



# SWAN Fireside Chat

March 25, 2025

# Agenda

- 2025 SWAN Expo
- Inactive Patron Record Purge
- Aspen Server Migration
- Transition to New Ticketing System
- Single Sign-On Update
- E-resource Update
- Resource Sharing Update
- Documentation & Training Updates
- User Group Update
- Upcoming Meetings

**SWAN Expo 2025**

## 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

# Inactive Patron Record Purge

# Monthly Inactive 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

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

# Aspen Server Migration

# Timeline



Monday, March 24th

System message banners go up on the app and catalog



Tuesday, March 25th

4PM the catalog goes into maintenance mode  
Data is exported from our current server and imported into the new server



Wednesday, March 26th

Go-live on the new server  
Patrons need to update the app



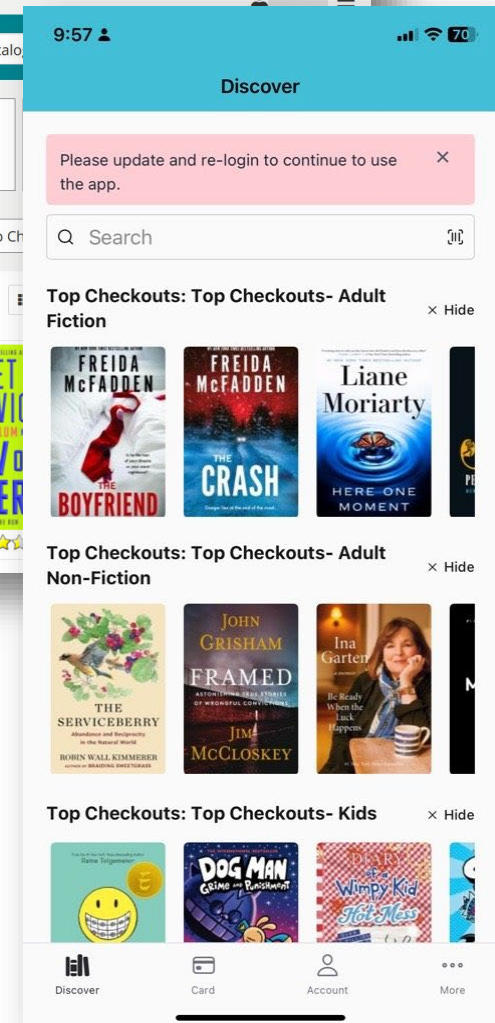
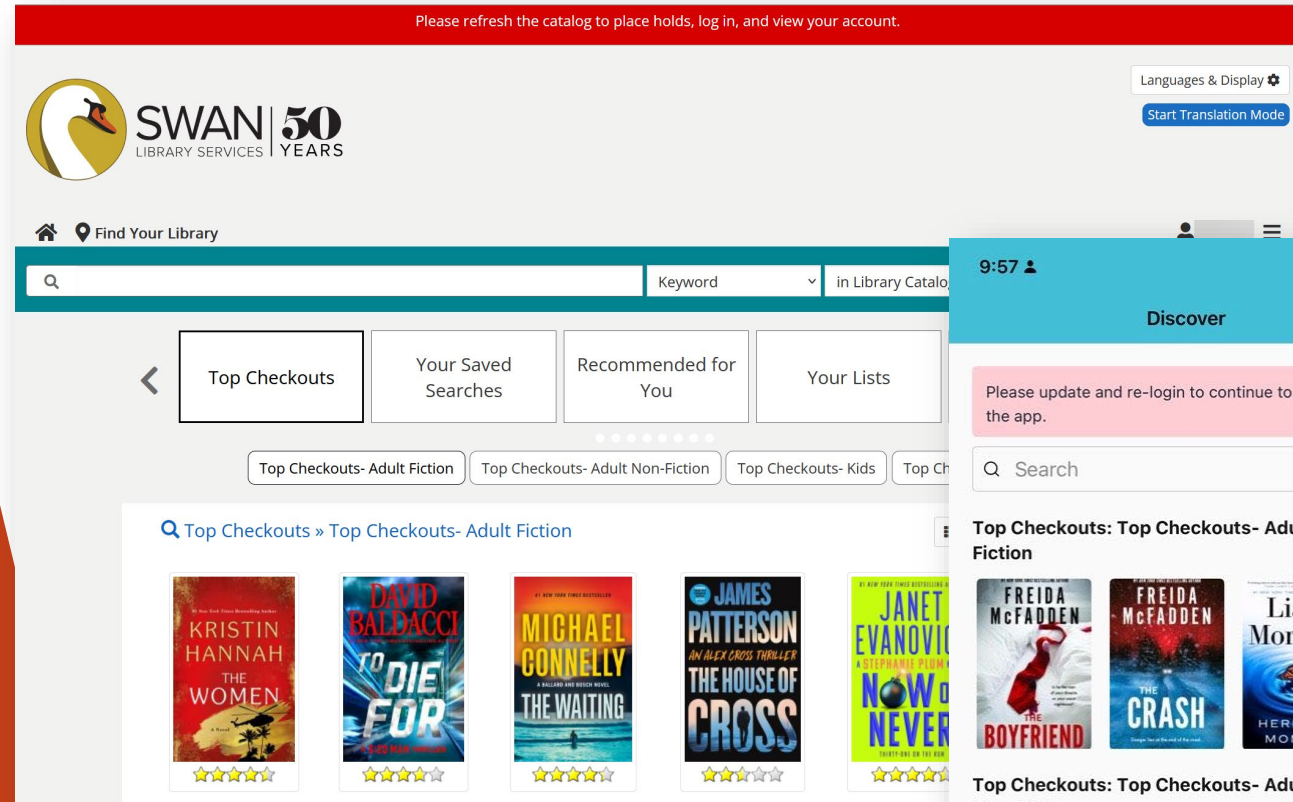
# What happens in maintenance mode?

