




SWAN Fireside Chat

February 28, 2023

Agenda

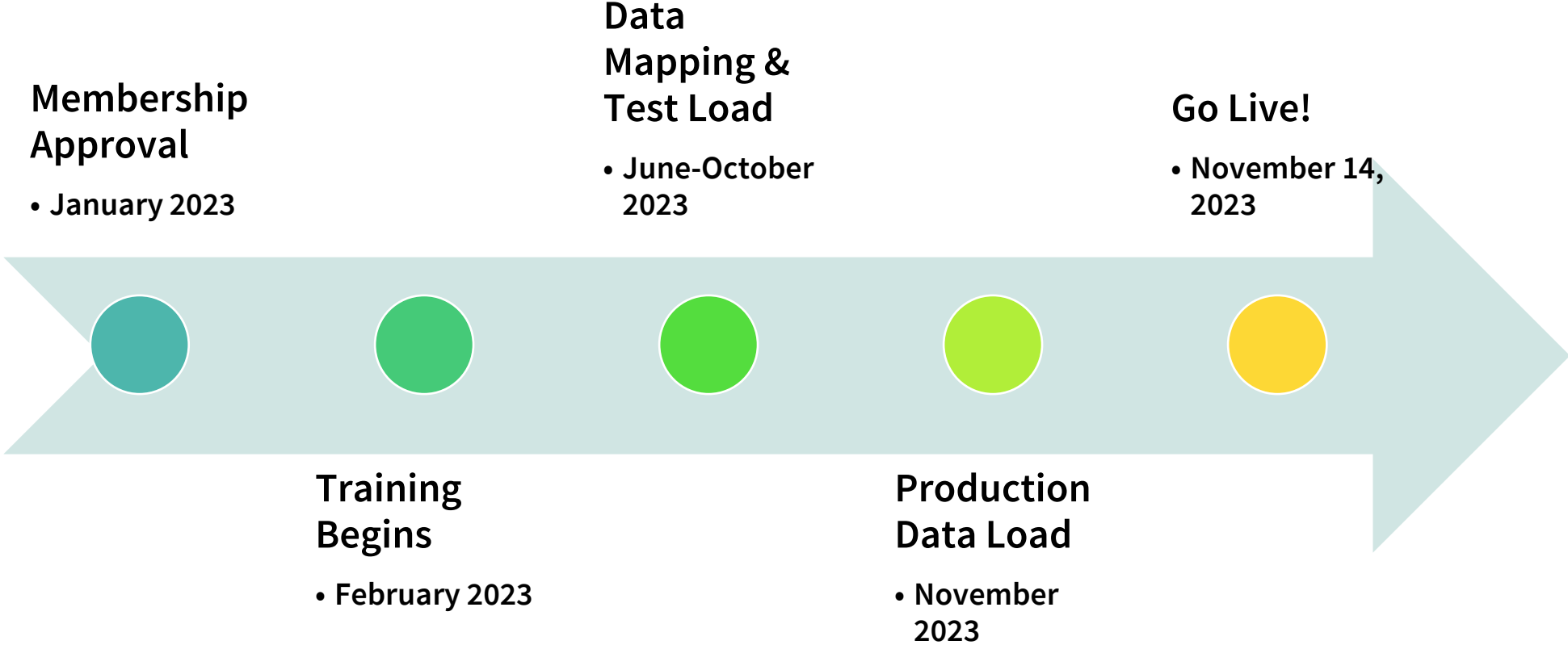
- Addison Update
 - MessageBee Update
 - SendGrid Deliverability
 - MobileStaff Documentation Update
 - EBSCO renewal update
 - BLUEcloud Staff release 23.02
 - Course updates
 - Aspen tip of the month
 - Circulation card sort
 - Upcoming meetings, training, announcements
 - SWAN Quarterly – March 2
- 

Addison Public Library joins SWAN

- SWAN membership approved the Addison Public Library to join as a full member of the consortia in a vote of 78 yes votes and 0 no votes
- The Addison project will be known as "SWAN101" internally to the membership
- Updates will be provided via Fireside and Quarterly meetings
- The circulation go-live will take place Tuesday, November 14, 2023



