

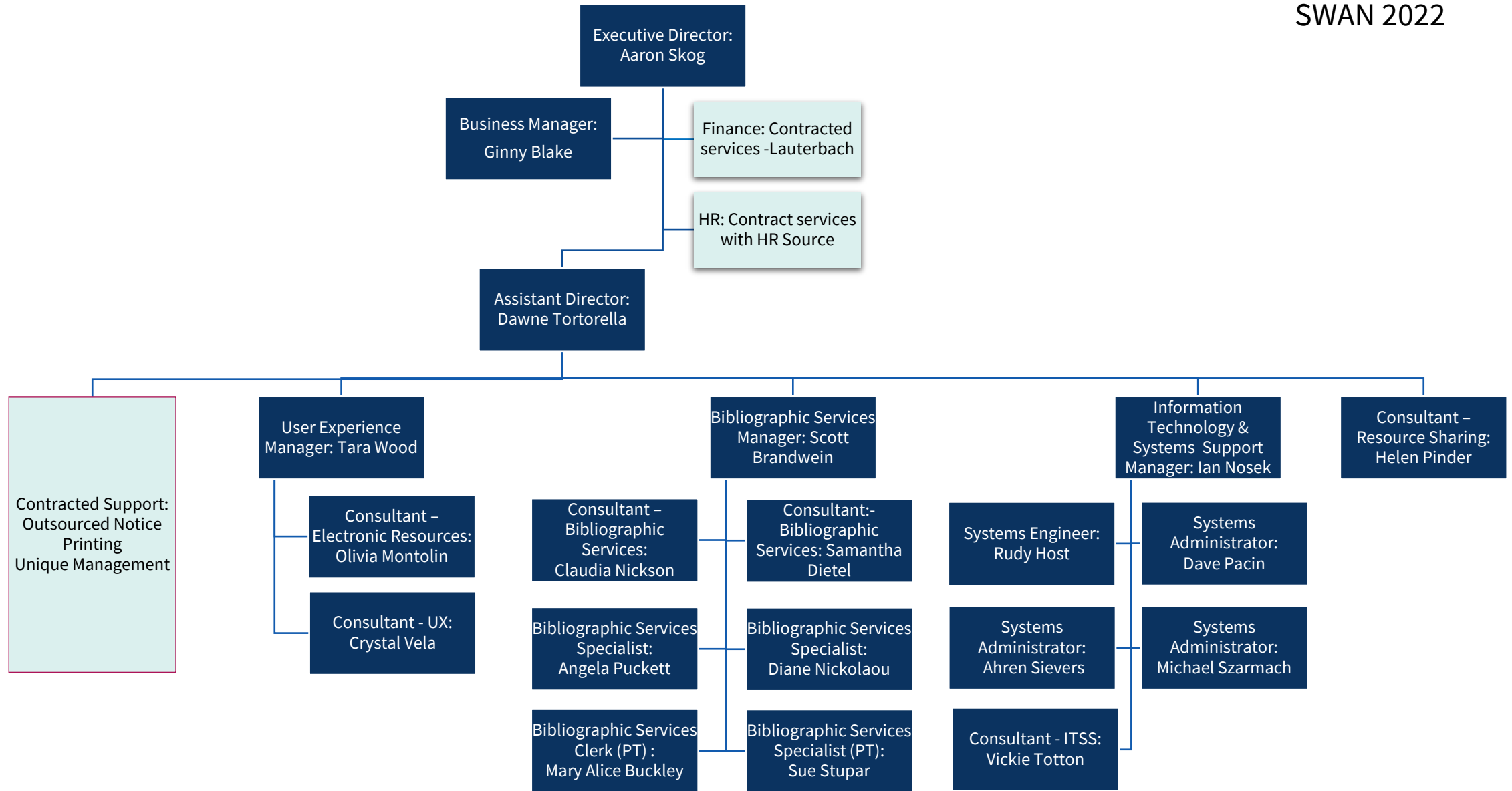


# SWAN Fireside Chat

October 25, 2022


# Agenda

- Staff announcements
- MessageBee proposal
- Learning management system
- Support Site updates
- BLUEcloud Circulation
- Platform news
- BLUEcloud Analytics accounts
- SWAN support tips and tricks
- Circulation Advisory update
- Cataloging groups
- Item type consolidation update
- Serial data cleanup
- Aspen formats
- Aspen tip of the month
- New webinars posted
- User group survey results
- Upcoming meetings, training, announcements
  - Quarterly meeting Dec 1st



# Welcome Ahren!

Ahren Sievers joined SWAN this month as the IT & System Support System Administrator

- Scott Brandwein, Assistant Director
  - Ian Nosek, IT & System Support Manager
  - Olivia Montolin, Electronic Resource Consultant
  
  - Posting soon for SWAN Bibliographic Services Manager
- 
- A teal-colored triangle is located in the bottom right corner of the slide, pointing towards the top right.

