**REACHING ACROSS ILLINOIS LIBRARY SYSTEM**

Agenda Item 7.4

November 8, 2021

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| **TO:** | **RAILS Consortia Committee – LLSAP Sustainability Working Group** |
| **FROM:** | **Anne Slaughter** |
| **SUBJECT:** | **LLSAP Services Breakdown** |

In response to the Working Group's desire to understand the range of services offered by the LLSAPs collectively, and the commonalities and divergences, we requested that each LLSAP submit a list of services broken down by the following categories:

1. Base Services – ILS software (bibliographic database, circulation functions, patron database), including OPAC
2. Additional Services
    a. Discovery options
    b. Digital collections
    c. Databases
    d. Staff-provided services
        i. Cataloging
        ii. Training
        iii. Consulting
        iv. Custom reports
    e. E-commerce
    f. Cataloging tools
    g. Mobile app
    h. Notifications
    i. Other services

Following this memo in your packet is a brief aggregation by category of the submissions I received from the LLSAPs, in an effort to provide a uniform summary of data that is quite disparate. Also included is each of the documents I received, as submitted. PrairieCat's list of additional services was submitted via email, and their "other services" are included in the aggregation. All other services are described in the documents submitted by individual LLSAPs.

| | CCS | Pinnacle | PrairieCat | RRLC | RSA | SWAN |
|---|---|---|---|---|---|---|
| **Base Services – ILS software (bibliographic database, circulation functions, patron database), including OPAC** | x | x | x | x | x | x |
| *Additional Services* | | | | | | |
| **Discovery options** | x | | | | | |
| **Digital collections** | | x | | | x | |
| **Databases** | x | x | | | | x |
| **Cataloging tools** | x | x | x | | x | x |
| **Mobile app** | | | x | | x | x |
| **Notifications** | x | x | x | | x | x |
| **E-commerce** | x | x | x | | x | x |
| *Staff-provided services* | | | | | | |
| **Cataloging** | x | | x | | x | x |
| **Training** | x | x | x | | x | x |
| **Consulting** | x | | x | | x | x |
| **Custom reports** | x | x | x | | x | x |
| *Other services* | | | Syndetics unbound for discovery layer (all members), API and SIP2 integration for circulating members, opt-in self check, opt-in curbside application. OCLC membership included in fees. | | | |

# CCS Services

## Base Services – ILS software (bibliographic database, circulation functions, patron database), including OPAC

1. ILS: Innovative Interface's Polaris ILS. Includes full access to all modules (except Administration) in Leap Web App and Polaris Staff Client, Simply Reports tool, unlimited SIP2 connections, unlimited API keys
2. OPAC: Innovative Interface's PowerPAC; includes Syndetics Unbound

## Additional Services:

1. Discovery options
    a. PowerPAC (incl. in core services above)
    b. Participating in Innovative's Vega Development Partner program to beta test new discovery interface, Vega Discover
2. Digital collections
    a. NA
3. Databases
    a. Novelist, including Novelist Select, Novelist Plus, Novelist K-8 Plus
    b. LibraryAware
4. Staff-provided services:
    a. Cataloging
        i. CCS centrally loads and maintains integrated and nonintegrated econtent records for participating libraries.
        ii. CCS completes core database cleanup tasks, including deletion of withdrawn item records, removal of bib records with no items, corrections to bibliographic target audience and format fields, merging of duplicate bib records, etc.
    b. Training
        i. CCS provides over 20 online, asynchronous training courses focusing on Polaris tools and functionality. These online courses provide a complete, start-to-finish training program for onboarding new library staff.
        ii. CCS provides live, synchronous training on a quarterly basis.
        iii. CCS offers custom training sessions upon request for individual libraries or departments
        iv. CCs provides ongoing training opportunities at technical and advisory groups
        v. CCS offers new manager orientations
    c. Consulting
        i. CCS provides customized consulting services to help libraries optimize departmental workflows, ILS settings and policies
        ii. CCS provides centralized user testing of patron-facing tools, and offers consulting regarding customization of the discovery interface
    d. Custom reports

          i. Web Reports contains over 150 reports custom-built by CCS. Reports are generated on a daily, weekly, monthly, or annual basis, and include circulation, patron, hold, cleanup data, and more. Libraries may request additional custom requests as needed.

          ii. CCS is in the process of building a new collection development tool to be used for a collection DEI audit

   e. E-commerce

          i. CCS provides Comprise's Smart Pay ecommerce solution for all libraries.

   f. Cataloging tools

          i. Ongoing bibliographic and authority record maintenance via Marcive

          ii. Updated OCLC holdings through Project OHM service

          iii. RDA toolkit

   g. Mobile app

          i. None

   h. Notifications

          i. Patron notices included in Polaris subscription (automated phone, email, and sms, library staff manage print notice delivery)

   i. Other services

          i. OCLC fees are included in CCS membership fees.

          ii. Support

              1. Library staff submit support tickets via online ticketing system. 4,297 tickets opened 7/1/20-6/30/21; average of 358 tickets per month. Support areas include ILS troubleshooting, 3rd party vendors and integrations, custom report requests, etc

          iii. Centralized database maintenance

              1. CCS completes monthly patron maintenance on behalf of all member libraries; offers additional patron maintenance services included NCOA address updates and annual fine waives/purge

          iv. Group purchasing

              1. Optional CollectionHQ Group Purchase not included in member fees

              2. Additional tools demoed and assessed for system-wide purchase. Members are generally referred to RAILS for optional deals and discounts

# Pinnacle Services

1. Base Services – ILS software (bibliographic database, circulation functions, patron database), including OPAC
    a. Access to Shared ILS – Polaris.
2. Additional Services
    a. Discovery options
        i. All member libraries use the ILS-supplied catalog, Polaris PowerPac
    b. Digital collections
        i. Shared OverDrive collection
        ii. Subscription to OverDrive Magazines
    c. Databases
        i. EBSCO – Basic database package / Ebsco Discover Service
        ii. Data Axle – 4 of 6 libraries participate in group database purchase for Data Axle (previously ReferenceUSA)
    d. Staff-provided services
        i. Cataloging
            1. No centralized cataloging – All members are full cataloging participants
            2. Authority Maintenance - Subscriptions to Backstage Library works and Polaris ZMARC
        ii. Training
            1. Pinnacle staff provides ILS Training through regular workshops and interactive training modules
        iii. Consulting
        iv. Custom reports
            1. Member libraries request custom SQL reports to be created and automatically delivered to their inboxes.
            2. All member libraries have access to Pinnacle Collection Studio – a free, web-based collection analysis tool that mimics the essential functions of vendor-supplied tools, like CollectionHQ.
    e. E-commerce
        i. JetPay - All libraries are eligible to integrate credit card payments with JetPay
    f. Cataloging tools
    g. Mobile app
    h. Notifications
        i. Phone Notification - Outsourced telephone notifications through Unique Phone Notices.
    i. Other services
        i. Chat service - Provided by UniqueChat on all catalog pages (and on library websites for an additional fee)
        ii. Linked Data - All member libraries are included in a linked data integration, allowing library holdings to appear in search engine search results.

