



SWAN Fireside Chat

April 30, 2024

Agenda



- VPN tunnel outage
- Project updates
 - MessageBee
 - Ticketing system
 - Symphony 4.1 upgrade
 - Ping SSO
 - SWAN Expo
- Technology Update
- Aspen/LiDA Update
- E-Resource Update
- User group recap
- Trainings & Upcoming Meetings

VPN Tunnel Outage

- Following a successful OS update, SWAN's virtual firewall became unresponsive early morning Monday, April 29th
- This firewall provides the VPN connection to all SWAN libraries, resulting in loss of connectivity to WorkFlows
- Attempts to bring the system online were unsuccessful
- Entire virtual firewall was restored from backup prior to yesterday's update
- VPN tunnel connections established just prior to 8:30AM
- Investigation into system crash underway

Project Update

MessageBee List Communications Demo – Now Available

Available
at: <https://support.swanlibraries.net/training/94603>

- SWAN had 2 live demos late March
- List Communications is MessageBee's add-on for sending promotional & other notices
- Video is less than 30 minutes
- Demo include lists, widgets, creating/sending templates, pricing and questions

MessageBee Report Digest Update

Previously

- Would show an entry for each notice even if there weren't any stats making for a longer email

SWS - 1st Overdue	Sent:	0
	Delivered:	0
	Unique Opens:	0
	Clicks:	0
	Failed:	0

SWS - Hold Expire	Sent:	0
	Delivered:	0
	Unique Opens:	0
	Clicks:	0
	Failed:	0

Now

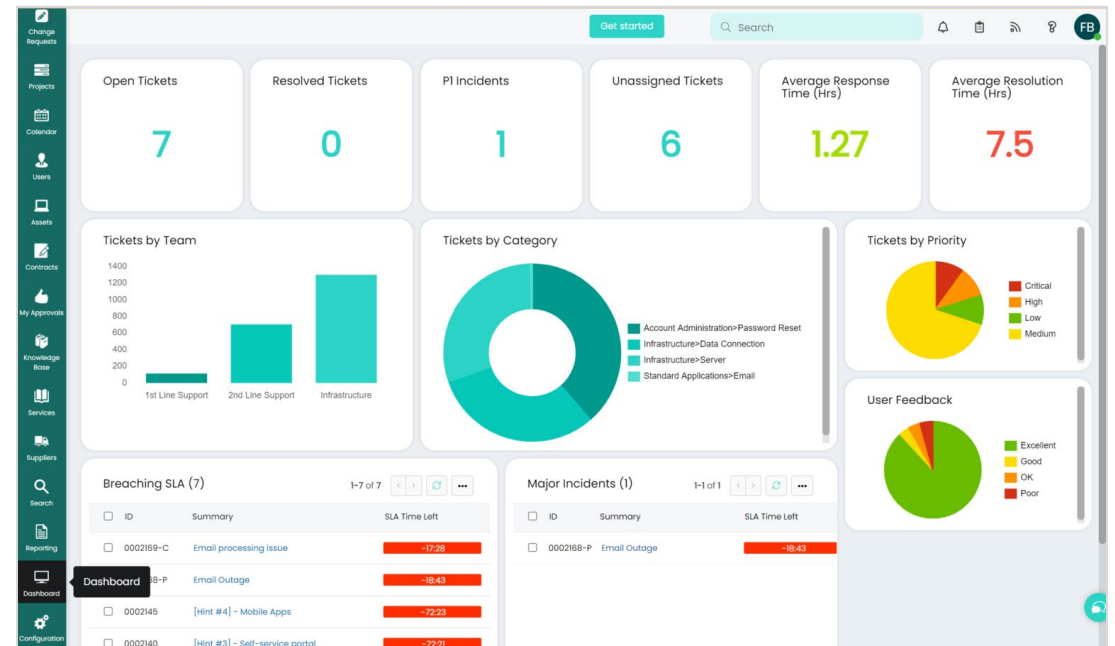
- The email is more condensed and will not include notices that didn't have stats for the previous day

	Email	
SWS - Hold Pickup Reminder Spanish	Sent:	1
	Delivered:	1
	Unique Opens:	1
	Clicks:	0
	Failed:	0

Sms
Voice

Ticketing system

- We have selected our new ticketing system – HaloITSM
- Rollout will be Summer 2024
- New dashboard to view and manage your tickets, library tickets
- Better tools for SWAN staff to triage, track usage of third-party vendors, and look at trends



Symphony WorkFlows 4.1

Symphony 4.1 upgrade

- Scheduled overnight Monday, June 17th
- SirsiDynix installer will begin upgrade process around 11PM June 17th
- During the upgrade window (2-3h) WebServices/SIP2 will be offline
 - No access to My Account in Aspen | E-Resources | SIP2
- Go-Live Tuesday, June 18th
- SWAN does not anticipate any library staff disruption or required use of Offline Mode
- Upon receiving All-Clear from SWAN, member libraries may access WorkFlows Tuesday morning, June 18
- Watch SWANcom for updates!