# MessageBee proposal

## Presentations to date

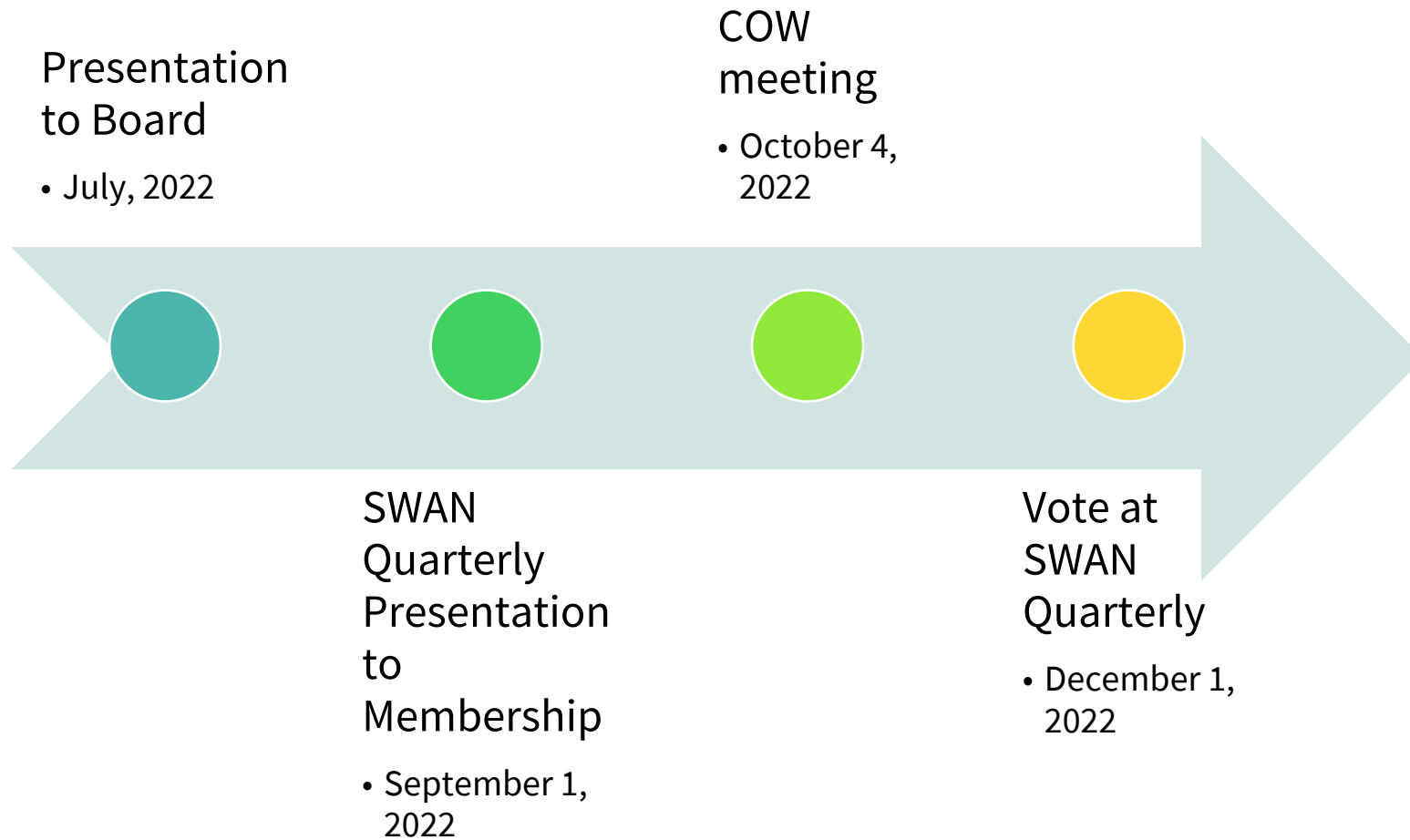
- Quarterly 9/1
- DUX 9/22
- Technology Users 9/22
- Fireside 9/27
- Committee of the Whole (COW)  
10/4

## Next steps

- Quarterly 12/1
- Seeking approval for one-time funds & amending the current budget for expenses through June 30, 2023



# MessageBee approval process (in progress)



# Training & Support updates

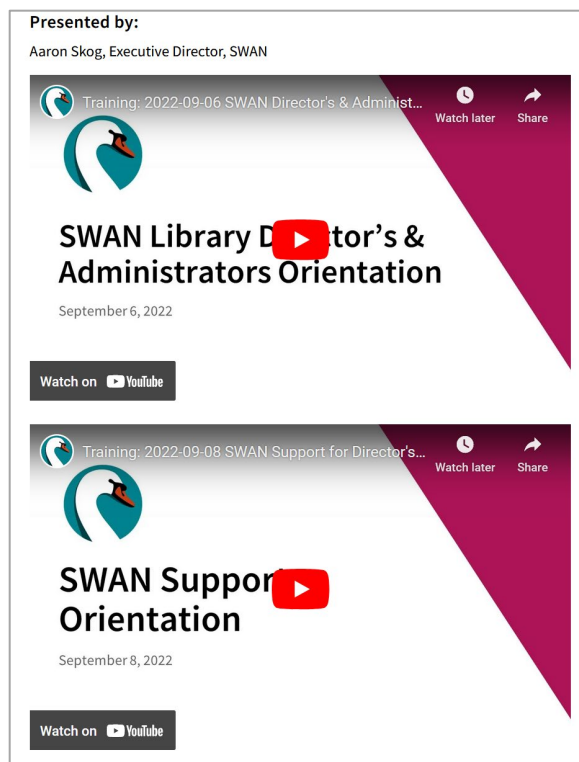
Crystal Vela, UX Consultant

Helen Pinder, Resource Sharing Consultant

Vickie Totton, IT & System Support Consultant

# New Webinars Posted

- [Directors' orientation part 1 & part 2](#)



- [Non-Resident Card Webinar](#)

Home » Training » Circulation Training » Issuing Non-Resident Cards: Yours, Mine, Ours

## Issuing Non-Resident Cards: Yours, Mine, Ours

**Webinar** 65 minutes  
Added Oct 18, 2022 · [Circulation](#)

This discussion and workshop provides tips and guidance on resources for determining non-resident card eligibility and how to work within our consortium to guide people to the closest public library for issuing a non-resident card. Whether the patron receives a non-resident card at my library or yours, they are all a part of the SWAN consortium. So, having some common practices helps us all.

We examine the Non-Resident administrative code, how to determine and report non-resident participation to RAILS, mapping tools for determining closest public library, and library districts providing contracted services.

**Presented by:**  
Crystal Vela, Consultant, User Experience, SWAN  
Vickie Totton, Consultant, Information Technology Systems & Support, SWAN  
Dawne Tortorella, Assistant Director, SWAN

Training: 2022-10-17 Issuing Non-Resident Cards: Yours, Mine, Ours  
Watch later Share



# Learning Management System

- 10 courses in Circulation and Technical Services
- 210 users
- 246 courses completed

TOP COURSES BY NUMBER OF ENROLLMENTS

1	PS100: Circulation Basics	100
2	PS101: Patron Management	86
3	TS100: Adding Call Numbers and Items	36
4	PS104: Patron Account Blocks & Notes	28
5	TS080: Searching in WorkFlows	28

Meetings & Trainings

Documentation

Help

## MEETINGS

Meetings & Documents

User Groups

SWAN Expo

L2 Library Learning

Remote Meeting Guide

Full Calendar

## TRAININGS

Upcoming Training

Tutorials & Training Resources

**SWAN Online Learning**

Request Training or Consultation

\*Your information needs to be up-to-date in L2 before we approve your account.

