

# **SWAN Fireside Chat**

May 27, 2025

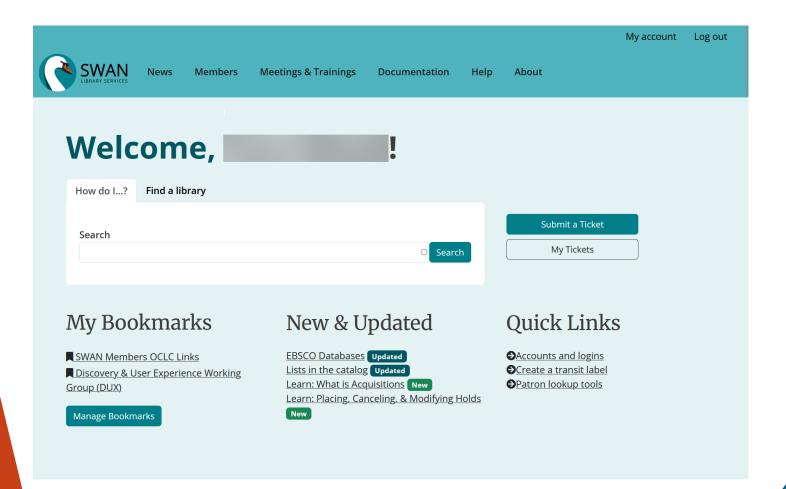
## Today's agenda

- Support site updates
- Expo 2025
- SWAN Helpdesk switch & recap
- Patron record purge review
- Aspen updates
- E-resource update
- Training & documentation updates
- User group update
- Upcoming meetings

# Support site updates

# Support site update

- Bookmark feature
- New & updated
- Trainings
- Coming up
  - o Single sign-on
  - Training checklists
  - Merge support and public site



# **SWAN Expo 2025**

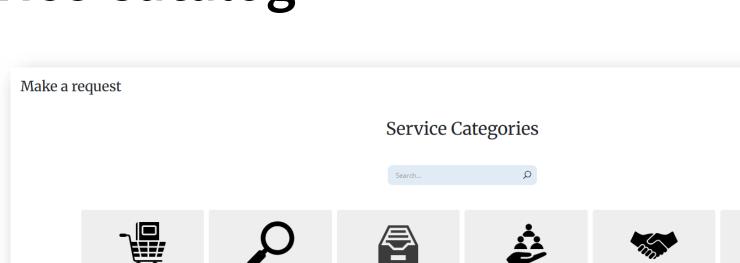
## 2025 SWAN Expo Friday, August 22<sup>nd</sup> Moraine Valley Community College



- John Chrastka, EveryLibrary Institute
- Chicago Public Library
- Collection inventory
- RAILS delivery
- Circulation efficiencies
- Library of Things
- Online patron registration

# SWAN Help Desk

# **Service Catalog**



#### Acquisitions

Request assistance with acquisition configurations, adding vendors, cleanup projects, or fiscal rollover.



#### Aspen Discovery & App

Request anything related to our discovery services, including the catalog and app.



#### Cataloging & Collections

Request assistance with pre-cats, record merges, record grouping, and other cataloging tasks.



#### Circulation

Request assistance with circulation configuration, such as loan periods, patron maintenance, receipts and more.



#### Devices & Integrations

Request assistance setting up a new product or platform to integrate with SWAN services.



#### E-Resources

Request authentication and integrations for new e-resources and databases.



#### Network & Firewall

Request assistance with VPNs and



#### Notifications

Request assistance with the MessageBee notification platform including reports and statistics, templates, or following up on failed notices.



#### Reports

Request assistance with reports and statistics.



#### Resource Sharing &

Request assistance with WorldShare ILL WorldCat Discovery, and quarterly billing



#### Staff & Training

On and off-boarding staff or request an online or in-person training or library visit from SWAN staff.

## Review



help.swanlibraries.net URL still requires configuration



All library tickets are visible to all users



Support Site platform page:

https://support.swanlibraries.net/platform/94846



Log-in requires L2 account



E-mail available to all

# **Getting in touch**



**Service Desk:** 

https://swanlibraries.haloitsm.com/portal



E-mail:

help@swanlibraries.net

# **Patron Record Purge**

## Purposes of automation of record removal







Keep the database as clean and efficient as possible

Avoid retaining personally identifiable information unnecessarily

Reduce library staff time necessary for record maintenance

## Timeline



## **End of 2019**

Plan to automate record removal at 3+ years inactivity/expiration.
Patrons with bills over \$200 would be retained.