WorkFlows 4.1 Installer

- SWAN's WorkFlows installation packages are ready for distribution
 - Standard installer (with prompts, for most installations)
 - Silent installer (non-interactive, best option for automated deployments)
 - Automatically removes WorkFlows 3.7.1 prior to installing 4.1
 - Will not affect settings stored in user profile (printers, preferences, etc.)
 - Libraries using customized signature pad language should backup modified files prior to installing
- Clients are not required to be updated prior to go-live
 - However new features will not be available until client has been updated
 - Client/Server version mismatch errors are normal until go-live
- WorkFlows 4.1 installers will be published to support site early June
 - Watch for updates via SWANcom!

PingOne SSO

Single Sign-On coming soon!

- Weekly meetings with our implementation engineer
 - Ad-hoc meetings if needed
- Developing and testing the authentication framework and workflow
- Working with RAILS to connect L2 to use for main authentication
- Testing with SWAN Forums underway
- Working with SirsiDynix on BLUEcloud connections next
- More to come!

SWAN Expo

Save the date! August 23rd



April 30, 2024

- There is still time to submit a presentation proposal at support.swanlibraries.net/expo
- What sessions would you be interested in? (Poll)
- What roundtable topics do you suggest? (Poll)

Aspen Update

Missing cover image report

Review Aspen Covers documentation:

<https://support.swanlibraries.net/documentation/85707>

We now have a report of records in Aspen using the default generated cover.

If you choose, you can upload covers for these records.

- Report is not real-time, so records on the list may have gotten covers since it was run
- It includes records added in the last year
- You can limit by titles your library owns

Did you know? You can add a feature image to lists

Examples from McKinney Public Library

List feature images appear in the Lists search and the Explore More bar in search results



18) NASA's Artemis Project Reading Challenge List

Created By Reading Recommendations M.

Number of Titles 90 titles are in this list.

Collection of Juvenile and Adult Non-fiction books covering topics ranging from Mars and the Exoplanets.

[More Info](#)

[Add to List](#)

[SHARE](#)



19) At Home Experiments

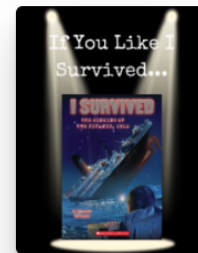
Created By Staff Lists M.

Number of Titles 26 titles are in this list.

[More Info](#)

[Add to List](#)

[SHARE](#)



20) If You Like I Survived, Read These!

Created By Reading Recommendations M.

Number of Titles 118 titles are in this list.

List mostly comprised of Juvenile and Middle Grade fiction, with some Young Adult fiction for

[More Info](#)

[Add to List](#)

[SHARE](#)



Electronic Resources Update

EBSCO 24-25 Renewal

- Package includes 14 standard databases and 4 additional databases at no cost.
- Participating libraries, choose additional databases on the [EBSCO Database Selection Form](#).
- Add-ons are available. Please see selection form for add-on product price.
- Links will be given to libraries last week of June.
- Patron site will be updated by July 1.
- New databases will be turned on July 1.



Selection form opens

Choose 4 additional databases at no cost.

Optional: Indicate any add-ons for additional price.



Selection form closes

Selections are sent to RAILS, and then onto EBSCO.



Links are live

Libraries have links. Patron site is updated. Patrons can access databases.

COMICSPLUS[®]

READ ALL
THE COMICS!

Existing Comics Plus libraries with a subscription set to expire **June 30, 2024**

Intent to renew form available now on our SWAN Support Site

[Pricing](#) for renewing libraries only, now available on our SWAN Support Site

Pricing for new libraries will be released soon, along with additional information

Additional eResource Checks

[View](#) [Edit](#) [Outline](#) [Delete](#) [Add another](#) [Revisions](#)

For patrons that are replacing a library card, or for patrons that have moved from one SWAN library to a new SWAN library and are issued a new library card.