# Exciting Platform News

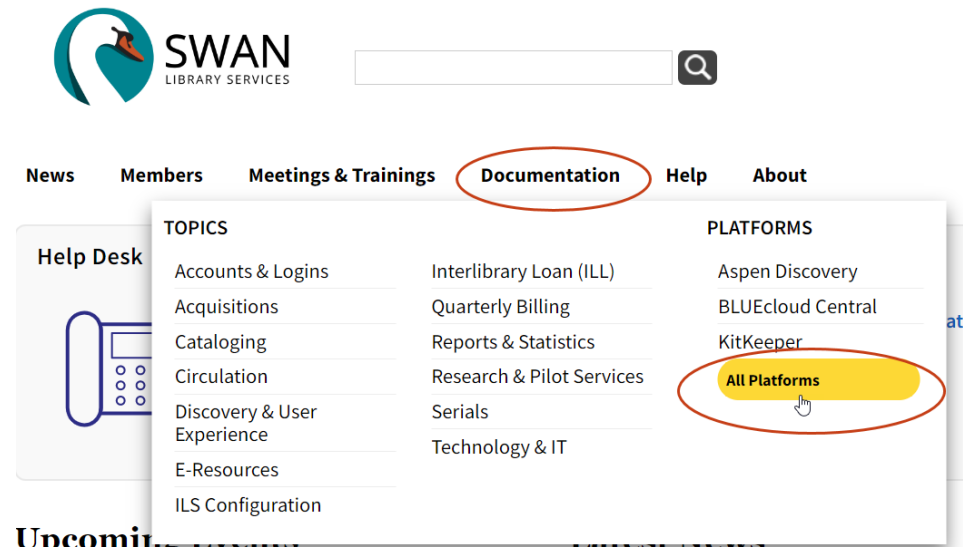


- Beanstack

- Current and upcoming challenges posted
- Beanstack-hosted training & recordings
- SWAN's Beanstack available to all readers

- KitKeeper

- Moved to Supported Platforms
- Detailed guidance and standards
- Borrow KitKeeper content even without a collection of your own



# Support Site Documentation Update

- You can now browse documentation by topic (e.g., Circulation) or by the platform (e.g., Aspen).
- Landing pages for documentation and topics will also link you to trainings and ways to get involved.

## Documentation

---

### Topics

#### Accounts & Logins

Login and access WorkFlows, BLUEcloud, and more.

#### Acquisitions

SWAN supports 2 Acquisitions products - BLUEcloud Acquisitions and Symphony Acquisitions. Please find product-specific documentation in the appropriate sections.

#### Cataloging

Create pre-cats, find local cataloging practices and policies, and learn about the scripts and processes running on our shared catalog.

#### Circulation

Learn about daily circulation duties and functions, including patron management, checkin and checkout functions, holds, mobile and offline circulation, and the Outreach module.

#### Discovery & User Experience

Learn about the SWAN online catalog, mobile app, and



### Platforms

#### Aspen Discovery

Aspen Discovery is our online public access catalog (OPAC) and discovery platform. Aspen integrates e-resources and digital archives, and it provides several tools to highlight your collections and recommend titles to patrons.

#### Beanstack

The Beanstack reading app is used by over 50 of our SWAN libraries. To support our members and provide opportunities for all readers in the SWAN service area to access an online reading app, the [SWAN libraries instance of Beanstack](#) is provided.

#### BLUEcloud Acquisitions

Tools for acquisitions management within the SirsiDynix BLUEcloud staff suite.

#### BLUEcloud Circulation

BLUEcloud Circulation is a web-based tool that covers very basic circulation tasks.

# Support Site Documentation Update

New landing pages for platforms and topics show you:

- Related training
- User groups and forums
- Open issues (platforms)

## KitKeeper

KitKeeper is a library staff tool for managing kits and book club requests.

### Documentation

#### [Cataloging Book Clubs Kits \(KitKeeper\)](#)

For libraries sharing book club kits, through the KitKeeper reservation system, cataloging consistency allows for easy identification of these resources. A shared Book Club Kit can be used by libraries who have book club kits of the same title/author that will be shared through KitKeeper. Each library will be able to describe the composition of their kit in a local note.

#### [Circulating a KitKeeper Kit](#)

Reservations are created and managed entirely within KitKeeper. Circulating these kits require parallel processing in both KitKeeper and WorkFlows to ensure accurate statuses and locations.

#### [Kit Contents and Packaging](#)

KitKeeper kits are unique in their preparation and use. Best practice examples of circulating kits and where to find the associated supplies. These bundles will fit in delivery totes, sit neatly on shelves, and safely contain and transport discussion materials.

#### [KitKeeper Communications](#)

A directory of KitKeeper email notification timing and language.

#### [KitKeeper General Guidelines](#)

Book Club kits can be shared throughout the consortium as complete kits via a reservation system.

#### [Reserving Kits](#)

Use KitKeeper to reserve a kit for a book discussion group.

### Trainings

#### [Book Club Kit Sharing: KitKeeper](#)

Webinar

### Get Involved

#### [Book Club Users](#)

#### [Book Clubs/Discussion Forum](#)

▸ [Open Issues](#)

▸ [Vendor Information](#)

▸ [Accessibility Information](#)

# BLUEcloud Analytics Personal Accounts



The screenshot shows the SWAN Library Services website. At the top right, there are links for 'Catalog', 'L2 Calendar', and 'Log Out'. The SWAN logo is on the left, with a search bar to its right. Below the logo is a navigation menu with 'News', 'Members', 'Meetings & Trainings', 'Documentation', 'Help', and 'About'. The 'News' link is underlined. Below the menu is a breadcrumb trail: 'Home » News » Sunsetting BLUEcloud Analytics Personal Accounts'. The main heading is 'Sunsetting BLUEcloud Analytics Personal Accounts'. To the right of the heading are links for 'Download PDF' and 'Print'. Below the heading is the date and author: 'October 12, 2022 - 6:38pm, by Vickie Totton'. The main text explains that SWAN created BLUEcloud Analytics accounts for each member library to help manage subscriptions, reports, and collaboration. It states that library staff were asked to use a personal account to add saved reports and subscriptions to the shared library account, with a deadline of December 31, 2022. It also mentions that all personal logins will be removed after that date. The text then states that they added Sunsetting BLUEcloud Analytics Personal Accounts Office Hours to assist with adding saved reports and recreating subscriptions. A bulleted list of office hours is provided at the bottom.