## May-June 2021

Discussion on forums and June Quarterly leads to rethinking plan.



### 2025

Final goal of purge after 5+ years inactivity is reached. Patrons with bills over \$100 still retained.

Pandemic postpones the record purge plan.



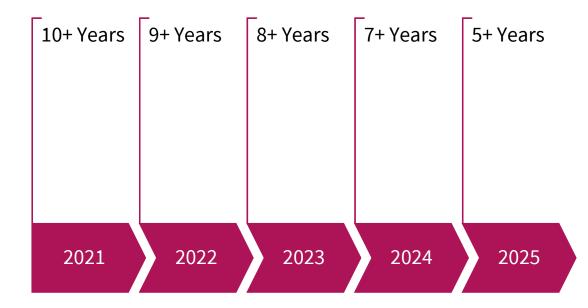
Implementation of current removal process, starting with 10+ year inactivity threshold with gradual reduction.



# **Last Activity Date**

• Planned reduction over time from 10+ years to 5+ years.

No further adjustments are planned



# Processes that update Last Activity Date

- Checking in/out or renewing an item
- Placing/Editing/Removing a hold
- Marking an item lost
- Billing a user or paying a bill
- Creating a user
- Editing address information
- Authenticating via OpenAthens

## **Final Criteria**

Patron records will be candidates for removal if and only if:

- Last Activity Date is over 5 years in the past.
- Total of patron's bills is less than \$100.

## The 2025 Jump

Reasons for large 2025 removal numbers:

- 1. Two-year change in purge threshold.
- 2. 2018 NCOA processing updated Last Activity Date (LAD)
  - Many of these records would have been purged prior to now

## Removal of Old Bills

SWAN has recommended removal of bills over 10 years old

We understand concerns about certain bad actors

Retaining certain delinquent accounts can protect you and other SWAN libraries

## **Documentation**



Monthly Patron Record Purge -

https://support.swanlibraries.net/docu mentation/87627



Patron Last Activity Date -

https://support.swanlibraries.net/docu mentation/94872



Includes review of BLUEcloud Analytics reports and review tasks.

# **Aspen Updates**

# Aspen 25.05 Release highlights

Boundless integration has been fixed!

Your library's lists will float to the top in search results.



#### 2) The boxcar children

Author Warner, Gertrude Chandler

Series Boxcar children mysteries volume 1

Pilot books

Alden family mysteries

More Series...

**Language** English

Appears on these lists OBD Books for Second and Third Graders - YOUTH

OBD Books Make Good Friends (March - May 2024) - YOUTH

OBD Must-Read Mysteries- YOUTH

More Lists...

Book

**Show Editions** 

#### On Shelf

Oak Brook Public Library - Juvenile

Fiction

J WARNER #1 1 available

Where is it?

Place Hold

# E-Resource update

# **Boundless**

Issues with the Boundless API in Aspen integration have been fixed in 25.05

All Boundless settings are back on

Boundless titles will appear in Aspen and the SWAN+ app

## **Comics Plus**



The LibraryPass team will be reaching out to current Comics Plus subscribers on the upcoming renewal process