Applies to both the app and the catalog

- You cannot...
  - Place holds
  - Log in
  - Access My Account
  - Masquerade
  - Create lists, spotlights, or browse categories
  - View current item availability
- You can...
  - Search the catalog

# Alerts in "old" catalog and app

If you or your patrons see alerts like this, it means you need to refresh your web browser or update your app.



# Aspen checkout history issues

We expect the cause of these issues to be resolved with our move to the new server, but there has been permanent data loss.

2/7-2/11

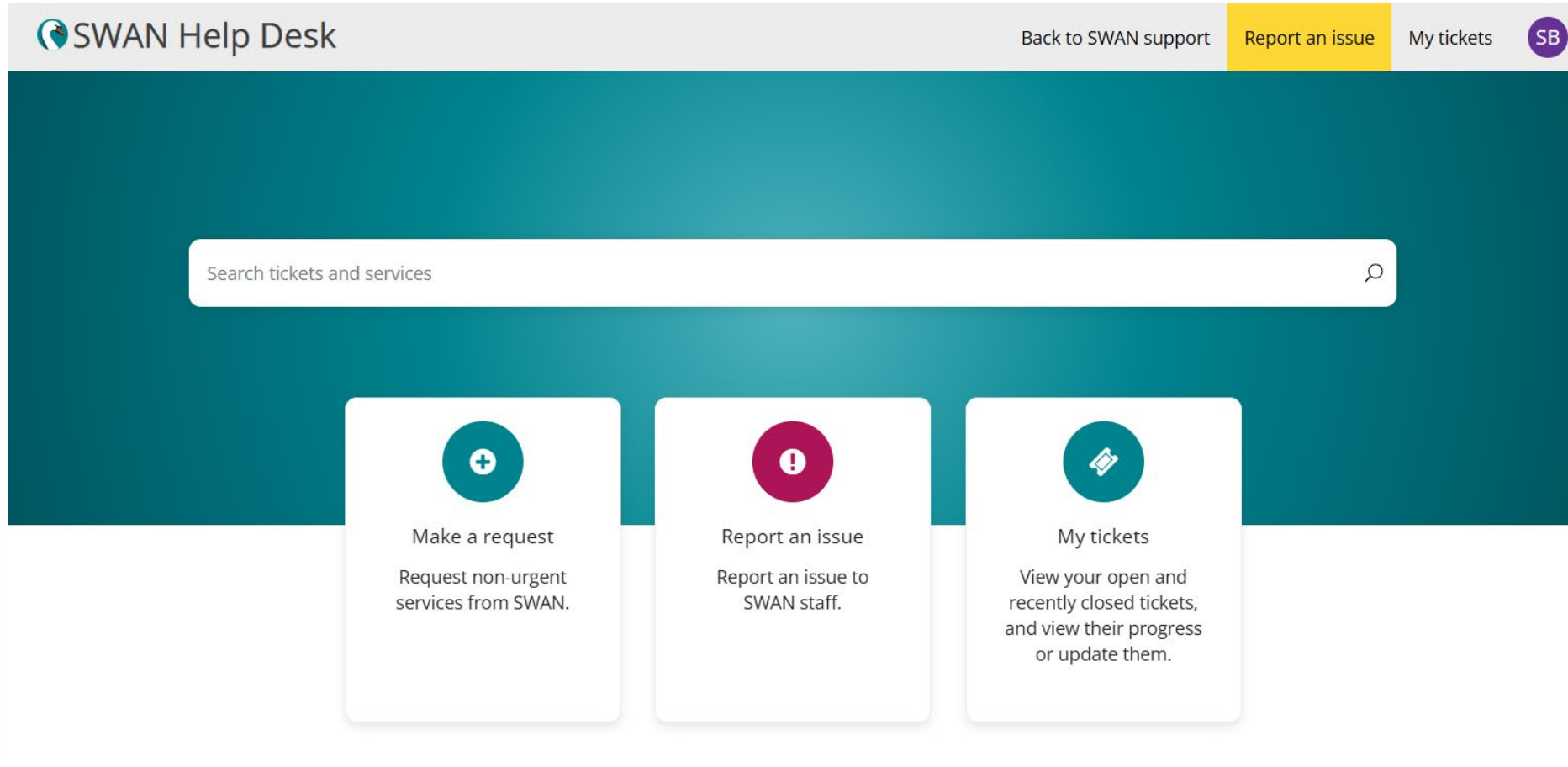
- Checkout history data was deleted in our database and restored from a backup on 2/12
- All lost data from this incident was restored