Catalog L2 Calendar Log Out

SWAN LIBRARY SERVICES

News Members Meetings & Trainings Documentation Help About

Home » News » Sunsetting BLUEcloud Analytics Personal Accounts

## Sunsetting BLUEcloud Analytics Personal Accounts

[Download PDF](#) [Print](#)

October 12, 2022 - 6:38pm, by Vickie Totton

SWAN created BLUEcloud Analytics accounts for each member library to help manage subscriptions, reports, and collaboration in your library. We asked library staff using a personal account to add saved reports and subscriptions to the shared library account. The deadline for this is December 31, 2022; all personal logins will be removed after that date.

We added the following Sunsetting BLUEcloud Analytics Personal Accounts Office Hours to assist you in adding saved reports and recreating subscriptions from your personal account into the shared library account.

- [Thu., Oct. 20 - 11:00 a.m. - 12:00 p.m.](#)
- [Fri., Oct. 28 - 10:00 a.m. - 11:00 a.m.](#)
- [Wed., Nov. 2 - 3:00p.m. - 4:00 p.m.](#)

- BLUEcloud Analytics Accounts are maintained by SirsiDynix - not SWAN
- Shared library member accounts allow better communication within the library and troubleshooting with SWAN

# Staff Changes Onboarding & Offboarding New Checklists!

Vickie Totton, IT & System Support Consultant

# Staff Changes Onboarding & Offboarding

## Onboarding

### Step 1: Create a Library Learning (L2) account

You will use your Library Learning account to access the SWAN support site, ticketing system, and events.

1. Follow these [instructions to set up your L2 account](#).
2. Once you've created your account, log into this page to view and complete the rest of the onboarding checklist.

### Step 2: Sign up for SWAN communications

- [Sign up for The Current](#), SWAN's monthly newsletter.
- [Sign up for the SWANcom email list](#) so you receive updates about issues and outages, upcoming trainings, and new services.

### Step 3: G

- Join
- When
- [Foru](#)
- Attend
- impo

### Step 4: R

- [Find](#)
- [Brov](#)
- Consider attending a [SWAN office hours](#) to ask the experts

## Offboarding

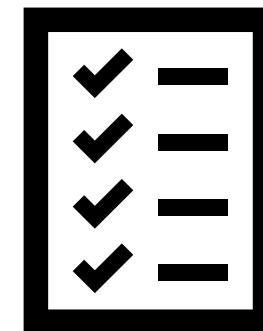
### Step 1: Remove the Library Learning (L2) account

Remove the staff person's L2 account. If you don't have access to update this, [contact L2 Help](#).

### Step 2: Contact SWAN

Email us at [help@swanlibraries.net](mailto:help@swanlibraries.net), and SWAN staff will disable accounts for the staff person.

Use the new checklists available on the SWAN Support Site to make sure new staff have access and outgoing staff access is cleared



# SWAN Support Tips & Tricks

- [Using the OTRS Help Desk | SWAN Library Services \(swanlibraries.net\)](http://swanlibraries.net)

- Once you are seeing Company Tickets, you can:

1. Select tickets currently open, closed, or all (in both states or other states such as merged)
2. Sort by state (closed, merged, etc.)
3. Sort by age, which is displayed as days-hours-minutes depending

The screenshot shows the SWAN Support System interface with a list of tickets. The interface includes a header with the SWAN logo and a navigation menu. Below the header, there are filter options for 'All (1840)', 'Open (0)', and 'Closed (1840)'. The main table displays columns for 'TICKET#', 'TITLE', 'STATE', and 'AGE'. Red circles 1, 2, and 3 highlight the filter menu, the state column, and the age column respectively.

TICKET#	TITLE	STATE	AGE
2019082610000188	Record merge (This Book Is Not Good For You) - a1922560 <-- BJD a884254 <--	closed successful	1 h 58 m
2019082610000179	Record merge (Super Turbo And The Fountain Of Doom) - a2776263 <-- ITD, LGS,	closed successful	2 h 24 m
2019082210000104	Record merge? (My Neighbor Totoro [BLU-RAY]) - 3 BLU-RAY records come up	closed successful	4 d 6 h
2019082210000079	Record merge (Where'd You Go, Bernadette) - a1501007 <-- CCS, INS, WDD	closed successful	4 d 6 h
2019082110000357	Record discrepancies - re-overlay or swap out record? - a1215412 [One piece.	closed successful	4 d 20 h
2019081910000343	Record merge (The Healthy Divorce) - a2365335 <-- BDD a840159 <--	closed successful	7 d 0 h
2019081610000125	Record merge (Madeline. The Complete Collection [DVD]) - a2589947 <-- BDD,	closed successful	10 d 4 h
2019081610000107	Record merge (Horton Hears A Who [DVD]) - a1452920 <-- LSS a1479945 <--	closed successful	10 d 4 h
2019081610000063	Record merge (Island Within A City) - 3 records come up for the title Island	closed successful	10 d 6 h
2019081410000414	Record merge (The Daughter of Sherlock Holmes) - a2823447 <-- CCS a	closed successful	11 d 21 h
2019081210000561	Please mass Discard these orphaned pre-cat's - Thank you! We'll trawl through	closed successful	13 d 23 h
2019081210000132	Record merge (Ordinary Heroes) - a2258232 <-- GED a640078 <-- everyone	closed successful	14 d 6 h
2019081210000114	Record merge (Ponyo [DVD]) - a1909204 <-- BVD, MED, OBD, SGD, WDD	closed successful	14 d 7 h
2019080910000102	Item charge history being retained on two records - ?Weird, thanks! Molly Bitters	closed successful	17 d 7 h
2019080710000017	Patron Email Bounce - The following patron(s) may have had an email	closed successful	19 d 11 h
2019080510000388	Record merge(s?) (Tanakh : The Holy Scriptures) - a1449309 <-- LSS (c1988)	closed successful	21 d 0 h
2019080510000333	Record merge (Folly) - a2021408 <-- BDD, BLD, CSD, GED, etc.	closed successful	21 d 2 h
2019080510000315	Record merge (Murder In Moscow) - a2159906 <-- BLD a307688 <-- everyone	closed successful	21 d 2 h
2019080510000262	Record merge (You Bet Your Life) - a2202387 <-- BLD a511224 <-- everyone	closed successful	21 d 3 h
2019080510000253	Record merge (Majoring In Murder) - a1474272 <-- BLD, FPD a525999 <--	closed successful	21 d 3 h
2019080510000235	Record merge (Murder In A Minor Key) - a1473103 <-- BLD, FPD a470692 <--	closed successful	21 d 3 h
2019080510000155	Record merge (Killer In The Kitchen) - a2020593 <-- BLD, BVD, OBD, SCD	closed successful	21 d 6 h
2019080510000128	Record merge (Destination Murder) - a1474449 <-- BDD, BLD, FPD, OBD,	closed successful	21 d 6 h
2019080210000204	Record merge (Ever After [DVD]) - a830880 <-- BLD, CIS, FPS, GHS, etc.	closed successful	24 d 2 h
2019073110000358	title control #a2791291 - Merged Ticket 2019073110000358 to	merged	26 d 2 h



