





SWAN Fireside Chat

January 31, 2023

Agenda

- Symphony indexing issues
 - Addison
 - MessageBee
 - NCOA update
 - Learning management system upgrade
 - Aspen server migration
 - Aspen tip of the month
 - Patron Use Report
 - EBSCO stats issue
 - Staffing updates
 - Upcoming meetings, training, announcements
 - Committee of the Whole meeting Feb 7th
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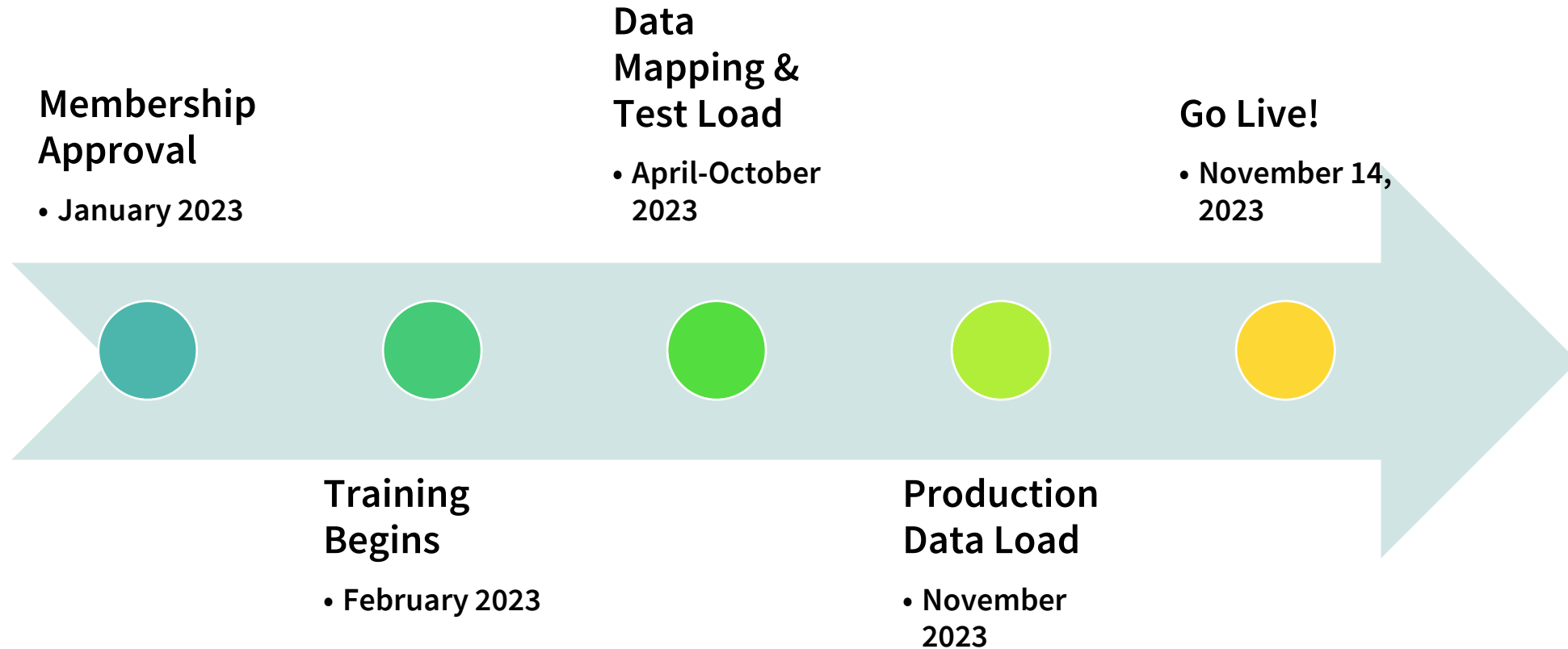
Symphony indexing issues

- Indexing errors first reported late Friday afternoon
 - Errors in ADUText portion of overnight maintenance Saturday
 - 430k record edits queued for overnight processing Sunday
 - 16k processed Sunday night
 - ADUText delay Sunday morning
 - Reports caught up around 1:30PM
 - Further reports of issues Monday
 - Targeted Reindexing restored records
 - Two records edited on Friday exceeding limit for 700 tag entries
 - ADUText encountered bad records and stopped processing
 - Modified system parameters to prevent recurrence
- 

