SWAN Fireside Chat

June 28, 2022

Agenda

- SWAN Expo 2022 – August 19th
- Vendor Integrations
- Baker & Taylor EDI issue recap
- Non-resident users under 18
- SMS Text Report by Library
- Monthly patron review – 9 years inactive
- Recruiting Activity
- New WorldCat – August

- EBSCO database subscription update
- Aspen Tip of the Month
  Masquerade Mode
- Member Engagement
  - SWAN Passport Idea
  - User Group Recap
  - Online Learning Update
  - L2 Employee Verification
  - Moving to Zoom
- Upcoming Meetings & Training

SWAN Expo 2022 – August 19, 2022

SAVE THE DATE

- Update on member user groups
- Highlighting use of the SWAN library services platform
- Network with colleagues

- Cost: $30, includes lunch
- Space limited to 300
- Raffle
- No vendor tables

SWAN Expo

SWAN invites members and non-members alike to join us for our SWANx annual conference. This all day event features a variety of speakers, sessions, and library vendors. A wonderful opportunity to network with library colleagues. We hope to see you there!
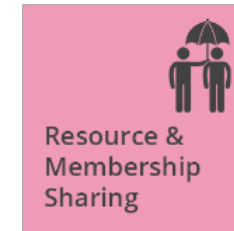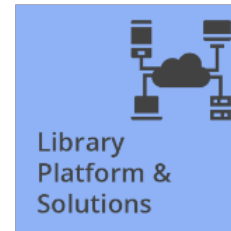
Registration

Please select the registration method your library prefers. SWAN will invoice libraries after completing registration, or if you prefer, register your attendees and pay via credit card. Lunch selections will be part of the registration process.

Register & Pay Later via Invoice OR **Register & Pay Now Online**

Tracks

| Library Platform & Solutions | Resource & Membership Sharing | Security & Privacy | Patron Engagement |

Update on registration

- 108 registered attendees
- 24 libraries
- Approximately 20 staff members from SWAN libraries participating in sessions

Lunch options:

- Turkey breast and swiss cheese wrap
- Grilled veggie wrap
- Santa Fe Salad w/grilled chicken
- Greek Salad

3rd Party Vendor Integrations

SWAN Library Services

Work with SWAN – early & often

- Contact SWAN as soon as you are considering a 3rd party vendor that requires integration with our ILS
- See [3rd Party Vendors & Integrations](#)
- RFID solutions must be consortium-aware (involve us early in discussion/evaluation)
- New integrations must use secure connections
- Vendors must sign Vendor Access Policy before connections are established

Connection methods supported:

- SirsiDynix Web Services API
- OpenAthens
- TLS-SIP2

PRIORITY

Fall 2022, we will be working with OverDrive to secure connections via TLS-SIP2

Baker & Taylor EDI Issue Recap

A recap on recent struggles with EDI functionality

B&T EDI Issues

Thanks Vickie for your work on behalf of SWAN Libraries with Baker & Taylor for the past 2 weeks!

- Problem identified on June 15th
- [Known Issue](#) tracks progress
  - Will not close known issue until we have caught up with pending EDI transfers
- Source of problem: B&T upgraded their ftp server and settings were incompatible with previous configuration
- Rudy identified B&T misconfiguration on 6/23 – sent them instructions on how to fix
  - B&T appears to have made this change afternoon of 6/27
- Vickie tested repeatedly with B&T for 2 weeks
- Currently scheduling reports to prioritize libraries with FY end June

Non-resident Users Under 18

[Public Act 102-0843](#)

Helpful Resources

[RAILS Nonresident Page](#)