6 July 2021

Subject: Detailed List of Specific Services

# Base Services – ILS software (bibliographic database, circulation functions, patron database), including OPAC

Note: All things listed here are considered by RSA to be Base Services to ALL RSA members.

Also note, RSA only charges for mobile app templates and extra per-library OverDrive Advantage syncs.  All other services are included in the price of membership.

- **Basic Cataloging Level** – Access to the WorkFlows cataloging module to catalog new items using OCLC bibliographic records already in WorkFlows, editing existing items either individually or globally in WorkFlows, and deleting items from WorkFlows, either manually or in batch. Access to the WorkFlows cataloging module to catalog books, video recordings, sound recordings, serials, and other formats using OCLC bibliographic records already in WorkFlows, editing existing items either individually or globally in WorkFlows, and deleting items from WorkFlows, either manually or in batch.
- **Basic Cataloging Training** – RSA support staff provides basic cataloging training free-of-charge for libraries that need to learn how to catalog new items, edit existing items, and delete items from WorkFlows. Completion of basic cataloging training is required prior to beginning to catalog in WorkFlows.
- **Brief Record Cataloging Level** – Access to the Add Title wizard in the WorkFlows cataloging module only when necessary for routine (not occasional) approved brief record uses listed in the Core Competencies for Cataloging Staff at RSA Member Libraries.
- **Brief Record Cataloging Training** – RSA support staff provides brief record cataloging training free-of-charge for libraries that have a routine (not occasional) need to create brief records for one or more of the approved brief record uses listed in the Core Competencies for Cataloging Staff at RSA Member Libraries. Completion of brief record cataloging training is required prior to beginning to create brief records in WorkFlows.
- **Authority Control Service** – This quarterly service performed on the RSA database controls name and subject headings to ensure they use authorized forms according to the Library of Congress authority file. Authority control results in consistency of bibliographic description and eases searching, for both staff in WorkFlows and patrons in the RSAcat. The authority control process happens

seamlessly, with no work necessary on the part of the RSA library. Performed Quarterly.

- **Brief Record Photo Visit** – Host RSA support staff for a brief record photo visit, during which the staff member digitally photographs library materials currently cataloged on brief records and in the weeks following the visit, uses the photos from the RAILS East Peoria office to replace the brief records with full description OCLC bibliographic records. The replacement of brief records with OCLC records improves discoverability of the items for library staff and patrons.
- **Collection Batch Change Service – Items** – Item-level information for groups of 50 items or more may be batch edited by RSA staff on behalf of the library using the WorkFlows item group editor wizard. Item-level information that may be batch edited includes home location, price, item type, item categories, number of pieces, extended information notes, and statuses for permanent, circulate, and shadowed. RSA libraries that use the RSA collection batch edit service are responsible for reviewing the results via reports to ensure accuracy of the edits.
- **Submission of RSA Cataloging Requests** – All RSA member libraries should submit a cataloging request to RSA support staff via the RSA cataloging request form, accessible at https://goo.gl/ovWW5D, if the item lacks an existing full OCLC bibliographic record in the RSA database or meets another condition listed at the beginning of the RSA cataloging request form linked above.
- **OCLC Holding Batchloads** – RSA libraries' bibliographic holdings in OCLC WorldCat are updated on a monthly basis. The batch load process is performed by RSA support staff. It both add and deletes holdings in OCLC WorldCat for the RSA library based on its current WorkFlows holdings. The OCLC batchload service is limited to those RSA libraries that belong to OCLC.
- **OCLC Local Holdings Maintenance Service** – Note: Mostly discontinued now. This service was formerly known as ALSPUL (Alliance Library System Periodicals Union List). RSA support staff add, edit, and delete local retention records, such as "Retains current + 1 year," to ensure holdings for RSA member libraries' periodicals are updated in OCLC WorldCat, making them visible for WorldShare interlibrary loan requests.
- **OCLC Local Holdings Maintenance Training** – RSA support staff provides OCLC local holdings maintenance training free-of-charge for RSA libraries that have a routine (not occasional) need to add, edit, and delete periodical local retention records, such as "Retains current + 1 year," to ensure holdings are updated in OCLC WorldCat, making them visible for WorldShare interlibrary loan requests.
- **Perform Item and Bibliographic Record Maintenance** – RSA Staff help libraries periodically perform maintenance activities to ensure quality item and bibliographic cataloging in the RSA database.
- **WorkFlows Bound-With Wizard** – The bound-with wizard is used to link two different call numbers, described by two different bibliographic records, which are bound together and shelved as a single unit in a library's collection. Bound-with items use a single barcode when the items are checked out.
- **RSAcat Online Catalog** – SSL (Secure Sockets Layer) secured public access online catalog with a profile for each RSA member library to ensure patron's

search and personal data is protected. Each library may choose to customize its RSAcat header with its preferred color and/or library logo. RSAcat allows patrons and staff to search holdings in a particular library or all libraries in the RSA membership.

- **RSAcat Mobile app** – Mobile version of RSAcat online catalog available for iOS and Android devices. Library patrons can place holds, manage their accounts, renew items, and pay bills online.

- **Enhanced Content for RSAcat and RSAcat Mobile** – The catalog is enhanced with book covers, reviews, table of contents for titles, summaries, first chapter reviews, about the author, series info, you may also like titles, also available as info, tags, book profiles, reading level, and awards info.

- **Staff Initiated Holds** – The ability for staff to place holds on behalf of patrons. Basic Online and Full Online libraries place the holds in WorkFlows.

- **BLUEcloud Visibility** – BLUEcloud Visibility, a service through SirsiDynix, transforms an RSA member's MARC collection data, as well as information about the library's physical space (such as address, hours of operation, and phone number) into machine-readable linked data. This linked data is visible in results of search engines such as Google, Yahoo, and Bing. BLUEcloud Visibility creates a visible presence for the RSA membership on the web, ready to meet both library users and non-users, who often use search engines before they use a library's online catalog.

- **RSA Support Staff Help for Day-to-Day Automation System Issues** – RSA Support Staff provide assistance for various issues with the Symphony system. Examples may include: reports problems, cataloging help, circulation and holds issues, billing issues and more. Libraries have several methods of interfacing with RSA Support Staff including: telephone, email, the help desk, online Cataloging Request and other forms, and in-person visits.

- **RSA Staff Support Website, RSA Help Desk, Toll-free Telephone Support** – RSA provides a Library Staff Support Site with various documents related to RSA membership, governance, operations, and policies.

- **RSA Member Library Site Visits (once COVID restrictions are raised)** – RSA Member Services staff visit member libraries at least once every two years to share RSA information, answer staff member's questions, and introduce new library directors to RSA. The visits can also be tailored to provide RSA specific or WorkFlows training or provide support during the first day a library begins using WorkFlows for circulation or holds.

- **RSA controlled Library Gmail account** (ag.als.xxx.rsa@gmail.com) – RSA has setup and keeps control of one Gmail account per library. This allows each library to have a single, known, unchanging email address to send reports to regardless of staff changes. This email can be used for other purposes but RSA must always know the password to ensure RSA staff can help new/replacement library staff and access the account to troubleshoot issues.