The following e-content platforms require additional support from library staff to ensure that if the patron has any current titles checked out or have titles on hold, that they do not lose their electronic content. A good rule of thumb is for desk staff to ask the patron if they currently use any of the library's electronic content.

There may also be additional e-content vendors and platforms that are not listed here that may require additional support from library staff.

Overdrive

Library Staff

- Sign into OverDrive Marketplace
- Navigate to **Support > Merge User IDs**

Support

End-user support

- MANAGE HOLDS** Move or cancel a user's hold on a title.
- RETURN TITLES** Return a title from a user's account before the end of the lending period.
- MERGE USER IDs** Merge a user's original and new IDs.
- SEARCH CHECKOUTS** Search checkouts and reset a user's download link.
- VIEW USER SUPPORT REQUESTS** View requests your users have made with OverDrive Support.

- The Merge user ID activity page will display

Merge user ID activity

Enter the now inactive library card number in the **Original user ID** field

Enter the new active library card number in the **New user ID** field

Click **Search**

A search is performed, if you find the matching values, select the boxes and continue by selecting **Merge**

Confirmation

Optional additional step

- Masquerade in Aspen to see if holds/checked-out titles have merged

Hoopla

cloudLibrary

Boundless

Overdrive

Library Staff

- Sign into OverDrive Marketplace
- Navigate to **Support > Merge User IDs**

OverDrive Marketplace

Search OC/OU & MA by title, author, series, or publisher

SHOP OverDrive User & Material Access | **INSIGHTS** | ADMIN | CURATE | NEWS | BILLING | SUPPORT | FEATURED

Support

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Merge user ID activity

Search for a user's original and new user IDs (library cards or other IDs they use to sign into your site), then click **Merge**. This will allow the user to retain their account activity from their original card (checkouts, holds, wish list, etc.) when they switch to their new card. Please note: For reporting purposes, historical activity associated with the original user ID will remain associated with that user ID. Any activity after this merge will be associated with whichever user ID the user uses to sign into your Public-facing website.

Original user ID:

New user ID:

Select the original user ID:

User ID	Authentication name	Active checkouts	Active holds
<input type="checkbox"/> 2191	Overnet	0	2

Select the new user ID:

User ID	Authentication name	Active checkouts	Active holds
<input type="checkbox"/> 2191	Overnet	0	0

- Enter the now inactive library card number in the **Original user ID** field
- Enter the new active library card number in the **New user ID** field
- Click **Search**
- A search is performed, if you find the matching values, select the boxes and continue by selecting **Merge**

User Groups Recap

Recordings of group meetings on the SWAN support site:
<https://support.swanlibraries.net/meetings-trainings/meeting-documents>

Cataloging Advisory

- Loaded over 90K new and revised authority files
- Various Cataloging and Acquisitions webpages updated
- Discussions centered on 245/246 consistency & read-alongs

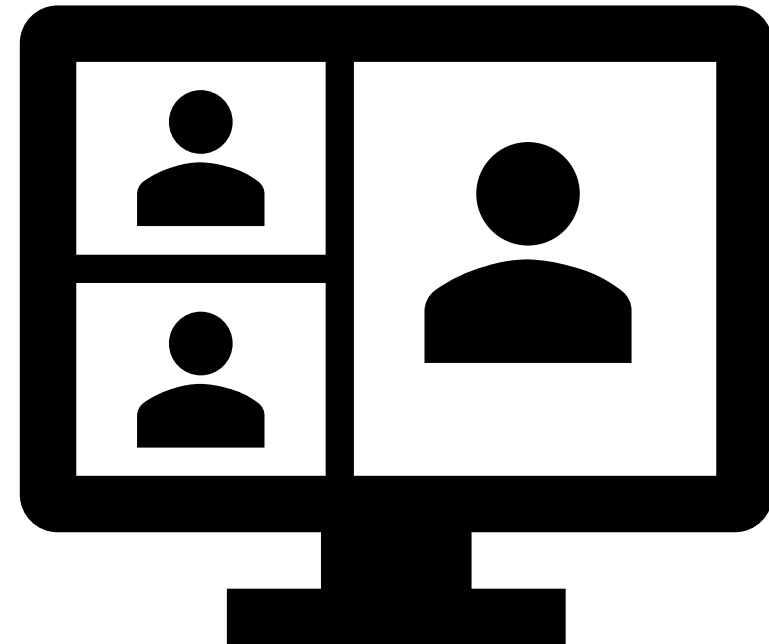
Circulation Users

- [Unique Bankruptcy Resource](#)
- How to bill patrons at libraries outside of SWAN
- On the Fly records- remember to place a copy level hold on item
- Creative ideas on Library Card Signups
 - Tied closely to Summer Reading kickoff
 - They use MobileStaff to register people
 - Tips for MobileStaff- Use a keyboard
 - QR codes linking to self-registration page