# Library services platform updates

Sam Dietel, Bibliographic Services Consultant

Crystal Vela, UX Consultant

Scott Brandwein, Bibliographic Services Manager

Claudia Nickson, Bibliographic Services Consultant

# BLUEcloud Circulation - in development

- Printing
  - Silent printing
  - Printing templates
    - Easy interface
  - Multiple printers supported as well as network printers
- Holds Pull List actions
- Checking out item without checking in behavior

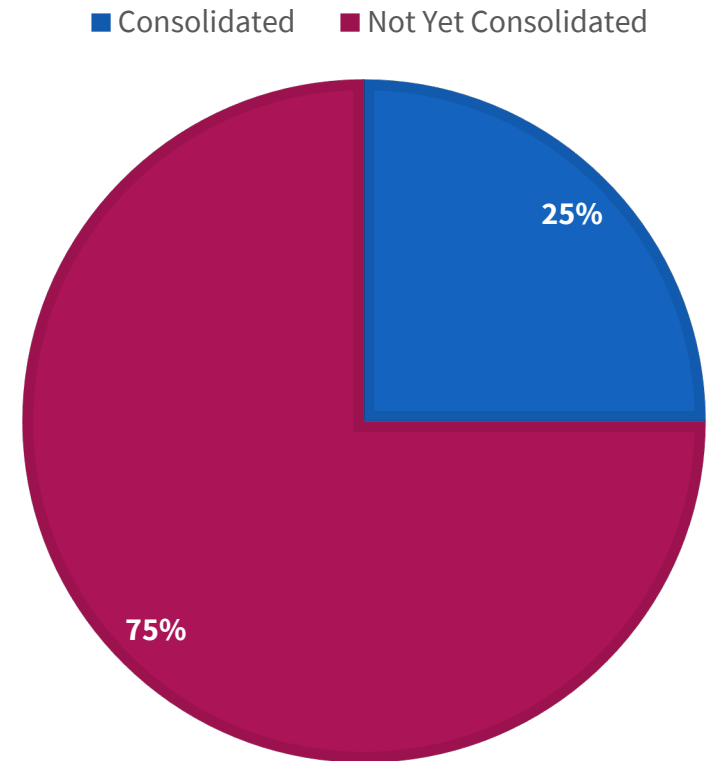
The image displays three overlapping screenshots of the BLUEcloud Circulation system interface. The top screenshot shows the 'Holds Pull List (1)' screen, which includes a table with columns for Call Number, Title, Item ID, Item Type, Location, and User Name. Below the table is a 'Processed (1)' section with a table showing the action taken (Trapped) and the transit to (Holds Shelf). The middle screenshot shows the 'Receipt Template' screen, which includes a 'Checkout Data' section with buttons for 'All Checkouts', 'New Checkouts', 'Previous Checkouts', and 'Number of Checkouts', and an 'Amount Saved' section. The bottom screenshot shows the 'Modify Template (Holds Slip)' screen, which includes a 'Patron Name' section with 'Variable Details' and 'Date Display Format' options, and a preview area showing the hold slip template with variables like [Hold Title], [Hold Item ID], [Patron Email], [Patron Phone], and [Patron Name].

# Symphony Item Type Consolidation Update

All SWAN Item Types consolidated into 5 format groups:

- Print
- Video
- Audio
- Equipment/Device
- Library of Things

LIBRARY CONSOLIDATION STATUS



Send a ticket to [help@swanlibraries.net](mailto:help@swanlibraries.net) to request a consultation!

# Serials Clean-up Project

- Serials prior to 01/01/2020
- Retention policy
- Check out to DISCARD user

2,989 serials items checked out to DISCARD

10 libraries

MARC holdings and controls were removed



What you can do:

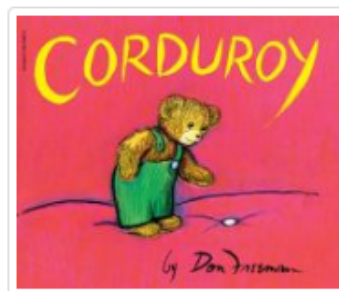
- Run or request serials reports of older serials
- Revise your retention policy
- Delete MARC holdings and controls
- Check them out to your DISCARD user

## Aspen Formats

The 22.10.00 release added support for the following formats:

- Playaway formats
- Pop-up books
- Board books
- 4K Blu-ray

Update is a work in progress! Further refinement to come.



### 13) Corduroy by Don Freeman

Author  
Series  
Language  
Appears on these lists

Freeman, Don  
Corduroy (Don Freeman)  
Puffin storytime  
Picture Puffins  
Board books  
More Series...  
English  
Explore the Classics - YOUTH  
OBD 1000 Books Before Kindergarten - YOUTH



Board Book

Available from another library

Place Hold

Show Editions

Where is it?

View all Formats

Overview: In 1968, a girl named Lisa fell in love with a little brown bear wearing green overalls with one button missing, and thousands of readers followed suit, making Corduroy one of the best-loved children's books of all time. Now, forty years later, Viking proudly celebrates Don Freeman's classic with a very special anniversary edition. With an extra-large trim size and special features including an embossed cover and four bonus spreads of never-before-seen...

