SWAN Fireside Chat

October 31, 2023

Agenda

- Information Security Update
- Addison Go-Live Schedule
- Ticketing System Research
- Delivery Counts
- SmartPort to MARC Listener
- Circulation Advisory Election
- Resource Sharing Updates
- Database Authentication Audit
- Aspen Update
- Trainings & Upcoming Meetings

Information Security Update

Arctic Wolf

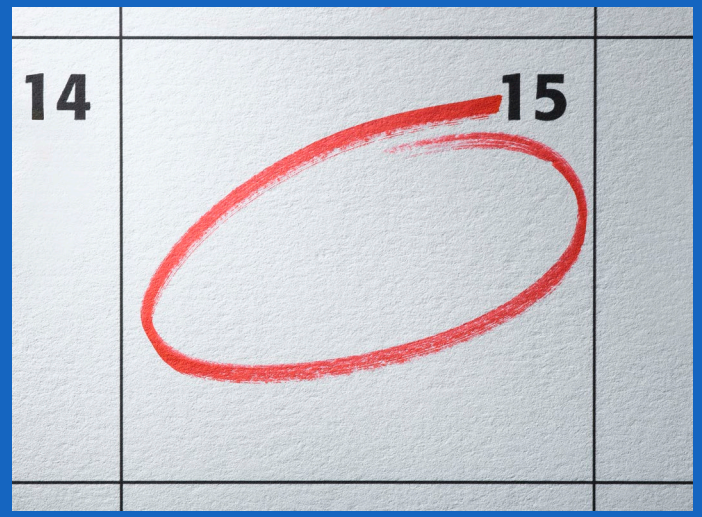
- Containment driver deployed and tested
- Allows security team to instantly isolate a system
- Containment policies in place for user devices and servers
- Next: Managed Security Awareness

Upcoming Sessions:

Legend: Phishi

Week Of	Title	Description
11/6/2023	Updated Vacation Policies for 2024	SCHEDULED: Tuesday, 08:00 EST
10/30/2023	Quiz: Email Phishing	Let's take a minute to test your knowledge of email phishing attacks. (Available in American English, British English, German [Deutsch], and Spanish [Español])
10/23/2023	No Session	A session has not been scheduled for this week
10/16/2023	Don't Forget the Paper!	Cipher once again emerges from the shadows to guide you through an often-unrecognized enemy, unsecured documents. As the evil villainous group close in on their data rich targets, you and Cipher must stop them before it's too late! (Available in American English, British English, German [Deutsch], and Spanish [Español])

WorkFlows Passwords



We will schedule phone calls with libraries that have not yet updated their passwords

1. Prep work:
   Choose new passwords for your login accounts
   - XXXCIRC
   - XXXCIRCSR
   - XXXREFILL
   - XXXTECH
   - XXXTECHSR

2. During the call we will:
   - Update the passwords on the SWAN support site and WorkFlows
   - Make sure you can login with each password

