



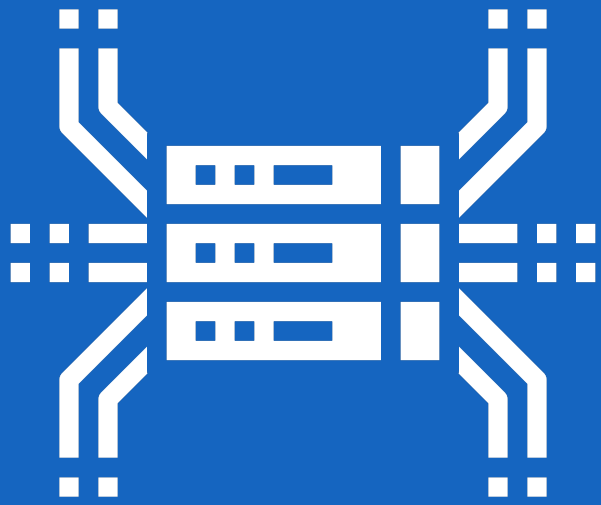
SWAN Technology Users Group

September 28, 2023

Agenda

SWAN Tech Users – September 2023

- ITSS Department Update
- Security Initiatives
- Project Updates
- Conferences & Expos
- System Support
- Open Discussion



New Staff Announcement!

Welcome Laurie!!

- Laurie Casiano – SWAN Network Administrator
- Started Monday, September 25th

SWAN IT & System Support (ITSS) Team

- Ian Nosek
- Laurie Casiano
- Dave Pacin
- Ahren Sievers
- Michael Szarmach
- Vickie Totton



For support, please email help@swanlibraries.net

Security Initiatives



Arctic Wolf

- All systems and endpoints are connected to Arctic Wolf's Systems
- 90 Day Customization Period
- External Visibility Assessment Complete
- Public Document Search!
- Addressing any gaps in coverage
- Developing Disaster Recovery and Incident Response Plans

End-User Awareness

- Be conscious of your interactions with external contacts
- Don't provide any sensitive information to unknown contacts
- Hover-over links in suspicious email – don't click unless you're sure
- Logging into a site manually is always safest!
- Do not provide credentials unless you know site is legitimate
- Pay attention to browser's address bar
- Did you **REALLY** book a flight that needs confirmation?

Be Proactive!

- Contact support when offboarding staff
- Purge inactive patron records regularly
- Ensure passwords are complex or use password managers
 - Try using a passphrase for regularly used passwords!
- Do **not** transmit credentials via email – including screenshots!
- Avoid sharing accounts or update password regularly
- Enable Multi-Factor Authentication for accounts

Mistakes Happen...

- Nobody's infallible – we ALL make mistakes
- Notify IT immediately if you:
 - Provided credentials or logged into a malicious site
 - Opened any attachments from a suspicious email
- Response time is critical for containment/threat mitigation!

Project Updates

MessageBee – Update

- Messaging service provided by Unique.
- SWAN has been using MessageBee for voice since 2021
- SMS went live April 26
- Email went live June 27
- Library staff can customize their own Email and SMS templates which includes the ability to add promotional banners
- Gather notice statistics
- Search on patron notice history



2 Types of Logins



Full Access: Available at go live



Report Access: Limits users to reports and doesn't not allow modifying of templates

2-Way SMS Tool

Tool is available
but not required
to use/monitor.