[Public Library Nonresident Card Participation](#)
(List of all libraries and their fee details)
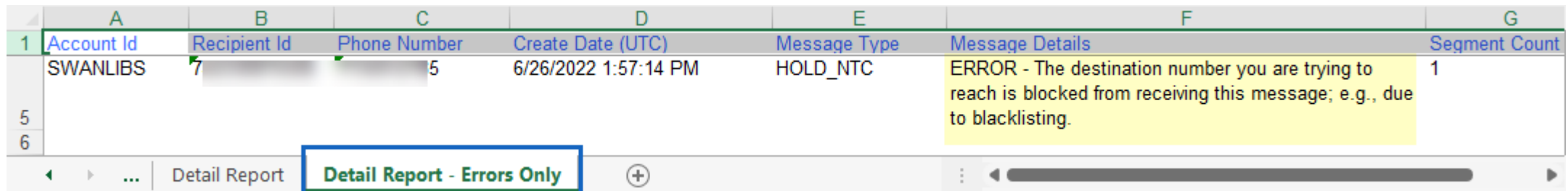
[Library Service Areas Map](#)
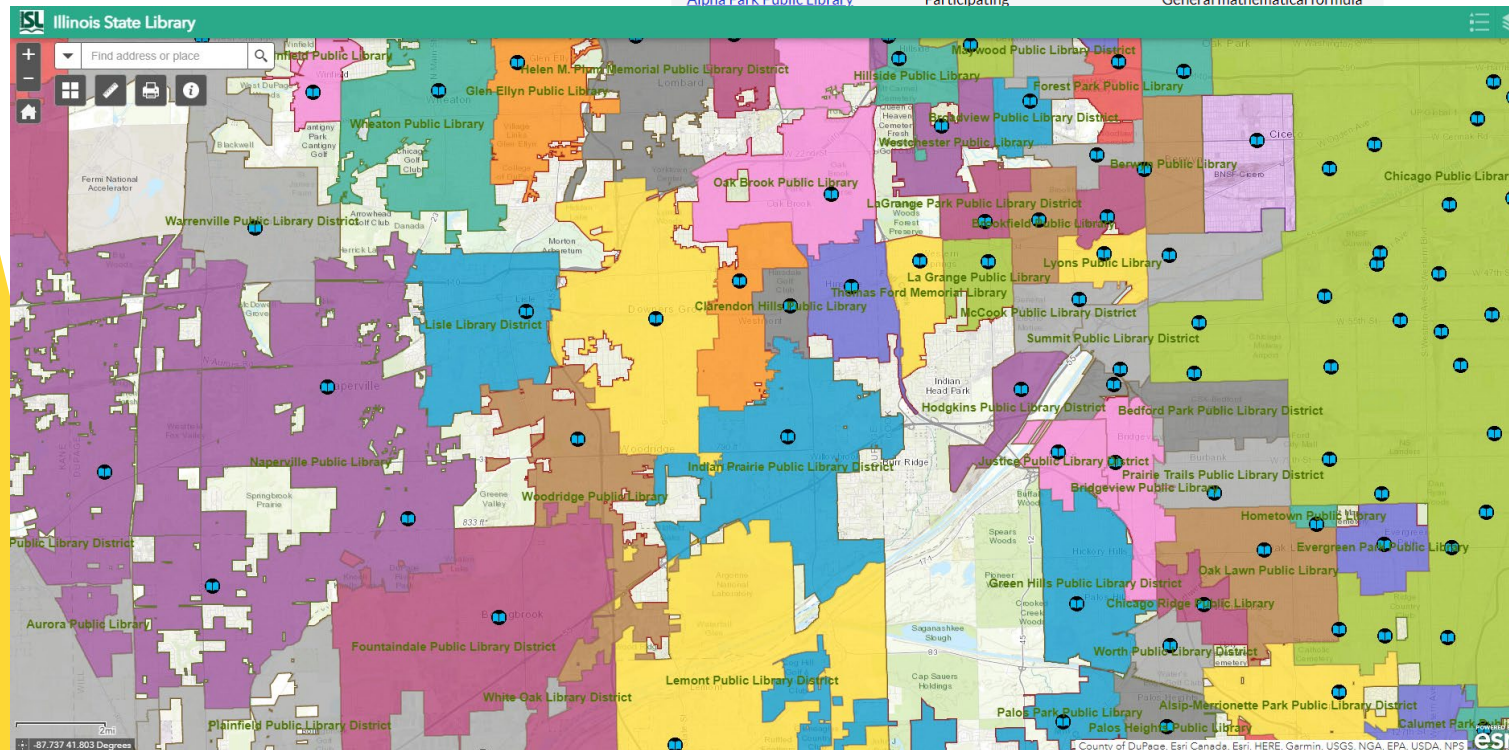
SMS Text Report by Library

