



SWAN Fireside Chat

August 29, 2023

Agenda

- Labor Day Reindexing
- Resource Sharing Update
- MessageBee Update
- Information Security Update
- SWAN Expo '23 Recap
- Aspen Update
- SWAN events & office hours

Labor Day Authority Reindexing

What's happening?

- Rebuilding the Authority and Thesauri indexes
- Fixes "See" References issue
- Occurring Sunday evening – September 3
- Regularly scheduled Symphony Reports may be delayed on Labor Day (9/4)

In preparation:

- Deduping authority records
- Cleaning up existing bib & authority records

Important notes:

- Aspen catalog will still be available
- More confidence in SmartPort usage

E-Resource & Resource Sharing Updates

Kanopy Demo

Join Paula Roman for a Kanopy demo

Friday, September 22

10:00 am – 10:45 am

Details on [L2](#) and [SWAN Support Site](#)

Good news!

- Increase in Kanopy discount for Pay Per Use credits and Kanopy PLUS Packs from 5% to 10%
- Updated discount will be on September 1 invoice
- Discount is for current and new subscribers

Resource Sharing Updates



Addison Public Library joining SWAN

- WorldShare ILL deflection now enabled

History

Lenders JVK

Date	Supplier	Response
08/09/2023 12:13:28	JVK	No - Auto-Deflection: custom group. Policy = SWAN Requests / / Matched Any Format / Matched Any Group / Matched Any License Term / Matched Custom Group /

Calling all programmers!



Programming



A warm and friendly place to share ideas for all things programming. Event ideas, presenters, marketing, group purchases, and more!

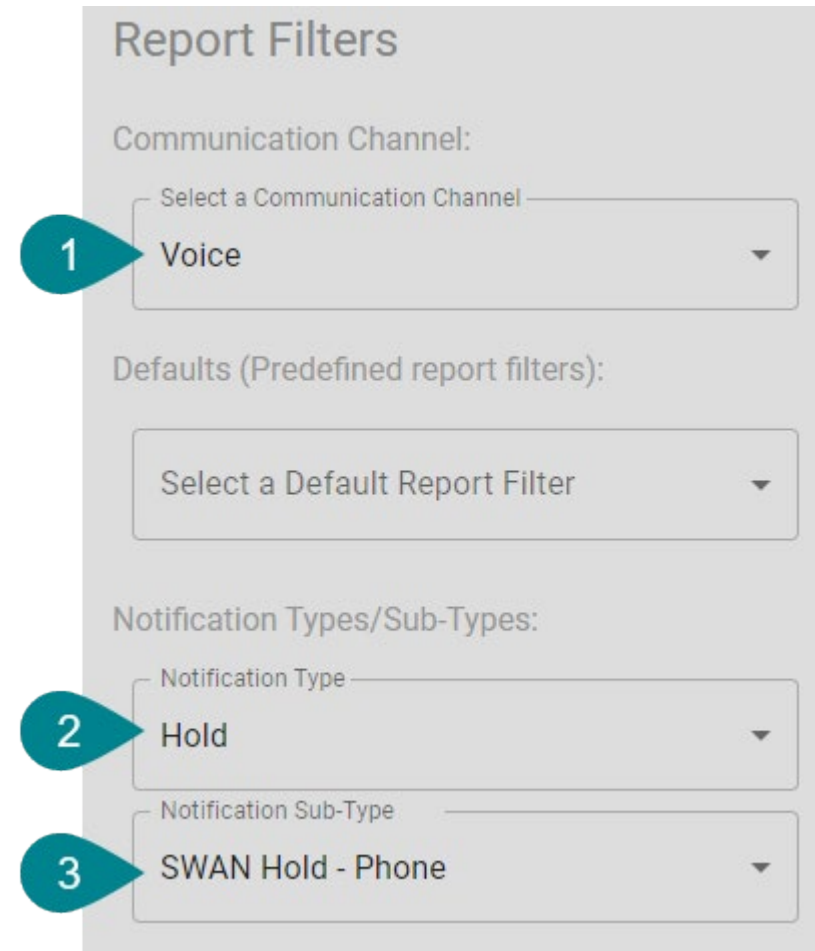


MessageBee Update

Phone notifications

We will be transferring phone notification statistics to your individual library portals.

