

# Consortial Reports

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## CARLI/I-Share

No report.

## Cooperative Computer Services (CCS)

- Database Management Committee is analyzing activity data to make recommendations regarding standardized holds policies.
- CCS is deactivating the branch used by SHARE libraries for institutional holds on January 1. All active users have been/will be contacted.
- Debra Wischmeyer has added a Vega Discover landing page for library staff: <https://www.ccslib.org/training/vega-discover-development-partner-program> (consortia staff should be able to access the password protected elements of the website. Contact Rebecca if not)
- CCS upgraded to Polaris 7.0, which includes adding most cataloging functionality to Leap, the web-based staff interface.
- CCS staff are investigating econtent use patterns of patrons. Econtent integration in the catalog has been a regular source of frustration for staff and seemingly rarely used by patrons in both Symphony and Polaris. If it is not a valuable source of discovery for patrons, CCS may consider changing integration procedures.
- Records were submitted to NCOA for interested libraries and CCS staff designed a cleanup workflow to help reduce manual updates.
- CCS Web Reports now using L2 logins for added security.

## Pinnacle Library Cooperative (PLC)

- Pinnacle continues to work with Innovative as development partners for Vega Discover. Our instance is now connected to our production database and we are testing functionality for individual libraries. We plan to soft launch the new catalog with staff in January, before introducing it to patrons sometime in the Spring.
- In December, we launched a new web-based report module that we're calling "WebReports." WebReports provides library staff access to over 60 custom Circulation, Tech Services and Collection Development reports, right from our consortium's intranet. As many of our libraries are moving away from the traditional desktop client and toward the web-based version of the ILS, this interface provides staff access to their frequently used reports without having to connect to the remote desktop environment.
- In January, we will be re-posting the Member Services Librarian position. The position has been vacant since early Summer and has proven difficult to fill this time around.

## PrairieCat

- PrairieCat signed a contract with Innovative to implement their new Vega discover platform when it is ready for consortium use. They currently target consortium functionality to be ready in January. PrairieCat will bring it live when it meets our requirements. We continue to be a development partner for their Vega patron engagement products, and staff and members participate in regular meetings with their developers.
- We are currently awaiting quotes from Innovative on costs to bring North Chicago Public Library into the consortium. They are targeting the project to kick off after their fiscal year, which is in April.
- Lostant Community Public Library continues to move forward with adding materials to the database, as does Putnam County Primary School.
- We have hired a new Systems Coordinator to replace Jeff Sullivan, who retired in July. The new staff member will work out of the Bolingbrook office (although all staff are teleworking the majority of their time at this point).
- In October, we held our fourth Resource Sharing Summit, again facilitated by Amanda Standerfer. This year, we concentrated on the possibility of group purchases beyond the ILS, and how that could be accomplished in our consortium to allow members to participate who wished to. Discussion is ongoing in our Resource Sharing Committee using the recommendations gleaned from this meeting.

## Resource Sharing Alliance NFP (RSA-NFP)

- RSA's new support website continues to be built out. We're working with our membership to design a multi-faceted navigation scheme that works for new staff, existing staff, and those that know exactly what they want. RSA instituted a new documentation policy to describe documentation types, who develops and approves them, and at what level in the stack they exist in. RSA staff has begun reviewing and recreating all our documentation to ensure we're using the new standardized terms and to pair documents on the same subject together. Our current support site holds all policies in one place, standards in another, guides, cheat sheets, training, in their own areas, etc.
- RSA had three libraries receive automation grants from RAILS this fall. New Windsor PL is a new library joining RSA. Beardstown CUSD is adding their Elementary school to RSA, and Farmer City PL is moving from being a Union Listing library to a Basic Online library. We will begin working with the new libraries to set up parameters and schedule cataloging training in January. Our system is being configured for the new branches in December.
- One of our catalogers has moved on to a new job where they can work with the public again. RSA had 10 applications for the posted position; we'll be doing interviews in early January in hopes of filling the position.
- Our Cataloging department made some internal operational changes to help streamline processes and make duties more predictable during the week. We've also instituted changes in the way we organize the incoming materials to eliminate individual cataloger staff queues and

just work from one RSA-wide incoming requests queue. So far the internal changes have been effective and have been well received.

- We revised our single report request form into four separate forms. This simplifies the forms and allows for easier inputs for simple one-off reports, rerunning a missed report, or stopping scheduled reports. Adding a new scheduled report remains a somewhat complicated form due to the various factors that could be covered in a new report.
- RSA updated our Enterprise and Symphony servers with the latest SirsiDynix releases. These bring mostly bug fixes for administrative staff. The main Enterprise enhancement is something RSA has requested for years; facets now correctly limit their displays to the search limit currently in place. Changing search limits inside an existing search now also correctly updates the facets with the new counts and data returned from the updated search limit.