Processing your SirsiDynix SMS Report

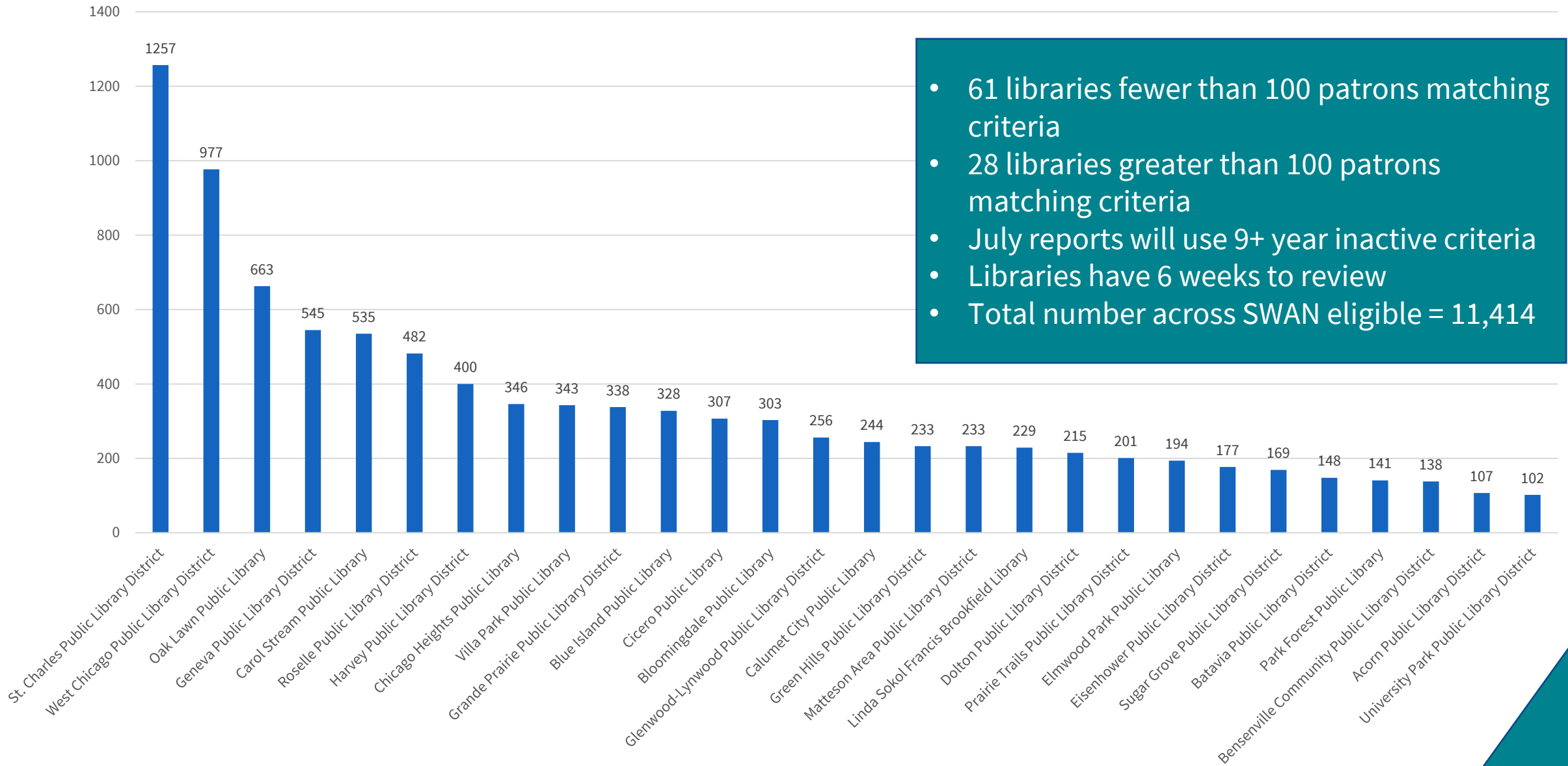- Sent daily to library's aliased xxx@swanlibraries.net email

- Review all ERROR details listed in the ***Detail Report – Errors Only*** tab to review errors and contact patron

- Note the message type (Hold or Overdue or Manual)

Monthly Patron Review – 9-Years Inactive

Count of Patrons eligible for removal (9+ years inactive with < $100 in bills)

- 61 libraries fewer than 100 patrons matching criteria
- 28 libraries greater than 100 patrons matching criteria
- July reports will use 9+ year inactive criteria
- Libraries have 6 weeks to review
- Total number across SWAN eligible = 11,414

Chart values:
- St. Charles Public Library District: 1257
- West Chicago Public Library District: 977
- Oak Lawn Public Library: 663
- Geneva Public Library District: 545
- Carol Stream Public Library: 535
- Roselle Public Library District: 482
- Harvey Public Library District: 400
- Chicago Heights Public Library: 346
- Villa Park Public Library: 343
- Grande Prairie Public Library District: 338
- Blue Island Public Library: 328
- Cicero Public Library: 307
- Bloomingdale Public Library: 303
- Glenwood-Lynwood Public Library District: 256
- Calumet City Public Library: 244
- Green Hills Public Library District: 233
- Matteson Area Public Library District: 233
- Linda Sokol Francis Brookfield Library: 229
- Dolton Public Library District: 215
- Prairie Trails Public Library District: 201
- Elmwood Park Public Library: 194
- Eisenhower Public Library District: 177
- Sugar Grove Public Library District: 169
- Batavia Public Library District: 148
- Park Forest Public Library: 141
- Bensenville Community Public Library District: 138
- Acorn Public Library District: 107
- University Park Public Library District: 102

IPLAR Patron Counts

- Monthly patron records are removed from the system that have been inactive for 10 years. Starting in August 2022, the period will be 9 years.

- Through NCOA and ongoing removal of inactive patron accounts, you may have noticed a reduction in your count of registered patrons from prior years.

- IPLAR Note: Files should have been purged within the past three (3) years.
  - This occurs monthly automatically.

You can note the following as an explanation on your IPLAR form:

We have moved to a monthly removal process for inactive accounts to protect patron privacy. Also, we ran a National Change of Address verification to remove out-of-district patrons in December 2021. These actions have resulted in a reduction in total resident card count.
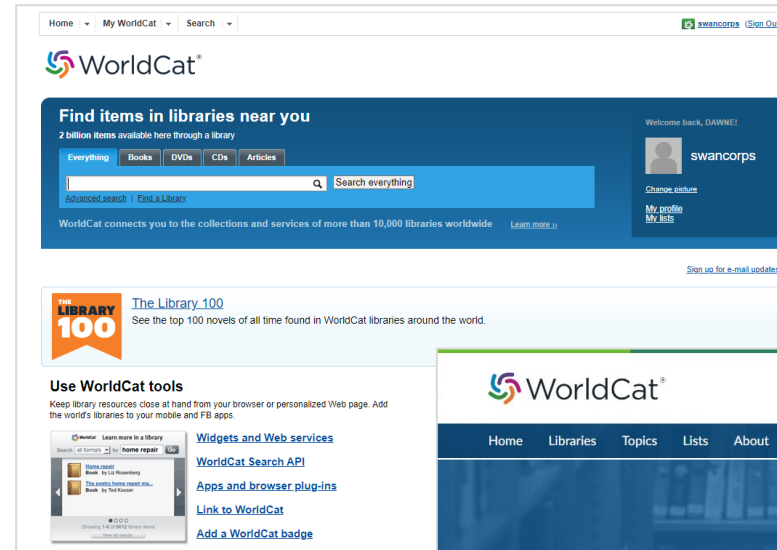
New WorldCat & WorldShare ILL Stats
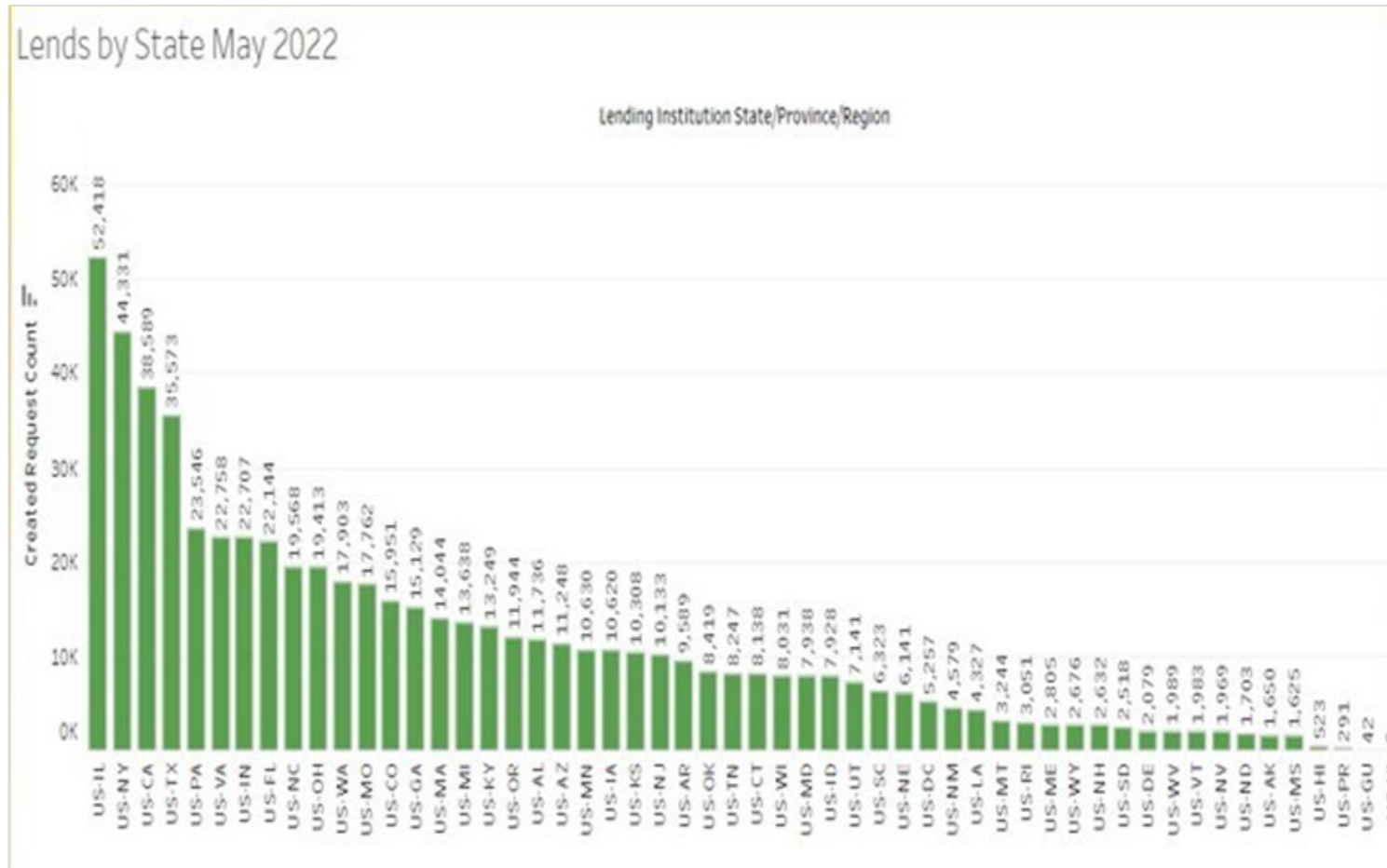
New WorldCat (August 2022)

Impact on SWAN Libraries

- Library card sign-up link
- Feature lists and topics of interest
- Not a replacement or in competition with Aspen
- Links to our Aspen catalog on all holdings
- WorldCat Discovery will continue as gateway for ILL requests

Look for webinar announcements later this summer. SWAN staff will provide front-line training, support, and config.

