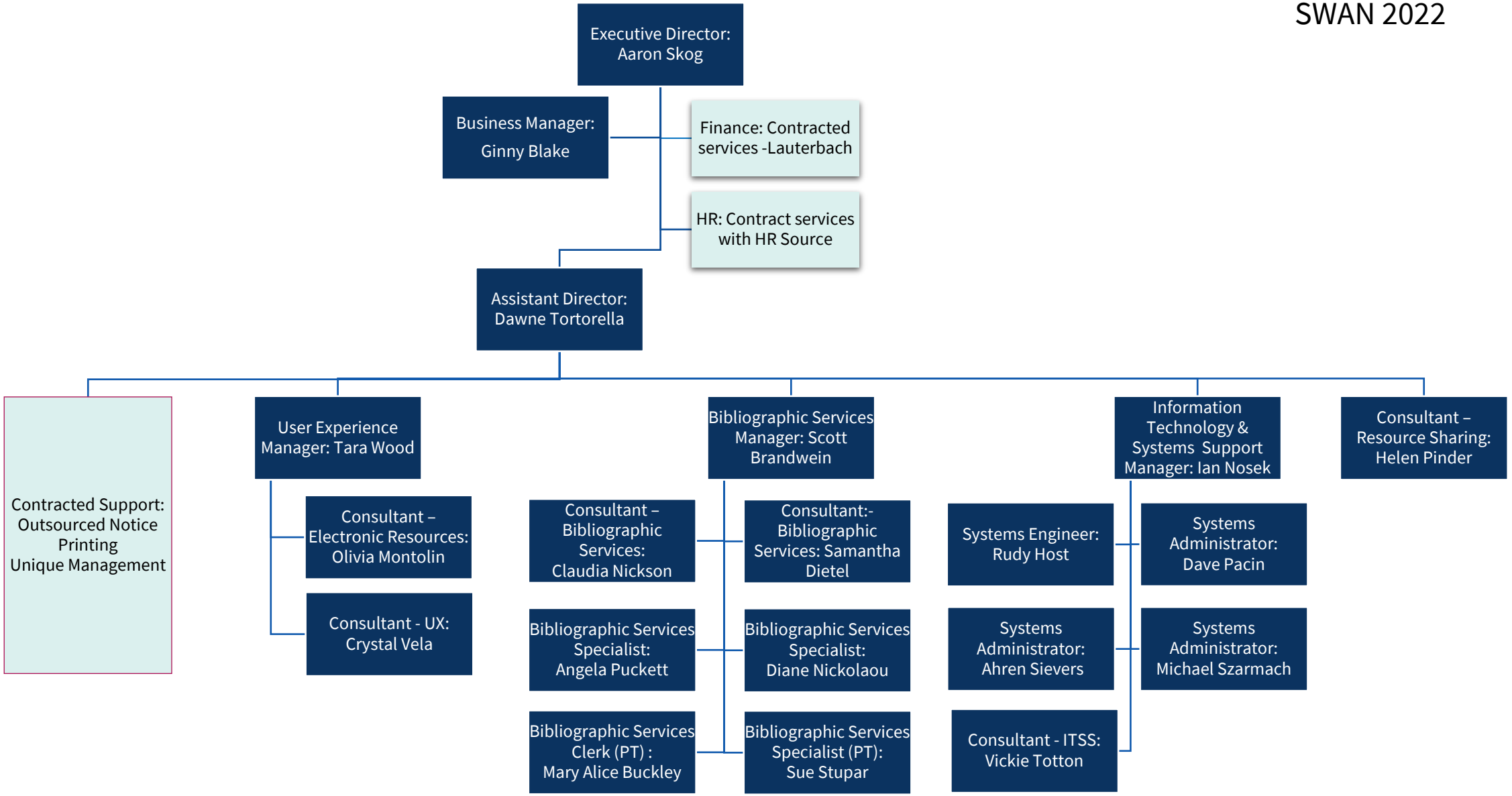
SWAN Fireside Chat

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


Executive Director: Aaron Skog
Business Manager: Ginny Blake
Finance: Contracted services -Lauterbach
HR: Contract services with HR Source
Assistant Director: Dawne Tortorella
Contracted Support: Outsourced Notice Printing Unique Management
User Experience Manager: Tara Wood
Consultant – Electronic Resources: Olivia Montolin
Consultant - UX: Crystal Vela
Bibliographic Services Manager: Scott Brandwein
Consultant – Bibliographic Services: Claudia Nickson
Consultant:- Bibliographic Services: Samantha Dietel
Bibliographic Services Specialist: Angela Puckett
Bibliographic Services Specialist: Diane Nickolaou
Bibliographic Services Clerk (PT) : Mary Alice Buckley
Bibliographic Services Specialist (PT): Sue Stupar
Information Technology & Systems Support Manager: Ian Nosek
Systems Engineer: Rudy Host
Systems Administrator: Dave Pacin
Systems Administrator: Ahren Sievers
Systems Administrator: Michael Szarmach
Consultant - ITSS: Vickie Totton
Consultant – Resource Sharing: Helen Pinder