- **Symphony Generated Reports / Requests from RSA Support Staff for Reports** – Holdings reports and breakouts generated monthly, annually, or as required. Reports are automatically generated at pre-determined time periods or

requested by the library on an as needed basis. RSA staff use a variety of report tools to provide requested data.

# Additional Services

1. Discovery options
   - Outside of the already mentioned RSAcat and RSAcat Mobile, RSA provides integrated eBook/eAudio Book services in RSAcat.  This allows libraries with OverDrive, eRead Illinois, and BiblioBoard to integrate their entire collection for discover and checkout in our catalog.

2. Digital collections

   - RSA manages a group purchase for OverDrive with 95 public libraries. The members of the group purchase pay for the service.
   - RSA provides eRead Illinois membership to all RSA members except our 4 Union Listing libraries.

3. Databases

   - RSA provides no 3<sup>rd</sup> party database services.

4. Staff-provided services
   - Cataloging
     i. RSA staff work on between 900 - 1,000 cataloging requests a month from member libraries.  Most of our libraries can't do anything beyond basic match and attach.
     ii. **Electronic Resource Bibload Service** – RSA support staff offers one-time and ongoing support loading bibliographic records into WorkFlows for Full Online libraries that subscribe to electronic resource collections such as (but not limited to) Freading, Learning Express, and Gale Virtual Reference. Electronic resource bibliographic records will only be loaded into the RSA database if the content cannot be integrated into the RSAcat via the eResource Central platform.
   - Training
     i. **Circulation Training** – RSA staff provide WorkFlows circulation training for Basic and Full RSA libraries. Libraries going live for the first time with the circulation module receive training prior to go-live and on go-live day a RSA staff member will be present (if possible) to answer questions and clarify processes. RSA will also provide

periodic basic WorkFlows circulation training sessions at the East Peoria office, group training in host libraries, or via onsite training (primarily for schools and small publics who can't attend otherwise) when RSA staff availability allows.

ii. **Holds Training** – RSA staff provides WorkFlows holds training for Basic and Full RSA libraries. Libraries going live for the first time with the Holds module receive training prior to go-live and on go-live day a RSA staff member will be present (if possible) to answer questions and clarify processes. RSA will also provide periodic basic WorkFlows holds training sessions in the East Peoria office, group training in host libraries, or via onsite training (primarily for schools and small publics who can't attend otherwise) when RSA staff availability allows.

iii. **Reports Training** – RSA staff provide training sessions for all supported reporting products. Sessions may in hosted at the East Peoria office, group trainings in host libraries, or via onsite training (primarily for schools and small publics who can't attend otherwise) when RSA staff availability allows.

iv. **WorkFlows Bound-with Training** – RSA support staff provides bound-with cataloging training free-of-charge for RSA libraries that have a routine (not occasional) need to create bound-with call numbers to link two different call numbers, described by two different bibliographic records, which are bound together and shelved as a single unit in a collection.

v. **OCLC Connexion Bibload Training** – RSA support staff provides OCLC Connexion training on free-of-charge for Full Online libraries that have a routine (not occasional) need to search OCLC WorldCat to find bibliographic records for items that do not already have matching records in the RSA database, and load those records into WorkFlows.

- Consulting
    i. **User Batch Changes** – User information for groups of 50 users or more may be batch edited by RSA staff on behalf of the library.
    ii. **User Batch Adding or Deleting** – Groups of 50 users or more may be batch added or deleted by RSA staff on behalf of the library. School libraries in particular find this useful.
    iii. **Collection Batch Change Service – Call Numbers** – Call number prefixes or suffixes for groups of 50 items or more may be batch edited by RSA staff on behalf of a Full Online library using a custom WorkFlows report.
    iv. **SIP/SIP2 and Web Services Access** – Setup per library/vendor access to allow patron authentication for 3rd party products such as self-check machines, PC reservation systems, RFID scanners, etc.
    v. **3rd Party Product Support** – RSA works to ensure compatibility with various 3rd party products. RSA cannot promise all 3rd party products will work with or have full functionality in the system.

- Custom reports
    i. **Bibliographic Record Exports** – Library bibliographic holdings may be batch exported by RSA staff on behalf of the RSA library at its preferred frequency for use in third-party products that are powered by up-to-date library holding information.
    ii. Custom reports are run for all libraries who request them.  We get, on average, about 100 custom report requests a month.  Plus 5 to 10 reports per library at IPLAR time.

5. E-commerce
   - Online bill payments in RSAcat (for those libraries that want it) and for all patrons using the RSAcat Mobile app.

6. Cataloging tools
   - Online submission forms to have RSA catalog for a member.

7. Mobile app

   - **RSAcat Mobile Templates** - RSA offers a per library template for a $500 upcharge to any library who wishes one.
   - **MobileStaff** – iOS and Android app for a tablet or smartphone that allows library staff to perform checkin, checkout, renewals, holds management, inventory, weeding, picklists and patron registration/modification from any location.

8. Notifications

   - System generated bill notices can be emailed or printed from the system for local and regular mail dissemination.
   - Text Messaging Service – RSA currently uses Shoutbomb for patron opt-in text messaging services. Patrons can receive courtesy notices for checkouts, overdue and bill notices, and renew items via text.
   - RSA staff configures overdue notices, bills, lost item notices, patron renewal notices, and courtesy notices on behalf of RSA member libraries.

9. Other services: -- in our context, these are things that Basic and Full Online member libraries can do.
   - **WorkFlows Circulation Module** – WorkFlows module with full circulation capability, charge, discharge, billing patron, managing patrons, and staff initiated holds, etc. Used for daily circulation operations by staff from RSA full online and basic online member libraries.
   - **WorkFlows Offline Circulation Module** – WorkFlows can be used in offline mode when system issues occur or a library has lost access to the internet. Transactions are automatically uploaded the next time WorkFlows connects to the Symphony server.

- **Patron Registration and Management** – User information is added to the patron database by RSA full online and basic online member libraries following the RSA patron entry standards. Individual
- **System-wide Holds** – Patrons and staff can place holds system wide based on the patrons home library holds lending rules. Public libraries loan to other public libraries, school libraries loan to other school libraries, many public and school libraries choose to allow holds to any other RSA library. Holds picklists for run twice a day and holds going to another library use the RAILS provided delivery system for routing and delivery.
- **BLUEcloud Analytics** – Web-based reporting tool for user, item, cataloging, billing, holds, checkout, and historical transaction data. All reports can be set to run and be delivered via email on a set schedule. Basic Online libraries has access to report side only for running pre-made reports. Full RSA members can run reports, create new reports from several pre-made templates and view or create visual dashboards.
- **WorkFlows Symphony Reports Module** – WorkFlows module with full reporting capability, notices, bill and overdue reports/notices, statistical reports, etc. Mostly used for notice reports, billing reports, and other patron notices.
- **WorkFlows Item Group Editor Training** – RSA support staff provides WorkFlows item group editor training free-of-charge for Full Online libraries that have a routine (not occasional) need to batch edit item-level information assigned to their collections in WorkFlows, such as (but not limited to) home location, item type, item categories, or price.
- **WorkFlows Serial Control Module** – This module is designed specifically for managing serials: receiving them, gathering circulation statistics, tracking claims, and generating lost issue notices.
- **Outreach/Homebound Module** – WorkFlows module allows libraries to manage circulation to patrons unable to visit the library. Allows staff members to manage patron's reading lists, allows differing checkout times, and unique holds management.
- **3rd Party Collections** – Unique Management integration for 3rd party collections management. Allows patrons to be referred to collections based on per-library requirements and limits. RSA sets up reports with the library's collection rules and from that point on all data gathering and sending to Unique Management is automated.
- **Acquisitions Module** – Currently being reworked into BLUEcloud Acquisitions. WorkFlows module allowing libraries to manage their acquisitions with full fund accounting. Also allows on-order records for soon to arrive materials.

