



SWAN Fireside Chat

May 28, 2024

Agenda



- Symphony 4.1 upgrade
- Project updates
 - MessageBee update
 - Hold map revamp
 - Ping SSO
 - SWAN Expo
- Aspen/LiDA update
- E-Resource update
- Resource sharing update
- User group recap
- Trainings & upcoming meetings

Symphony WorkFlows 4.1

Symphony Upgrade: What to Expect

June 17th

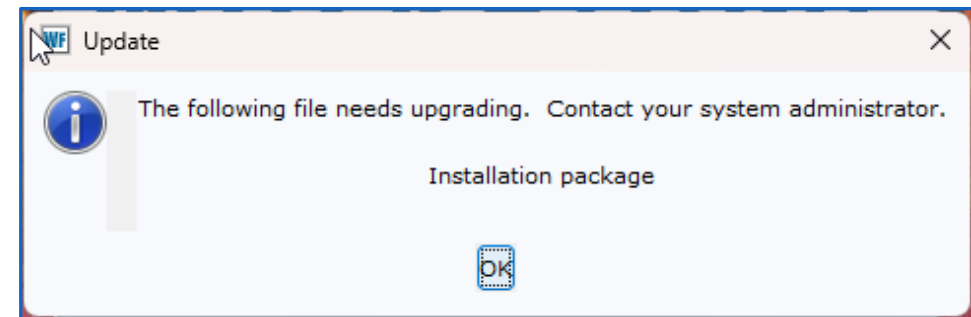
- Download WorkFlows 4.1 installer from SWAN Support Site and update staff workstations
- Upgrade takes place overnight
 - *System will be offline beginning around 11:30PM*
- WebServices and SIP2 services are unavailable during upgrade
 - *No access to 'My Account' features in Aspen Catalog | E-Resources | SIP2*

June 18th

- Downtime for library staff/use of Offline Mode not anticipated
- Wait for 'All-Clear' SWANcom
- **Go live on Symphony 4.1!**
- Watch for any client/server mismatch errors
- Open a support ticket to report unexpected behavior/errors
 - *Provide as much detail as possible*

Installing WorkFlows 4.1

- Installation packages for WorkFlows will be available on [Support Site](#) by June 10th
 - Standard installer (*with prompts, for most installations*)
 - Silent installer (*non-interactive, best option for automated deployment*)
 - Automatically removes v3.7.1 prior to installing 4.1
 - Will not affect settings stored in user profile (printers, preferences, etc.)
 - *Libraries using custom sig-pad language should backup any modified files prior to installation*
- Clients are **not** required to be updated prior to June 18th
 - New features unavailable until client is and server version matches
 - Client/Server mismatch errors to be expected until after go-live



Project Updates



- Official forwarding to new statistics portal
- "List Notifications" becomes "Marketing" and moves to new site
- User Management module

Symphony Hold Map Update



- Our hold map will undergo an update on July 16th
- Why? To fix a loophole in hold queue and placement
 - If your user placed a hold at a station library other than yours (Aspen instance or staff logged into WorkFlows)
AND
 - The item type was restricted to your users only in the hold map
THEN
 - Your item would not fill that patron hold until it was no longer restricted
This typically affected new items.
- We will update the hold map so this loophole will no longer exist
- Libraries do not need to do anything, and this will be seamless. All Hold Map rules and restrictions will remain the same but holds will no longer be impacted by which Aspen instance or "station library" was used to place that hold.

Single sign-on: PingOne SSO



- Authentication between PingOne and L2 successfully configured and tested!
 - Special thanks to Wayne Dixon at RAILS!
- SWAN Community Forums are staged
- Connection deployments underway:
 - Inquisiq LMS (SWAN's online learning)
 - SirsiDynix BLUEcloud
 - Halo ITMS (our new ticketing system)
- More updates to come!

SWAN Expo

Save the date! August 23rd



May 28, 2024

Registration open!

<https://support.swanlibraries.net/expo>

The full session schedule will include roundtables, workshops, and presentations - we will announce the full schedule soon!

- Workshops and presentations
 - Aspen for library staff
 - BLUEcloud Analytics
 - Circulation best practices
 - Collection management: weeding, storage, renovation
 - MobileStaff hands-on
 - Navigating copyright
 - Power searching in Symphony
 - RAILS delivery
 - WorldCat Discovery
- Roundtables
 - Mindfulness and self care
 - Staff development and team building
 - Difficult service scenarios


SWAN Library Services

Aspen Update

Updates to record grouping

Video games and other materials should now group better.