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

MessageBee proposal

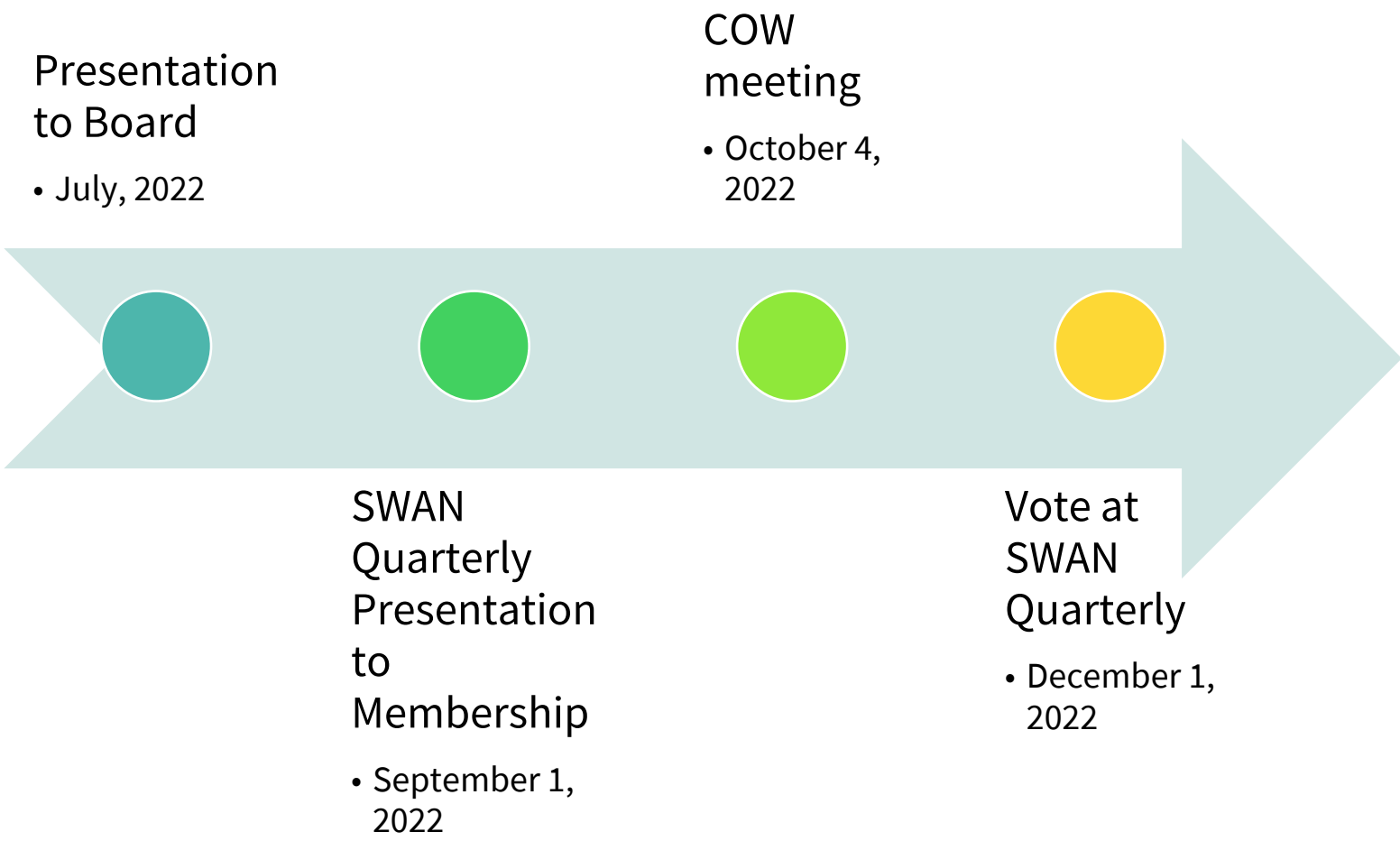
Presentations to date

- 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

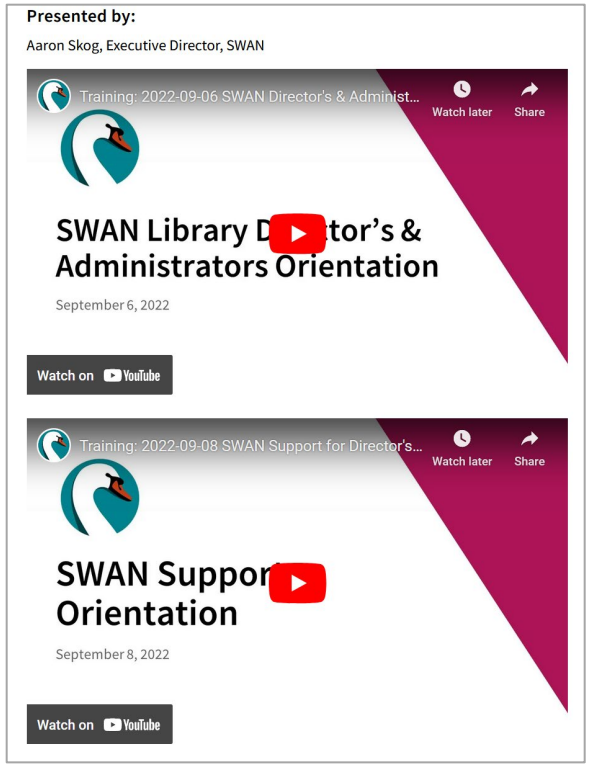
Crystal Vela, UX Consultant

Helen Pinder, Resource Sharing Consultant

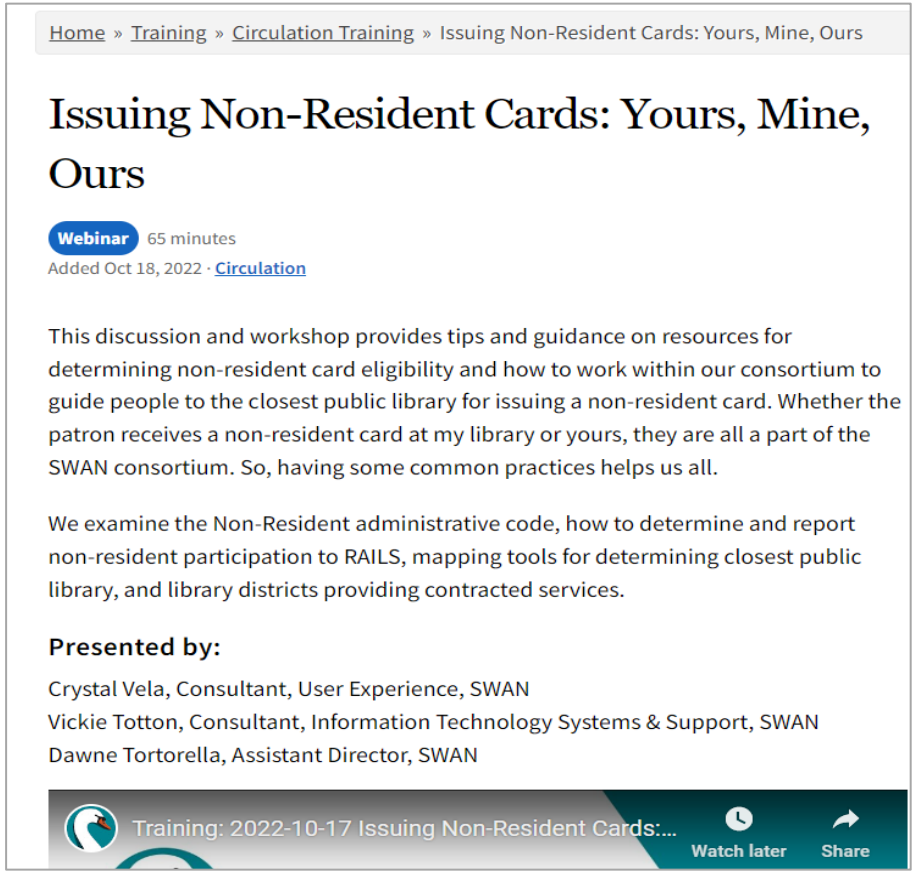
Vickie Totton, IT & System Support Consultant