WorldShare ILL Activity by State, May 2022

Lends by State May 2022

Statistics provided by OCLC - See: https://www.oclc.org/community/discussions/interlibrary_loan.topic.html/oclc_ill_activitybystate-LfEe.en.html

- Illinois led the country in both lending and borrowing
- Illinois is a net-lender
- So far in 2022, Illinois filled most requests within own state (so far 79,420)
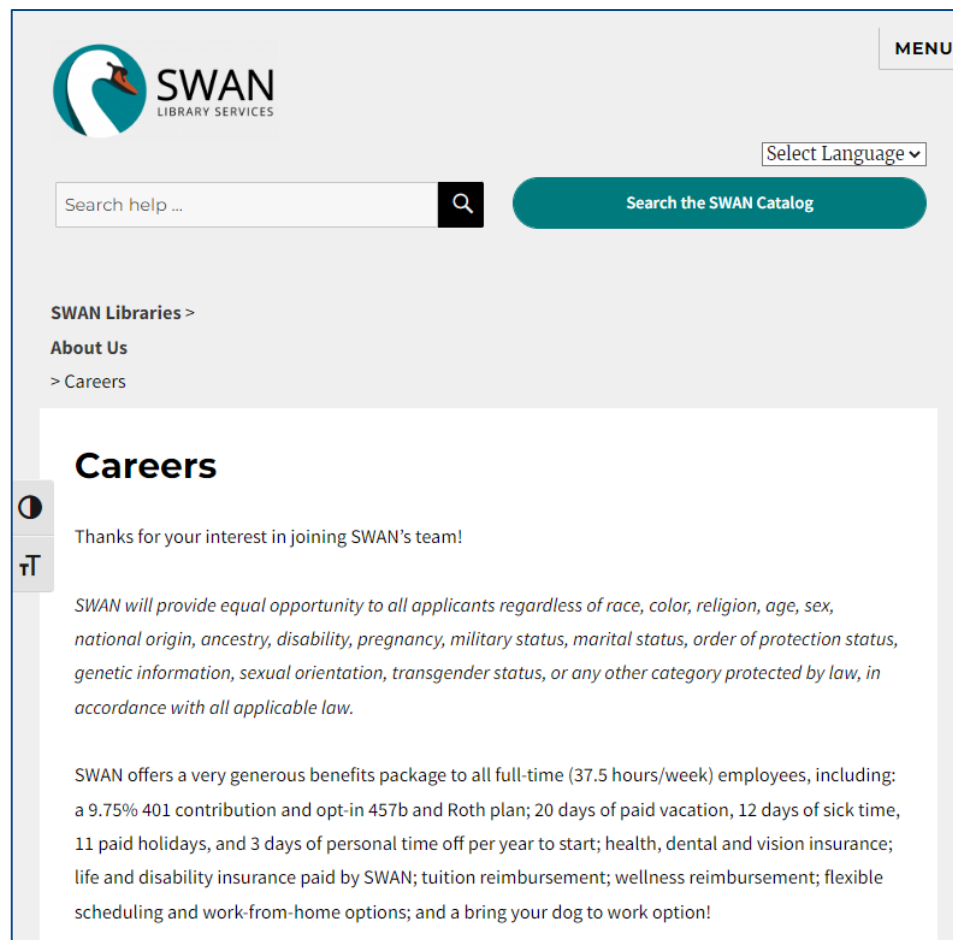- OCLC WorldShare ILL is, by far, the most used resource sharing platform in Illinois

Recruiting activity

SWAN Library Services

Available Positions at SWAN

- Information Technology & Systems Support Manager

- E-Resources Consultant

Search is expected to being this week. See [SWAN's Career Page](swanlibraries.net/about-us/careers) swanlibraries.net/about-us/careers

E-Resources

EBSCO database subscription 2022/2023

New database links are available!

1. See the patron site or SWAN support site for URLs
2. Update database links on your websites

If your library didn't change your subscription, you don't need to do anything.

Aspen

Aspen Tip of the Month

Start exploring masquerade mode!

If you haven't tried out masquerade mode yet, it is great!

- No need to switch between the catalog and WorkFlows

- Great for a dual-monitor public service desk

- You see what the patron sees – place in queue, frozen holds, ratings, linked accounts, and more

SWAN Library Services

How to use masquerade mode

- Get the OPACREF login from your director
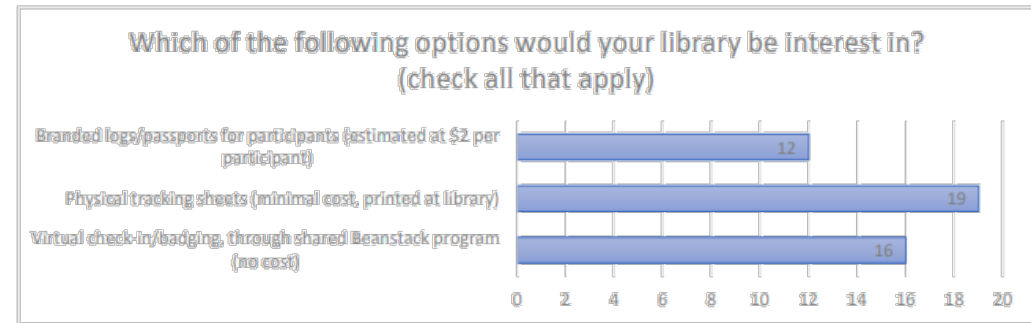- Account > Masquerade
- Scan the patron barcode