More Info

Add to list

SHARE

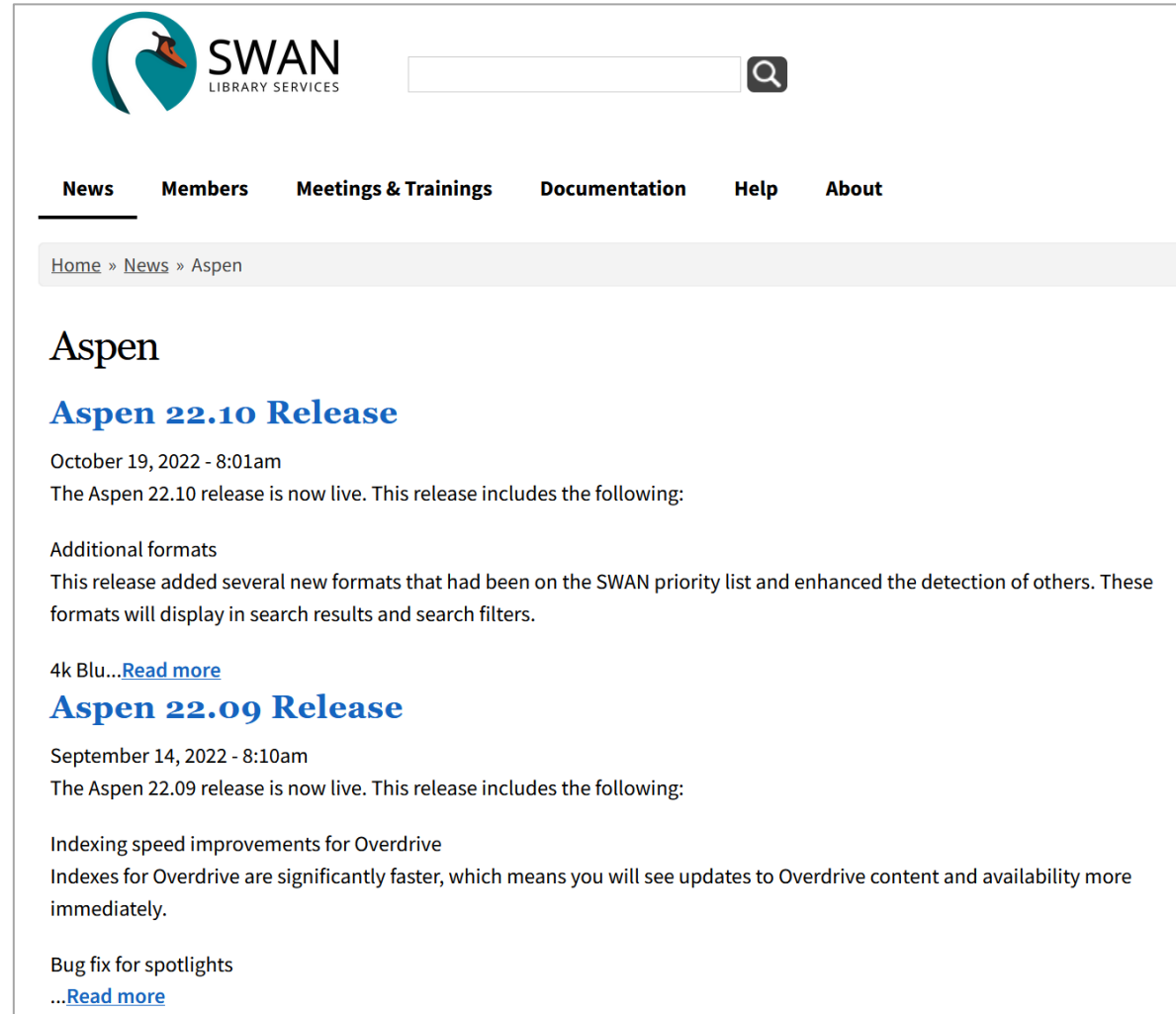


<https://bywatersolutions.com/news/aspen-discovery-announces-22-10-00-release-notes>

# Aspen Tip of the Month: Keep up with Aspen releases

Aspen releases go live every month and introduce new features and bug fixes.

We track releases and everything relevant for SWAN libraries in our News section: <https://support.swanlibraries.net/news/aspen>



The screenshot shows the SWAN Library Services website. At the top left is the SWAN logo, which consists of a stylized bird or wing shape in teal and blue, followed by the text "SWAN LIBRARY SERVICES". To the right of the logo is a search bar with a magnifying glass icon. Below the logo and search bar is a navigation menu with links for "News", "Members", "Meetings & Trainings", "Documentation", "Help", and "About". The "News" link is underlined. Below the navigation menu is a breadcrumb trail: "Home » News » Aspen". The main content area features a large heading "Aspen" and a sub-heading "Aspen 22.10 Release" in blue. Below this is the date "October 19, 2022 - 8:01am" and the text "The Aspen 22.10 release is now live. This release includes the following:". Underneath, there is a section titled "Additional formats" with the text "This release added several new formats that had been on the SWAN priority list and enhanced the detection of others. These formats will display in search results and search filters." Below this is a link "4k Blu...[Read more](#)". The next section is titled "Aspen 22.09 Release" in blue, with the date "September 14, 2022 - 8:10am" and the text "The Aspen 22.09 release is now live. This release includes the following:". This section includes "Indexing speed improvements for Overdrive" with the text "Indexes for Overdrive are significantly faster, which means you will see updates to Overdrive content and availability more immediately." and "Bug fix for spotlights" with a link "...[Read more](#)".