Addison Project Timeline

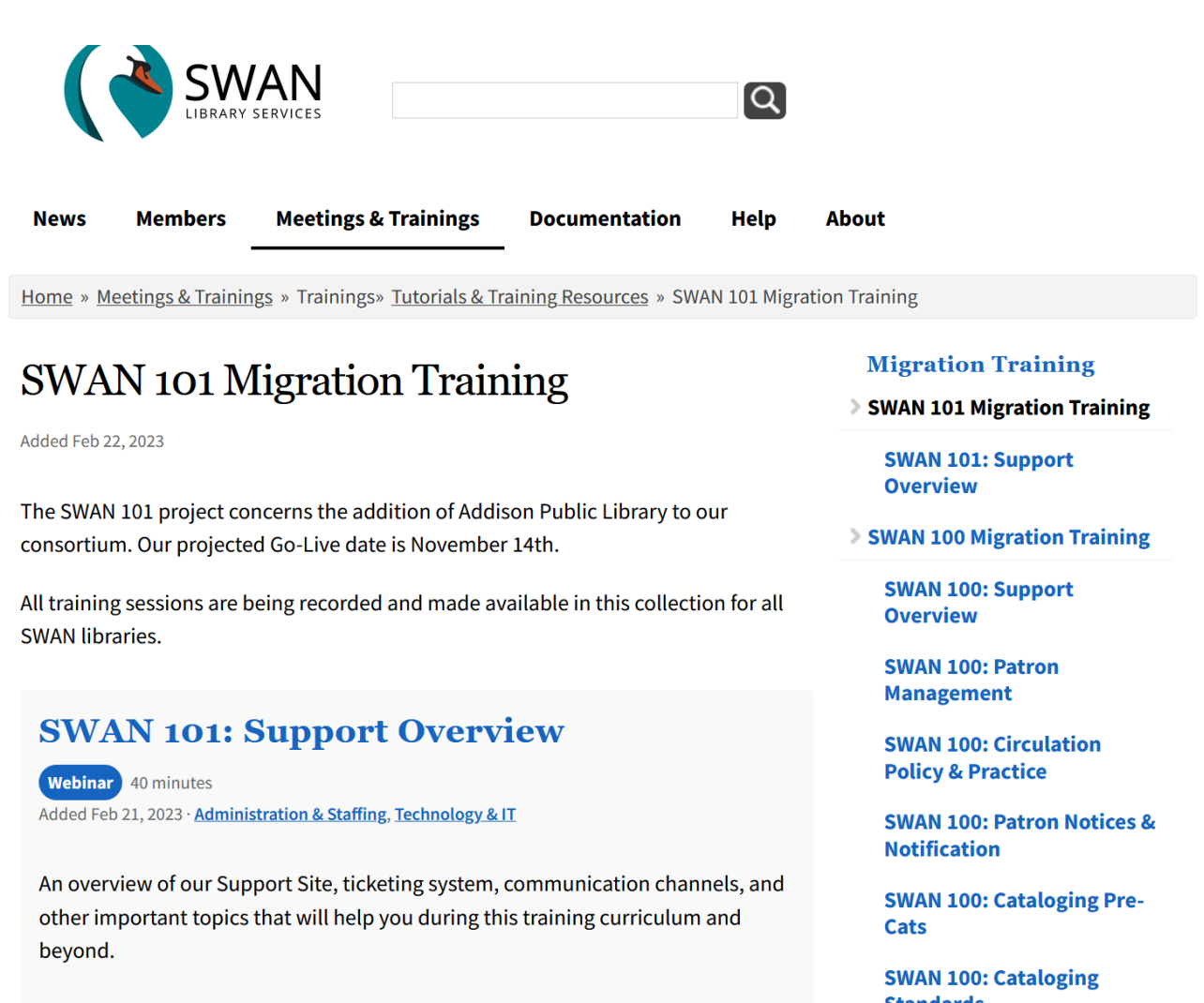


Addison Training

Meetings & Trainings > Tutorials & Training Resources > ...