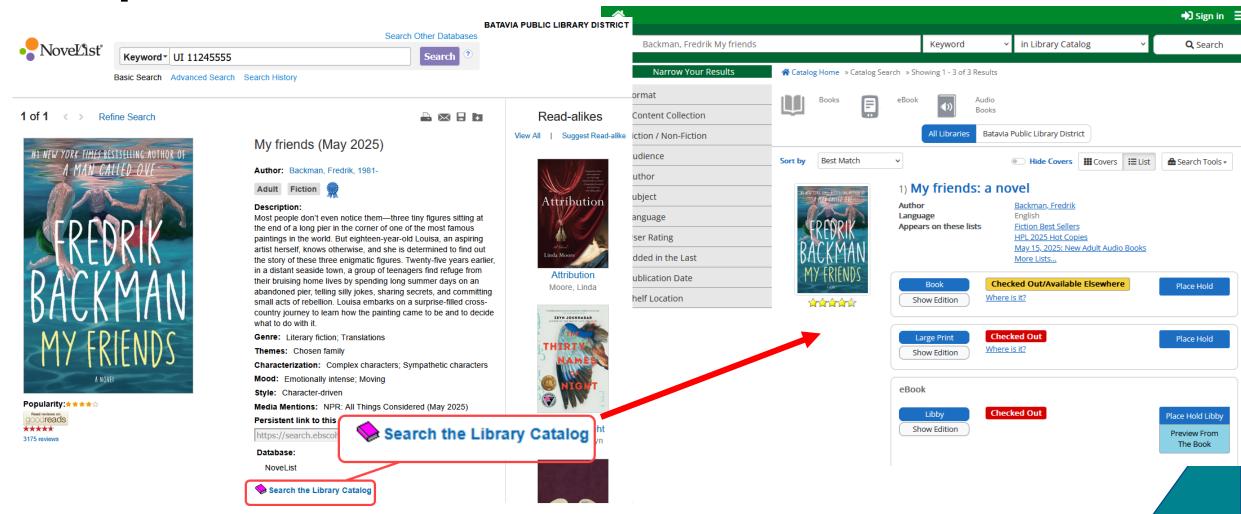


LibraryPass will work with libraries individually on pricing for the renewal, once complete, the renewal will be completed by RAILS



RAILS will be handling all new Comics Plus purchases

# Aspen link from Novelist



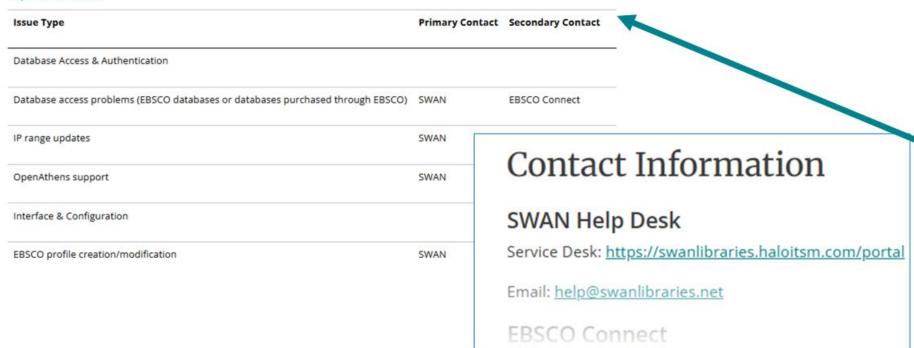
# Update to EBSCO Databases page

#### Who to contact for EBSCO-related issues

#### Start Here

This guide outlines common support scenarios, but it may not cover every situation. When in doubt, members car SWAN for assistance—the team will ensure the issue is handled or directed appropriately.

#### **Export Table Data**



### On this page

EBSCO package from the Illinois State Library

Supplemental EBSCO Databases

Tutorials and training

**EBSCOadmin** 

**EBSCO Connect** 

Promotional materials

Who to contact for EBSCOrelated issues

Contact Information

https://support.swanlibraries.net/documentation/70949

# **Training & documentation**

# **New Class Alert**



**ENROLL TODAY** 



PS302: Placing, Canceling, & Modifying Holds



# **User Groups**

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

# Acquisitions & Cataloging Networking Group

- In-person meeting at Downers Grove Public Library on May 8th
- Over 40 attendees
- Conversation focused on Acquisitions processes with presentations by member libraries
- Notes and PowerPoint can be found on the <u>support site</u>
- Next meeting is virtual on <u>September 11, 2025</u> from 9:30-11am

## E-Resources Working Group

# E-Resource Working Group met virtually on May 22. Things covered:

- Explora 2025 is wrapping up!
  - Creating default Explora profiles for Public Libraries, High School, Middle School, and Elementary School
- Reviewed troubleshooting documentation
- Discussed EBSCO areas of interest for SWAN Expo

## **IN PERSON**

# Circulation Networking Group

Register Today

### When

Wednesday, Jun 18, 2025 | 9:30 am - 11:00 am

### Where

Eisenhower Public Library District

#### **Physical address**

4613 N Oketo Ave Harwood Heights, IL 60706 United States

In Person

## Register

Register on Zoom

## **Upcoming Events**

Register now for 2025 user groups, governance meetings, and office hours! On L2 and the SWAN Support Site:

support.swanlibraries.net/calendar

- SWAN Quarterly Meeting (6/5)
- SWAN Acquisitions Office Hours (6/17)
- SWAN Circulation Networking Group (6/18)
- SWAN Board Meeting (6/20)