Respond to AND
initiate SMS
notifications with
patrons

Phone Calls



**PHONE NOTICES MOVED TO
LIBRARY'S OWN ACCOUNT**



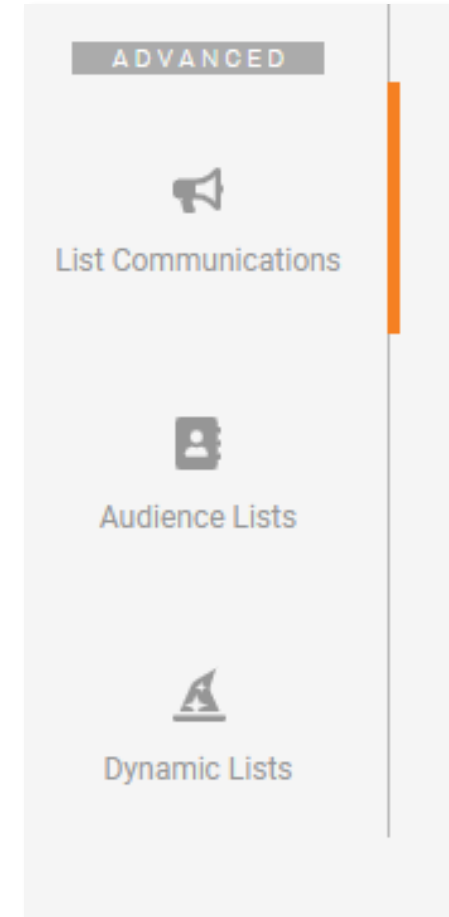
**CONFIRMATION WHETHER A
CALL WAS SUCCESSFUL OR NOT**



REPORTING STATISTICS

List Communications Research

- List Communications Modules
 - Audience Lists
 - Dynamic Lists
- SWAN doing R&D with plans of public demos and possible pilot in early 2024
- Opt-in model with cost
- [Unique List Communications Documentation Collection](#)



Addison Public Library Update

- Circulation go-live still on-track for Tuesday, November 14, 2023
- Initial data extract copied to SWAN Test – August
- SIP2 access creation
- Currently in a testing phase



Authority Record Cleanup Project

- SWAN Bibliographic Services Manager Cynthia Romanowski identified issues with authority records requiring large scale cleanup
- Impact on overnight processing somewhat unpredictable
- Was able to leverage Azure environment to spin up test servers and gauge impact of different approaches to cleanup

Conferences & Expos

SWAN Expo 2023



Technology Sessions

- [Information Security in Libraries](#)
 - Protecting SWAN's systems/data
 - Securing patron PII
 - Good security practices
- [SWAN Support: Pulling Back the Curtain](#)
 - Tips for submitting great tickets
 - Insight into SWAN Support/Ticketing

SLUI

SirsiDynix Library Users of Illinois

Hosted at St. Charles 9/21

- Future of the SWAN mobile app
 - SirsiDynix – BLUEcloud Mobile
 - Aspen – LiDA
 - Solus – Untitled Project
- BLUEcloud Suite
 - Native 2FA coming early 2024
 - New Discovery Extract Utils
 - Tiered Access Levels
- Best practices in patron privacy and securing PII
 - [Slideshow \(PDF\)](#)

System Support

Domain Services Outage

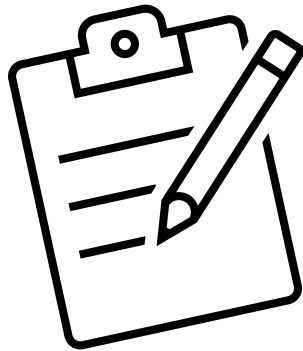
Thursday, September 7th

- Services Became Inaccessible Thursday Afternoon
- Root Cause Was Domain Registrar Account Issue
- Domain Services Restored Thursday Evening
- Patron Lookup and Transit Label Utilities Remained Offline
- Services Fully Restored Friday Afternoon

Staff Offboarding

- You do:

- Update your organization affiliations in L2
- Open a ticket (help@swanlibraries.net) and let us know about departing staff



What we do:

- Aliased email removal
- BLUEcloud Analytics account password reset
- BLUEcloud Central account removal
- SWANCom unsubscribe
- The Current – SWAN Newsletter unsubscribe
- SirsiDynix Mentor account removal
- SWAN Community Forums account removal
- WorkFlows Personal Logins account removal
- Inquisiq Learning Management System account removal
- Support Site account removal