SWAN Library Services
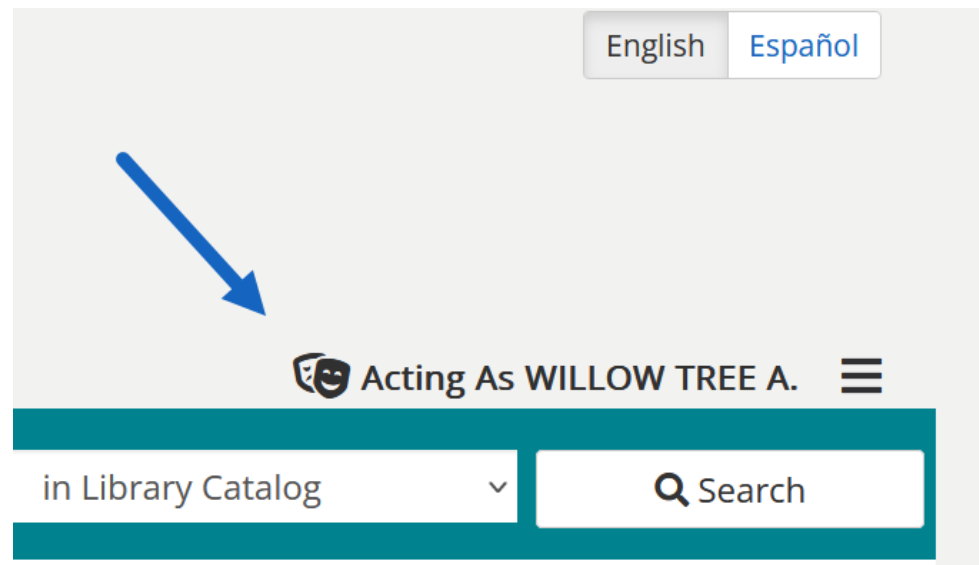
Member Engagement

SWAN Passport Idea/Survey

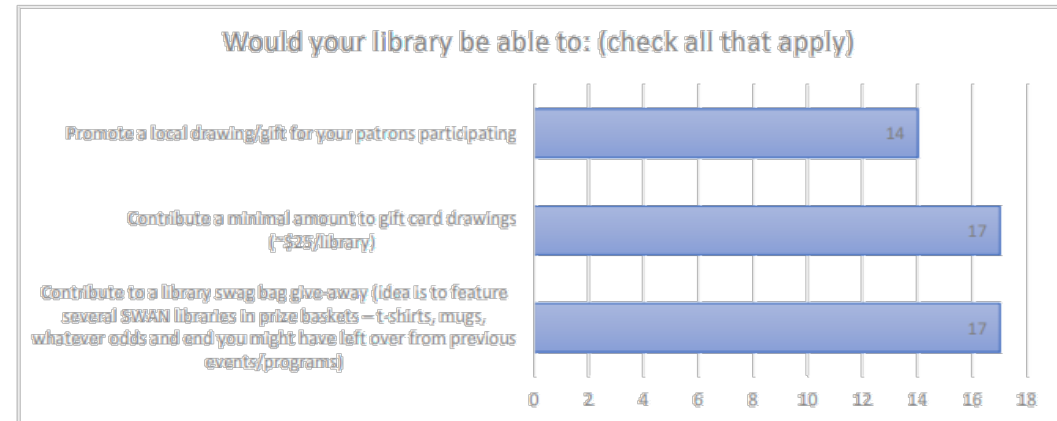Pgs. 41-44 of June Board Packet

- 22/26 responding libraries are interested in participating

- Need more time to plan

- Facilitate discussion with libraries interested

- Needs to be member library driven/led

- Need 3-4 month lead time for marketing & promotion

Which of the following options would your library be interest in? (check all that apply)

Which of the following options would your library be interest in? (check all that apply)

Option	Value
Branded logs/passports for participants (estimated at $2 per participant)	12
Physical tracking sheets (minimal cost, printed at library)	19
Virtual check-in/badging, through shared Beanstack program (no cost)	16

11 libraries indicated all three options

Would your library be able to: (check all that apply)

Would your library be able to: (check all that apply)

Option	Value
Promote a local drawing/gift for your patrons participating	14
Contribute a minimal amount to gift card drawings (~$25/library)	17
Contribute to a library swag bag give-away (idea is to feature several SWAN libraries in prize baskets – t-shirts, mugs, whatever odds and end you might have left over from previous events/programs)	17

12 libraries indicated all three contributions

User Groups/Meetings: Recap

SWAN Quarterly Meeting 6/2

- Board Elections
- Performance Metrics
- Library Cards for Non-Residents
- Passport Idea
- SWAN Online Learning Update

