



# SWAN Fireside Chat

February 25, 2025

# Agenda

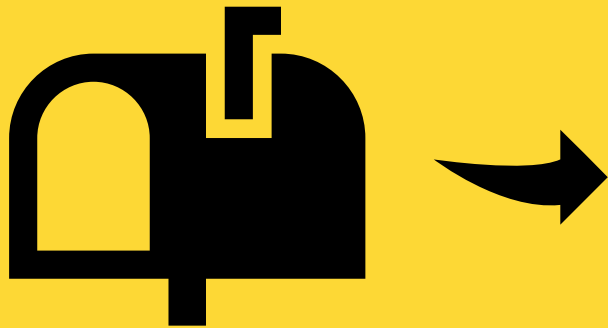
- 2025 SWAN Expo
- NCOA & inactive patron record purge
- VPN Tunnel Monitoring
- Ticketing System migration
- E-resource update
- Aspen update
- Resource Sharing update
- Documentation & training updates
- User Group update
- Upcoming meetings

## 2025 SWAN Expo



- Save the date! Friday, August 22<sup>nd</sup>
- Seeking session ideas  
[support.swanlibraries.net/expo](https://support.swanlibraries.net/expo)
- Submit your roundtable topic ideas
- This year's theme “How Can We Help?”
- Sessions to include:
  - Online learning
  - BLUEcloud Analytics
  - MessageBee
  - New ticketing system

## National Change Of Address



<https://support.swanlibraries.net/documentation/94541>

SWAN NCOA 2024 process is complete –  
now it's your turn!

See the [National Change of Address](#)  
documentation on the SWAN support site  
for recommended review and action

# Monthly Patron Record Purge



Last change in selection criteria – will start in April

- Last activity date more than 5 years past
- Less than \$100 in bills

<https://support.swanlibraries.net/documentation/87627>

[Monthly Patron Record Purge](#)  
documentation describes the process

## VPN Tunnel Monitoring



- We monitor VPN availability using Simple Network Management Protocol (SNMP)
- Most libraries are currently set to use SNMPv2
  - Community String
  - Not Encrypted
- We will be moving to SNMPv3 which introduces several security improvements
  - Username and password
  - Encrypted

# Help Desk Migration

The screenshot displays the SWAN Help Desk interface. At the top left is the logo 'SWAN Help Desk'. On the top right, there are navigation links: 'Back to SWAN support', 'Report an issue' (highlighted in yellow), and 'My tickets' next to a user profile icon labeled 'SB'. Below the navigation is a search bar with the placeholder text 'Search tickets and services' and a magnifying glass icon. The main content area features three white cards on a teal background:

- Make a request**: Request non-urgent services from SWAN. (Icon: teal circle with a white plus sign)
- Report an issue**: Report an issue to SWAN staff. (Icon: pink circle with a white exclamation mark)
- My tickets**: View your open and recently closed tickets, and view their progress or update them. (Icon: teal circle with a white ticket icon)

## Help Desk Migration

- Help Desk Orientations
  - Today at 1:30 p.m. ([L2](#))
  - Tomorrow at 11:00 a.m. ([L2](#))
- Crossover in late April
- Access URL and e-mailing ticket will remain the same



# E-Resource update

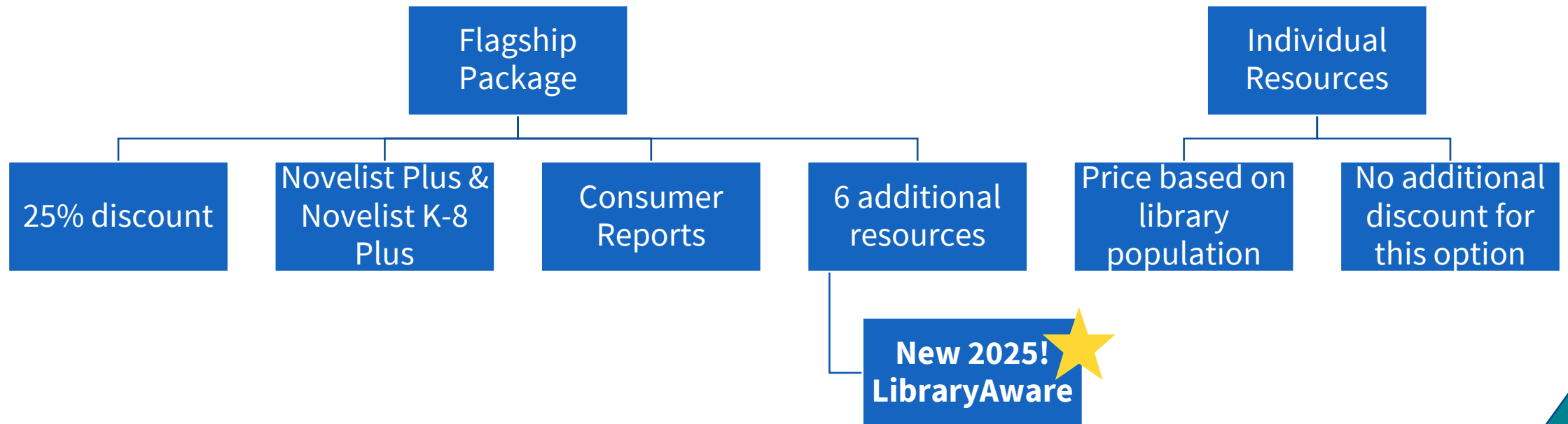
## EBSCO 25-26

# Supplemental Resources to Statewide E-Resource Package

- Libraries will sign up through **RAILS > Deals & Discounts**
  - Available after March 1, 2025
  - New and existing libraries
- Billing will be through RAILS
- Sign up by May 31 to receive discount pricing