# User groups & upcoming events

Scott Brandwein, Bibliographic Services Manager

Crystal Vela, UX Consultant

Aaron Skog, Executive Director

# Join the Cataloging Think Tank!

## Cataloging Advisory

- Quarterly meetings
- Discuss cataloging policy and strategy
- Adapt practice to changing discovery layer
- Cataloging Library status not required

## DEI Working Group

- Bi-monthly (but irregular) meetings
- Discuss issues of representation in the SWAN catalog
- Update bibliographic description to respectful, modern and accessible terminology
- Cataloging knowledge not required



# Circulation Advisory Group

## Circulation Advisory Group

- 9-member advisory group
- Meet quarterly
- Advisory Group members serve two-year terms on a rotating basis.
- Members are self-nominated & elected if necessary

## New Group Members

- Emily Foster, Itasca
- Latricia Thompson, Downers Grove
- Parish Turner, Bensenville
- Stephanie DeYoung, Batavia



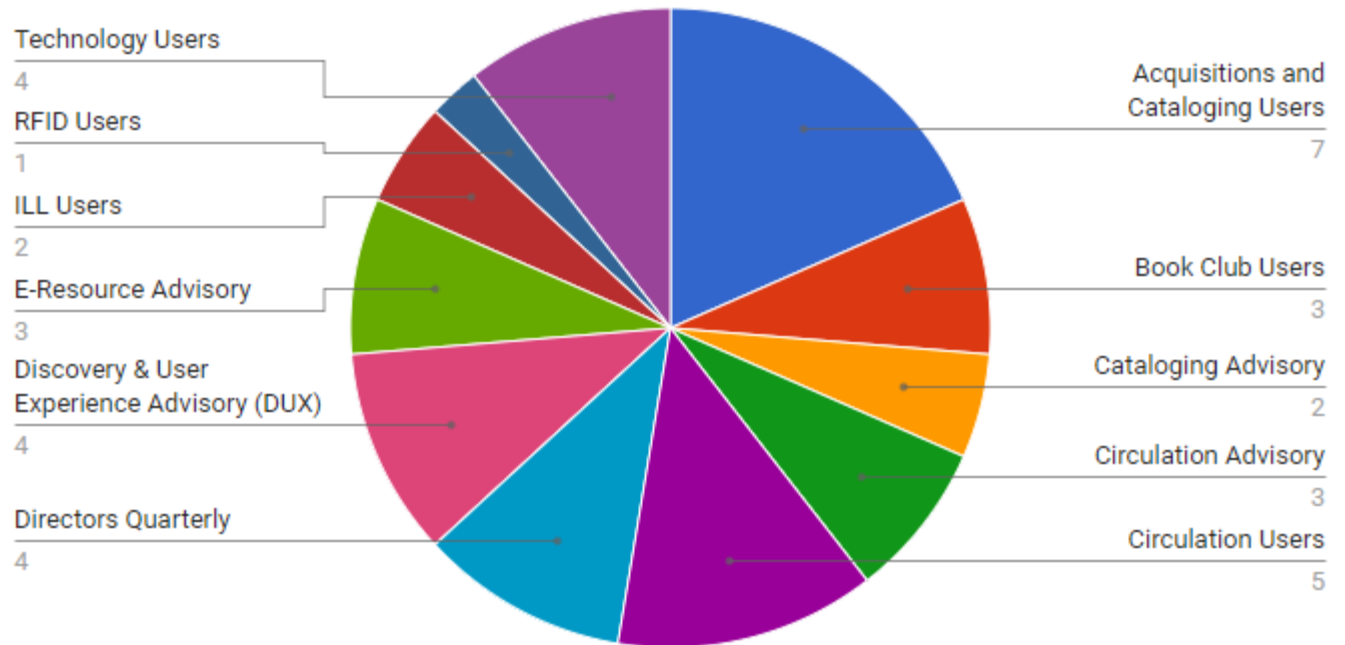
# User Group Interest Survey

**Results & Recommendations**

# User Group Interest Survey Results

- 34 responses from 27 libraries
- Nineteen of the 34 respondents (56%) currently participate in SWAN groups

Which groups?