New Webinars Posted

- Directors' orientation part 1 & part 2

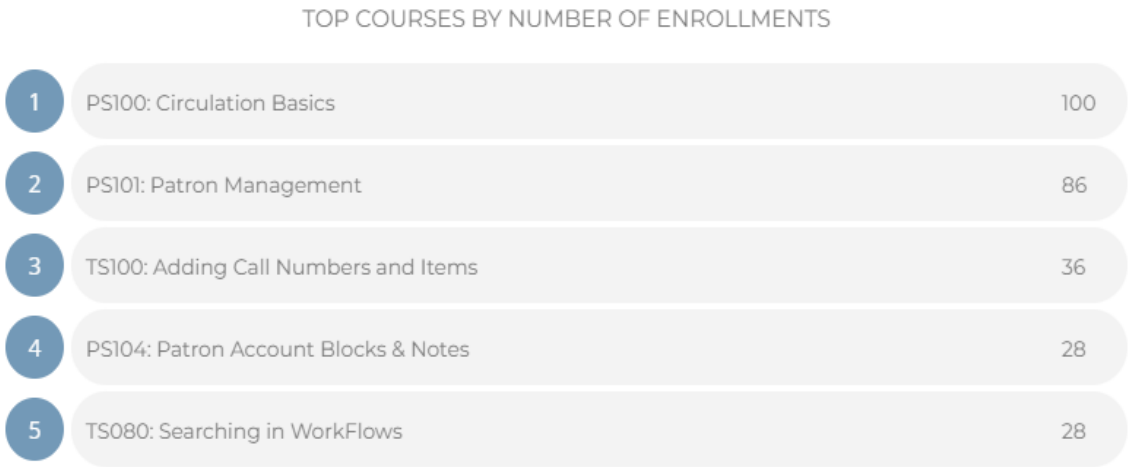


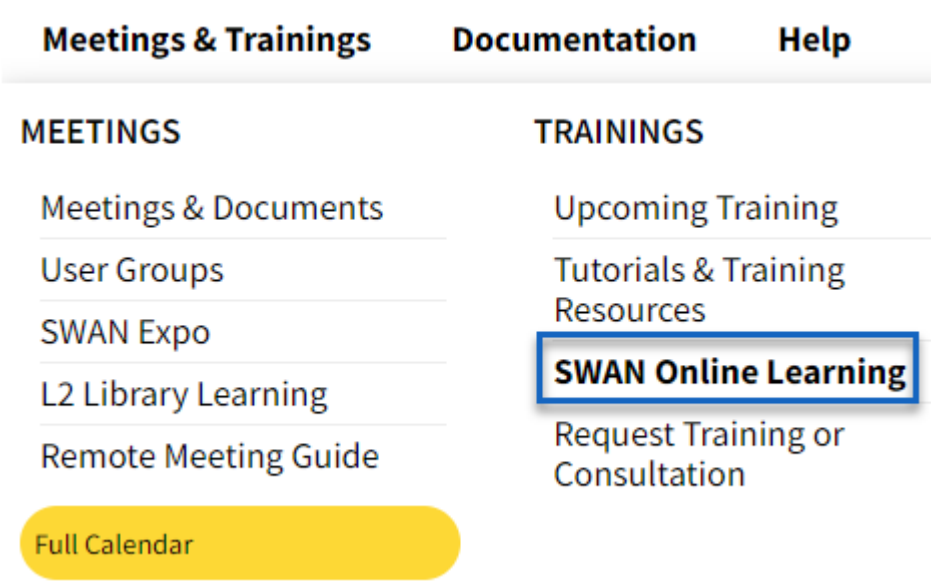
- Non-Resident Card Webinar



Learning Management System

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

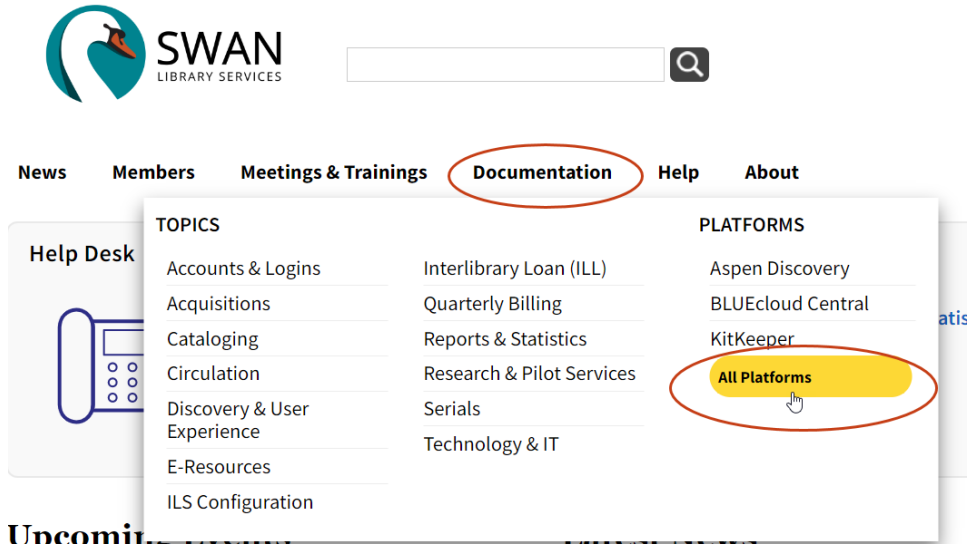




*Your information needs to be up-to-date in L2 before we approve your account.

