



Date: July 22, 2014
To: SWAN Member Libraries
From: Aaron Skog, Executive Director
Re: SWAN Migration Whitepaper Recommendation – Vote Results

On July 1st, the SWAN Board met to review whitepaper recommendations for certain settings in the new SirsiDynix ILS, as outlined by the SWAN staff. These recommendations were given in order to assist SWAN in creating the optimal patron experience possible with the new ILS features, and would require potential change to current settings at SWAN member libraries. Recommendations were delivered and discussed by the SWAN membership at the July 8th Committee of the Whole meeting, with member feedback received by the Board at that time. On July 16th, the SWAN Circ Advisory Group met to weigh in on the recommendations as well, and provided their thoughts and a formal recommendation to the Board via group vote.

On July 18th, the SWAN Board voted on the whitepaper recommendations. The results of votes on the five recommendations are outlined below. Please note the Board policies approved in some cases differ from the initial recommendation.

#1 Set ILL Lending/Borrowing at Home Library

Recommendation: Opt for the Symphony software default setting & allow the borrowing library rules to define the circulation rule, instead of the lending library.

Result: The SWAN Board resolved that the ILL Circulation in SirsiDynix be set to the borrowing library as recommended.

What does this mean to SWAN libraries?

As noted in the whitepaper recommendation, this will be a popular benefit to home library patrons as part of the new system in April 2015. During the Committee of the Whole discussion and feedback afterwards to the SWAN Board, the overwhelming consensus was to endorse this configuration. Questions and answers will be provided as we move forward within the training periods of the migration.

#2 Consolidate Circulation Configuration

Recommendation: Create uniformity for the optimal patron experience – set all grace periods to two days, allow unlimited renewals, and provide alternate loan periods. Have the SWAN Circulation Advisory Committee make a final recommendation to the SWAN Board for approval in August 2014.

Result: The SWAN Board resolved that consolidated circulation be set to a minimum of two renewals, with exceptions made for library-designated collections, and that grace periods of either zero days or three days will be allowed in the new system.



What does this mean to SWAN libraries?

The final decision was adjusted to the following:

- **Exceptions for library-designated collections:** this could include “hot copies” collections, or special collections. SWAN will work with libraries on a case-by-case basis to accommodate these.
- **Grace periods:** these allow a fine to be automatically waived by the Symphony ILS during a set number of days, which will be either 0 or 3 days.
- **Alternate Loan Periods:** this Symphony ILS feature will not be used for the go-live, but explored at a later time.
- **Renewals:** patrons will have the option to renew items a minimum of two times or more depending on the library choice. The use of the “Unseen Renewal” described in the whitepaper was deemed a confusing option for patrons and will not be configured at this time.

Loan period of one week, two weeks, etc. are not being consolidated, nor was this part of the original recommendation. Fine rates will be migrated as they are currently configured in Millennium.

#3 Create Uniformity in the Way that Member Libraries Catalog Volumes

Recommendation: Have the Bibliographic Services staff set the standard for data entry for multi-volume records for all cataloging libraries and non-cataloging libraries in SWAN.

Result: The SWAN Board resolved that uniform cataloging of volumes will be set.

What does this mean to SWAN libraries?

The details on the start date for the process will be provided over the next several months. Please note the SWAN Board made sure not to set the new policy with a start date, leaving this date to the discretion of the SWAN consortia staff. The goal is to have this uniform volume ready for the new system software for the April 2015 go-live.

#4 Recommendation: Standardize Treatment of Boxed Sets

Recommendation: Have all boxed sets cataloged uniformly by SWAN libraries starting January 1, 2015. Boxed sets will circulate for two weeks to allow patrons time to view the material. This applies only to new sets acquired by SWAN libraries. Existing collections will not have to be repackaged or re-cataloged (unless a library chooses to do so).

Result: The SWAN Board resolved that boxed sets will circulate as a set, with a minimum checkout time of two weeks.



What does this mean to SWAN libraries?

Boxed set includes television series, music collections, etc. The final decision accommodates the option for libraries that wish to circulate beyond two weeks, e.g. three week period. Some questions came up about BluRay/DVD combo packs, which SWAN will continue to allow and provide bibliographic records for within the system.

The details on the start date for the process will be provided over the next several months. Please note the SWAN Board made sure not to set the new policy with a start date, leaving this date to the discretion of the SWAN consortia staff.

#5 Pick Up Anywhere for All Public Libraries

Recommendation: All public libraries in SWAN should allow patrons within the OPAC to select a location other than their home library for pickup of materials.

Result: The SWAN Board resolved that SWAN libraries will choose to opt-in or opt-out to Pick Up Anywhere.

What does this mean to SWAN libraries?

The final decision was to make this optional for SWAN libraries. The feedback we received was that some libraries that are not certain of the impact on services at their libraries. SWAN will include this option to opt-in within a future survey as we continue with the software migration and configuration. We will outline the possible impact and how it will be monitored over time.