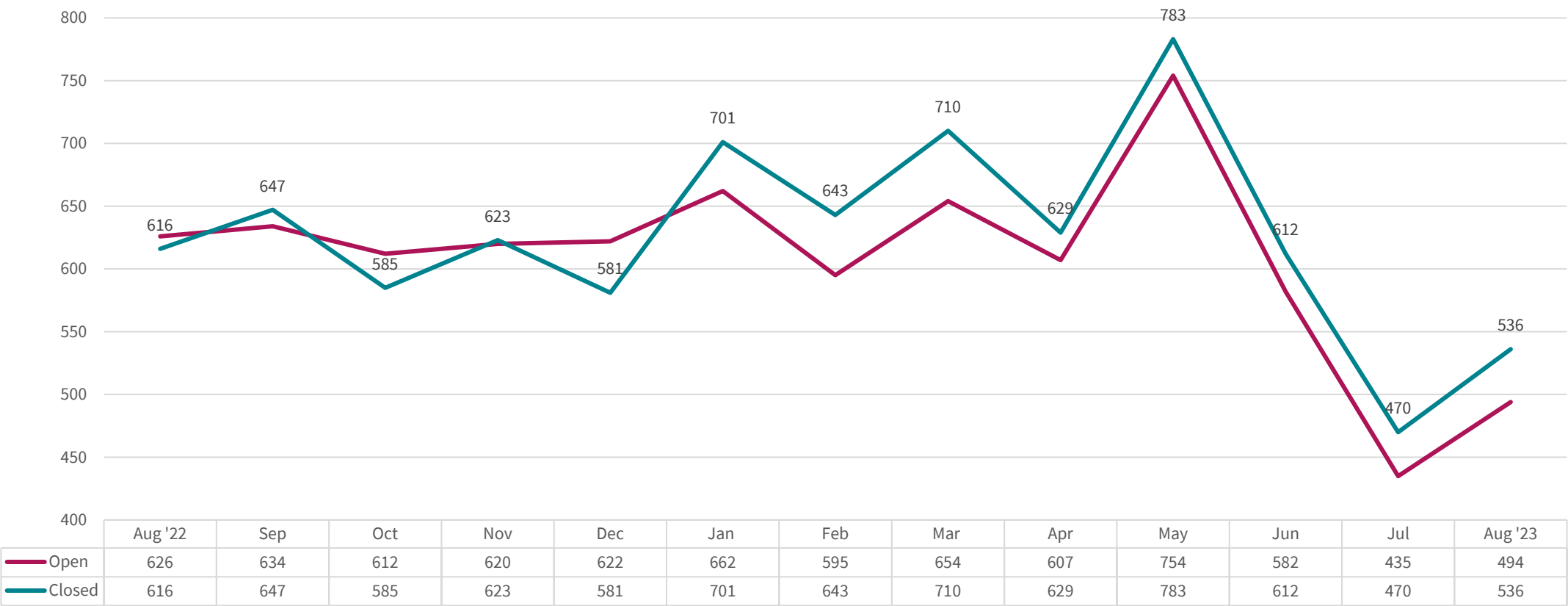
Onboarding & Offboarding – SWAN Support Site
<https://support.swanlibraries.net/documentation/91662>

SWAN IT & System Support Project Retrospective

- SonicWall Replacements
- Vendor Integration
 - Collection HQ
 - Patron Point
- 18 Pseudo Libraries
 - 5 Drive up
 - 11 Lockers
 - 2 School Districts
- TLS-SIP2 Migrations
 - OverDrive
 - Kanopy
 - Hoopla

Support Ticket Retrospective

SWAN Support Tickets: August 2022-August 2023



SWAN Support Tickets Opened/Closed in Past 12 Months

WorkFlows

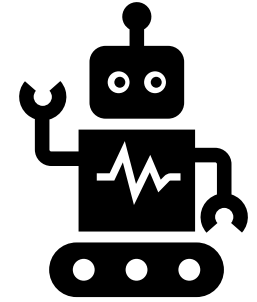
- Inventory Project Assistance
- Days Closed
- Renovation Projects (in conjunction with SWAN Bibliographic Services)
- Fine Free Projects
- Troubleshooting oddities
 - Default Settings adjustments
 - Circulation and Hold Map consultations and adjustments
 - Creating cases with SirsiDynix for further troubleshooting

Manual Database Maintenance



- Patron Record Cleanup – Monthly
 - Reports delivered to libraries listing mis-matched Library and User Profile fields
- National Change of Address - Annual
 - Update address in patron record
 - Insert note with old address
 - Create reports for libraries
 - Patron record removal upon request from library

Automated Database Maintenance



- Custom Longoverdue - Weekly
 - Shelf Check report delivered
 - Removal of items at least 1 year overdue
- Missing Item Record Purge – Monthly
 - Shelf Check report delivered
 - Removal of items missing at least 1 year
- Patron Record Purge - Monthly
 - Email delivered with link to that month's dossier in BLUEcloud Analytics
 - Removal of patron records inactive for 8 years

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](#)

Open Discussion

Upcoming meetings

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

- **Monthly Office Hours**

- Cataloging: 10/2 @ 10:00 AM
- Circ & Hold Map: 10/4 @ 2:00 PM
- Circ, ILL, Outreach: 10/12 @ 2:00 PM
- Aspen: 10/18 @ 1:00 PM
- BLUECloud Analytics: 10/19 @ 2:00 PM

- **Meetings**

- DUX Advisory Group: 9/28 @ 1:30 PM
- ILL Users Group: 10/4 @ 9:30 AM
- Cataloging Advisory: 10/12 @ 9:30 AM
- Circulation Users Group: 10/18 @ 9:30 AM
- E-Resources Advisory: 10/26 @ 1:30 PM
- RFID Users Group: 11/02 @ 9:30 AM

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.