Addison Public Library approved

- Addison Public Library requested membership in SWAN
 - Board recommendation & Impact Study issued
 - Addison approved SWAN agreement
 - SWAN membership approval 2/3 required = 67 yes votes
- To-date: 76 yes votes, 0 no votes
- E-ballot open until February 22nd
 - Email to library directors Monday, January 23rd
 - Contact Aaron Skog if unable to vote – aaron@swanlibraries.net
- Find out more!
[Addison Public Library seeking approval to join SWAN | SWAN Library Services \(swanlibraries.net\)](#)

Addison Project Timeline



MessageBee

Where we are

- Approved at SWAN Quarterly December 2022
- SWAN has been working with Unique on initial setup of templates for SWS and Carol Stream
 - Text and translations in both Polish and Spanish
 - Library related: name, address, phone, logos, colors and links

Next Steps

- Setup and live testing of SWS notices
- Unique will build out additional templates and MessageBee portal logins for libraries
- SWAN will develop training for February



UNIQUE



MESSAGEBEE


NCOA Update

- Documentation on SWAN support site
 - <https://support.swanlibraries.net/documentation/66540>
- Find reports in BLUEcloud Analytics
 - Shared Reports > SWAN Reports > Users > NCOA Processing
 - Folders for 2021 and 2022
- Recommend removing records for patrons that are no longer in your service area, particularly if they have moved out of state
- SWAN can automate this process, including clearing bills below a given amount
- Currently 7,888 records flagged for NCOA 2022 that live out of state

Training & Support updates

Learning Management System





New User Interface




MY ACTIVITIES

MY LEARNING

CATALOG




Transcript





● Courses: 1 ● ILT: 0 ● Learning Paths: 0


[VIEW ALL](#)

Documents



 [Frequently Asked Questions: Adding Call Numbers and...](#)
(Course-TS100: Adding Call Numbers and Items)


 [Adding Call Numbers and Items Course Guide \(PDF\)](#)
(Course-TS100: Adding Call Numbers and Items)

 [Circulation Basics Course Guide \(PDF\)](#)
(Course-PS100: Circulation Basics)

My Certificates

1

Certificates

 [PS100: Circulation Basics](#)



MY ACTIVITIES

MY LEARNING

CATALOG

My Learning(5)

No Due Date
No Expiration Date



PS100

100%

PS100: Circulation Basics

[Details](#)

No Due Date
No Expiration Date



PS101

0%

PS101: Patron Management

[Details](#)

No Due Date
No Expiration Date



TS080

0%

TS080: Searching in WorkFlows

[Details](#)

No Due Date
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TS100

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TS100: Adding Call Numbers and Items

[Details](#)

No Due Date
No Expiration Date



TS101

5%

TS101: Creating Pre-Cats

[Details](#)



PS304: Demand Management

New Course Announcement

Want to know how holds work? We have a new course just for you!



