Date: **December 6, 2023**
To: **SWAN Board of Directors**
From: **Aaron Skog, Executive Director**
Re: **Recommendation on SWAN mobile application: Aspen LiDA**

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Background: the Solus & SirsiDynix split

SirsiDynix BLUEcloud Mobile was added to SWAN's platform in 2018. The app was created through a partnership between SirsiDynix and the company Solus. In October 2023, SirsiDynix shared the partnership with Solus had ended, and a new BLUEcloud Mobile 2.0 app was under development. The 2.0 app would be released Q2 2024.

Timeline & Communication

Sunday, November 26, 2023	BLUEcloud outage begins
Monday, November 27, 2023	Known Issue posted on SWAN Support, SWAN announcement of outage.
Tuesday, November 27, 2023	SirsiDynix CEO shares unlikely return of BLUEcloud Mobile app, refund offer due to outage, and fast-tracked BLUEcloud Mobile 2.0 release.
Wednesday, November 28, 2023	Meeting with SWAN Board president to review situation and membership communication. SWAN announcement that SWAN Libraries App is assumed dead, suggested communication to the public is provided, and use of Aspen Discovery library instance as interim solution.
Thursday, November 29, 2023	SirsiDynix announcement of policy against official Solus connectors to SirsiDynix platform. SWAN Board president updated with SWAN proposed solution to quickly deploy an alternate app, with an overview of the proposal to take place at the Thursday, December 7th Quarterly meeting, followed by a SWAN Board special meeting.
Friday, December 1, 2023	Agreement negotiated with ByWater Solutions. Meeting with ByWater Solutions to discuss LiDA app configuration process and timeline. SWAN staff remove BLUEcloud Mobile branded "SWAN Mobile App" from Google & Apple app stores.
Sunday, December 3, 2023	SWAN announcement of Quarterly meeting where new app solution will be presented.
Monday, December 4, 2023	Meeting with SirsiDynix CPO regarding app refund, confirmation of notice process to remove BLUEcloud Mobile and eResource Central from May 1, 2024 renewal.

It is not entirely clear why the app failed suddenly. The companies involved in the arrangement have been working together for 5 years, but evidently there was a major breakdown in the partnership. The BLUEcloud Mobile app stopped functioning after Solus disabled the critical functions of the app on Sunday, November 26th, which caught everyone off guard. SirsiDynix had been working on an update to the app under the release BLUEcloud Mobile 2.0 but this solution was scheduled for Q2 2024 release. SirsiDynix has now prioritized a pilot of Mobile 2.0 for December 2023 with selected customers.

After intense discussion internally, I requested internal work begin on the SWAN instance of Aspen LiDA while preparing this recommendation. The work to date was for SWAN staff to submit the requirements to get Aspen LiDA on the precipice of a full SWAN launch, pending a membership presentation and SWAN Board approval.

SirsiDynix refund for BLUEcloud Mobile

SWAN requested a refund of BLUEcloud Mobile and eResource Central. I have requested eResource Central to be included as part of the refund, as this product supports all the e-content integration in BLUEcloud Mobile. This combined refund is for Mobile and eResource Central and is prorated by days since the outage started on November 26, 2023 and when SWAN's subscription to each ends April 30, 2024. The refund total is $40,850.03 and will be applied as a credit to the annual SirsiDynix maintenance invoice on May 1, 2024.

SWAN will need to notify SirsiDynix of its intention not to renew eResource Central and Mobile by February 28, 2024. I have informed SirsiDynix to proceed under the assumption that SWAN will not renew but cancel.
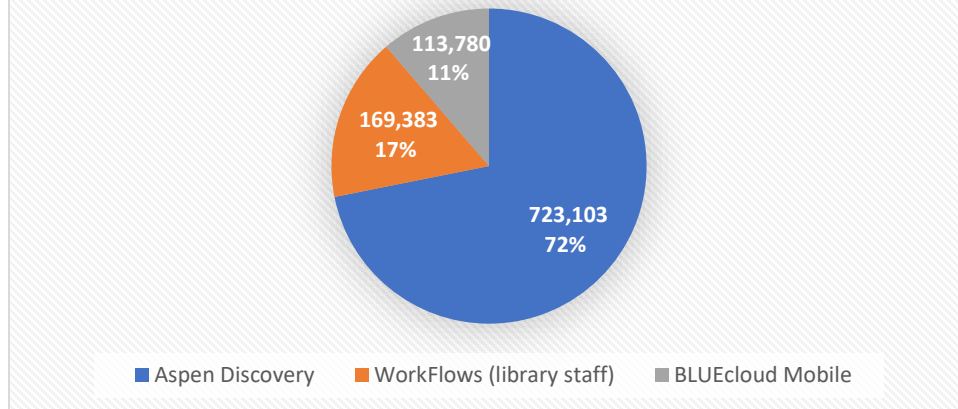
Necessity for replacement of mobile app solution

The loss of the BLUEcloud Mobile "SWAN Libraries App" has impacted library patrons in the following ways.

- SWAN Libraries App is not updating, so returned materials still appear on the app as checked out
- Searching of the catalog is broken
- SWAN is unable to post any notifications on the home screen of the app, due to the administrative functions being inoperable

BLUEcloud Mobile SWAN Mobile App usage table

Month	Launches	Devices	New Devices	Holds Placed
August 2023 usage	90930	12,805	1,231	23,786
All time (since 2018 launch)	2,727,360	60,205	59,876	803,686

Holds placed & filled in past 6 months by hold client

- Aspen Discovery: 723,103 — 72%
- WorkFlows (library staff): 169,383 — 17%
- BLUEcloud Mobile: 113,780 — 11%

The mobile app is responsible for almost as many holds placed as library staff place in total using WorkFlows.