11/2025 - present

- Server issues have interfered with the recording of checkout history
- Missing titles are spotty – some patrons may see one title missing, others may see 100 titles missing
- Some of this data loss is permanent – what can be restored will be reflected in our new server

# New Help Desk platform

# New Help Desk platform



## Change to Help Desk timeline

- Crossover in late April
- Portal URL and e-mail address for submitting tickets remaining the same
- The “make a request” portal will highlight ways SWAN staff can assist your library and route to the best SWAN team to help
- You will be able to view all tickets associated with your library via portal

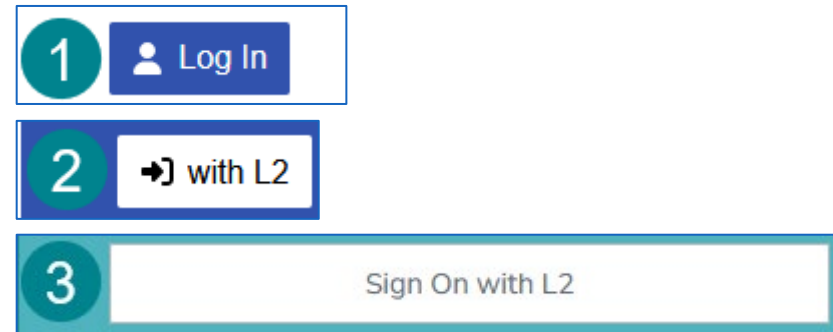
# SSO Update

- L2-based authentication being introduced for SWAN Community Forums

# New login procedure for forums with SSO

Initial login will require extra steps, but once you are authenticated with L2 for anything (this, the support site or L2 itself) you get right in.

- We expect the authentication process to be more streamlined as more services are connected to SSO
- Going live early April – watch for further communication!



The screenshot shows a login form with the following elements:

- Email \***: A text input field with a red asterisk and a red "x" icon on the right.
- Enter your email address.
- Password \***: A text input field with a red asterisk and a red "x" icon on the right.
- Enter the password that accompanies your email address.
- 4**: A purple button with the text "LOG IN".
- [CREATE AN ACCOUNT →](#)
- [FORGOT PASSWORD? →](#)

Upon authenticating with L2, you'll be redirected back to SWAN Forums.



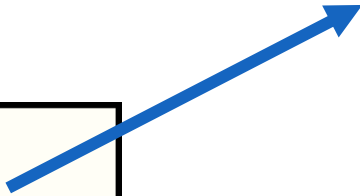
# E-Resource update

## Note on the RAILS – EBSCO form

Form Submission Type

New EBSCO Participant

Annual Renewal



### Form Submission Type

- All orders are new this year.