PS106

Course

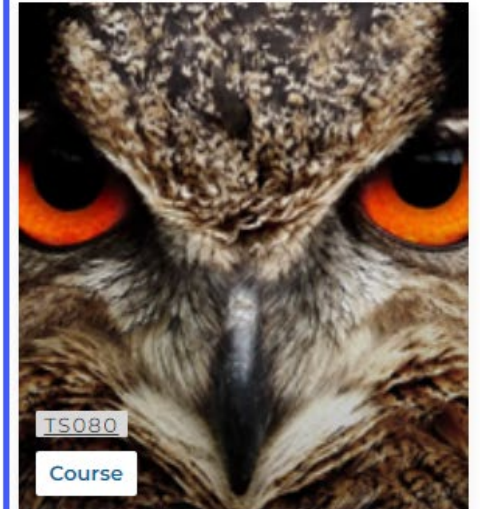
PS106: Lost Cards



PS304

Course

PS304: Demand Management



TS080

Course

TS080: Searching in WorkFlows

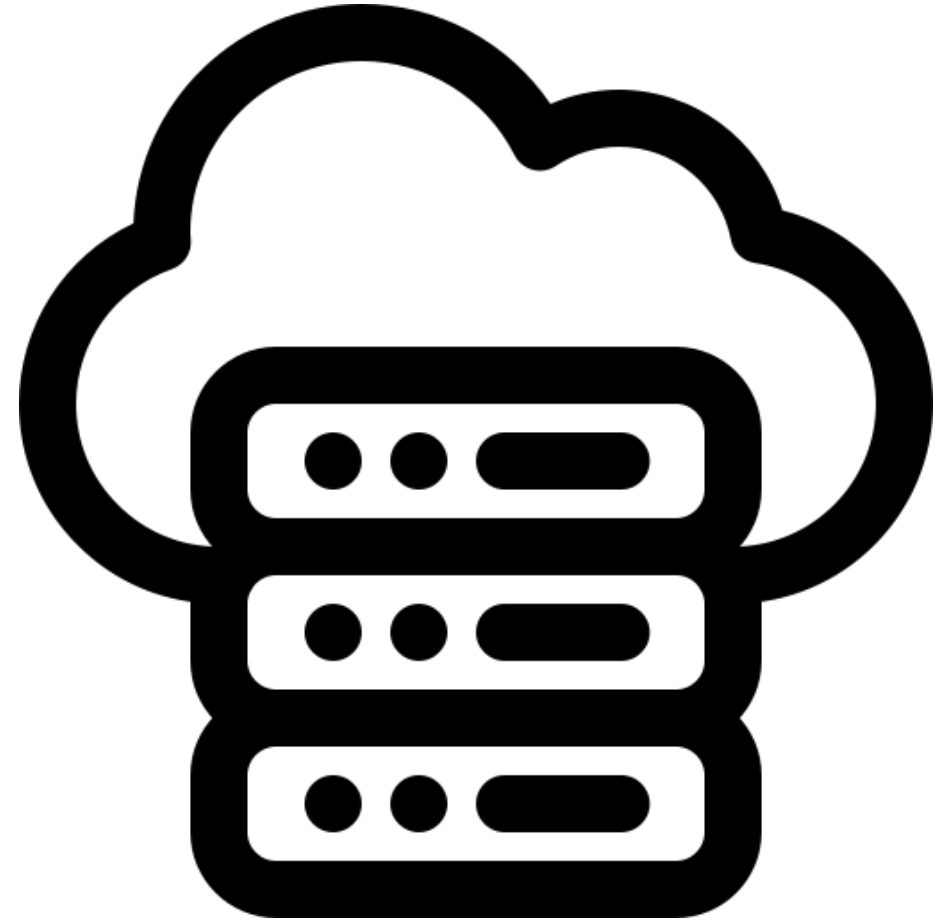


Aspen Server Migration

On January 16th, we migrated to managed hosting for our Aspen server.

We hope this move will improve performance for our catalog.

Thank you for your patience!



Aspen Tip of the Month: Linked Accounts

The 22.12 release in December had several updates for linked accounts.

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

- Users can change their PIN without breaking their linked accounts.
- Users can remove accounts that have linked to theirs without changing their PIN, though they will be prompted with a recommendation to change their PIN.
- Aspen now displays more prominent messaging when someone has linked to your account.