<https://railslibraries.org/deals>

Library Service Population	<10,000	10,000-30,000	30,000-50,000	50,000-75,000	75,000-100,000	100,000-150,000
EBSCO Flagship Package Option						
Novelist Plus/ConsumerReports.org and your choice of 6 additional individual resources	\$3,934	\$6,996	\$10,494	\$14,430	\$18,802	\$25,382
Flagship Package 25% off Discount	\$2,950	\$5,247	\$7,870	\$10,823	\$14,102	\$19,037



# Aspen Update

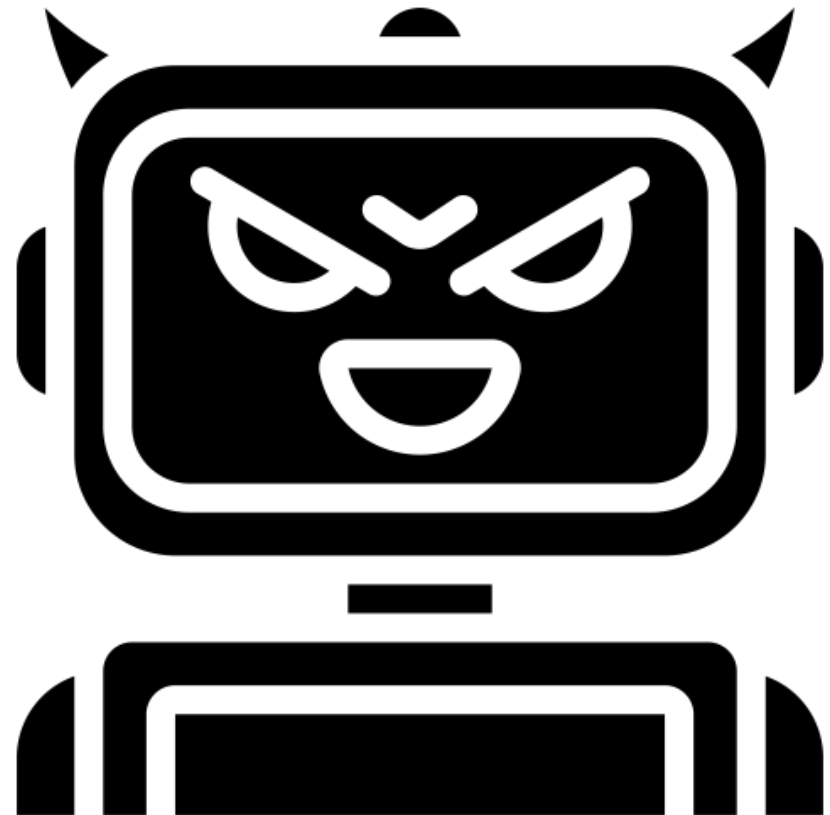
# Checkout history issues

Thank you for your patience as we worked through these issues with our hosting provider!

- Checkout histories were unavailable 2/7-2/11 and restored 2/12
- Patrons (and staff!) should see your full histories – nothing should be missing
- We had a data loss in our Aspen database, which was restored from a backup from Thursday, 2/6 and combined with data for history from 2/7 onward

# Outages and slowness

- Experiencing issues with bot traffic, causing slowness and periodic outages
- Moving from a "whack-a-mole" approach to a durable block for bot traffic



# Resource Sharing Update

# WorldShare ILL Staff interface Modernization

Two-phase release process.

<b>The modernized version of this page...</b>	<b>Released to the preview group...</b>	<b>Released to all WorldShare ILL libraries...</b>
Accessibility improvements and bug fixes	February 2025	February 2025
Borrowing: Request Details page	March 2025	To be scheduled
Lending: Request Details page	June 2025	To be scheduled

- No new functionality
- Improved accessibility, usability, and navigation
- Clearer organization of information
- Use of modern components, elements, and behaviors.





## Volunteers Needed

ILL Staff Mentorship Pilot

Interested?

Email [helen@swanlibraries.net](mailto:helen@swanlibraries.net)

- Do you know ILL Processes forward and backward?
- Do you have  $\approx 20$  minutes weekly for calls or emails to a peer?
- Did someone help you out in your library career when you were thoroughly confused and want to pay it forward?
- We are looking for you!

# Training & documentation

# Documentation Highlight

[Home](#) / [ILS Configuration](#) / [Symphony Policies: Overview and SWAN Process](#)

## Symphony Policies: Overview and SWAN Process

### [Symphony Policies & SWAN Process](#)

A major component of system management is configuring policies, including circulation maps and rules. The rules and maps configured in the system determine how and to whom material is loaned.