E-Resource Advisory

- Reviewed goals and topics for 2024
- Reviewed our promotional marketing materials gathered for e-resource vendors on our [SWAN Support Site](#)
 - EBSCO
 - Comics Plus
 - Consumer Reports, etc.
- Reviewed the [Additional eResource Checks](#) page on SWAN Support Site
- Worked together to start compiling questions for troubleshooting electronic resources documentation



RFID Users

- COSUGI 2024 Update – RFID integration with BLUEcloud Circulation
- Updates on Member Library RFID Projects
 - Including La Grange Public Library [Pick Up Window](#)
- Library Lockers and Drive-Up Windows chart

Description	Agency Code	Route To	RFID?
Bloomington Public Library Locker	BDD_L	BDD	Y
Bensenville Public Library Locker	BVD_L	BVD	N
Downers Grove Public Library Locker	DGS_L	DGS	Y
Glen Ellyn Public Library Drive-up Window	GED_D	GED	N
Geneva Public Library Drive-up Window	GVD_D	GVD	Y
Indian Prairie Public Library District Drive-up Window	INS_D	INS	N
La Grange Public Library Drive_up Window	LGS_D	LGS	Y
Matteson Area Public Library Locker	MTS_L	MTS	Y
North Riverside Public Library Locker	NRS_L	NRS	N
Oak Park Public Library Main Branch Indoor Locker	OPS_LI	OPS	Y
Oak Park Public Library Main Branch Outdoor Locker	OPS_LO	OPS	Y
Park Forest Public Library Drive-up Window	PFS_D	PFS	N
St. Charles Public Library District Drive-up Window	SCD_D	SCD	Y
Stickney-Forest View Public Library Central Stickney Locker	SFS_LC	SFS	N
Stickney-Forest View Public Library District Locker	SFS_LO	SFS	N
Villa Park Public Library Locker	VPD_L	VPD	N

Trainings & Upcoming Meetings

New self-paced course – Working with non-English Materials



TS304: Local Practices - Working with non-English Materials

- Circulation courses
- Cataloging courses, including Serials

To access the courses:

- <https://support.swanlibraries.net/meetings-trainings/swan-online-learning>
- Register in L2 before requesting access to the courses.

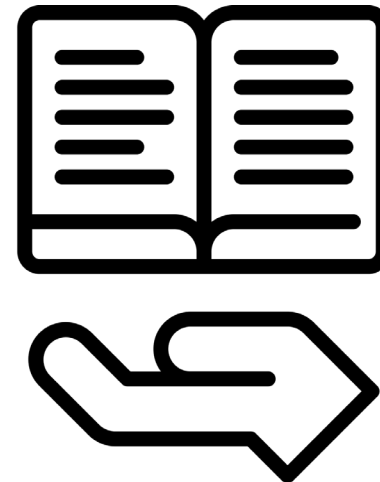
ILL Boot Camp Series & Ongoing Training

- SWAN-led Training recordings
 - <https://support.swanlibraries.net/training/87282>

Or

- Book a consultation!

- OCLC-led live and recorded trainings:
 - https://help.oclc.org/Resource_Sharing/WorldShare_Interlibrary_Loan/WorldShare_Interlibrary_Loan_training?sl=en



SWAN Documentation



- [Damaged & Unusable](#)
 - Documentation Addition of clarification on when to use the LOSS_RB_ILL user.
- [Symphony Acquisitions](#)
- [Marc Listener Procedures](#)
- [Cataloging Standards](#)

Upcoming 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.

- Acquisitions and Cataloging Users 5/9
- Circ/ILL/Quarterly Billing Office Hours 5/16
- SWAN Board Meeting 5/17
- Director's Coffee Hour 5/20
- Discovery and User Experience Advisory 5/23
- Quarterly 6/6

See you at the next
Fireside!

May 28, 2024

See L2 for details & registration