Aliased Email accounts

Alias addresses are used to deliver news, system reports, and statistics

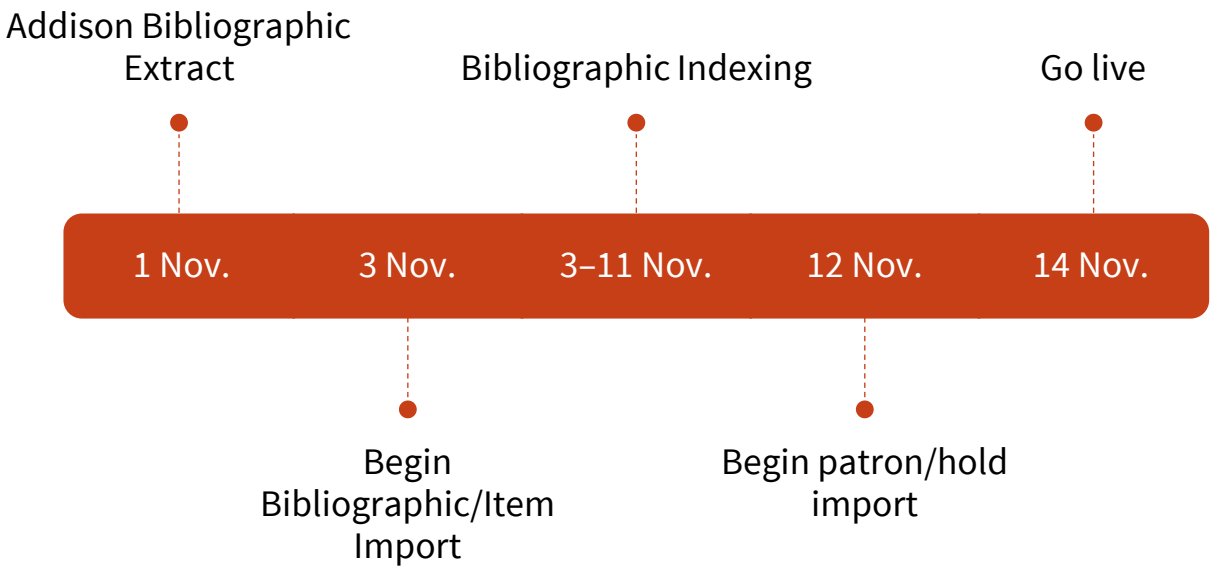
Make use of departmental email/distribution groups

- Less maintenance required if staff changes
- Reach more than five email addresses

SWAN recommends both Library Director and Circulation Manager are added if you do not use email groups

Addison Go-Live Schedule

Addison Go-live Schedule



Bibliographic Indexing

- Gradual indexing November 3rd-11th in lieu of downtime/rebuild
- Priority will be given to indexing newer, shared records.
- Possible anomalies searching Addison items in Workflows
- Aspen and BLUEcloud will be updated immediately after data load completes

Holdability

- Addison items will not immediately be available to fulfill SWAN holds.
- SWAN member items may go to Addison (ADD) starting November 14th
- Hold restrictions will be in place for only a couple of weeks

Ticketing System Research

Still in the early stages.

Evaluating options for:

- Ticketing System
- Customer Relationship Management (CRM) system
- Knowledge Base/Documentation

Priorities

- User portal
- Robust tracking of support by user/library
- Integration with documentation and training

Delivery Count

Start Friday, October 27th

Counts for outbound bins

Monday, October 30 – Friday, November 3rd

WHAT TO COUNT

- You will need to establish an internal procedure to tally items and bins throughout the day and enter the daily totals into the online form.
- Start counting # of items and # of bins after the last pickup on the Friday before the count starts.
- Monday (or first scheduled delivery of the week): Weekend items in Monday's pickup are part of your count. Include all items put in the bins after your delivery on Friday, including Saturday and Sunday. Remember, you are counting all items and bins that are picked up on Monday.
- The count is to be of the bins/items picked up each day for the period of one week.
- Outgoing items are those being delivered **from your library to another location**, including items being sent to fill interlibrary loan requests and items you are returning to other libraries.

SmartPort to MARC Listener

- Cataloging libraries to move from SmartPort to MARC Listener
- Starting in January 2024
- Completing by June 2024
- Thank you early adopters! TPS, DGS, OPS, SCD, and soon to be ESS!
- Contact cynthia@swanlibraries.net

Remember to Vote!

Circulation Advisory Election

Deadline

Friday
November 3rd
5 P.M.