Graphic novels, manga, and comics will group separately from books.



1) **LEGO Jurassic World**

Language English
Appears on list [Playstation](#)

Nintendo 3DS	Available from another library	Place Hold
Show Edition	Where is it?	
Nintendo Switch	Available from another library	Place Hold
Show Edition	Where is it?	
Nintendo Wii U	On Shelf Villa Park Public Library - Juvenile Video Games WII U LEG 1 available Where is it?	Place Hold
PlayStation 3	Available from another library	Place Hold
Show Edition	Where is it?	
PlayStation 4	Available from another library	Place Hold
Show Editions	Where is it?	
Xbox 360	Available from another library	Place Hold
Show Edition	Where is it?	
Xbox One	Available from another library	Place Hold
Show Edition	Where is it?	

Polish translations in Aspen

Polish translations are now available in the Aspen catalog

Big thanks to Kate at ByWater Solutions for adding these!

The screenshot shows a search result for the movie 'Ida' in the Aspen catalog. The interface includes a search filter sidebar on the left with categories like 'Dostępne Teraz W', 'Format', 'Fikcja / Fakt', 'Odbiorca', 'Autor', 'Seria', 'Tematyka', 'Język', 'Agrody', 'Dodano w ostatnim', 'Rok publikacji', and 'Biblioteka'. The main content area displays the movie title '1) Ida' with a Polish language indicator. Below the title, there are two format options: Blu-ray and DVD. Each format has a 'Na półce' (On shelf) status, a 'Pokaż Wydanie' (Show edition) button, and a 'Pokaż lokalizację' (Show location) link. A 'Zarezerwuj' (Reserve) button is also present for each format. A star rating of 4.5 is shown below the Blu-ray image. A synopsis is provided: 'A moving and intimate drama about a young novice nun in 1960s Poland who, on the verge of taking her vows, discovers a dark family secret dating from the terrible years of the Nazi occupation.' At the bottom, there are buttons for 'Więcej' (More), 'Dodaj do listy' (Add to list), and 'Grupuj z' (Group with).

New Novelist Select display

We have a new display for Novelist Select recommendations in the catalog that went live today for public libraries.

This does not impact Novelist Plus or K-8.

The screenshot shows a library catalog interface for a Novelist Select display. At the top, it features a dropdown menu labeled 'Novelist' and a title 'Wings of fire. Original series' with navigation arrows. Below the title, five book covers are displayed in a row, labeled 'Book 1' through 'Book 5'. The covers are: 'Wings of Fire: The Dragonet Prophecy' (Book 1), 'Wings of Fire: The Lost Sea' (Book 2), 'Wings of Fire: The Hidden Kingdom' (Book 3), 'Wings of Fire: The Dark Secret' (Book 4), and 'Wings of Fire: The Brightest Night' (Book 5). Below the book covers is a 'Similar Titles' section with five book covers: 'The Guardian Herd: Starfire' by Jennifer Lynn Alvarez, 'The Familiars' by Jane Yolen, 'The Earth Dragons: The Wearle' by Chris D'Lacey, 'Longburrow: Podkin One-Ear' by Kieran Larwood, and 'The Great Texas Dragon Race' by Kacy Ritter. At the bottom is a 'Similar Authors' section with two author profiles. The first profile is for Erin Hunter, with a bio: 'Tui Sutherland is one of the authors behind the pen name Erin Hunter. Under her name, she is perhaps best known for her fast-paced dragon fantasy series Wings of Fire. -- Autumn Winters...' and buttons for 'Read More' and 'Find It'. The second profile is for T. A. Barron, with a bio: 'These authors' works are world-building, and they have the genres "fantasy fiction" and "historical fantasy"; and the subjects "dragons," "prophecies," and "magic."' and buttons for 'Read More' and 'Find It'.

Electronic Resources Update

Illinois State Library E-Resource Program

Notice of Award Form

Agency and Awarded Vendor Information

*Description:	ILSOS Illinois State Library Database Subscriptions		
*Bid Number:	24-350SOS-LIBRA-B-41700	*Agency:	Illinois Secretary of State
*Vendor Selected for Award:	EBSCO Information Services LLC		
*Line Item Description:	ILSOS Illinois State Library Database Subscriptions		
*Award Amount:	10,286,265	*Length of Initial Term:	3 years
		*Length of available renewal options:	7 years

[Publicly available information from:
State of Illinois - General Services - Bid Solicitation](#)

What is it?

- The Illinois State Library will administer a program for an e-resource package available to all communities in Illinois.

What will we get?