... Migration Training

... Search & Discovery Training



The screenshot shows the SWAN Library Services website. At the top left is the SWAN logo, which consists of a stylized blue and green shape resembling a bird or a person, 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 the following items: News, Members, Meetings & Trainings (which is underlined), Documentation, Help, and About. Below the navigation menu is a breadcrumb trail: Home » Meetings & Trainings » Trainings » Tutorials & Training Resources » SWAN 101 Migration Training. The main heading of the page is 'SWAN 101 Migration Training'. Below the heading is the text 'Added Feb 22, 2023'. The main body of the page contains two paragraphs: 'The SWAN 101 project concerns the addition of Addison Public Library to our consortium. Our projected Go-Live date is November 14th.' and 'All training sessions are being recorded and made available in this collection for all SWAN libraries.' Below the main body is a featured section for 'SWAN 101: Support Overview', which is a 40-minute webinar added on Feb 21, 2023, covering 'Administration & Staffing, Technology & IT'. The description of this webinar is: 'An overview of our Support Site, ticketing system, communication channels, and other important topics that will help you during this training curriculum and beyond.' On the right side of the page is a sidebar with a heading 'Migration Training' and a list of links: 'SWAN 101 Migration Training', 'SWAN 101: Support Overview', 'SWAN 100 Migration Training', 'SWAN 100: Support Overview', 'SWAN 100: Patron Management', 'SWAN 100: Circulation Policy & Practice', 'SWAN 100: Patron Notices & Notification', 'SWAN 100: Cataloging Pre-Cats', and 'SWAN 100: Cataloging Standards'.

Training & Support updates

MessageBee

- Testing of templates continues
- SWS Notices
 - Final look over
 - SWS live testing soon
- MessageBee will be sending notices via **noreply@notice.swanlibraries.net**



SendGrid Deliverability

- Increased number of ‘bounce drops’ observed in January 2023
- Worked with Twilio support to identify configuration options to improve deliverability
- Ensured all SWAN-owned domains are fully validated with SendGrid
- Bounce list was cleared, allowing previously dropped emails to process
- Continuing to monitor deliverability over the next several weeks

Month/Yr	Total Emails Sent	Success Rate	Email Addresses Bounced	Email marked SWAN as SPAM	Invalid Emails	Blocks	Bounce Drops	Spam drops
January, 2022	414,381	96.94% (401,716)	645	31	153	2,772	8,653	1,696
February, 2022	385,196	96.97% (373,511)	1,551	38	116	3,102	7,365	1,077
March, 2022	418,531	97.67% (408,766)	523	37	120	2,357	6,274	1,382
April, 2022	390,872	97.72% (381,971)	563	43	153	1,969	5,402	1,622
May, 2022	414,381	96.94% (401,716)	645	31	153	2,772	8,653	1,696
October, 2022	446,583	96.80% (432,311)	618	48	273	2,919	9,567	2,247
November, 2022	417,528	96.58% (415,344)	563	37	294	2,978	9,877	2,344
December, 2022	402,970	96.42% (400,868)	455	45	244	2,917	10,208	2,316
January, 2023	446,637	95.12% (443,495)	727	45	255	4,652	16,958	2,392

MobileStaff Documentation Update

Did you know you can use MobileStaff with Wi-Fi or a mobile hotspot to:

- Process your holds pull list
- Manage Holdshelf
- Scan your items for inventory
- Create weeding lists and process items
- Mark item used
- Access Symphony off-site


[MobileStaff Setup](#)

[Introduction to MobileStaff](#)



EBSCO Renewal Group Purchase

Important dates to look out for...

- April 24 – Database selection form opens
 - May 12 – Database selection form closes
 - June 30 – Updated EBSCO links sent to participating libraries
 - July 1 – All new EBSCO database selections are live
- 
- A teal-colored triangle is located in the bottom right corner of the slide, pointing towards the top right.

BLUEcloud Release 23.02


BLUEcloud Circulation

- Permit checkout of a checked out item
- Call number browse for catalog searching

BLUEcloud Acquisitions

- Order status "Complete" is now called "Closed"

Release Notes

 Select a product and version to view release notes. Use the checkboxes to select specific items to export, or leave all items unchecked to export PDF. Use the [Product Roadmap](#) page to view items currently being worked on for upcoming releases. Visit the [Timeline & Highlights](#) for planned releases. [Learn how to contribute to the roadmap.](#)

Product: Version: Category:

Enhancements

<input type="checkbox"/>	Jira #	Summary	Product	Version	Category	Enhancements
<input type="checkbox"/>	ACQ-5724	Order status "Complete" is now called "Closed" With the implementation of order cancellation in BLUEcloud Acquisitions, the Order Status "Complete" has been changed to "Closed". "Closed" indicates orders where the quantity is satisfied by any combination of received/invoiced and canceled.	BLUEcloud Acquisitions	23.02.00		
<input type="checkbox"/>	CIRC-2218	Permit checkout of a checked out item The BLUEcloud staff user will be able to override and check out an item that is currently checked out to another patron. BLUEcloud will honor the selected option in Symphony global configuration for charging of an already-checked-out item.	BLUEcloud Circulation	23.02.00		
<input type="checkbox"/>	CIRC-2362	Permit checkout of a checked out item Staff users in BLUEcloud Circulation can now check out an already checked out item to a new patron. Previously, if an item did not get properly scanned at check in and another patron wanted to check it out, the circulation staff user was blocked from completing the checkout. In order to check out the item, the staff user had to navigate away from... Read more...	BLUEcloud Circulation	23.02.00		
<input type="checkbox"/>	CIRC-2370	BLUEcloud Circulation now includes call number browse for catalog searching BLUEcloud Circulation staff users can now filter circulation searches by call number. When a call number is entered with this option selected, BLUEcloud	BLUEcloud Circulation	23.02.00		



New Course Announcement

We have 2 brand
new courses about
holds!

PS303: Holds Daily Processing
PS301: Resources Sharing in SWAN

The screenshot shows a library catalog interface with two course announcements. At the top right, there are search and navigation icons. The first announcement, on the left, features a map background with a blue location pin icon containing a book and a building icon. It is labeled 'PS301 Course' and 'PS301: Resource Sharing in SWAN'. The second announcement, on the right, features a photograph of a library shelf filled with books. It is labeled 'PS303 Course' and 'PS303: Holds Daily Processing'. Both announcements include a small circular icon with the number '3' at the bottom left.

Updated Aspen Webinars

All Aspen webinars, with the exception of Purchase Suggestions, have recently been updated.

If you have new staff, or are interested in learning more about Aspen, now is a good time to dive in!

[Home](#) » [Meetings & Trainings](#) » [Trainings](#) » [Tutorials & Training Resources](#) » [Aspen All-Staff Training](#)

Aspen All-Staff Training

[Discovery & User Experience](#)

Training aimed at all library staff to assist patrons with using the library catalog.

Aspen All Staff: Searching and Intro to Grouped Records

Webinar 55 minutes

Added Feb 27, 2023 · [Discovery & User Experience](#)

All library staff are welcome to join us to learn more about the Aspen Catalog. This training session will cover searching and grouped records. We recommend viewing this training first if you are new to Aspen.

Aspen All Staff: Accounts and Recommendations

Webinar 35 minutes

Last updated Feb 17, 2023 · [Discovery & User Experience](#)

Learn about patron accounts and recommendations in Aspen. This training is intended for all library staff.

Search & Discovery Training

» Aspen All-Staff Training

[Searching and Intro to Grouped Records](#)

[Accounts and Recommendations](#)

[Lists](#)

[Masquerade Mode and Holds](#)

[E-Resources](#)

» Aspen Administration Training

[Browse categories, Spotlights, & Adding Covers](#)

[Placards & System Messages](#)

[Purchase Suggestions](#)

[Themes & Library Settings](#)

[Aspen Statistics & Reports](#)

[Record Grouping](#)

[BLUEcloud Mobile App Administration](#)

Aspen Tip of the Month: Preferred Name

The 23.02 release included an update to preferred name.

Now, when a user sets their preferred name in Aspen, this will also display in WorkFlows and in patron notices.