Please cast your vote for Five SWAN Circulation Advisory candidates : *

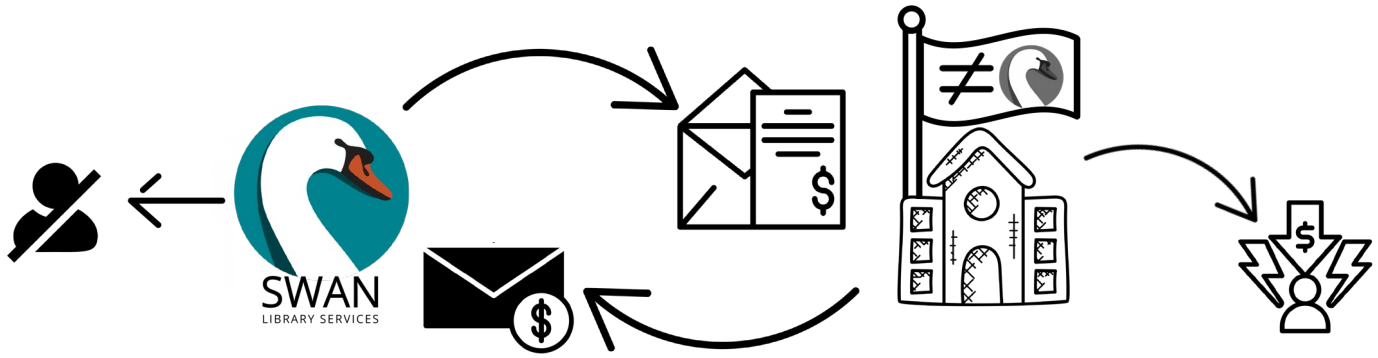
- ☐ Tori Stratton, South Holland Public Library
- ☐ Peggy Tomzik, Eisenhower Public Library District
- ☐ Sandra Leyva, Alsip-Merrionette Park Public Library District
- ☐ Victoria Muraiti, River Forest Public Library
- ☐ Pam Kamin, Glenside Public Library District
- ☐ Tisha Smith, Broadview Public Library District
- ☐ Melanie Johnson, Carol Stream Public Library

Circulation Managers should vote. One vote per library.

Resource Sharing Updates

Non-SWAN RB billing PSA

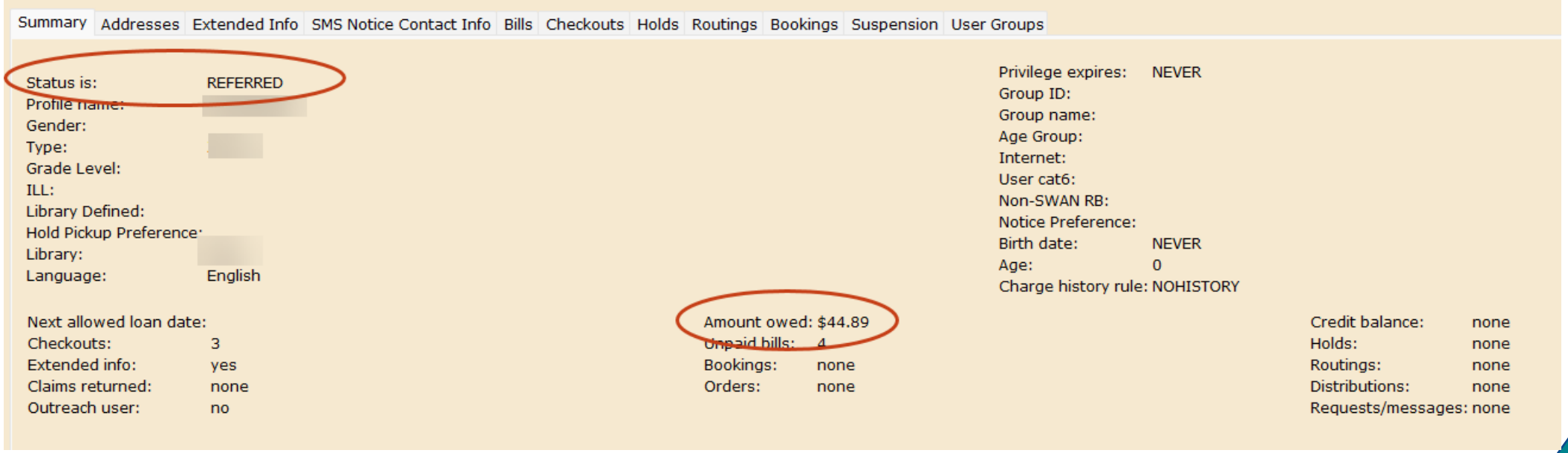
- Invoiced bills are marked paid in user records with RBLIBREIMB
- Do not renew/ reinstate barred non-SWAN RBs without reverifying their status
- Read user notes