# SWAN Services

## SWAN Budget

SWAN's budget is posted publicly and contains a narrative off all revenue and expenses.

https://support.swanlibraries.net/about/budget

## SWAN sites

Staff Support https://support.swanlibraries.net

Patron support: https://www.swanlibraries.net

Community Forums: https://forums.swanlibraries.net/

Public Catalog: https://catalog.swanlibraries.net/

## Support requests

Libraries submitted 8,518 support requests in 2021.

## Base Services: description of library services SWAN provides

All services provided are considered "base" to SWAN full membership. Services are listed here as they appear on SWAN Support.

**Authentication**

Authentication is needed when a patron is accessing a digital resource remotely. SWAN provides several methods.

**SWAN EBSCO Databases**

Through a SWAN-wide group purchase in partnership with RAILS, all SWAN public libraries have the option to subscribe annually to a standard set of 14 EBSCO databases, including Consumer Reports and NoveList Plus, and a selection of an additional set of databases. Many of these databases are integrated into Article Search in your library catalog. Monthly usage reports are posted on the SWAN-Wide Monthly Statistics page.

**Usage Statistics**

SWAN can assist you with gathering usage statics for eContent.

**Article Search (EDS)**

Article Search integrates EDS (EBSCO Discovery Service) into Enterprise and is compatible with EBSCO and Gale.

**eResource Central (eRC)**

eResource Central (eRC) provides access to digital content such as eAudiobooks, eBooks, and downloadable music through the Enterprise catalog, without the need for adding MARC records.

**Login to BLUEcloud Analytics**

To help manage BLUEcloud Analytics subscriptions, reports, and collaboration within your library, we have created an account for each SWAN member library.  You no longer need to request an account for each staff member who needs to access BLUEcloud Analytics.

**E-Commerce (ProPay)**

Instructions for managing the required merchant account vendor ProPay used for patron credit card payments of fines, fees collected at service desks in WorkFlows, and online Enterprise payments.

**BLUEcloud Mobile**

Mobile patron app provided to each SWAN library. Each SWAN library has a shared login for BLUEcloud Mobile Administration.

**L2 Library Learning**

Library Learning, also known as L2, is the statewide calendar of continuing education, networking meetings, catalog consortium training, and other events for Illinois library employees and trustees.  L2 also includes a directory of libraries and personnel that are affiliated with an Illinois library system. Use your L2 login to access the SWAN support site and OTRS ticket system. Verify that the staff member is registered in L2. Submit a support ticket to help@swanlibraries.net requesting the account

**SirsiDynix Mentor Accounts**

Library directors and managers can request SirsiDynix Support Center (SDSC) accounts for staff. To request an account for a staff member:

**WorkFlows, SIP2, and Aspen Logins**

Library directors can access logins for WorkFlows and SIP2 and deliver them to staff.

**User Groups In WorkFlows**

User Groups is a tool for families.  It allows them to manage their checkouts, holds, and consolidate bill payments as a group.

**Research & Pilot Services**

SWAN engages in a variety of research and discovery projects, with a goal of identifying new tools and services that will benefit our membership. SWAN is currently engaged in research in the following areas.

**Generic Users**

Generic users are used to assign material with an intended purpose, such as to a department for display or storage. Generic users can also be used to serve system functions, such as designating items for discard or lost. When material is charged/checked out to one of the below users it is assigned a particular location. The location code displays in WorkFlows and the description displays in the online catalog.

**BLUEcloud Acquisitions**

Use BLUEcloud Acquisitions to provide fund statuses to selectors, import records, invoices and purchase orders. All acquisitions data is saved in the Cloud, interacting with the Symphony server only when adding bibs, call numbers, and items to the catalog.

**Symphony WorkFlows Acquisitions**

Use Symphony Acquisitions to create manual orders or invoices, import orders and invoices from vendor sites, and manage funds.

**Pre-Cats**

Create brief records for overlay through SWAN's Centralized Cataloging service, and view standards, examples, and tips for speeding up the process.

## Cataloging Standards

SWAN's cataloging standards aim at maintaining a reliable, consistent, and uniform catalog, providing accurate, convenient, and reliable access to items. Please refer to these guidelines when creating pre-cats, overlaying records, or adding call numbers and items to existing records.

## Item Records & Call Numbers

Learn about SWAN's item fields, call number information, and available classification schemes.

## Scripts & Processes

Learn about the behind-the-scenes processes and vendors we use for bibliographic, authority, item, and holdings maintenance.

## Circulation

Learn about daily circulation duties and functions, including patron management, checkin and checkout functions, holds, mobile and offline circulation, and the Outreach module.

## Patron Management

Patron management procedures and annual SWAN patron maintenance.

## Checkins & Checkouts

Common Checkout and Checkin functions.

## Patron Notices & Notifications

There are several ways patrons can be notified for holds, overdue materials, renewals, bills, or manual messages.

## Renewals

How to use the renewing item wizards in the common task wizard group, and information on how Autorenewals work.

**Holds**

Documentation on how to place holds, how holds are filled and how to cancel them.

**Days Closed**

Your library calendar and days closed settings affect due dates. You can manage your own library calendar through Workflows, or, SWAN can manage it for you.

**Fees & Fines Management**

Fees and Fines can be paid and or waived in special instances at any SWAN library. Here are some helpful procedures to guide staff through paying Fees and Fines.

**Offline Circulation**

WorkFlows Offline Mode is a tool for performing new checkouts without a live network connection to the Symphony Production server.

**Outreach**

The Outreach module allows staff to identify, select and distribute library materials for patrons that are unable to visit the library.

**School Partnerships**

An Intergovernmental Agreement (IGA) will allow the public library to provide services to schools within their service area, including but not limited to, individual teacher cards and student access to resources. Libraries may not have IGAs in place, but still work in partnership with local schools supporting student and teacher cards. SWAN libraries adhere to policy and legal requirements when working with school populations.

**WorkFlows Search Indexes and Types**

Searching bibliographic records in WorkFlows presents some challenges. This document outlines the interactions between search indexes (Title, Author, etc.) and search types (Keyword, Browse, Exact) to help you find the combinations that best suit your needs.

**Cataloging Libraries**

A complete list of SWAN Cataloging Libraries.

**Library Catalog (Enterprise)**

We use the SirsiDynix Enterprise platform for our online catalog (or OPAC). Every library has their own profile, or instance of their catalog. You can request customizations to your profile, create custom links to your catalog, and embed a catalog search into your library website.

**Beta Catalog (Aspen)**

Learn to use the Aspen administration and staff features. Visit the patron site for documentation on public-facing features such as searching and managing accounts. You can also view the Aspen All Staff trainings.