## Rock River Library Consortium (RRLC)

No report.

## System Wide Automated Network (SWAN)

### Aspen Discovery

SWAN has worked on a transition from the existing Enterprise Discovery OPAC to Aspen Discovery. We spent about 1 year working on Aspen configuration and providing feedback to our support vendor ByWater Solutions. SWAN staff held weekly meetings with ByWater's Aspen product manager and lead software developer. We have completed the setup for all 100 libraries unique catalogs and e-content, and are in the process of training library staff on new and exciting features that never existed prior.

Based on the experience of switching 7 pilot libraries and the first group of libraries that switched over within the first cohort, SWAN has refined its resources and plan for moving from one discovery platform to a new one. This is shared below for other resource sharing consortium to consider within switching your own platforms.

### **Aspen Cohort 2: outline of the kickoff meeting on January 10, 2022**

Aspen resources created and provided by SWAN

- [Support site documentation](#)
- [Aspen All-Staff Training](#)
- [Patron site](#): Patron-facing Aspen instructions
- Aspen administration logins & roles
- Directors have access to staff logins
- Logins grant access to Aspen Administration
- [Review the permissions](#) that will work best for your staff
- Assign at least an OPAC Administrator role and give the OPAC reference to any staff who help patrons place holds.

Trainings: pre-recorded video trainings and live online trainings for Aspen administrators

- [Aspen All-Staff trainings](#)
- Dates for [Aspen Admin trainings](#)
  - Just library staff with OPAC Public & Tech Services, OPAC Cataloging, or OPAC Administration permissions
  - Admins should view all staff trainings before starting admin trainings
- Hosted Aspen office hours for drop-in questions
- Reporting issues

Aspen forum: Library staff share questions and connect other library staff in the SWAN Community Forums <https://forums.swanlibraries.net>

Fines Payment options: SWAN sponsored online payment solution departs from existing Enterprise Discovery online payment

- Library's PayPal account
- SWAN PayPal account (reconciled for library's quarterly)
- No online fines payment

E-resources: library e-resources configured in Enterprise are already in Aspen with the exceptions of Freegal and Biblioboard

- Overdrive
- Hoopla
- Axis360/B&T
- Cloud Library
- ESBCO Discovery Service (Article Search)

"Sideloaded" e-resources: SWAN supports sideloading where MARC records for e-resources are added directly into Aspen. Currently just available for:

- Kanopy
- Freegal
- Only simultaneous-use resources can be sideloaded

Open Archives: libraries with a digital asset management system (DAMS), SWAN can add those digital archives, most likely CONTENTdm or the [Illinois Digital Archive \(IDA\)](#)

Go Live: soft Launch

- Aspen is available to library patrons, but use will be low until library takes steps towards final go live.

Final Go Live: Tuesday March 8th

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- Libraries can continue to use the Enterprise catalog through the end of April. We recommend giving patrons at least a month of overlap.

### Library engagement platforms

SWAN issued a whitepaper on its research into an emerging area of library software, which is a form of data driven marketing.

- Web-based administration
- Templates for email marketing, targeted at specific patron groups, i.e., segments
- ILS integration means some initial harvest of users & ongoing API connection
- Data integration with other vendors possible (OverDrive)
- Webpage code integrated into library website

The whitepaper provides an overview of the platforms provided by Patron Point, OrangeBoy Savannah, OCLC WISE, and SirsiDynix Community Engagement Platform. The strengths and weaknesses of these software platforms are outlined, along with some recommendations on the benefits of a library consortia deployed version for its member libraries with centralized data harvesting and support.

You can find the whitepaper on SWAN's Support site under the Quarterly meeting held on December 2, 2021.

[https://support.swanlibraries.net/sites/default/files/meeting/21\\_12\\_02/82154/packet2021-12-02.pdf](https://support.swanlibraries.net/sites/default/files/meeting/21_12_02/82154/packet2021-12-02.pdf)

### SWAN Learning Management System – launch in January

We have purchased a subscription to Inquisiq to manage our online courses and establish a curriculum of training for library staff to gain expertise on SWAN's library services platform. This Learning Management System (LMS) will track learner progress, provide library managers with learner reports, issues certificates of completion, and enable learning transcripts. Our initial launch will include all the current self-paced learning modules developed by SWAN staff over the past year. Two staff are busy adding more short courses.

Learners will be able to self-register. Registrations must be approved by a SWAN administrator, but once approved, learners can enroll in any course offered through the SWAN Course Catalog.