Resource Sharing Updates

REFERRED status

- Do not change a user status from REFERRED
- Doing so will result in duplicate referral to Unique Management and duplicate REFERRAL fees
- Only a $0 balance will correctly clear the status



Database Authentication Audit

What does this mean?

- Going through each library's database/resource list available on library websites.
- If a resource should instead be using OpenAthens, it will be recommended that the access URL be updated.

How will this be communicated?

- On a monthly basis, a spreadsheet with updated URLs will be made available.
- Replace existing link(s) with new link(s). Testing has already been completed.

The logistics

- All SWAN libraries will be broken up into 12 groups.
- If nothing needs to be updated, that will be communicated in the spreadsheet.

Other things to note

- Some resources, though compatible with OpenAthens, are already using other methods of authentication.
  - Not covered by this audit
  - Open a ticket with help@swanlibraries.net to see if method of authentication should be updated with vendor.
- SWAN should be notified if adding or removing electronic resources – help@swnalibraries.net

Aspen Update

Want to know how your patrons use the catalog?

There are two great tools to see how patrons are using the lists, placards, and browse categories your library staff create:

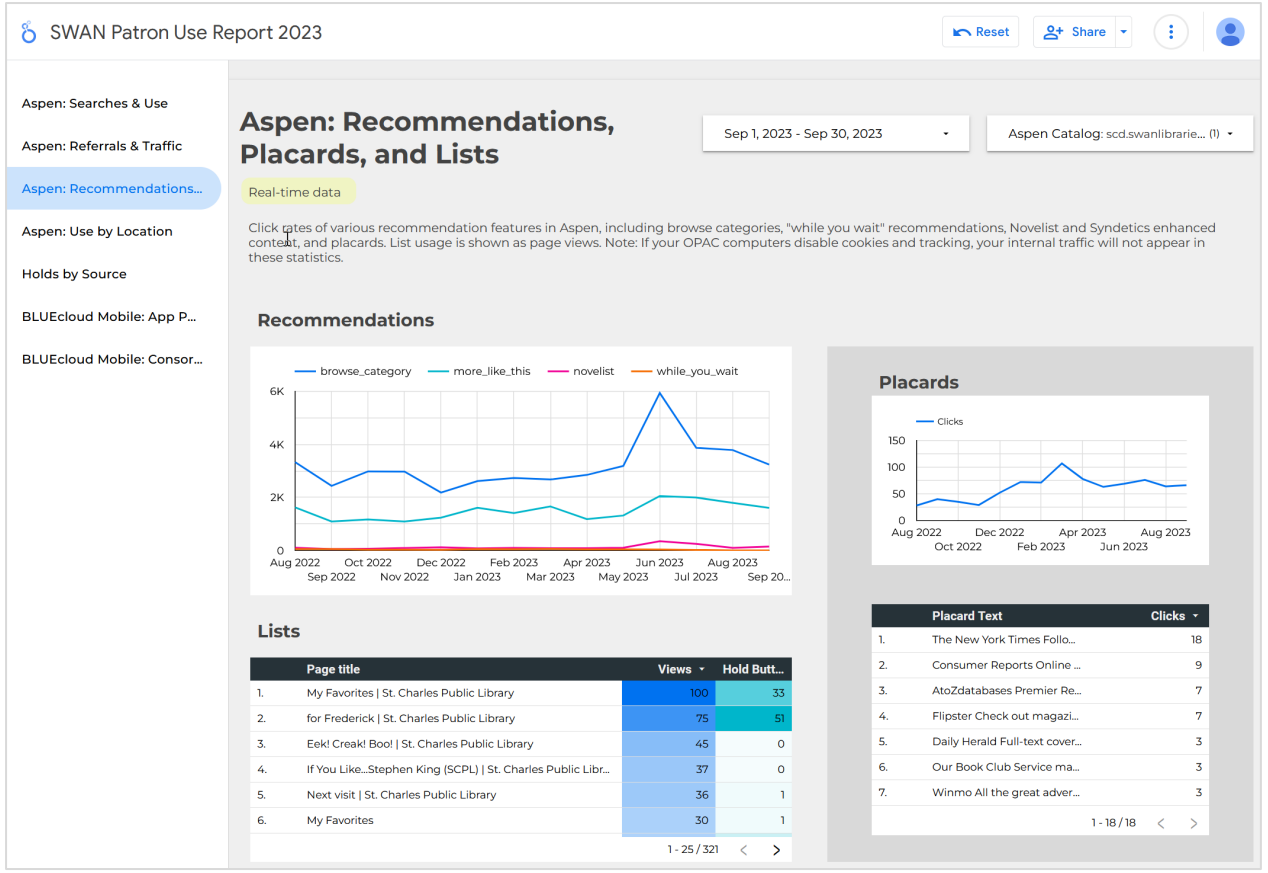
The SWAN Patron Use Report

Shows usage of lists and placards and compares all the readers advisory activity in Aspen.

Aspen Administration > Browse Categories

Breaks down clicks on titles for your library's browse categories.

Learn more: https://support.swanlibraries.net/documentation/86066



Trainings & Upcoming Meetings

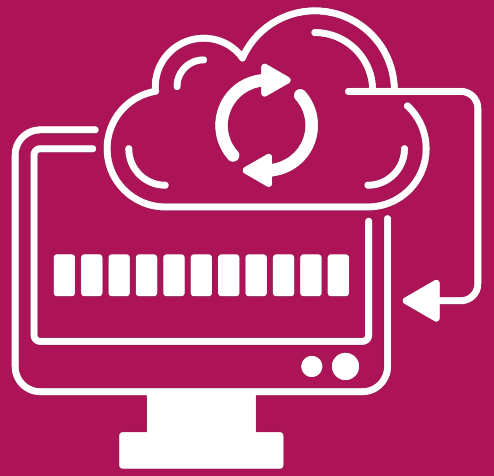
2 Brand New Courses!