**Mobile App**

The BLUEcloud Mobile app provides real-time mobile access to the catalog. Patrons can use the app to search the catalog, access downloadable and streaming resources, and place holds.

**Usability Studies**

SWAN conducts ongoing usability research to improve our library catalogs and patron-facing services.

**Accessibility for the Catalog and Databases**

Accessible search and discovery tools, including the library catalog and databases, ensure that your library resources are accessible to a wide range of people with disabilities, including blindness and low vision, deafness and hearing loss, cognitive disabilities, limited mobility, speech disabilities, photosensitivity, and combinations of these.

**ILS Configuration**

SWAN uses SirsiDynix' Symphony Integrated Library System (ILS). This section provides an overview to configuration settings, how they impact your library and support your circulation policies, and configuration files to help identify your library's settings. Updated files are posted monthly.

### ILL (Interlibrary Loan)

SWAN libraries participate in over 4,000,000 Interlibrary Loan transactions annually. Over 99% of these loan requests are handled between SWAN libraries. The other, less than 1%, can be processed through several methods, including OCLC WorldShare ILL.

### OCLC WorldShare Management Services & WorldCat Discovery

SWAN manages links for SWAN members for ease of access.

### Overview and Types of Interlibrary Loan

SWAN libraries participate in a variety of resource sharing communities. These include intra-consortium (within SWAN) Interlibrary Loan, in-state ILL via email/fax/phone requests, and both in-state and out-of-state lending and borrowing through OCLC WorldShare ILL.

### ILL Process Diagrams

The steps required for processing interlibrary loans are dependent on the parties involved and the systems used to process those requests (Symphony Workflows, holds placed by patrons in online public access catalogs, OCLC WorldShare ILL). To help outline these processes, we have developed visual diagrams and outlined the steps.

### RAILS Delivery

RAILS provides delivery service to all SWAN libraries either directly or through contract delivery service with Continental Transportation (a division of CTL Global).

### ILL Requests from SHARE IL or Internet Access Libraries

Some SHARE Illinois libraries and Internet Access libraries have library accounts for initiating hold requests in SWAN. These libraries use Enterprise to place their holds and SWAN staff process these items through Symphony WorkFlows. Pursuant to a recent conversation with the Consortia Committee regarding the future of SHARE Illinois, a legacy cooperative project intended to facilitate staff-initiated

interlibrary loans among participating Illinois library automation consortia, RAILS will sunset our support for this program effective October 30, 2021. We will reach out to participating consortia with specific details regarding termination of agreements and taking down the website and email list.

**Loan Requests Received from OCLC**

Requests received via OCLC should be managed in OCLC WorldShare ILL and checked out to either the library's In-State or Out-of-State user. If your library does not have a user record for these accounts, you can create the user record and then submit a support ticket to update the User Profile and User Categories to correctly reflect these generic accounts.

**Borrowing Items from Non-SWAN Libraries**

Items received from libraries outside of SWAN need to be entered temporarily in our catalog as a brief title record. Once a brief title record is created, the item can be checked out to the patron for which the ILL request was made. Consider these items one-time use items: only the patron requesting the item should have a hold on the item and be allowed to check it out. Once returned, the brief title record is deleted.

**Using the Transit Label Generator**

When setting an item in-transit, use this SWAN-developed tool to print an automatically generated transit label rather than hand-writing one. This helps to reduce the number of incorrect and ineligible routing slips. A reduction in these errors will help to ensure patrons receive their requested material as quickly as possible. This tool can be used to transit any item for any library, including items transiting to ILL_LIBS (SHARE Illinois and Internet Access libraries placing holds in the SWAN catalog).

**Internet Access Library Quick Reference Guide**

Internet Access Libraries utilize the SWAN catalog in a unique way. Special steps are necessary to ensure proper material processing.

**Quarterly Billing**

Learn about SWAN centralized billing for Reciprocal Borrowing material losses and how your bills are structured. On a quarterly basis, SWAN processes paid Collection Fees and material replacement costs for Reciprocal Borrower and Inter-Library Loan losses. Transactions that occur within the SWAN system associated with item bills are included in the Quarterly Billing. Item Information, Item Status, Bill Reason, and User Information drive the quarterly credits and debits. The Quarterly Billing Summary

sheet will have 12 columns of debits and credits. These 12 are derived from pivots on 6 distinct base reports.

**Reports & Statistics**

Download monthly statistics and learn about BLUEcloud Analytics and on-demand reports in Symphony Workflows.

**Delivered and Helpful Reports**

Use these delivered reports to assist in your day-to-day operations.

**BLUEcloud Analytics**

BLUEcloud Analytics is the statistical and reporting platform for SWAN libraries, provided by SirsiDynix. Data is harvested from Symphony data and transaction logs on a nightly basis for reporting and analysis.

**Inventory**

Learn how to conduct an inventory in Symphony WorkFlows.  Items can also be inventoried in MobileCirc.

**SWAN Patron Use Report**

Use the interactive SWAN Patron Use Report to see how your patrons are use the catalog and mobile app to search, place holds, and interact with your resources.

**Reports in WorkFlows**

Whenever possible, reports should be run within BLUEcloud Analytics. However, some reports update data and rely on real-time status information for accuracy. These On-Demand reports include daily reports run by SWAN and some reports which can be configured and scheduled by SWAN libraries.

**SWAN-Wide Monthly Statistics**

Usage statistics for all SWAN libraries.

**SWAN-Wide Monthly Statistics Catalog**

File paths, uses, and limitations of SWAN Monthly Circulation statistics. Date range used for examples selects July, 2019.

**Monthly Patron Record Purge**

Starting in Fall, 2021 an ongoing process of review and automatic removal of inactive accounts occurs monthly. This process ensures a constant review of patron records that are inactive and removal, based on consistent criteria.

**Research & Pilot Services**

SWAN engages in a variety of research and discovery projects, with a goal of identifying new tools and services that will benefit our membership. SWAN is currently engaged in research in the following areas.

**BLUEcloud Staff Suite**

The BLUEcloud staff suite includes BLUEcloud Circulation, BLUEcloud Cataloging, and BLUEcloud Acquisitions. SWAN staff are working with a small pilot group of member libraries to test and improve upon these tools as an eventual supplement to, or replacement for, the Symphony WorkFlows staff interface.

**Aspen Discovery**

SWAN is exploring the Aspen Discovery platform as an alternative to our current discovery platform, Enterprise.

**KitKeeper Pilot**

SWAN is pilot testing the KitKeeper software by Plymouth Rocket to allow Book Club kits to circulate on a scheduled basis within the consortium. Book Club kits could be shared throughout the consortium as complete kits via a reservation system.

**Pandemic Curbside Research**

SWAN libraries are continuing to serve their communities through the pandemic. The report shows how four libraries are continuing services throughout the pandemic and what factors play into their decisions.

**SWAN Practice for Managing Serials**

Overview of SWAN Practices and how these practices support the patron experience.

**Serial Control**

Compilation of wizards that manage the receipt and status of a library's serial collection. Serial Control uses the following information to manage serials: title records, serial control records, prediction records, receipt records, claim records and routing records.