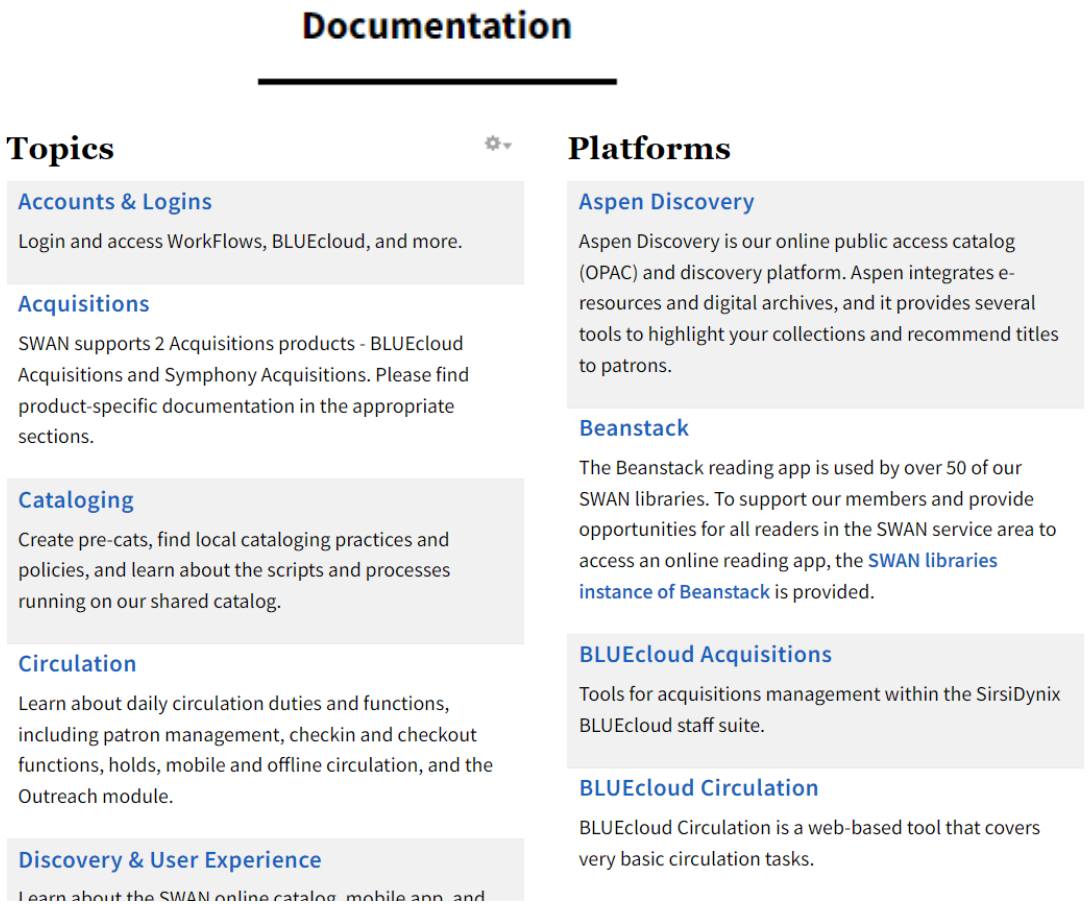
Exciting Platform News

- 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

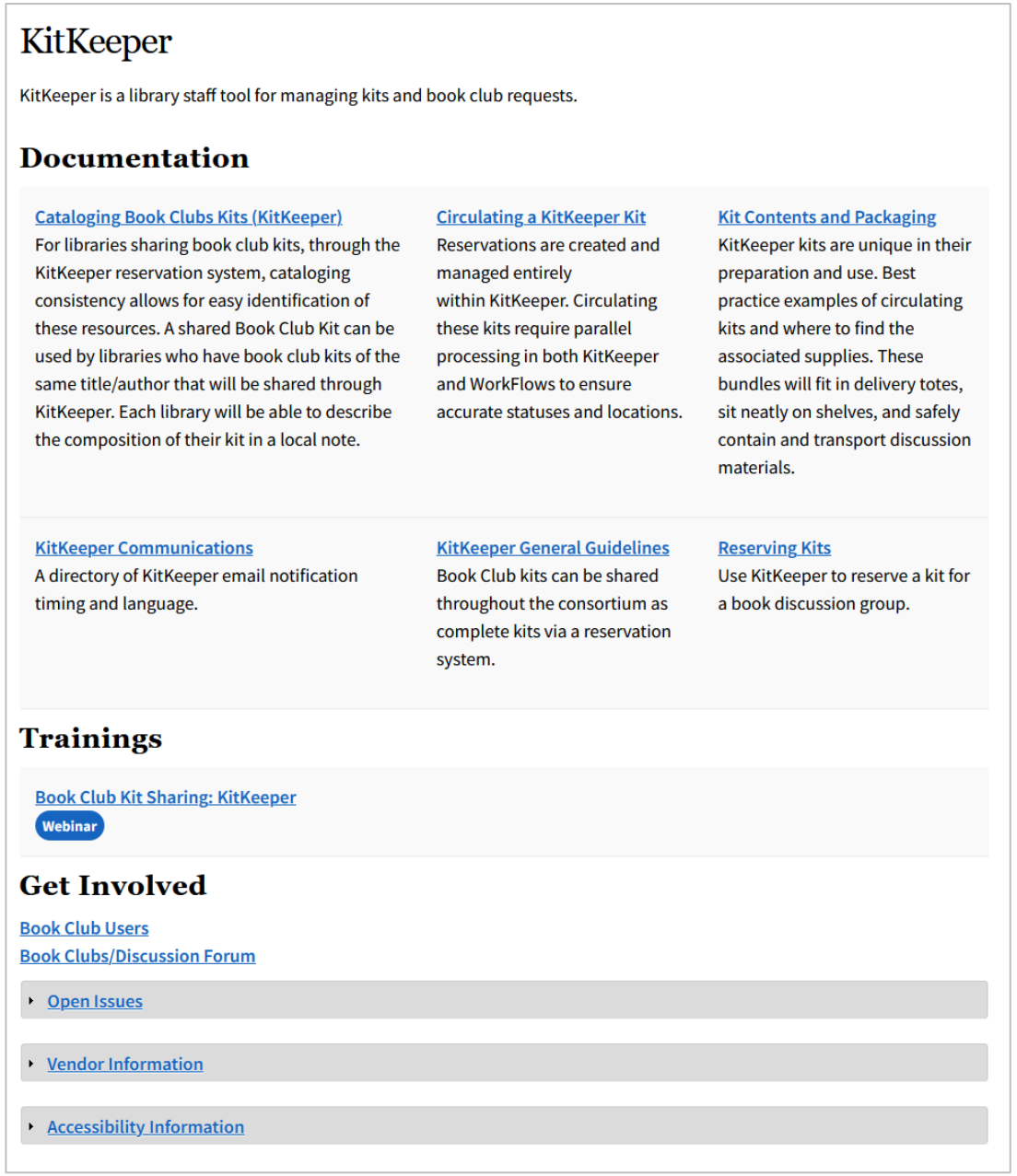
- You can now browse documentation by topic (e.g., Circulation) or by the platform (e.g., Aspen.
- Landing pages for documentation and topics will also link you to trainings and ways to get involved.