Reports and statistics integrated with SMS and email.



The image shows a 'Report Filters' configuration panel. It contains three main sections: 'Communication Channel', 'Defaults (Predefined report filters)', and 'Notification Types/Sub-Types'. Each section has a dropdown menu. Three numbered callouts (1, 2, and 3) point to the 'Voice' selection in the first dropdown, the 'Hold' selection in the second dropdown, and the 'SWAN Hold - Phone' selection in the third dropdown.

Report Filters

Communication Channel:

1 Select a Communication Channel
Voice

Defaults (Predefined report filters):

Select a Default Report Filter

Notification Types/Sub-Types:

2 Notification Type
Hold

3 Notification Sub-Type
SWAN Hold - Phone

Phone notifications

Only statistics access is changing. Your patrons will receive the same experience. Calls will come from the same number as before.

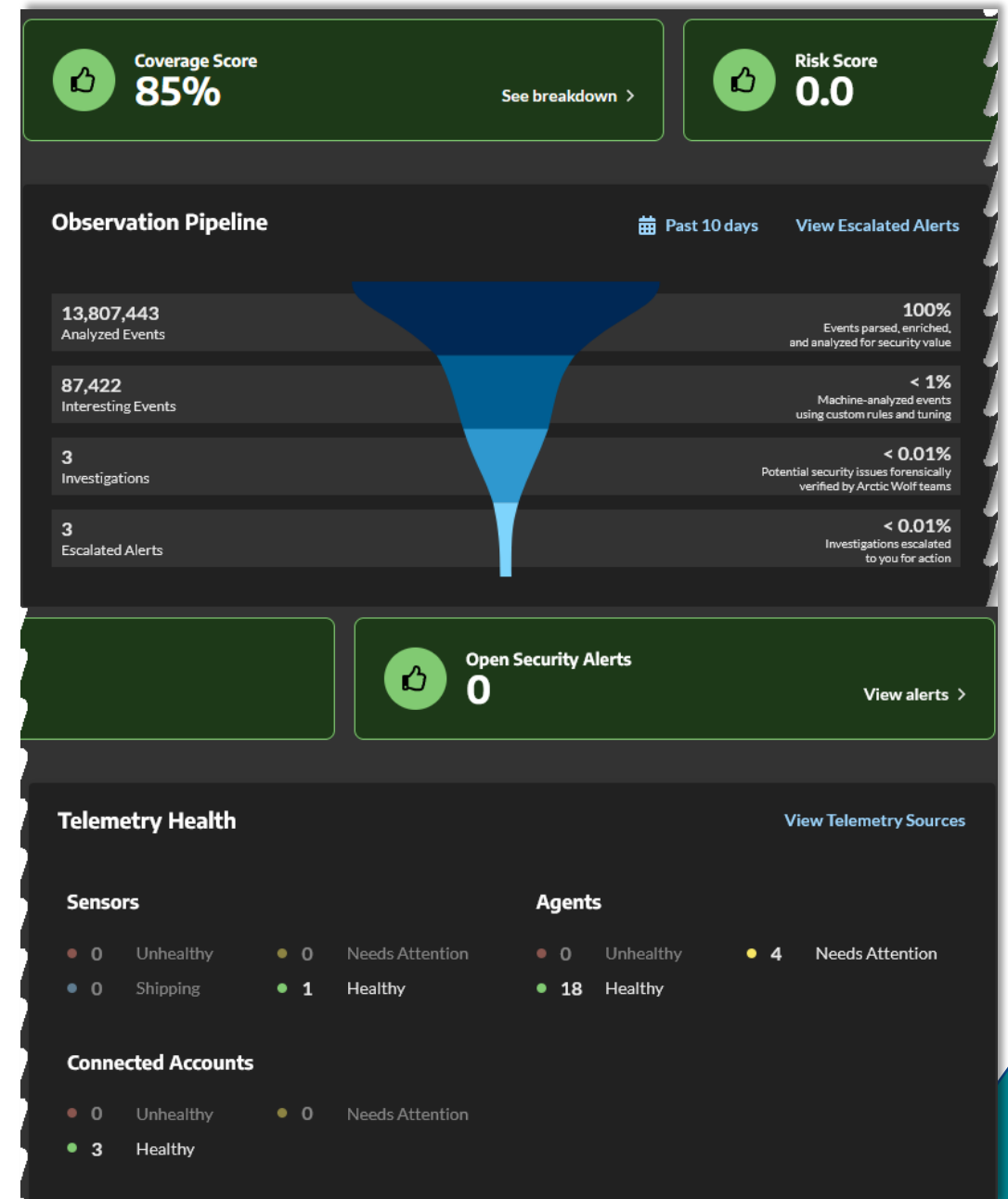
- Change taking place tomorrow: Wednesday, August 30th
- Should be seamless
- Statistics available by checkout library
- Contact help@swanlibraries.net if you have any difficulty with deciphering failure reasons or need to lookup failures from another library.