Circulation Users 6/15

- Update on Daily SMS Report
- Non-Resident Cards
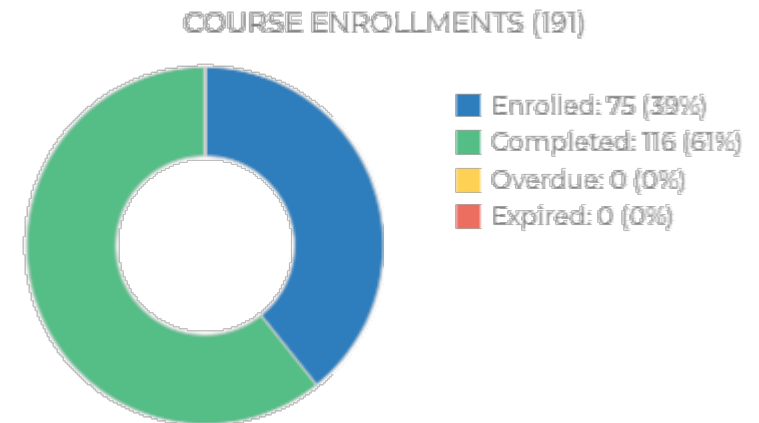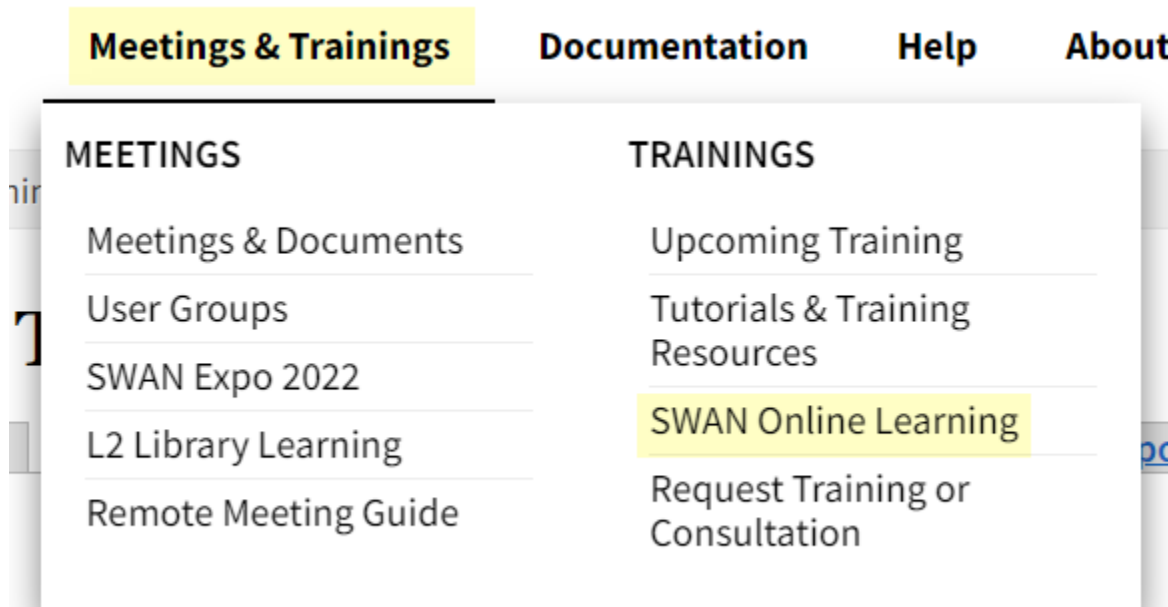- Placing Holds in Aspen

ILL Users 6/1

- Article Exchange
- New WorldCat
- OCLC Community Resources

E-Resource Advisory 6/23

- Announcement – Thanks and congrats to Robin
- RAILS VPAT
- Hoopla & OverDrive collections

Online Learning Update

- 9 courses in the catalog
- Look for new course in July on WorkFlows Searching

USERS (144)

144 active   0 inactive   1 online

NEW USERS

0 this week   22 this month   130 this year

COURSE ENROLLMENTS (191)

- Enrolled: 75 (39%)
- Completed: 116 (61%)
- Overdue: 0 (0%)
- Expired: 0 (0%)

L2 Reminder – Verify Employees

- We rely on L2 to verify employees

- L2 is required to access:
  - SWAN Support Site members-only content
  - Login to OTRS ticketing
  - SWAN Forums (verify before account invite)
  - SWAN Online Learning
  - Creation of BLUEcloud accounts

Don't forget, a Library Director can designate an L2 delegate to help with managing staff accounts. HR or Department Heads are great backups!

Staff List: System Wide Automated Network

MANAGE STAFF/BOARD LIST FOR THIS LOCATION
MANAGE EXTRA AGENCY-LEVEL ACCESS FOR ADMINISTRATORS
Important: A person must have an L2 user account before they can be added to the library staff list.