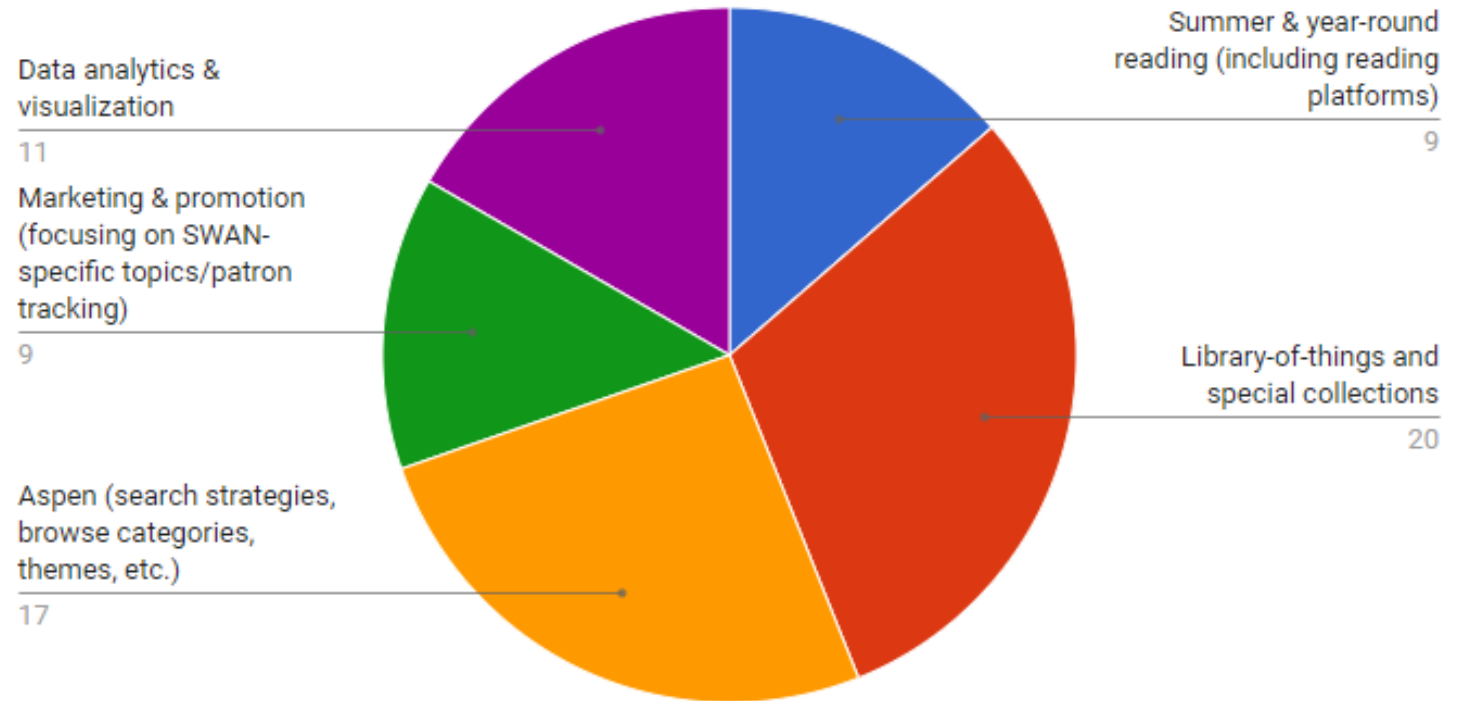


38 responses in 19 results

# User Group Interest Survey Results

- 66 from 34 respondents shows some would participate in more than one topic

Would you participate in a user group for any of the following topics?



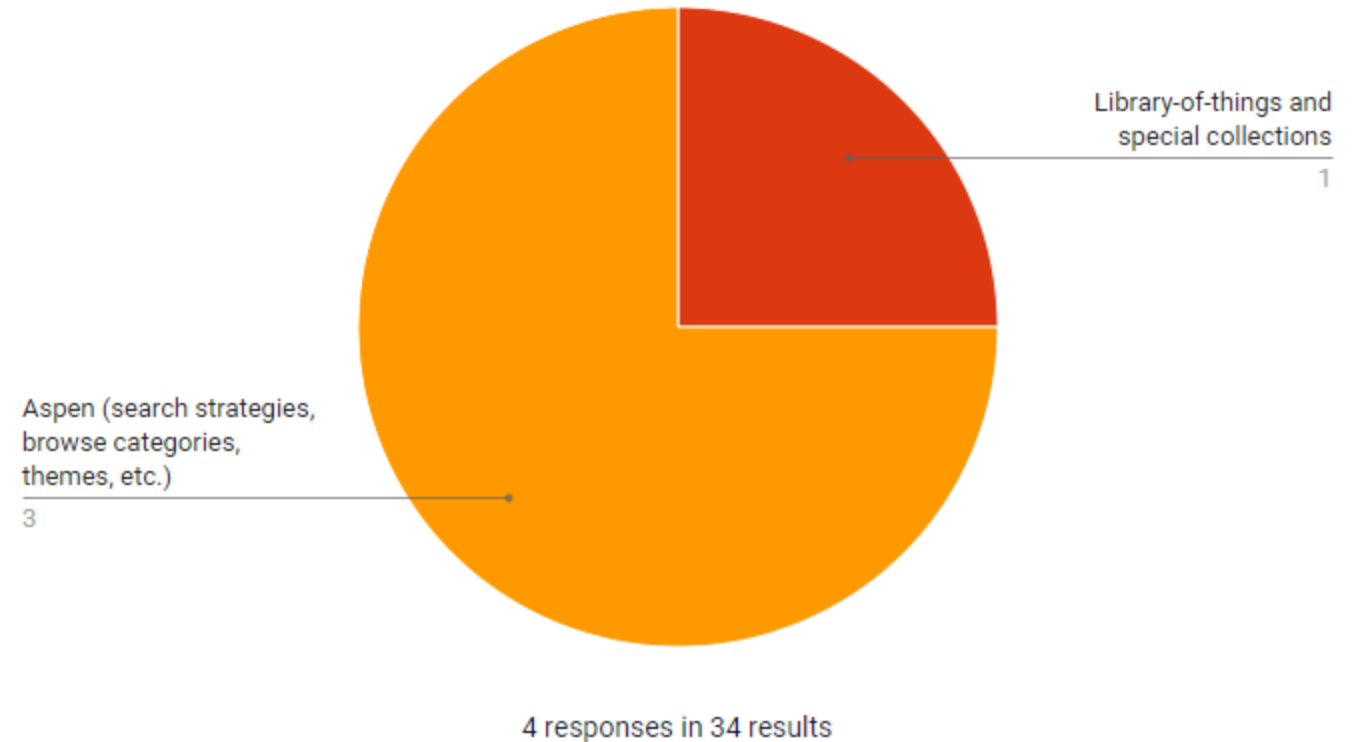
66 responses in 34 results

# User Group Interest Survey Results

Only 2 of the identified topics have library volunteering to chair the new user group

- Aspen
- Library of things

Which of the following would you be willing to serve as a chair or co-chair? Chairs would not be expected to lead a group for more than 1 year. Ideally a groups co-chair would become chair the following year.



# User Group Interest Survey Results

## Recommendations for 2023

- Focused panel discussion on Library of Things (multiple topics, centered on a day of discussion)
- Marketing & promotion – promote RAILS and other library groups addressing the topic; expanded office hours and workshops if SWAN membership approves MessageBee (focused on the tool, rather than the overarching topic)
- Data analytics & visualization – workshop offerings
- Summer & year-round reading – special online forum discussion, facilitate a “get-together” as requested, no formal users group

# Upcoming meetings

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

- Monthly Office Hours
  - Sunsetting BLUEcloud Analytics personal accounts – 10/28 & 11/2
  - Cataloging - 11/2
  - Circulation/ILL/Outreach - 11/2
  - Aspen – 11/7
  - BLUEcloud Analytics 11/9
  - Circulation & Hold map –11/16
  - BLUEcloud Staff (Acq, Cat, Circ) 11/23
- OCLC: WorldShare ILL Borrowing- 10/26
- RFID Users – 10/27
- OCLC: WorldShare Lending – 10/27
- E-Resources Advisory – 10/27
- Director's Coffee Hour – 10/31
- Book Club Users - 11/9
- Circulation Advisory – 11/ 16
- DUX Advisory –11/17

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.

# SWAN Quarterly Meeting

**Thursday, December 1st**  
**10:00 a.m. – 12:00 p.m.**

Oak Brook Public Library

- Voting to amend budget
- Live-stream, but only in-person attendees can vote (per OMA)



# The End

- Join us for the next SWAN Membership Fireside on Tuesday, November 29<sup>th</sup>  
11:00 a.m. - noon
- See L2 for Zoom details