Information Security Update



Enhanced Security Monitoring – Officially Live!

- **Arctic Wolf held final onboarding call on 8/24**
 - Met SWAN's dedicated security team
 - 'Customization Journey' next 90 days
 - Security reports are delivered weekly
 - Reviewed Service Level Agreement (SLA)
 - Started populating Incident Response Plan
 - Security audits performed quarterly
- **Technical meeting scheduled next week**
 - Review monitored networks/devices
 - Ensure all necessary sensors are deployed
- **Ongoing meetings scheduled as needed**



How Does SWAN Protect Our Data?

- Restricted access to Symphony Server – Firewall rules & VPN
- 3rd party vendors must sign privacy agreement prior to onboarding
 - Vendor connections are restricted and read-only unless explicitly needed
- Use of TLS-SIP2 and SFTP for vendor connections and data transmission
- Regular system maintenance and patron data removal
- Library staff cannot access patron's reading history or PIN
- BCA reports scrubbed of PII or password protected



How can you help?

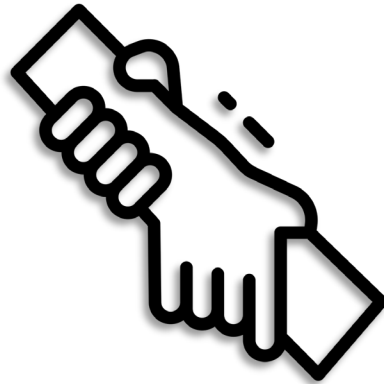
- Subscribe to SWANcom and The Current newsletter
- Avoid sending PII or passwords in help tickets
 - *Ensure any attached screenshots are redacted!*
- Require PIN on Self-Checks and Reservation Systems
- Password protect BCA reports containing PII
- Change passwords on a regular basis
- Limit collection and retention of PII
- Know where your data is going
- Submit offboarding tickets



Offboarding Staff

Open a support ticket when offboarding library staff.

SWAN can help!



What is included in SWAN offboarding?

- Reset passwords in
 - WorkFlows
 - BLUEcloud Analytics
- Unsubscribe from
 - SWANcom
 - The Current
- Remove access to
 - SWAN support site
 - SWAN Community Forums (posts remain)
 - SWAN Online Learning

WorkFlows Passwords



- Five-minute phone call
- Send an email to help@swanlibraries.net to schedule a phone call – do not send passwords in the email
- Choose your own passwords following guidelines on [Managing Passwords & Logins](#)
- Always change when offboarding staff