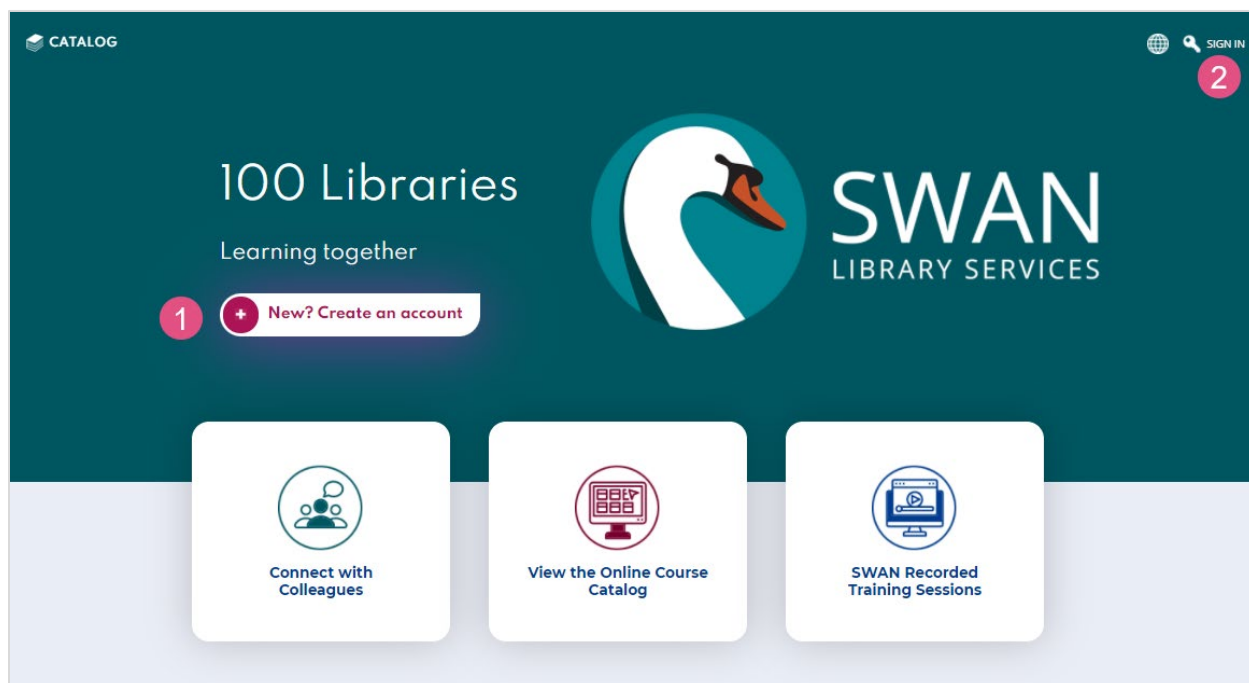
We will be starting with a couple of pilot libraries, Elmwood Park and Downers Grove, in December to provide some feedback prior to the official launch. By launch date, we expect to have about 8 courses covering cataloging, circulation, patron management, and serials.

The following screen captures provide a sneak preview of what's in store.

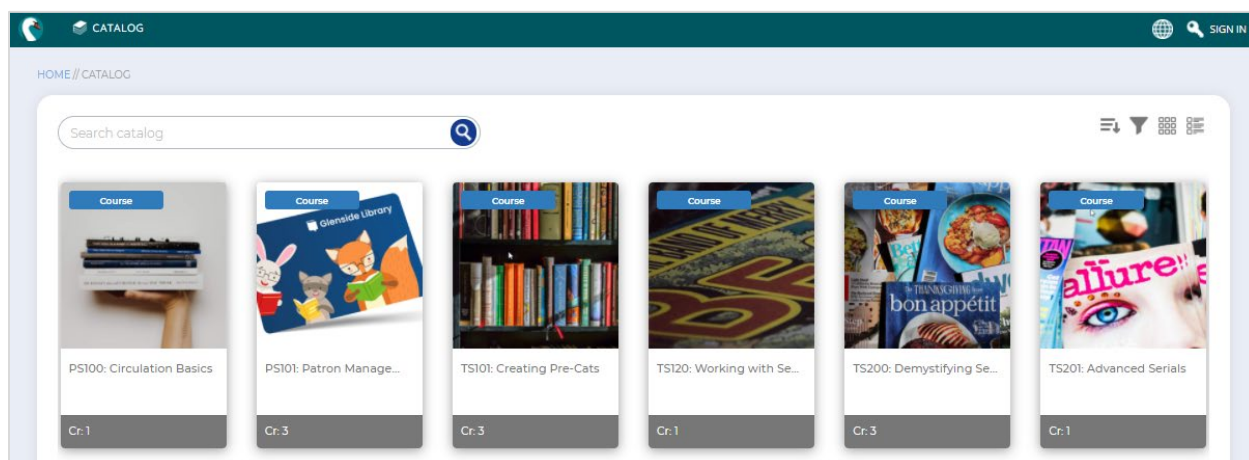
Users will follow links from the learning management home page by:

1. First time – Create an account

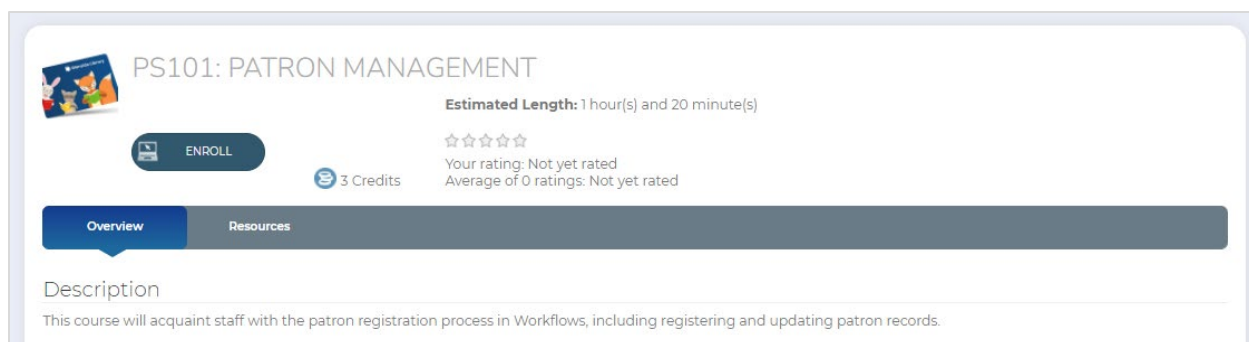
2. Once approved – SIGN IN



A sneak peek at the catalog of courses:

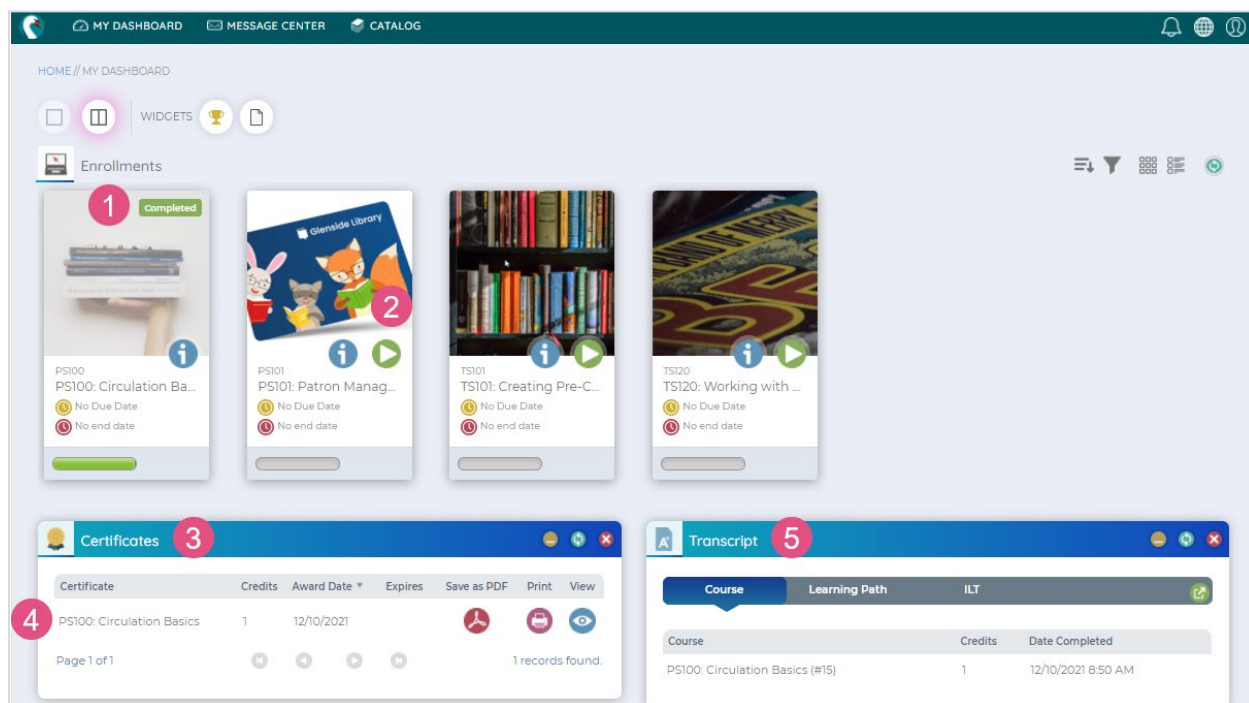


Details and resources for the course can be reviewed. If interested, the learner can enroll.



Once enrolled, learners can manage their courses through their learner dashboard.

1. Completed courses are shown
2. Play button for courses to continue learning on those not yet completed
3. Certificates of Completion
4. Save as PDF, print, or view specific Certificates
5. Transcripts provides a full list of all completed courses, even those not offering certificates of completion



Look for announcements in early 2022.