<https://support.swanlibraries.net/news/aspen>

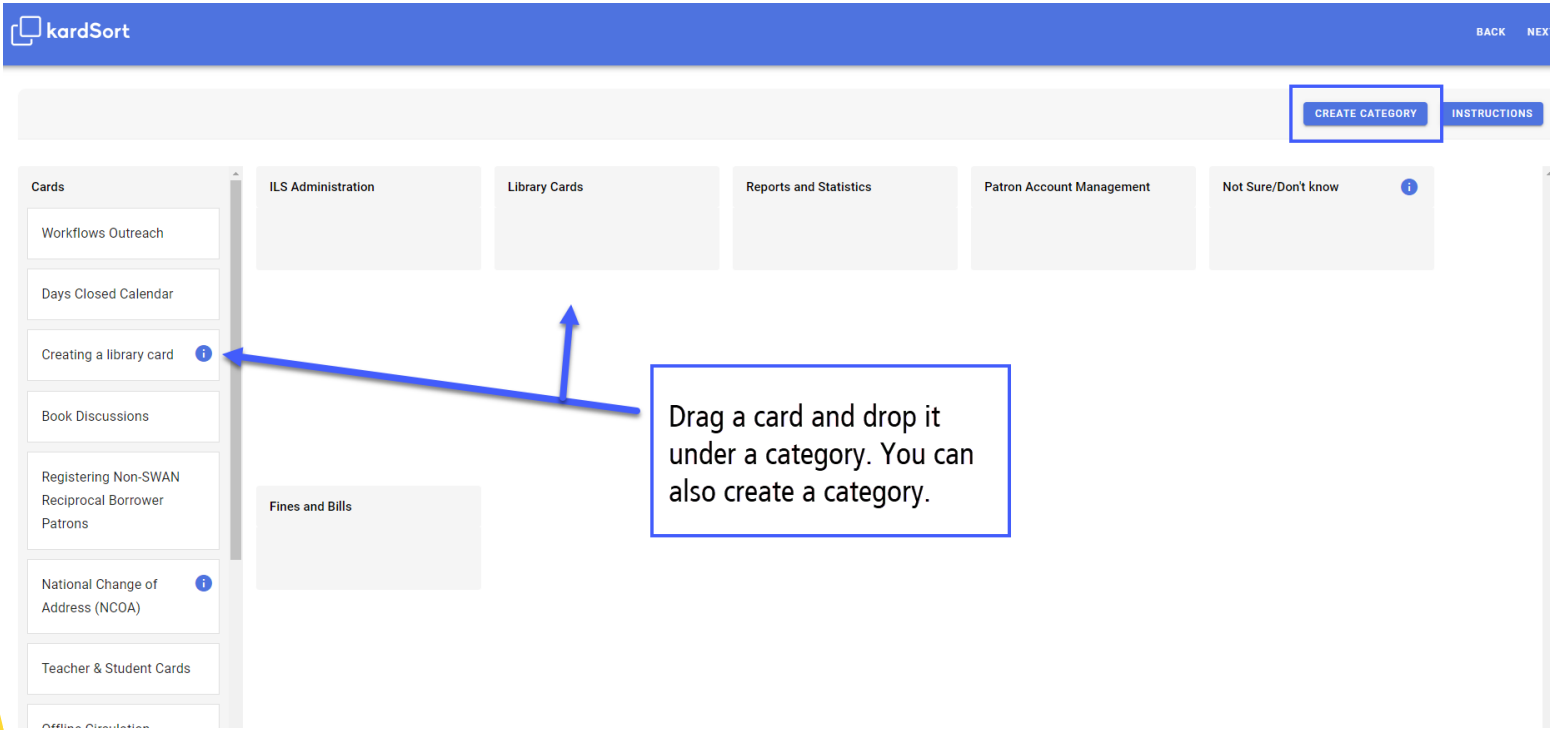
[Catalog Home](#) » [My Account](#) » Contact Information

Contact Information

Full Name	ASPENTEST, WILLOW TREE
Expiration Date	
Preferred Name	<input type="text" value="Jack"/>
Address	1313 MOCKINGBIRD LANE
City	TREE TOWN
State	IL
Zip	60588
Primary Phone Number	
Email	<input type="text" value="test@swanlibraries.net"/>

[Update Contact Information](#)

Circulation Documentation Activity



User groups & upcoming events

SWAN Quarterly Meeting

- Membership meeting for library directors & administrators
- 10 a.m. Thursday, March 2, 2023 at Oak Brook Public Library
 - Approval of FY2024 budget
 - Aspen Discovery mobile app LiDA (Library Discovery App)
 - Update on MessageBee
 - SWAN Online Learning
- Live streaming of the event via Zoom



Upcoming meetings

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

- Monthly Office Hours

- Cataloging 3/1
- BLUEcloud Analytics – 3/6
- Circulation/ILL/Outreach - 3/6
- Aspen 3/8
- Circulation & Hold map –3/8

- Meetings

- SWAN Quarterly: 3/2
- Book Club Users: 3/8
- Circulation Advisory: 3/15
- Technology Update: 3/23
- DUX: 3/23
- Directors Coffee Hour: 3/27

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.

See you next time!

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