Note: We can update your Alias Email Addresses during the call

SWAN Expo 2023



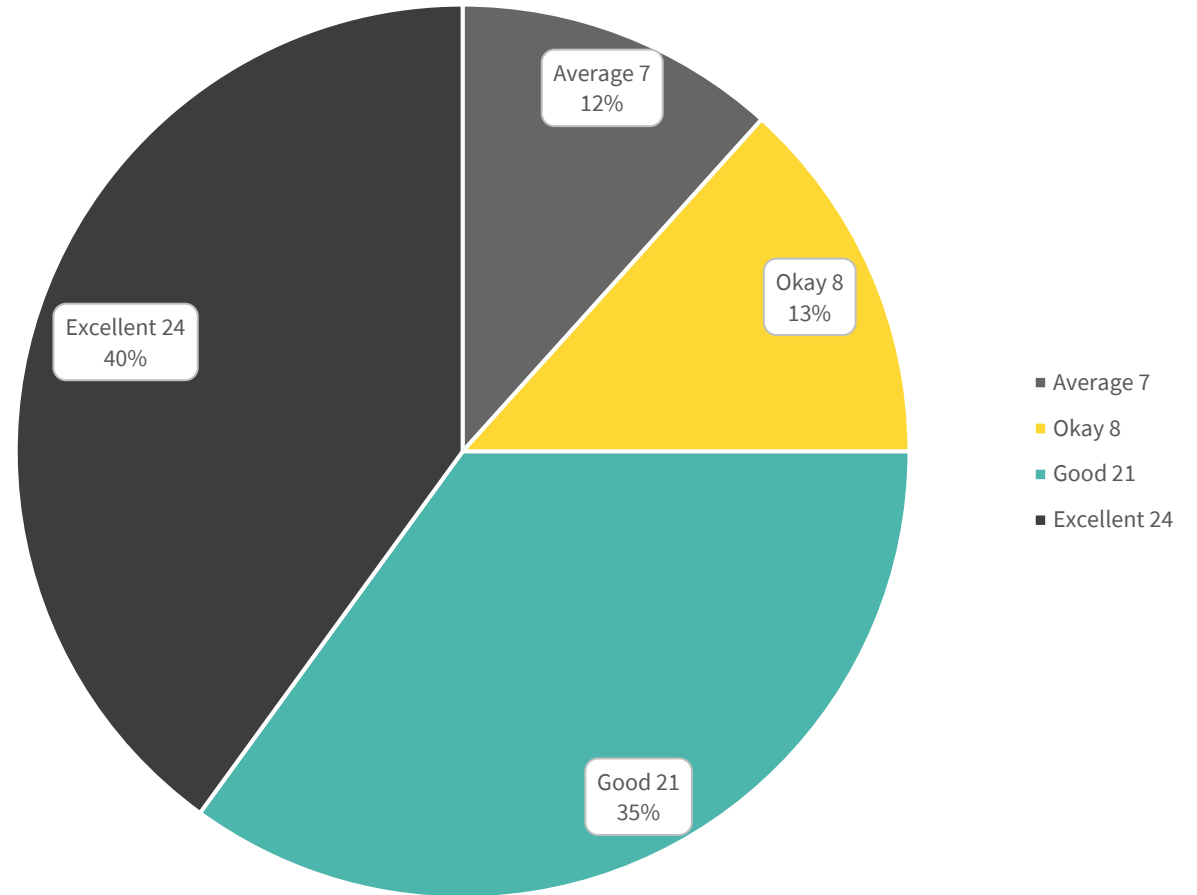
It's a wrap recap!

- 213 registered attendees
- 3 roundtable discussions
- 9 session presentations
- Expo 2023 [archive](#)
- Attendee [feedback survey](#)

How would you rate the conference overall?



How would you rate the conference overall?



Coming soon iLEAD

iLEAD is an Illinois statewide service to be launched later this year for public library trustee orientation

Designed by Illinois Heartland, RAILS, and the Illinois State Library

A promotional graphic for iLEAD. At the top, a red banner contains the text "COMING 2023" in white, with "COMING" in a red speech bubble and "2023" in a blue speech bubble. Below this, a man and a woman are smiling. To the right of the man, a blue circle contains the text "AN INTERACTIVE GUIDE TO THE TRUSTEE'S ROLE AND DUTIES". Below the man, a dark blue circle contains the text "FREE ACCESS". To the right of the woman, a dark blue circle contains the text "STATEWIDE". At the bottom, a dark blue banner contains the text "PUBLIC LIBRARY TRUSTEES". The iLEAD logo is at the bottom, featuring a stylized 'i' inside a blue circle, followed by "LEAD" in large red letters. Below the logo, the text "Leadership. Empowerment. Access. Development." is written in blue, and "for public library trustees" is written in red. At the bottom right, the email address "ittgrant@illinoisheartland.org" is listed, followed by a paragraph of small text about funding and development.