### Current Databases

- **Open a SWAN ticket if you need your previous selections.**

# Resource Sharing Update

# RSC 2025

Recording:

ILL survival guide: Essential tips for new professionals 3/12

- <https://community.oclc.org/t5/rsc-recordings/ill-survival-guide-essential-tips-for-new-professionals/tap/57115>

Up next:

Double feature: "ILL: Intra-library liaising to improve ILL" and "Enhancing visual literacy for ILL" 4/9

- <https://community.oclc.org/t5/rsc-agenda/double-feature-quot-ill-intra-library-liaising-to-improve-ill/ec-p/56727#M9>



## 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



## Cataloging

### ▼Pre-Cats

Cataloging Workflow

Pirated A/V Materials

Creating a Pre-Cat

Creating Pre-Cats for  
Audiovisual Materials

Pre-Cat Templates

Creating Pre-Cats for Non-  
English Materials

Pre-Cat Examples

[Home](#) / [Cataloging](#) / [Pre-Cats](#) / [Pirated A/V Materials](#)

## Pirated A/V Materials

As streaming services prioritize digital content to attract and retain customers, the availability of popular shows and movies in physical formats like Blu-Ray and DVD has declined. This shift has spurred an increase in counterfeit products sold by third-party vendors on platforms like Amazon, Walmart, and eBay. This page will assist you in preventing the acquisition of these materials, identifying pirated materials in-hand, knowing how to respond if an item is found to be pirated, and additional resources available to you in these efforts.

### In this page:

- How to prevent the purchase of pirated materials
- How to identify pirated items when purchased
- What to do when pirated materials are found
- Additional resources

# User Groups

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



## Aspen Users

Aspen Users met in person at Oak Brook Public Library on March 11th and included demos and show and tell of:

- Browse category and spotlights ideas
- Browse categories statistics and analysis – what are patrons drawn to?
- Placing holds through purchase requests

Take a look at the [Aspen wishlist activity](#)

# Circulation Managers Checklist

Comprehensive list of training, documentation, and tasks for new Circulation Managers.

## Circulation Working Group

## Agenda & Notes

The Miro board is titled "Circulation" and contains the following content:

- Roles/Tasks (Purple Box):**
  - All Circ levels (Transit label)
  - Circulation Clerk & Ref (PS104)
  - Circulation Manager-review criteria (Patron Purge)
  - Circulation Assistant (Patron Purge)
  - All Managers (BLUEcloud Analytics)
  - Admin/Director (Purge & NCOA)
  - Circulation Clerk, Manager & Assistants (Trouble shooting MessageBee)
  - Circ Manager & Admin Closings
  - Circulation Clerks and Managers (Bill Reason)
  - All Circ may be all library staff/ Delivery codes
  - Circ Managers Non-resident cards
- Melanie (Green Box):**
  - Rails Count: Tips on how they keep track of the RAIS count
  - patron purge: Draw attention to PS104: Patron Account Notes & Blocks
  - NCOA processing
  - Make sure that staff can ready due dates and hold pickup by date for emergency storage
  - Documentation: MessageBee Trouble shooting
  - May be add a link to Introduction of BLUEcloud Analytics
  - Bill reason & payment glossary
  - General Awareness that it is there to use, Transit label generator
  - Link to Delivery codes
  - Issuing non-resident cards
- Pam (Pink Box):**
  - confirm alias emails
  - Confirm I2 lists
  - link for cashless transactions
  - effects of cards with never expiration dates
  - How to enable checkout history in a patron record
  - Documentation on how SMT tabs and MessageBee connect
  - How to manually send bill message to a library patron and troubleshoot
  - Troubleshooting: "ghetter" link, checkout bills not MessageBee
  - Aspen printing duplicate library card
  - Aspen Masquerade Mode
  - Aspen-pickup library Preference
  - How to link accounts
  - How to permission a library with PACSAS/RESERV MALS/RETD
  - Clearing fines/bills will not automatically reinitiate the user
- Peggy (Blue Box):**
  - Mention SWAN community forum
  - Mention annual meetings
  - mention where upcoming meetings as well as recordings
  - Sticky stack
- Tori (Light Blue Box):**
  - Aspen help to manage and add/delete documentation
  - Add login and logout of MessageBee documentation

## E-Resource Working Group

Explora 2025 is the project this year

E-Resource Working Group met virtually on March 13. Things covered:

- Newly acquired e-resources.
- Reviewed troubleshooting documentation the group is working on.
- Group voted to add a link to Aspen from all NoveList /NoveList Plus databases.
- Identified what EBSCO databases are going into EBSCO Explora profiles.



## 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)

- OCLC: Intro to WorldShare ILL – Get Started (4/3)
- Cataloging Working Group (4/10)
- Circulation Working Group (4/16)
- OCLC: Intro to WorldShare ILL – Prep & Plan (4/17)
- SWAN ILL/Quarterly Billing Office Hours (4/17)
- Discovery & User Experience Working Group (4/24)
- SWAN Fireside Chat (4/29)



Next Fireside Chat  
April 29th!