**Searching & Placing Holds on Serials**

Holds on serial records are attached to specific volumes.  The serial call number determines what defines a volume.

**Networking**

SWAN uses secure network connections with its member libraries to transmit patron, item, and checkout data through the shared Integrated Library System (ILS) and associated databases. For direct connections over SIP2 or through the WorkFlows client, a VPN (Virtual Private Network) is required for access to SWAN's servers.

**Recommended Hardware**

The computers, peripherals, and printers that you use to perform functions through WorkFlows, Enterprise, and the BLUEcloud suite should meet a minimum specification or hardware vendor, as detailed here. Hardware outside of these specifications, while possibly compatible, are not supported by SWAN.

**Software Downloads & Setup**

SWAN utilizes the SirsiDynix WorkFlows client for connectivity to the Symphony server and patron database. With each new version of Symphony server, an upgrade to the WorkFlows client is required for login.

**3rd Party Vendors & Integrations**

SWAN permits integration with third-party external vendors to serve a variety of services in the library, including digital media, self checkout, automated materials handling (AMH), and room reservation, just

to name a few. These integrations are established through several connections methods, which are detailed under Connection Methods. There are 102 listed vendors.

| Vendor Name | Product | Connection |
| --- | --- | --- |
| **3M/Bibliotheca** | Selfcheck<br>AMH | SIP2 |
| **ABC.CLIO** | Reference DB | OpenAthens |
| **AccessScience** | Reference DB | OpenAthens |
| **Aerospace Research Central** | Reference DB | OpenAthens |
| **American Library Association** | Reference DB | OpenAthens |
| **Ancestry Library** | Reference DB | OpenAthens |
| **AtoZ Databases** | Reference DB | OpenAthens |
| **Baker & Taylor** | Axis360 | SIP2 |
| **Biblioboard** | | SIP2 |
| **BookBrowse** | Reference DB | OpenAthens |
| **Bowker** | Reference DB | |
| **Brainfuse** | Reference DB | OpenAthens |
| **Careers College, The** | Reference DB | OpenAthens |
| **Capira** | Capira Mobile | SIP2 |
| **Cengage Learning** | Reference DB | OpenAthens |
| **Cen-Tec** | Selfcheck<br>AMH | SIP2 |
| **Chadwyck.Healey databases** | Reference DB | OpenAthens |
| **cloudLibrary** | | OpenAthens |
| **Comprise Technologies** | SAM<br>SMM | SIP2 |
| **Consumer's Checkbook** | Reference DB | OpenAthens |
| **Counting Opinions** | | SIP2 |
| **CQ Researcher** | Reference DB | OpenAthens |

| Vendor Name | Product | Connection |
|---|---|---|
| **Culture Grams** | Reference DB | OpenAthens |
| **Cypress Resume Builder** | Reference DB | OpenAthens |
| **DEMCO** | Boopsie<br>Evanced | SIP2 + PERL Extract |
| **D-Tech** | Selfcheck<br>AMH | SIP2 |
| **Ebooks Corporation** | Reference DB | OpenAthens |
| **EBSCO** | Novelist On The Shelf | PERL Extract |
| **EBSCO Information Services** | EBSCOhost<br>EBSCO Discovery Service | OpenAthens |
| **Elsevier Products** | Reference DB | OpenAthens |
| **Encyclopedia Brittanica** | Reference DB | OpenAthens |
| **Envisionware** | PCRes<br>LPT:One<br>OneStop (Self-Checkout) | SIP2 |
| **Epson** | Receipt Printers | USB |
| **Evanced** | Room Reservation<br>Spaces | SIP2 |
| **EZProxy** | EZProxy | SIP2/Hosted |
| **Facets Kids** | | OpenAthens |
| **Gale** | Analytics On Demand | PERL Extract |
| **Gale InfoTrac Databases** | Reference DB | OpenAthens |
| **Grey House Publishing** | Reference DB | OpenAthens |
| **Heritage Quest** | Reference DB | OpenAthens |
| **HighWire Press** | Reference DB | OpenAthens |
| **Historical Newspapers** | Reference DB | OpenAthens |
| **Honeywell** | Barcode Scanners | USB |
| **Infobase Publishing** | Reference DB | OpenAthens |

| Vendor Name | Product | Connection |
| --- | --- | --- |
| Ingram MyiLibrary | Reference DB | OpenAthens |
| Interactive Sciences Inc | Wowbrary | Z39.50 |
| iTeamResources | Print Solutions | SIP2 |
| iVerse Media | Comics Plus | |
| JAMA Network, The | Reference DB | OpenAthens |
| Kanopy | | SIP2 |
| LearningExpress Library | Reference DB | OpenAthens |
| LexisNexis | Reference DB | OpenAthens |
| Library Aware | | |
| Library Ideas | Freegal<br>Freading | SIP2 |
| Library Insight | | SIP2 |
| LibraryThing | | Scraping |
| Living Language | | SIP2 |
| Lynda | Reference DB | SIP2 |
| Macmillan Science and Education | Reference DB | OpenAthens |
| Mango Languages | Reference DB | OpenAthens |
| MARC of Quality | | PERL Extract |
| McGraw.Hill Education | Reference DB | OpenAthens |
| Midwest Tape | Hoopla | SIP2 |
| MK Solutions | Selfcheck<br>AMH | |
| Morningstar | Reference DB | OpenAthens |
| Muzzy Club | Reference DB | OpenAthens |
| NewsBank | Reference DB | OpenAthens |
| Newspaper Archive | Reference DB | OpenAthens |

| Vendor Name | Product | Connection |
| --- | --- | --- |
| **OCLC** | Connexion | |
| **OCLC FirstSearch** | Reference DB | OpenAthens |
| **OCS** | CUBS | SIP2 |
| **OrangeBoy Inc** | Savannah | PERL Extract |
| **Overdrive/Overdrive Advantage** | | SIP2/OpenAthens |
| **PowerKnowledge Earth & Science** | Reference DB | OpenAthens |
| **Pronunciator** | Reference DB | OpenAthens |
| **ProQuest** | Reference DB | OpenAthens |
| **PsychiatryOnline** | Reference DB | OpenAthens |
| **Public Information Kiosks** | AV Vending | SIP2 |
| **Public Record Information Services** | Reference DB | OpenAthens |
| **Radiological Society of North America** | Reference DB | OpenAthens |
| **Recorded Books** | RBDigital | OpenAthens |
| **Sage Journals** | Reference DB | OpenAthens |
| **Salem Press** | Reference DB | OpenAthens |
| **Scholastic Library** | Reference DB | OpenAthens |
| **SocketMobile** | Barcode Scanners | Bluetooth |
| **Springer** | Reference DB | OpenAthens |
| **Star Micronics** | Receipt Printers | Bluetooth |
| **Taylor & Francis Online** | Reference DB | OpenAthens |
| **TBS** | MyPC<br>Papercut | SIP2 |
| **Teaching Direct** | Reference DB | OpenAthens |
| **TechLogic** | Selfcheck<br>AMH | SIP2 |
| **Teen Health and Wellness** | Reference DB | OpenAthens |

| Vendor Name | Product | Connection |
| --- | --- | --- |
| Tek Data | | SIP2 |
| Topaz | Signature Pad | USB |
| Tumblebooks | Reference DB | OpenAthens |
| ValueLine | Reference DB | OpenAthens |
| Wiley Online Library | Reference DB | OpenAthens |
| Wolters Kluwer Health | Reference DB | OpenAthens |
| World Book Online | Reference DB | OpenAthens |
| World Trade Press | Reference DB | OpenAthens |
| Zebra | Label Printer | USB |
| Zinio | | OpenAthens |

**Connection Methods**

SWAN permits access to the ILS server over several connection methods. These methods are not publicly accessible, and access must be requested by the library or vendor prior to the establishment of a contract with the 3rd party vendor. Please email help@swanlibraries.net prior to signing any agreements to ensure connectivity can be established for the requested services.

