AM: Great, thanks!

TIm Jarzemky (to Everyone): 11:29 AM: will patron circulation record move over to Aspen

Jennifer Cottrill (to Everyone): 11:30 AM: You are probably going to answer his, but how will you determine which libraries go in which cohort?

Juanita Durkin (to Everyone): 11:33 AM: Will patrons have a choice of catalog for a while, once we go live with Aspen? Or will it be a straight switch over to the new catalog. I know you have contracts to consider, so easing in may not be an option.

Tiffany Verzani (to Everyone): 11:39 AM: Good idea on not printing, but info on your website that we can copy/paste/use is perfect, as well as links to video/YouTube training. Thank you.

Julie Milavec (she/her) (to Everyone): 11:41 AM: Thanks!