PRIMARY ADMINISTRATOR	CONTACT INFO
Aaron Skog Executive Director	630-326-7022 aaron@swanlibraries.net

STAFF	CONTACT INFO
Ginny Blake Business Manager	844-792-6542 ginny@swanlibraries.net
Scott Brandwein Bibliographic Services Manager	630-326-7455 scott@swanlibraries.net
Mary Alice Buckley Bibliographic Services Clerk	630-326-7374 maryalice@swanlibraries.net
Samantha Dietel Bibliographic Services Consultant	630-326-8647 samantha@swanlibraries.net
Diane Nickolaou Bibliographic Services Support Specialist	630-326-7361 diane@swanlibraries.net
Claudia Nickson Bibliographic Services Consultant	630-326-7303 claudia@swanlibraries.net
Ian Nosek System Administrator	630-326-5886 ian@swanlibraries.net
Dave Pacin Systems Administrator	630-326-8360 dave@swanlibraries.net
Helen Pinder Resource Sharing Consultant	630-326-8716 helen@swanlibraries.net
Angela Puckett Bibliographic Services Support Specialist	630-326-7179 angela@swanlibraries.net
Aaron Skog Executive Director	630-326-7022 aaron@swanlibraries.net

Moving to Zoom – August 2022

- Starting August 2022 – all SWAN meetings will transition to Zoom instead of GoToMeeting

- Check L2 listings and SWAN support site for updated meeting links

- Will have new links in place by mid-June

NOTE: Recorded meetings in Zoom will include participant video displays. This is a change from GoToMeeting which will be announced to members as we move to Zoom recordings.

Other Upcoming Meetings

- SWAN Board Meeting – 7/15
- Monthly Office Hours
  - Circ/ILL/Outreach – 7/6
  - Aspen – 7/11
  - Cataloging – 7/12
  - BLUEcloud Analytics – 7/13
  - Circulation & Hold Map – 7/20
- DEI in Metadata – 7/22

- User Groups:
  - Book Club Users – 7/13 – Planned for Geneva Public Library on-site!
  - Cataloging Advisory – 7/14
  - Circulation Advisory – 7/20
  - DUX Advisory – 7/21

Office hours are free-form, without an agenda. Bring your questions, ideas you'd like to share, and request demonstrations of how to perform functions/tasks.

Recent webinar recordings available

- [Getting Started with Accessibility Testing](#)

- [EDS New User Interface](#)

- [Track Reading with Beanstack](#)

- New Self-Paced Training: [Patron Account Blocks & Notes](#)
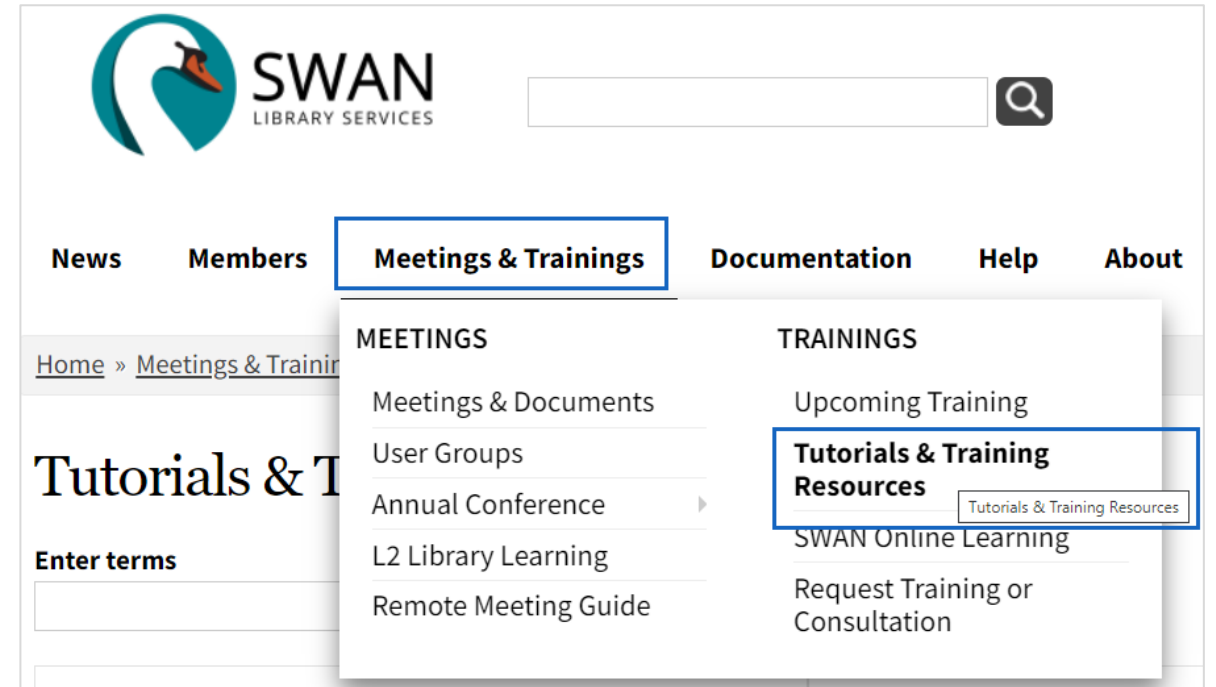
Thank you!

Next Fireside Chat:
July 26, 11:00 AM - Noon

Register at GoToWebinar:
https://register.gotowebinar.com/register/116435402112460813