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

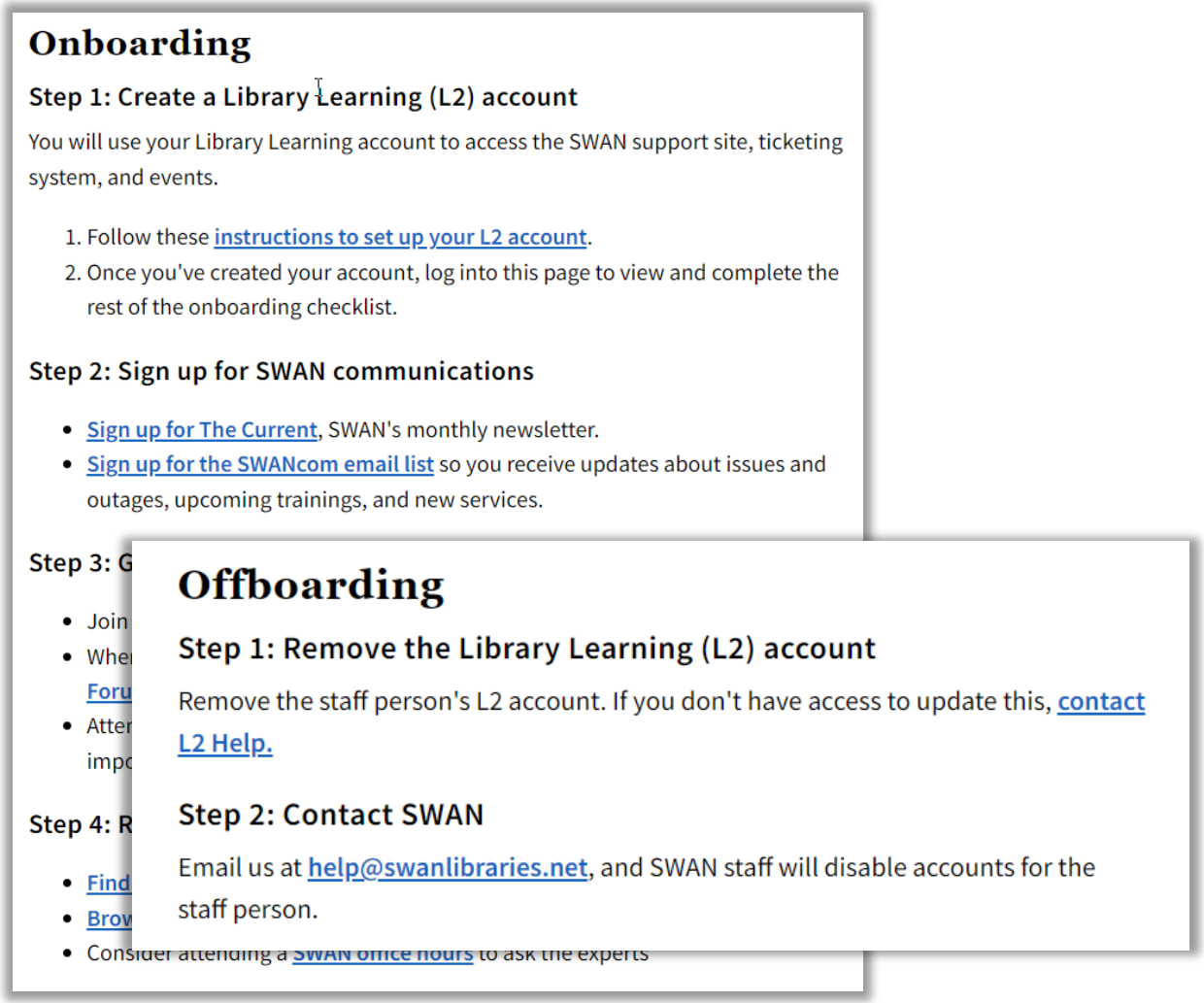
BLUEcloud Analytics Personal Accounts

- 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.

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Step 4: R

- Find
- Brow
- Consider attending a SWAN office hours to ask the experts

Offboarding

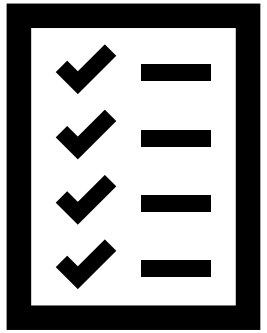
Step 1: Remove the Library Learning (L2) account

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, and SWAN staff will disable accounts for the staff person.

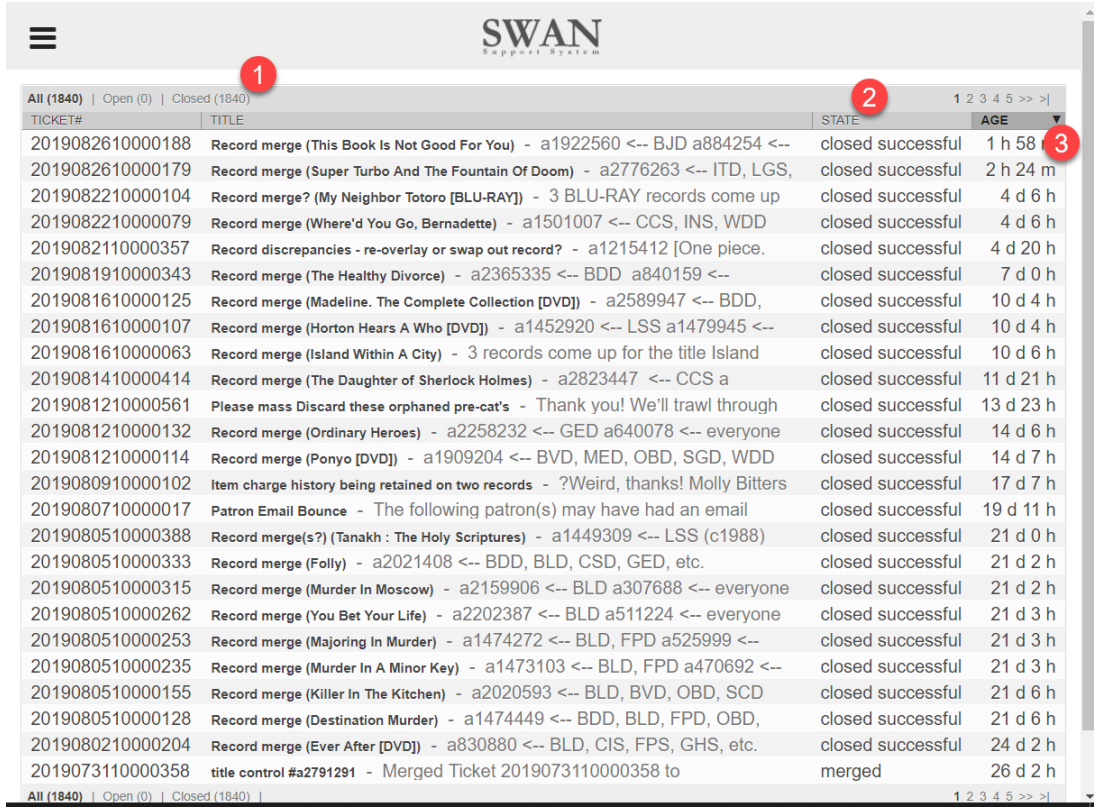
Use the new checklists available on the SWAN Support Site to make sure new staff have access and outgoing staff access is cleared