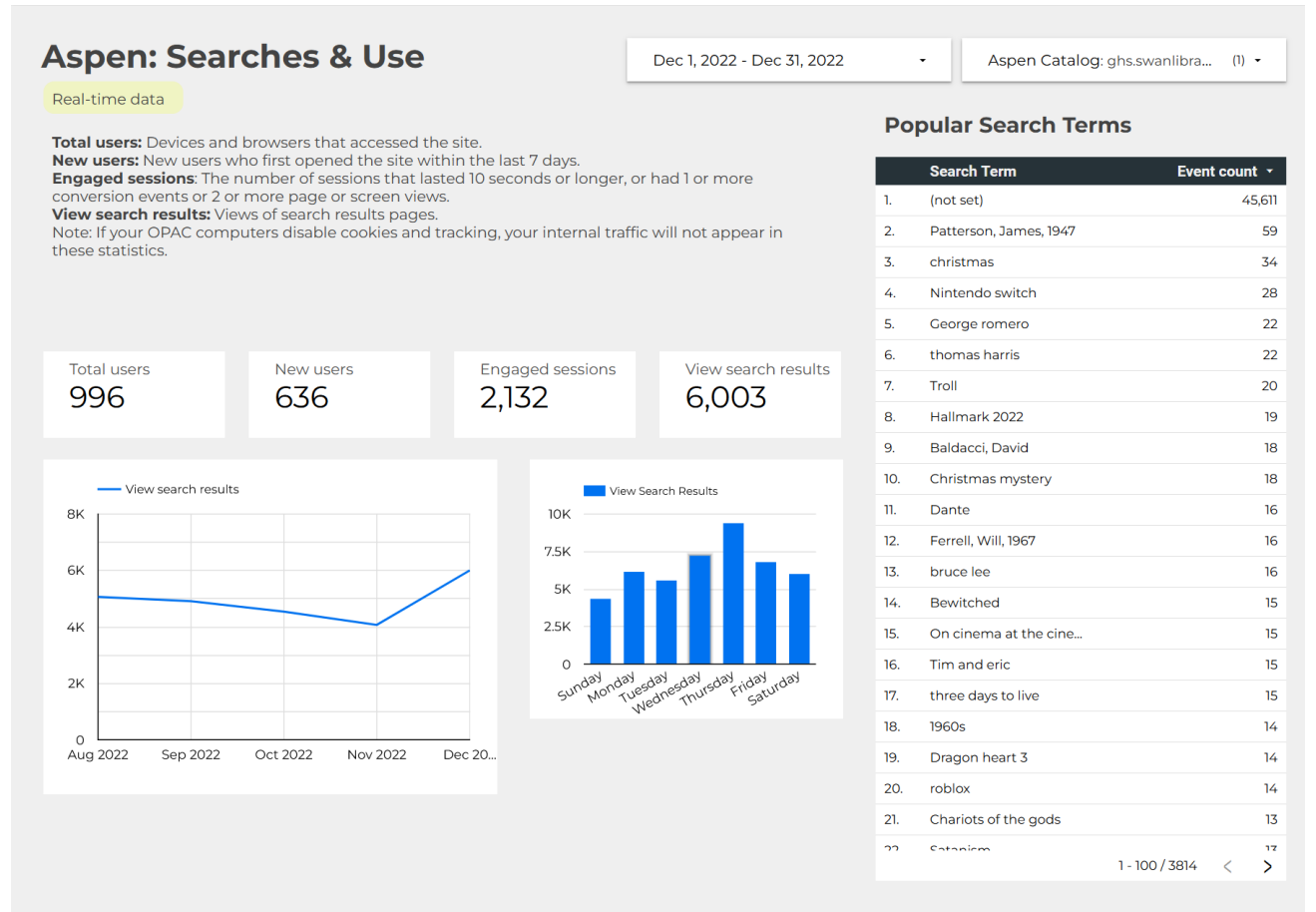
Patron Use Report

Learn about usage of the Aspen catalog, BLUEcloud Mobile app, and holds.

Updated from Universal Analytics to Google Analytics 4.

Access on the SWAN support site:

<https://support.swanlibraries.net/documentation/70841>



EBSCO Stats Issue

EBSCO reported to its users that a series of defects tied to the new user interface (UI) caused both overreporting and underreporting in database usage counts.

The defects, as of November 2022, have been fixed and EBSCO is confident that usage counts are now correct. We have a plan in place for comparing year-end statistics.

Please contact us at help@swanlibraries.net if there are additional questions.

**Staffing
Announcement**

**Welcome Cynthia
Romanowski!**
Bibliographic Services Manager

Start Date: February 6th, 2023

User groups & upcoming events

Membership meeting for budget

- Committee of the Whole meeting Tuesday, February 7th 10 a.m.
 - Budget presentation
 - July 1, 2023 through June 30, 2024 (Fiscal year 2024)
 - EBSCO group-purchase renewal
- Zoom virtual meeting
- Details & packet posted SWAN Support
- Meetings & Documents > SWAN Committee of the Whole Meeting
- [SWAN Committee of the Whole Meeting | SWAN Library Services \(swanlibraries.net\)](https://swanlibraries.net)

Upcoming meetings

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

- Monthly Office Hours

- BLUEcloud Analytics – 2/1
- Circulation/ILL/Outreach - 2/6
- Circulation & Hold map –2/8
- Cataloging 2/8
- Aspen 2/15

- Meetings

- ILL Users: 2/1
- Cataloging Advisory: 2/9
- Aspen Users: 2/14
- Circulation Users: 2/15
- Acquisitions & Cataloging Users: 2/23
- E-Resources Advisory: 2/23
- Directors Coffee Hour: 2/27

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.

The End

Join us for the next SWAN Membership Fireside on
Tuesday, February 28th 11am-noon
See L2 for Zoom details