- A robust package of full-text databases provided from the state library through EBSCO.

What does this mean?

- Through our current SWAN-RAILS EBSCO Package, many of the databases will overlap in content.
- The goal is to work with EBSCO and RAILS to negotiate a package that makes sense for our SWAN members.

SWAN EBSCO 24-25 Renewal

- SWAN will complete the renewal but delay any invoicing of library until we have full instructions from the Illinois State Library
- SWAN/RAILS “Package B” includes 14 standard databases and 4 additional databases at no cost
- 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®

For 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 and new libraries available under [SWAN Group Discounts for E-Resources](#).

New library pricing is set to expire on June 30, 2024 – take advantage while you can!



Resource Sharing Update

**Schedule your
WorldShare ILL
audit today!**

https://scheduler.zoom.us/helen-pinder/ill_audit

- Check for standard practice
- Explore opportunities for process improvements
- Review/cleanup user accounts
- Customize deflections

User Groups Recap

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

Acquisitions & Cataloging Users

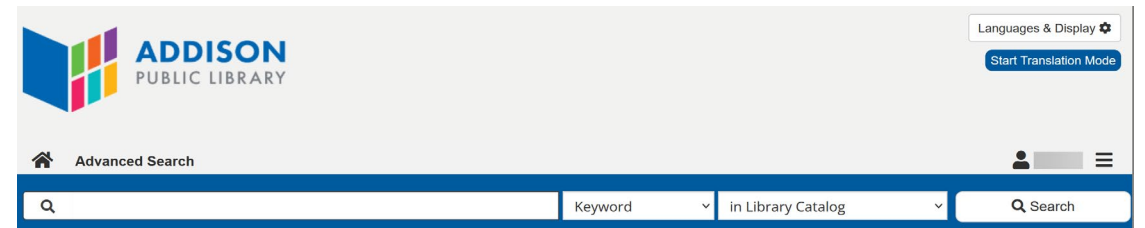
- LACONI Technical Services Section Acquisitions Roundup
- Order Cards
- Brief Record and On-the-Fly Item Creation and Maintenance
- SWAN Support Site Revamp
- Pre-Cat Libraries Expectations
- New Self-Paced Course
- Next meeting: September 12th, 2024-9:30 a.m.

Discovery & User Experience group

Agreed to enable the new Novelist Select display.

Reviewed suggestions and comments from the SWAN platform survey and configuration changes:

- "Library" facet
- Defaulting search to home library for OPAC computers
- Settings for nearest libraries
- Adding an "Advanced Search" link to your library menus



Trainings & Upcoming Meetings

Circulation Mentor Program

Are you a new(ish) Circulation
Manager?

Do you wish you had someone you
could bounce ideas and questions off
of?

May 28, 2024

If you have answered any of these questions like the
Kool-Aid man, put in a ticket and SWAN staff will set
you up with a mentor!



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SWAN Library Services

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Updated documentation

Check out recently updated documentation on Item Configuration and Item Types

<https://support.swanlibraries.net/documentation/64869>

<https://support.swanlibraries.net/documentation/64642>

[Home](#) / [ILS Configuration](#) / [Item Configuration](#)

Item Configuration

Item configuration includes policy lists for Item Type, Item Categories 4 and 5, Default Price, and Location.

Item Types identify the material of items and impact how material will circulate and whether holds can be placed. Some Item Types are marked "not recommended" in line with the Item Type Consolidation effort. When Item Types are not required for a circulation or holdability rule, Item Categories should be used instead.

Item Categories are used for statistical analysis and do not impact how items will circulate. Item Categories are defined as follows:

- Item cat1 - general format
- Item cat2 - audience or intended audience
- Item cat3 - fiction/nonfiction format
- Item cat4 - genre
- Item cat5 - carrier type

[Home](#) / [Cataloging](#) / [Item Records & Call Numbers](#) / [Item Types](#)

Item Types

Item Type determines how item records circulate in the ILS. This includes hold rules and loan rules. Due to the size of the SWAN consortium and the diversity of needs among our membership, this vocabulary is quite large. To prevent it from growing too unwieldy, we request that libraries choose existing values for Item Type whenever possible.

In this page:

- When to request a new Item Type
- Item Type vs. Item Category 1
- Best Practices

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.

- Quarterly meeting June 6th at Oak Brook Public Library
 - Website accessibility challenges for public libraries & SWAN's role
 - Statewide subscription databases
 - Software platform survey analysis
 - SWAN headquarters move



See you at the next
Fireside!

June 25, 2024

See L2 for details & registration