**Supported Third-Party Vendors**

The vendors listed on this page have an established relationship with SWAN and have proven compatibility with their integrated services. While SWAN can potentially support vendors not listed here, please reach out to SWAN prior to signing contracts with new third-party vendors to ensure compatibility with SWAN's systems and to discuss integration options.

**Product List**

Third-party vendors offer a number of services and hardware to supplement your library's operations. The services described on this page are the most common service integrations supported by SWAN.

**RFID Libraries**

List of RFID enabled libraries, along with installed hardware and vendors.

| Code | Library | Self Check | Self Check Vendor | Material Handler | AMH Vendor | RFID Data Model |
|------|---------|------------|-------------------|------------------|------------|-----------------|
| BLD | Batavia | Yes | Bibliotheca | | | 28560-2 |
| BDD | Bloomingdale | Yes | Bibliotheca | Yes | Bibliotheca | 28560-2 |
| BFS | Brookfield | Yes | Bibliotheca | Yes | Lyngsoe | 28560-2 |
| CRS | Chicago Ridge | Yes | Cen-Tec | | | 28560-2 |
| DGS | Downers Grove | Yes | Bibliotheca | Yes | Bibliotheca | 28560-2 |
| EPS | Elmwood Park | Yes | Envisionware | | | 28560-2 |
| GVD | Geneva | Yes | Bibliotheca | | | 28560-2 |
| GSD | Glenside | Yes | Envisionware | | | "Danish" |
| GHS | Green Hills | Yes | Bibliotheca | | | 28560-2 |
| LGS | LaGrange | Yes | Bibliotheca | | | 28560-2 |
| LPS | LaGrange Park | Yes | Bibliotheca | | | 28560-2 |
| MTS | Matteson | Yes | D-Tech | Yes | D-Tech | 28560-2 |
| OLS | Oak Lawn | Yes | Bibliotheca | | | 28560-2 |
| OPS | Oak Park | Yes | Bibliotheca/MeeScan | Yes | TechLogic | 15693/28560-2 |
| PTS | Prairie Trails | Yes | Bibliotheca | | | 28560-2 |
| SCD | St Charles | Yes | Envisionware | | | 28560-2 |
| WMS | Westmont | Yes | Bibliotheca | | | 28560-2 |

## User Groups

SWAN hosted meetings organized by topic of interest. Agendas, documents, and recordings for all SWAN meetings are posted for each group. All meetings using the meeting date links to the L2 Library Learning calendar. SWAN will host 75 user group meetings per year on average.

**Acquisitions Users**

Join us for a lively discussion of SirsiDynix Acquisitions. If you have topics for discussion or a tip to share please let us know. This meeting is primarily for current SirsiDynix Acquisitions libraries, but all are welcome. If you are considering using Acquistions in the future and are curious-feel free to attend this meeting.

**Book Club Users**

This gathering of SWAN Book Club Users will discuss programming, collection development, circulation practice, holds management, cataloging and all things book club! Creative solutions and methods of meeting demands for book discussion groups will be shared.

**Cataloging Advisory**

This group is a working group assigned with detailed review of data standards and testing of how those standards are applied throughout the consortium. Their work is presented to the entire membership at Cataloging Users meetings. Meetings are restricted to members due to size and logistical constraints in these working sessions.

**Cataloging Users**

Join us for a lively discussion of cataloging practice, including materials handling, serials, and review of cataloging standards. This is an opportunity to learn from colleagues and share effective cataloging techniques.

**Circulation Advisory**

The Circulation Advisory Group is a 9-member advisory group that meets quarterly. Meetings are held four times a year on the third Wednesday of the month. The Advisory Group members serve two-year terms on a rotating basis. Advisory Group members may be called to volunteer as members of strategic task forces. This group will take part in discussions led by SWAN and will bring forth resulting recommendations to the SWAN Executive Director.

**Circulation Users**

Join chair Peggy Tomzik and co-chair Lucas McKeever for a lively discussion of circulation processes, procedures, and software/application use related to circulation functions. This is an opportunity to

network with peers and share successes. Participants will provide tips on providing service efficiently and optimizing software.

**Discovery & User Experience Advisory (DUX)**

Discovery and User Experience Advisory members collaborate on both patron and staff facing interfaces for searching catalog data. This group is engaged in research activities related to user experience and are active participants in conducting research.

**E-Resource Advisory**

SWAN E-Resource Advisory works on improving access to e-content, including databases, e-books, e-audiobooks, and streaming. Advisory members are active participants in usability testing and user experience.

**ILL Users**

Join SWAN colleagues to review Interlibrary Loan processes, procedures, and best practice. The group meets 3 times/year.

**Membership Fireside Chat**

Monthly 1-hour virtual meetings for all library staff to attend for updates on projects, resource sharing activity, and to ask questions from the presenters.

**Outreach Users**

Join chair, Lynda Spraner from St. Charles Public Library in a quarterly exchange of outreach activities, tips and best practice in using the Symphony Workflows Outreach module, and networking with your colleagues.

**RFID Users**

RFID Users Group gathers bi-annually to share best practices and advice for libraries considering and implementing RFID. In addition, this group will be working on SWAN-wide standards to help provide consistent technology solutions.

**SWAN Annual Event Planning**

The SWAN Expo Planning team will meet in January, March, May and July to help plan the SWAN Expo Annual Membership Event. SWAN Expo is held in August.

**Technology Users**

SWAN Technology Users Group meets bi-annually for an update on trends in library Information Technology and IT projects that relate to SWAN.

# SWAN Training

Training listed for the six-month period of November 2021 through April 2022.

**SWAN Circulation/ILL Office Hours**

Join SWAN staff in open office hours to answer your questions on circulation and interlibrary-loan. This includes review of circulation/hold policies, OCLC WorldShare ILL and configuration questions, and handling exception cases.

**SWAN Cataloging Office Hours**

Join SWAN Bibliographic Services team for office hours. Bring acquisitions, cataloging, and serials questions for help problem-solving and brainstorming. The team will also share their tips and tricks.

**SWAN BLUEcloud Analytics Office Hour**

Join SWAN staff in open office hours for BLUEcloud Analytics. Bring questions, challenges, and examples you would like to pursue in this informal problem-solving and tips session.

**SWAN Academic & Special Library Consultation**

Special consultation and targeted topic discussions for SWAN Academic & Special Libraries. Each 2 hr session will include a component of training in discovery/electronic resources, technical services, circulation, and resource sharing. This gives us an opportunity to focus on topics of interest...