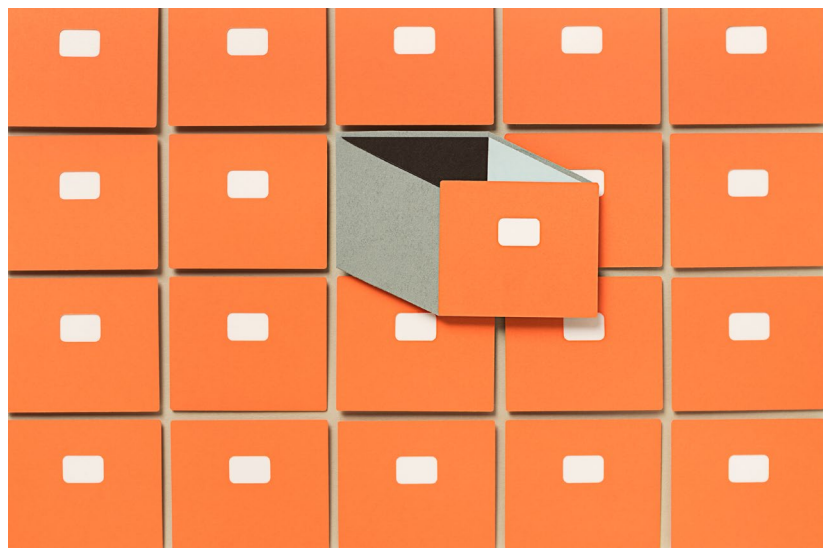
Symphony policies are composed of 2 pieces: Names and Descriptions.

- Names appear in Symphony WorkFlows only
- Descriptions may be displayed in the public catalog.

When you request a new policy, SWAN will do its best to match your requested description. Policy names, however, are limited to 10 characters. While we attempt to match your requested policy name, we may need to modify it to maintain consistency and avoid policy name duplication.

SWAN staff posts updated policy lists monthly on their corresponding page in this section of the support site:

- [User Configuration](#)
- [Circulation and Holds Configuration](#)
- [Item Configuration](#)
- [Holdings Codes \(Acquisitions, Cataloging, & Serials\)](#)



# Pre-Cat Examples

## Yoto card

```
024 8 5061016030516
245 00 Encanto (Yoto).
264 1 New York, NY :|bYoto Inc.,|c[2023]
300 1 audio-enabled card (31 min.)
538 Yoto cards can be used with a Yoto player or with the free Yoto app.
590 OTHER AUDIO
710 2 Yoto Limited, Inc.,|epublisher.
946 SWS/LM/20250221
977 PRE-CAT
```

### **New record types include:**

Blu-ray (4K), board game, electronic equipment, Playaway launchpad, puzzle, Tonie character (figurine), toy, Yoto card, and Yoto player kit.

Updated  
Documentation  
Alert!

2X the examples!

New Formats!

# User Groups

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

# Acquisitions & Cataloging Networking Group

Agenda & Recording

- I. Welcome and introductions
- II. Autism-Friendly city initiative with in-house circulation of sensory kit
- III. Weeding Special Collections
- IV. WorldShare Real Time Availability Settings
- V. SWAN Updates
  - A. Publishers reusing ISBNs
  - B. WorkFlows Pre-cat templates
  - C. Library of Things catalog records
  - D. Acquisitions Rollover Experiences
- VI. Update from Cataloging Working Group meeting
- VII. Open Discussion
  - A. Ingram Accounts
- VIII. Next Meeting

Thursday, May 8, 2025, 9:30 AM – 11:00 AM <https://support.swanlib>

# Circulation Networking Group

## Agenda & Recording

### Agenda

- I. Welcome and Introductions
- II. Best Practices Presentation- Kathy Welko (ADD)
- III. Reading History in Aspen Update- Tara Wood (SWAN)
- IV. NCOA Update- Vickie Totton (SWAN)
- V. Do we still need our Director's approval to change patron status to BADADDRESS due to NCOA – Sarah MDS
- VI. What strategies do libraries have to reduce patron distress at the service desk when informing patrons that NCOA has flagged them?
- VII. Windows logins on shared computers: shared vs individual? – Kathy ADD
- VIII. Around the Zoom meeting
- IX. Next meeting: Wednesday, April, 16, 2025, 9:30 am

### Stick children are sneaky

- ▶ Always use a photo ID to look up users without their library card.
- ▶ Confirm details an imposter might not know by having user write it down and shred after verifying.
- ▶ Documentation:  
<https://support.swanlibraries.net/documentation/94616>




## Upcoming Events

Register now for 2025 user groups, governance meetings, and office hours! On L2 and the SWAN Support Site:  
[support.swanlibraries.net/calendar](https://support.swanlibraries.net/calendar)

- E-Resource Working Group (2/27)
- Help Desk Orientations (2/25 & 2/26)
- SWAN Quarterly Meeting (3/6)
- Aspen Networking Group (3/11) - in person at Oak Brook Public Library!
- Circulation Working Group (3/19)





Next Fireside Chat  
March 25!