Aspen Discovery as interim solution

SWAN's recommendation in the absence of the mobile app was to have library staff instruct patrons on the use of the library's Aspen profile. SWAN provided public webpages for patrons to learn how to use Aspen Discovery in a mobile environment.

Responsive design

The goal of Aspen Discovery from its inception was to include responsive design, which benefits small screen devices. This choice has benefited SWAN users and was an important part of Aspen Discovery as a replacement for Enterprise.

Affirms adherence to accessibility and usability standards

The testing phase of Aspen Discovery was an important period where SWAN User Experience advised ByWater Solutions on design and display choices for Aspen Discovery to comply with accessibility standards.

Crash course on using Aspen for previous Mobile users

Library users that have solely used the BLUEcloud Mobile app are becoming acquainted with Aspen Discovery as the interim solution. They may remain users of this solution from this point forward, which we will track in monthly usage statistics.
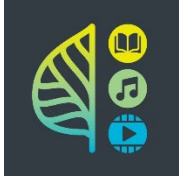
Aspen Library Discovery App: LiDA recommendation

The software development of Aspen Discovery has included parallel preparation for LiDA for several years now, starting in 2021. LiDA is a library open source project supported through ByWater Solutions.

Logic of arrangement

In 2018, SWAN selected the BLUEcloud Mobile app from SirsiDynix as the mobile solution under the logic that our discovery platform Enterprise was provided by the same vendor.

While that logic made tremendous sense, once SWAN moved away from Enterprise Discovery, the differences between Aspen and BLUEcloud Mobile were enough that the SWAN Discovery & Usability Experience (DUX) advisory group began testing Aspen LiDA as a potential replacement. SWAN having the same search experience in its Aspen Discovery and LiDA, designed by the same vendor, and both supported by the same vendor affirms that logical choice by the SWAN Board in 2018 and is an important part of this recommendation

LiDA is consortia ready

The app is designed for library consortia. Patrons once logged onto LiDA will see their library's individual instance based on how you have created that in SWAN's Aspen Discovery.

Search results & grouping of formats

Aspen LiDA will address the top concerns of the Discovery & User Experience Advisory Group (listed below). The search results between Aspen Discovery and LiDA will be identical because they use a shared search index (keyword, control number, etc.).

Aspen Discovery controls LiDA functions

The administrative access your library staff have in the design of your Aspen Discovery theme will be reflected in LiDA. There is no need to set up your choices in two places; LiDA will reflect those changes once made.

Browse categories, lists, & e-content

Your library created browse categories, lists, and e-content are already integrated within LiDA.

Ready to deploy

Requesting the LiDA solution from ByWater now gets us in front of the line for the deployment of a SWAN replacement app in the Apple and Google mobile app stores.

DUX ranked choices

Feature	DUX Score	Aspen LiDA
Consistent keyword search results between the app and the catalog	85%	✓
A consistent holds experience between the app and the catalog (holds on grouped records)	83%	✓
A consistent account experience between the app and the catalog	81%	✓
Linked cards (store multiple library cards in the app)	81%	✓
Consistent search facets between the app and the catalog (subject, availability, etc.)	79%	✓
Consistent display of record details between the app and the catalog	73%	✓
Library specific links (to your website, events, etc.)	71%	Under development
Library specific branding (customize logos, colors, etc.)	69%	✓
Fines payment in the app	69%	Under development
Alerts (e.g. holiday closings)	67%	✓
Access to eBooks and streaming content in the app	67%	✓
Push notifications for hold pickup, etc.	60%	Under development
Consistent display of my library's browse categories in the app and the catalog	54%	✓
Calendar integration	52%	✓
Self checkout in the app	42%	✓
My library's name on the app in the app stores (Google Play, Apple App Store)	42%	Future option
Novelist and supplemental content in the app	38%	Under development

ByWater Solutions LiDA agreement

I reached out to ByWater Solutions and explained SWAN's situation with the loss of the BLUEcloud Mobile SWAN Library App. My request was that LiDA would be an addendum to the existing agreement with ByWater, and payment for the app would be delayed six months until the ByWater agreement automatically renews on May 1, 2024. This arrangement of delaying payment for LiDA until the ByWater Solutions renewal with SWAN was accommodated by ByWater Solutions immediately.

SWAN & ByWater Solutions existing arrangement & working methods

The addition of LiDA as our new mobile app would be facilitated under the existing arrangement with ByWater's Aspen team.

SWAN and ByWater have held bi-weekly meetings for the past three years where we:

- Squash bugs
- Review tickets
- Test releases
- Request development of new features
- Build community

Cost & refund amount

	BLUEcloud Mobile	Aspen LiDA
Annual cost		
Mobile	$71,930	$4,600
E-content integration	$23,200	included
Total	**$95,130**	**$4,600**
Refund applied to May 1, 2024, renewal	($40,850)	(not applicable)
One-time cost	(Not applicable)	$1,917
Costs May 1, 2024 at renewal	**($95,130)**	**$6,517**
	Credit: SWAN cancels SirsiDynix BLUEcloud Mobile & eResource Central	Expense: SWAN pays ByWater Solutions additional amount at renewal

SWAN budget needs a development fund

The savings after moving to LiDA would be significant. But we should consider introducing a fund for paid development of needed functions for SWAN with LiDA and Aspen Discovery. The FY25 budget is being prepared by the SWAN Board where the cost of LiDA and the savings from removing BLUEcloud Mobile could be incorporated into that budget.