SWAN Support Tips & Tricks

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

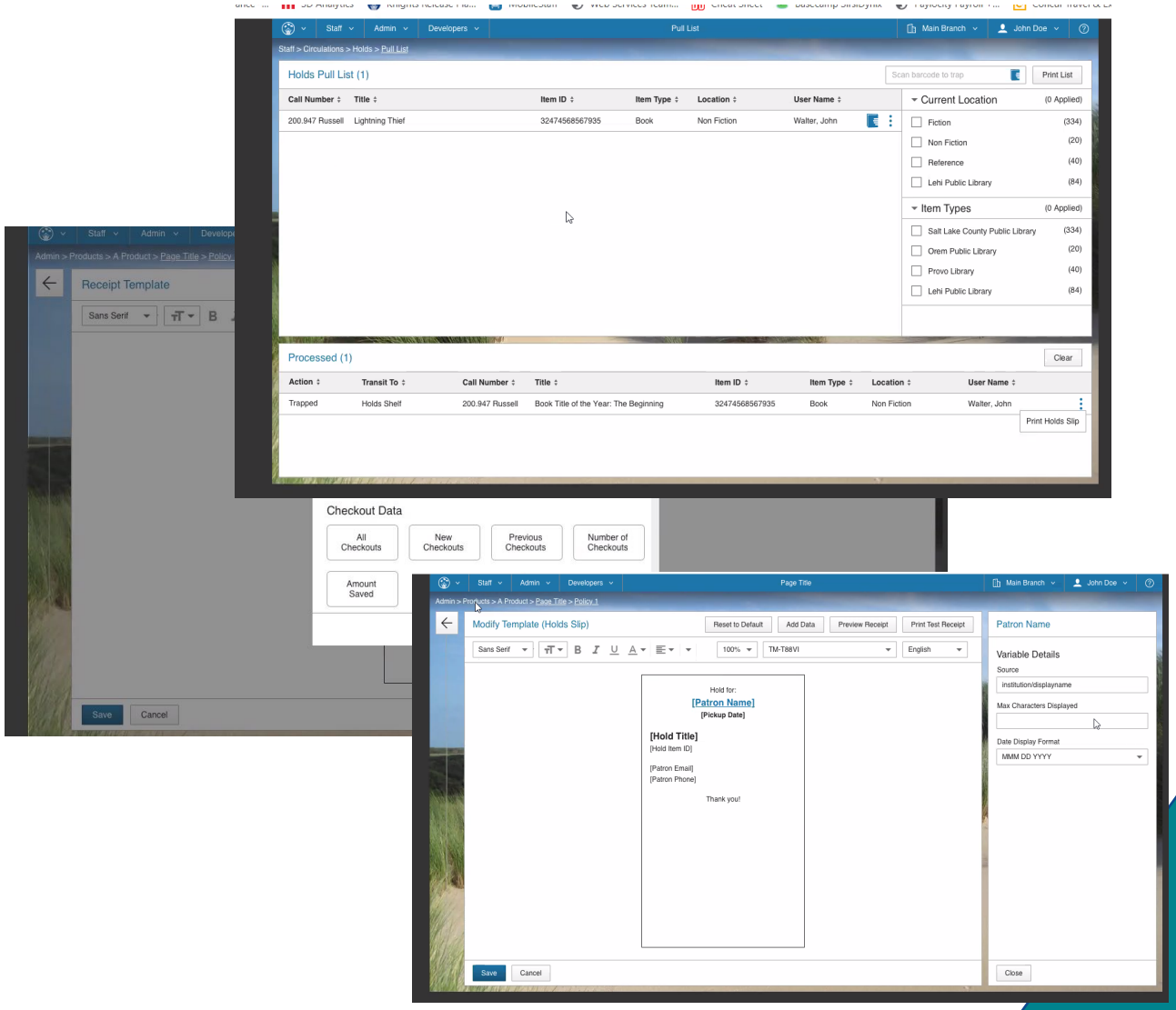


Library services platform updates

Sam Dietel, Bibliographic Services Consultant
Crystal Vela, UX Consultant
Scott Brandwein, Bibliographic Services Manager
Claudia Nickson, Bibliographic Services Consultant

BLUEcloud Circulation - in development

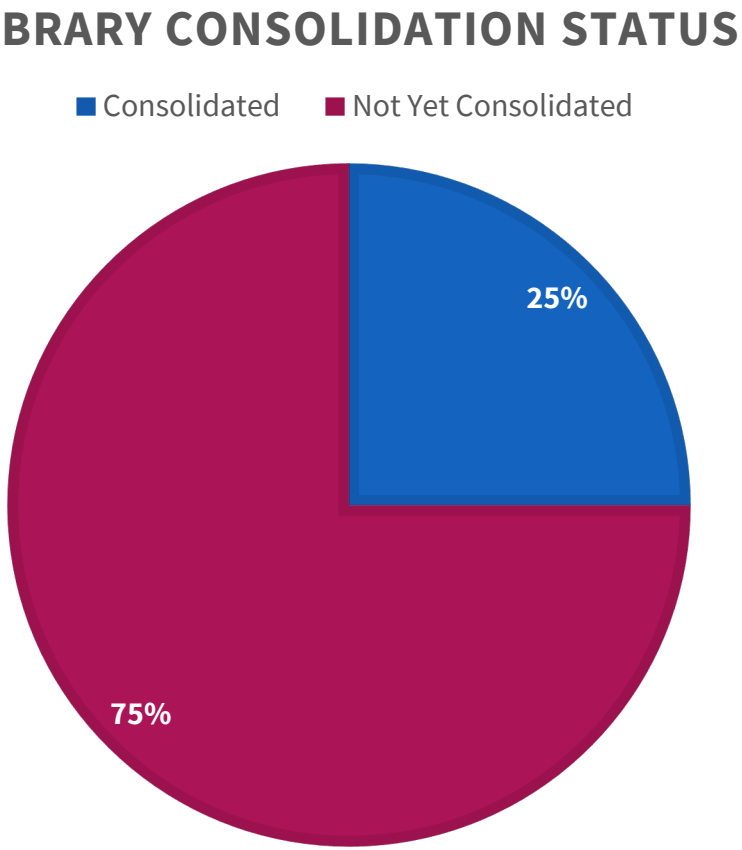
- Printing
  - Silent printing
  - Printing templates
    - Easy interface
  - Multiple printers supported as well as network printers
- Holds Pull List actions
- Checking out item without checking in behavior



Symphony Item Type Consolidation Update

All SWAN Item Types consolidated into 5 format groups:

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



Send a ticket to 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

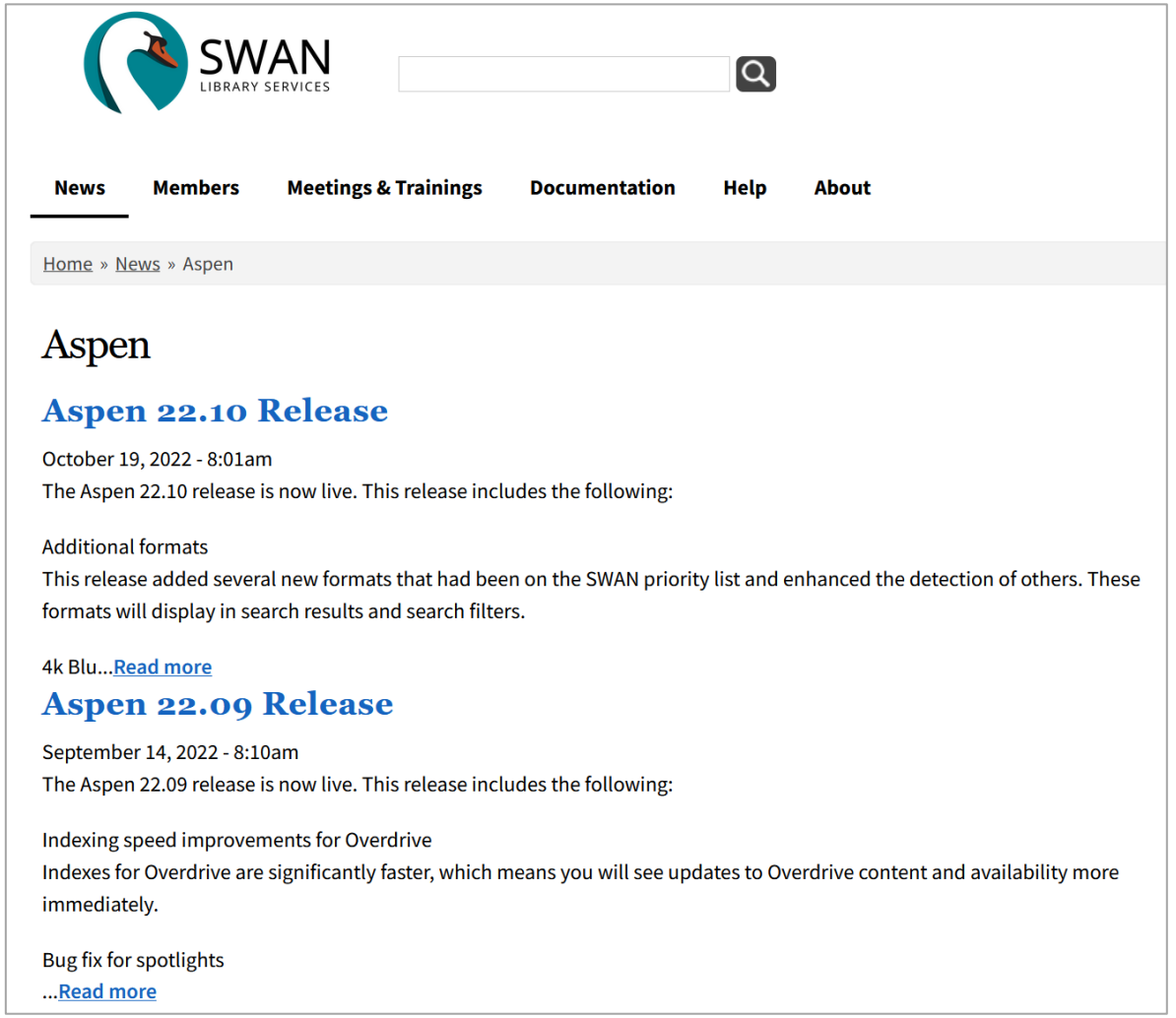
Update is a work in progress! Further refinement to come.