**SWAN Aspen Office Hours**

Join SWAN for our bi-weekly Aspen office hours. Bring your questions about all things Aspen and share tips and tricks with your library colleagues. Office hours are open to all staff.

**SWAN Aspen Kickoff Meeting**

SWAN libraries participating in the second training cohort for the Aspen rollout should attend this meeting. SWAN staff will cover everything you need to know about the rollout process, including the training schedule, library staff Aspen administration roles, and the configuration request form.

**SWAN Aspen Admin Training: Themes & Library Settings**

This training will cover: How to customize colors, logos, and fonts; adding hours & holidays; and adding links to your catalog menu. Who should attend: Library staff with the OPAC Administrator role.

**SWAN Aspen Admin Training: Browse Categories, Spotlights, & Adding Covers**

This training will cover: How to customize the home page of the catalog with highlighted collections, embed item lists into your website, and add item covers to items in the catalog missing covers or in need of a custom cover. Who should attend: Any library staff with Aspen Administration access.

**SWAN Aspen Admin Training: Placards & System Messages**

This training will cover: How to add system alerts, for a library closing for example, and placards to highlight e-resources and/or services in your search results. Who should attend: Library staff with the OPAC Administrator role, additional staff optional.

**SWAN Aspen Admin Training: Purchase Suggestions**

This training will cover: How to use Aspen's Purchase Suggestion form to manage purchase suggestions from your patrons. This training is optional - if your library chooses not to use the Aspen Purchase Suggestion functions, no one at your library needs to attend.

**SWAN Aspen Admin Training: Record Grouping**

This training will cover: Record grouping and cataloging functions in Aspen for SWAN Cataloging Library staff Who should attend: Library staff with the OPAC Cataloging role

# Tutorials & Training Resources

Listed below are SWAN created self-paced tutorials (using Articulate 360 software) and recorded training topics

**Acquisitions Training**

Acquisitions Overview (Webinar 80 minutes)

**Serials Training**

Serial Control (Webinar 80 minutes)

Demystifying Serials (Self-Paced Interactive Training 60 minutes)

Advanced Serials (Self-Paced Interactive Training 60 minutes)

Serials Call Number (Webinar 35 minutes)

**Cataloging Training**

Creating Pre-Cats (Webinar 75 minutes)

Creating Pre-Cats (Self-Paced Interactive Training 60 minutes)

Searching in WorkFlows (Webinar 75 minutes)

Working with Series (Self-Paced Interactive Training 40 minutes)

BLUEcloud Cataloging as a Work-from-Home Tool (Webinar 60 minutes)

OCLC Sponsored: Connexion Training (Self-Paced Interactive Training 60 minutes)

**Circulation Training**

Learn Circulation Basics (Self-Paced Interactive Training 75 minutes)

Circulation Basics (Webinar 38 minutes)

Learn Patron Management (Self-Paced Interactive Training 80 minutes)

Patron Management (Webinar 63 minutes)

Helpful Reports for Managing Circulation (Webinar 55 minutes)

Serving Homebound Patrons Using WorkFlows Outreach (Webinar 50 minutes)

Using WorkFlows in Offline Mode (Webinar 23 minutes)

Getting to Know Curbside Communicator (Webinar 40 minutes)


**eResources Training**

EBSCO Statistics (Webinar 50 minutes)

Article Search and EBSCO Discovery Service for Reference Support (Webinar 45 minutes)


**Interlibrary Loan (ILL) Training**

WorldCat Discovery V2: Member Update (Webinar 60 minutes)

Resource Sharing Overview for SWAN Libraries (Webinar 80 minutes)

ILL Boot Camp Series Training Collection 4 trainings

Completing Your ILLINET Traffic Survey (Webinar 10 minutes)

OCLC WorldShare ILL - Setting Up Groups & Deflection (Webinar 85 minutes)

OCLC WorldCat Discovery and WorldShare ILL Integration (Webinar 70 minutes)

Using OCLC Article Exchange for Electronic Copies (Webinar 55 minutes)

Requesting Items from SWAN Libraries (SHARE Illinois Sunsetting) (Webinar 45 minutes)

Book Club Kit Sharing: KitKeeper (Webinar 60 minutes)

OCLC Sponsored: WorldShare Interlibrary Loan (WSILL) Self-Paced Interactive Training 60 minutes

OCLC Sponsored: WorldCat Discovery Self-Paced Interactive Training 60 minutes


**Quarterly Billing Training**

Quarterly Billing Overview Check-In (Webinar 35 minutes)


**Reports & Statistics Training**

BLUEcloud Analytics Overview (Webinar 120 minutes)

BLUEcloud Analytics Advanced (Webinar 130 minutes)

BLUEcloud Analytics for Directors: Assessing the Collection (Webinar 60 minutes)

BLUEcloud Analytics for Directors: Circulation Activity & Trends (Webinar 60 minutes)

BLUEcloud Analytics for Directors: Overview (Webinar 45 minutes)


**Search & Discovery Training**

Aspen All-Staff Training Collection 4 trainings

Aspen Administration Training Collection 5 trainings

BLUEcloud Mobile App Administration (Webinar 50 minutes)

Using WorkFlows and Enterprise Search to Assist Patrons (Webinar 80 minutes)


**Reports & Statistics Training**

BLUEcloud Analytics Overview (Webinar 120 minutes)

BLUEcloud Analytics Advanced (Webinar 130 minutes)

BLUEcloud Analytics for Directors: Assessing the Collection (Webinar 60 minutes)

BLUEcloud Analytics for Directors: Circulation Activity & Trends (Webinar 60 minutes)

BLUEcloud Analytics for Directors: Overview (Webinar 45 minutes)


**Search & Discovery Training**

Aspen All-Staff Training Collection 4 trainings

Aspen Administration Training Collection 5 trainings

BLUEcloud Mobile App Administration (Webinar 50 minutes)

Using WorkFlows and Enterprise Search to Assist Patrons (Webinar 80 minutes)


**Member Updates**

Aspen Cohort 1 Kickoff Meeting (Member Update 60 minutes)

Symphony/Workflows 3.7.1 Upgrade (Member Update 30 minutes)

SWAN Notice Dialer June 2021 (Member Update 50 minutes)

Aspen Update April 2021 (Member Update 50 minutes)

SWAN EBSCO Databases Group Purchase Update July 2020 (Member Update 40 minutes)

Symphony/WorkFlows 3.6.2 Update (Member Update 35 minutes)

Getting Ready for Patron Record Purge December 2019 (Member Update 35 minutes)

Enterprise 5.0.1 Update (Webinar 20 minutes)

**Panels & Presentations**

Panel Discussion: Diversity Audits (Webinar 105 minutes)

Panel Discussion: Library Lockers (Webinar 60 minutes)

SWAN eXpo 2020 Web Series (Training Collection 9 trainings)

Panel Discussion: Fine Free (Webinar 125 minutes)

**Migration Training**

Directors' Orientation for SWAN Members (Webinar 45 minutes)

SWAN 100 Migration Training (Training Collection 22 trainings

New 19 Training Archive (2018) Training Collection