COMING 2023

THIS AUTUMN

AN INTERACTIVE GUIDE TO THE TRUSTEE'S ROLE AND DUTIES

FREE ACCESS

STATEWIDE

PUBLIC LIBRARY TRUSTEES

iLEAD
Leadership. Empowerment.
Access. Development.
for public library trustees

ittgrant@illinoisheartland.org

iLEAD is funded by a grant that was awarded by the Illinois State Library, a Department of the Office of Secretary of State, using funds provided by the U.S. Institute of Museum and Library Services, under the provisions of the Library Services and Technology Act (LSTA). iLEAD is being developed by Illinois Heartland Library System.

Aspen Update: Custom Facets

We are now able to create custom search facets based on MARC data for physical items.

We will be working with Cataloging Advisory and Discovery and User Experience Advisory to brainstorm implementation options.

▼ Demographic

- ☐ nat Americans
- ☐ occ University and college faculty members
- ☐ gdr Men
- ☐ gdr Women
- ☐ Men
- [More ...](#)

▼ Specific Audience

- ☐ Children
- ☐ Age group Early Adolescents
- ☐ Preteens
- ☐ Age group Late Adolescents
- ☐ General
- [More ...](#)

Example for testing purposes only.

Aspen Update: Local item notes

Cleanup of local notes continues.

Pending further bugfix, we hope to launch local item notes after Labor Day.

We will be in touch as this develops.

▼ Copies			
Location	Call Number	Note	Status
Geneva Public Library District - 2nd Floor - Nonfiction	977.323 FAC		Checked out
Kaneville Public Library District - Local History	R 977.301 FAC	In local history collection; does not circulate.	On Shelf
Messenger Public Library of North Aurora - Reference material	R 977.301 FAC		On Shelf

Note

In local history collection; does not circulate.

Upcoming Meetings/Trainings & Announcements

SLUI Annual Meeting

(SirsiDynix Library Users of Illinois)

What: SirsiDynix Library Users of Illinois

- SirsiDynix representatives will be showcasing their new software and provide product roadmap updates
- Afternoon lighting talks on security as well as on and offboarding procedures.

When: Thursday, Sep 21, 2023 | 9:30 am - 2:30 pm

Where: Saint Charles Public Library District
1 S. 6th Avenue, St. Charles, IL 60174

For more information: [View event details on L2](#)

Registration: [Eventbrite](#)

Upcoming membership events

SWAN Quarterly Meeting

Oak Brook Public Library

September 7, 2023

10:00 a.m.

Topics

- SWAN's strategic planning process overview
- SirsiDynix agreement overview & partnership
- EBSCO group-purchase databases year-3 usage metrics overview

Upcoming Meetings

SWAN Office Hours are events held with experts at SWAN for anyone that would like to ask questions and discuss in a virtual group setting

- Monthly Office Hours
 - Cataloging: 9/6 at 2:00 PM
 - Analytics: 9/11 10:00 AM
 - Circ & Hold Map: 9/13 2:00 PM
 - Aspen: 9/20 1:00 PM
 - Circ, ILL, Outreach: 9/20 2:00 PM

We updated these events in L2 to allow for registration, which gives you the benefit of receiving email reminders

- Meetings
 - Acquisitions & Cataloging Users Group: 9/14 at 9:30 AM
 - Kanopy for SWAN Libraries: 9/22 at 10 AM
 - Directors' Coffee Hour: 9/25 at 1:30 PM
 - Technology Update: 9/28 at 9:30 AM
 - DUX: 9/28 at 1:30 PM



Class Dismissed!

Next Fireside Chat:
Tuesday, September 26th at 11 AM

See L2 for Zoom details