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



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

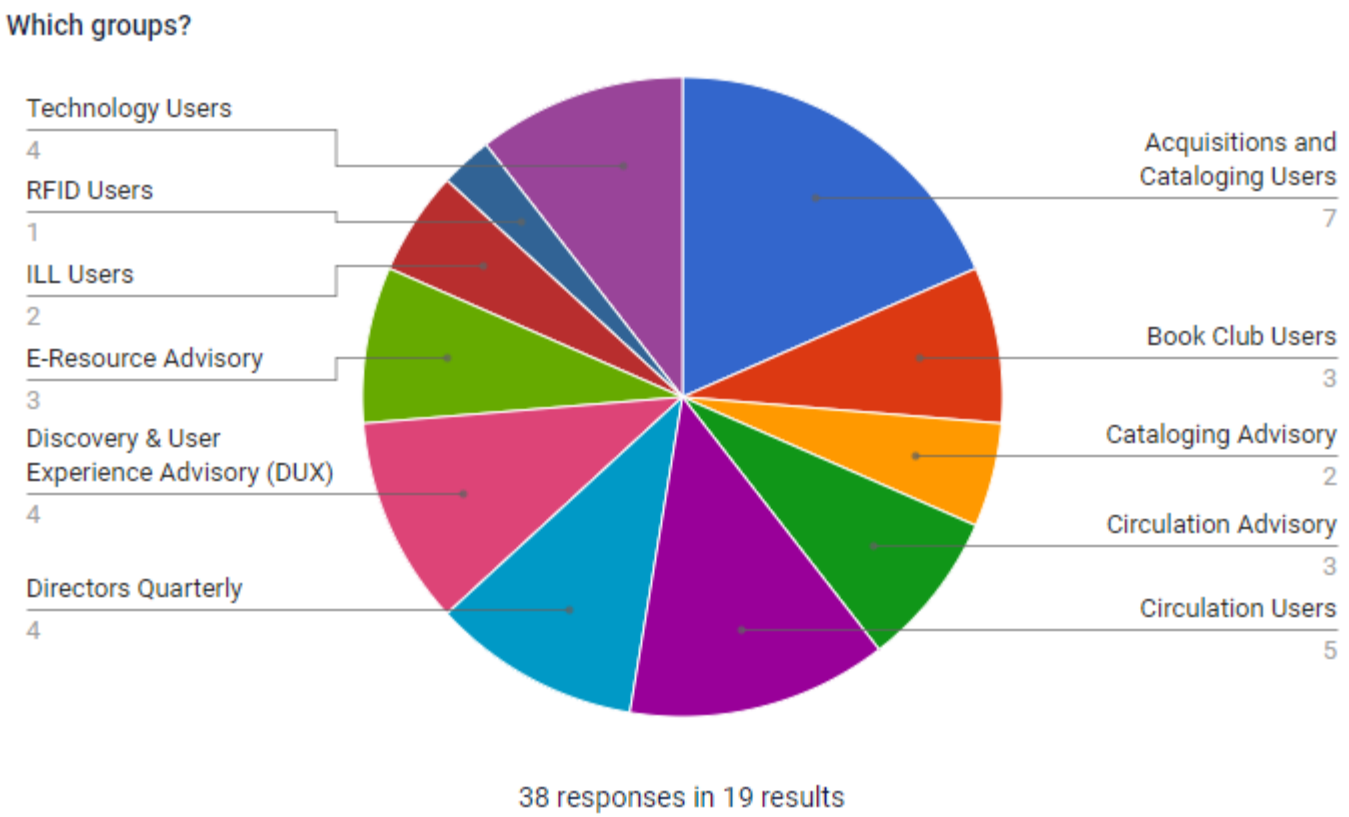
New Group Members

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

User Group Interest Survey

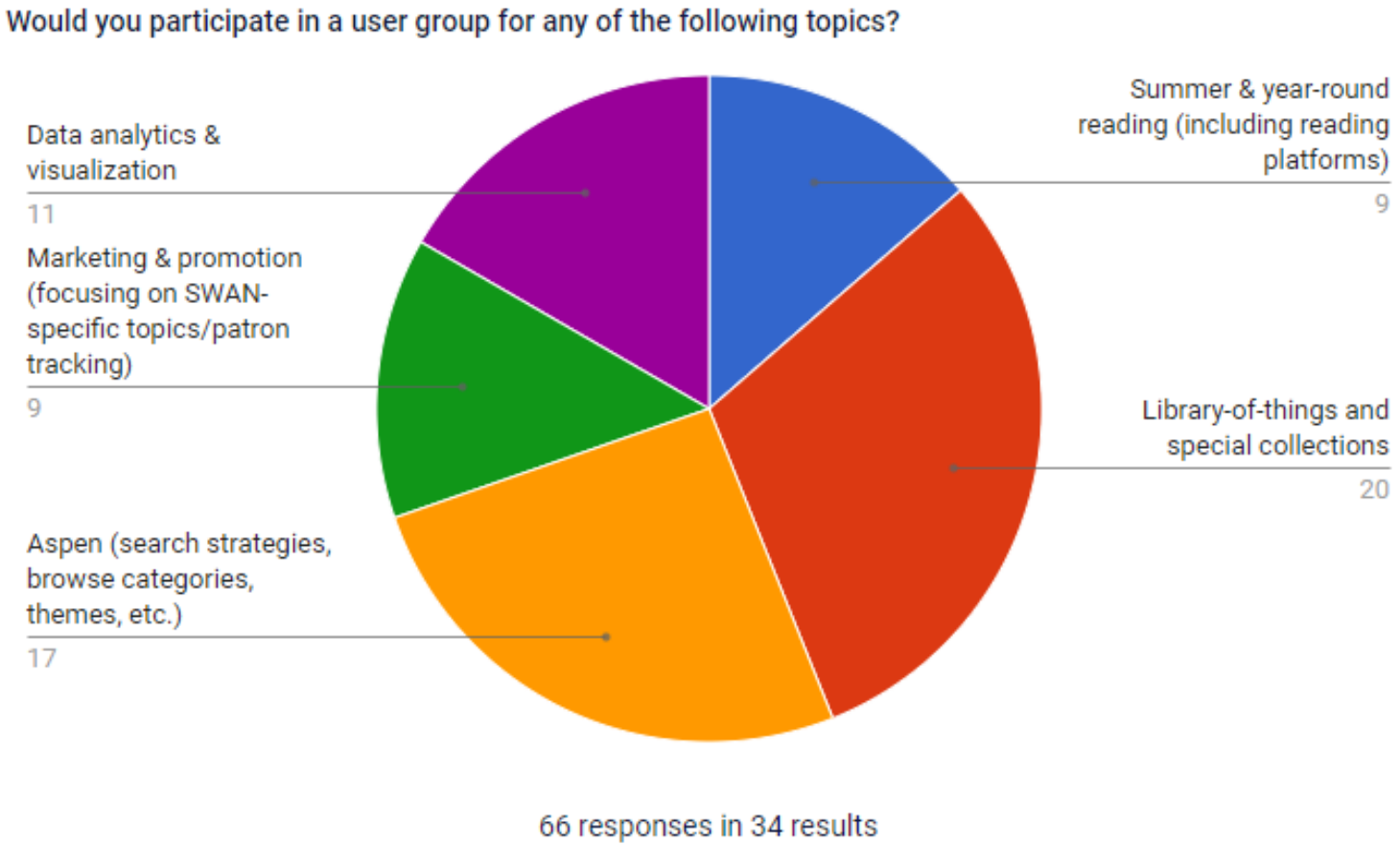
User Group Interest Survey Results

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



User Group Interest Survey Results

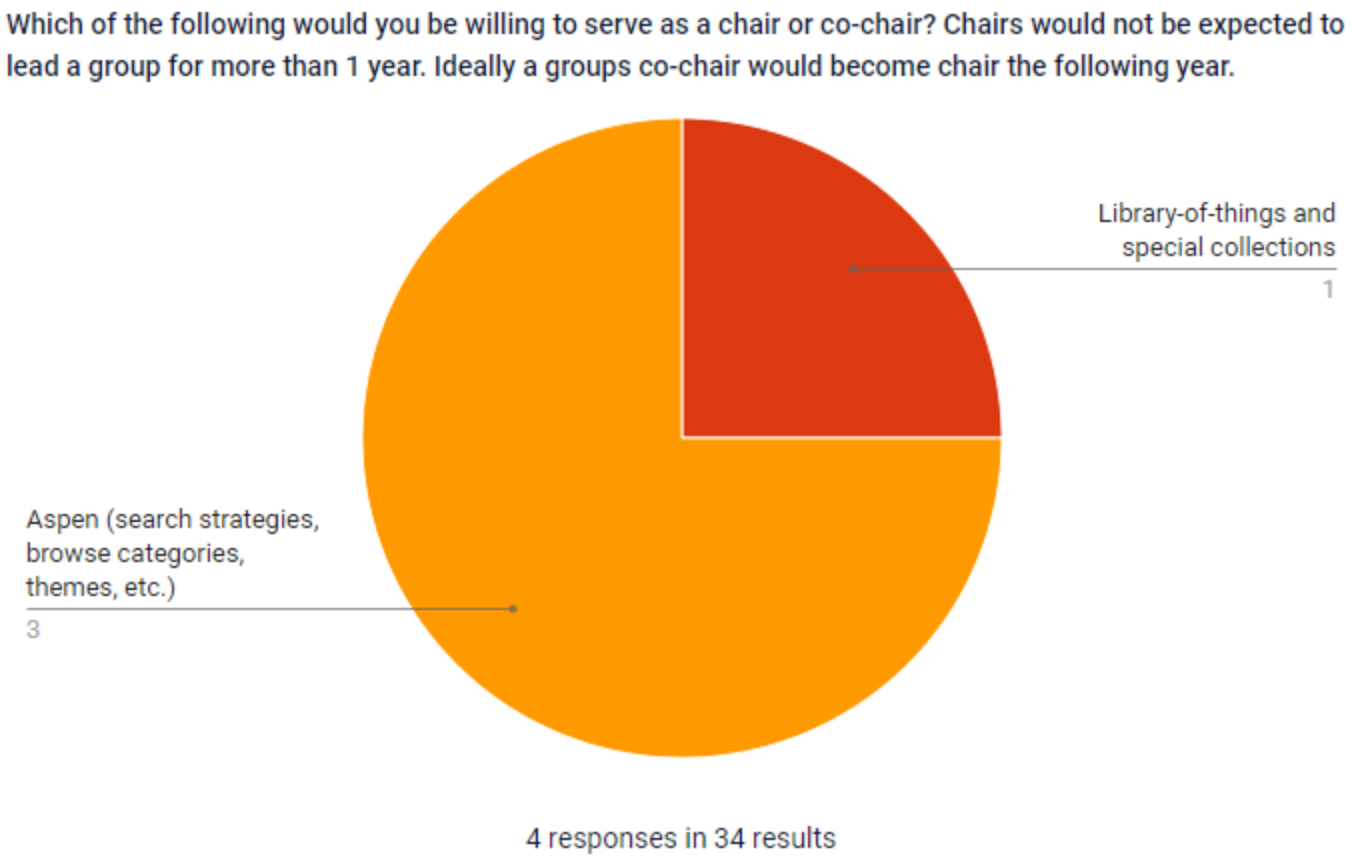
- 66 from 34 respondents shows some would participate in more than one topic



User Group Interest Survey Results

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

- Aspen
- Library of things



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

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.

- 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

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 29th

  11:00 a.m. - noon
- See L2 for Zoom details