Training

- Local Practices for Cataloging Local Materials
- Bills in a Patron Record

TS303: Local Practices for Cataloging Local Materials

PS108: Bills in a Patron Record



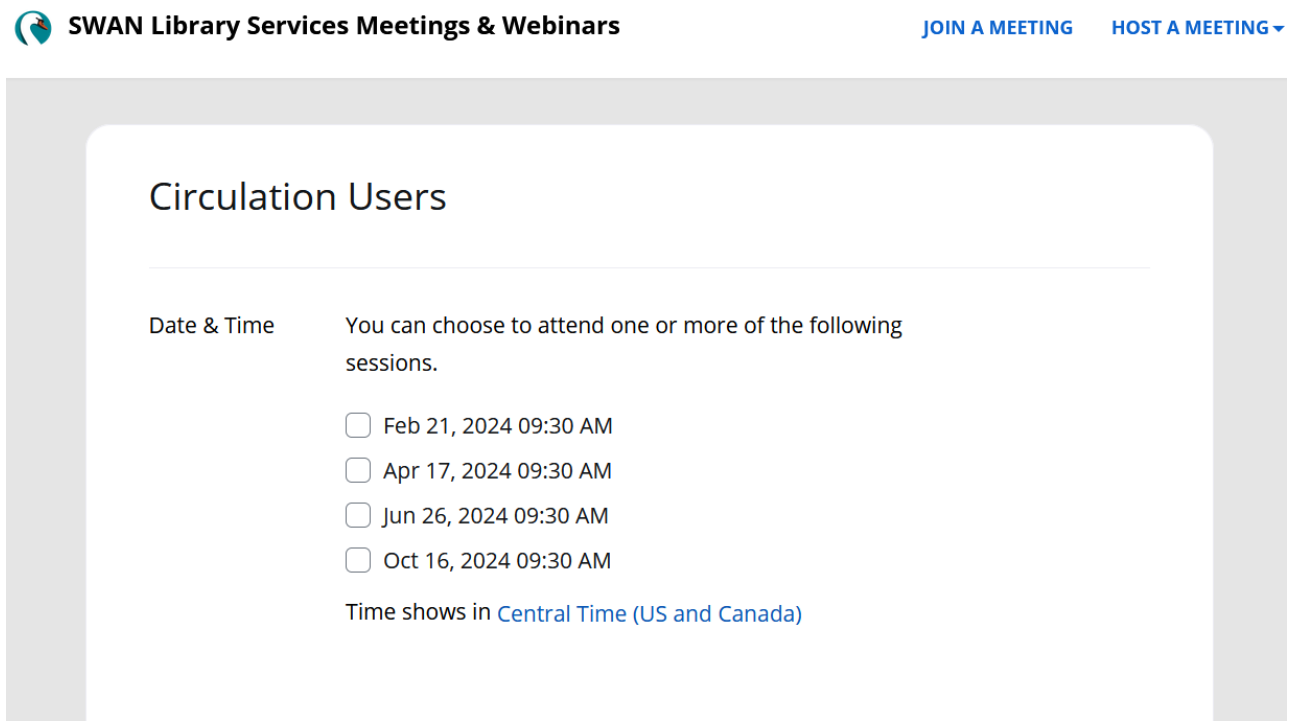
SWAN RFID Users Meeting

- Discuss RFID in Libraries
- Meet Vendor Reps from:
  - Bibliotheca
  - Envisionware
  - FE Technologies
  - Lyngsoe
  - Tech Logic
- Join us on Zoom
- Thursday, November 2nd
- 9:30AM – 11AM
- Registration on L2

2024 Meetings

Register now for 2024 user groups, governance meetings, and office hours! On L2 and the SWAN Support Site: support.swanlibraries.net/calendar

This year all registration is through Zoom. Register to receive email reminders.



2024 User Groups, Office Hours, & Governance Meetings

- Acquisitions & Cataloging Users
- Circulation Advisory
- Circulation Users
- Cataloging Advisory
- Aspen Users
- Discovery & User Experience Advisory
- ILL Users
- RFID Users
- Technology Update
- E-Resource Advisory
- Book Club Users
- SWAN Quarterly
- SWAN Committee of the Whole
- SWAN Board Meetings
- Fireside Chat
- ILL/Circ/Quarterly Billing Office Hours
- Directors Coffee Hour
- IPLAR Office Hours
- Serials Office Hours

Office Hours R.I.P.

(Most) Office Hours canceled in 2024 due to low attendance.

We will be ramping up opportunities to get in touch with SWAN staff for one-on-one consultations. Stay tuned.

Continuing Office Hours:
ILL/Circ/Billing, Serials (New), and IPLAR (New)

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
  - Circulation & Hold Map: 11/6@10:00AM
  - Circulation/ILL/Outreach: 11/8@2:00PM
  - BLUEcloud Analytics: 11/9@10:00AM
  - Cataloging: 11/15 @ 2:00 PM
  - Aspen: 11/15@1:00PM

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

- Meetings
  - RFID Users Group: 11/2@ 9:30 AM
  - Book Club Users: 11/8@9:30AM
  - Circulation Advisory: 11/15@9:30AM
  - Discovery & User Experience Advisory: 11/16@1:30PM
  - SWAN Board: 11/17@9:30AM

Next Fireside Chat:

Tuesday, November 28th at 11 AM

See L2 for Zoom details