

**Date:** August 7, 2015  
**To:** SWAN Member Libraries  
**From:** Kate Boyle, SWAN Member Services Manager  
**Re:** Member Services Update

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I just thought it would be a good time to send out a few announcements, reminders, and hints.

#### New Tech Services Department card (available upon request)

We have had a number of requests for a Tech Services Department card for materials that are currently housed in that department for repairs, etc. Please note that you all should currently have a REPAIR user, an ONORDER user, and an INPROC user. If you feel that you would benefit from having another, unique Tech Services Department card that will assign a current location of TECH\_DEPT, we can configure that for you. When materials are checked out to a user with a profile of TECH\_DEPT, the following will be true:

- Items will display with a current location of TECH\_DEPT.
- The due date will be never.
- Items will not be holdable.
- Bills will not generate for these items.
- The “total charges” counter in the item record will not increment.

If you currently have a Tech Services Department card and want the above statements to be true for that user account, please send an email to [help@swanlibraries.net](mailto:help@swanlibraries.net), and we will give you access to the TECH\_DEPT user profile. If you do not have a Tech Services Department card but would like one, please send in those requests as well.

#### Unique Management Services announces Small Balance Accounts

Unique Management Services announced at the recent meeting held on July 16th that they have created an addition to their materials recovery/debt collection service. This new service is referred to as “Small Balance Accounts”. To be reported to Unique, the outstanding balances for these patrons should be between \$10.00 and \$24.99. When the patron is reported to Unique, there is a \$5.00 fee posted to that patron record. However, the charge to the library is only \$2.95. Please call Edlyn (630.734.5161) for more specifics, if you should have any questions.

#### Patron PIN reminder

When we migrated to SirsiDynix all patron encrypted PINS were reset to the last four digits of the patron’s phone number. For patrons registering after migration, the Symphony software now assigns patrons a randomized four digit PIN. Patrons can either change their PIN or if they have forgotten their PIN request a new one by logging into “My Account” in Enterprise.

#### ILL-Libs requests

Holds placed on SWAN by any of the SHARE library consortia members or our Internet Access libraries have a pickup of ILL\_LIBS. Trapping a hold with a proposed action of “Route/Transit to ILL\_LIBS” requires additional processing. Select “Put item intransit” and note the requesting library/User ID. Complete routing information can be obtained from the Display User wizard – Address Tab ( if not displayed on the screen). Use an ILDS label when appropriate. Use a RAILS routing slip for those libraries that have direct delivery or a drop off point. As a reminder, any materials with an ILL\_LIBS pickup need to be checked out to the requesting library before it leaves your library. Please include the due date on the routing slip.

### Auto-generated RAILS delivery labels

The Oak Lawn PL and Prairie Trails PLD are in the process of testing a new auto-generated delivery label. At present, this label has a scannable barcode across the top. This was created to test the auto sorting of materials at the delivery sort center. However, some patrons have confused this barcode with the item barcode when using self-checks. We would suggest that libraries obliterate this delivery barcode when you place materials on your open hold shelves. We have alerted the label designer that this is confusing and needs to be redone.

### SVA robo calling update

Just a brief update, SVA is being tested presently at Woodridge PL. Once testing is complete we will expand the program to other libraries.

### Charge History

Some patrons have noted that their Charge History in Enterprise has stopped displaying their most recent history. This is due to limits in the amount of data Enterprise will pull for History from the server. If your patrons want their current Charge History to display, you will need to request that we purge some of their older History. Please assure your patrons that the current data is still being collected and will reappear once some old data is purged. Please open a ticket with the SWAN office at [help@swanlibraries.net](mailto:help@swanlibraries.net) and provide us with the patron name and User ID and the dates that we can purge (i.e. purge 2008 charges, purge 2009-2011 charges etc).

### Hold Pickup Notices

We are getting closer to a resolution on hold pickup notices not being received by patrons via email. When we check the report logs, we find that 98% of the time the notice was indeed sent. But we are very seriously pursuing the 2% that did not receive their notice. Please keep sending us tickets with any specifics you may have on this behavior.

### Opening a ticket

While we are on the subject, when submitting a ticket to [help@swanlibraries.net](mailto:help@swanlibraries.net) please be as specific as possible and report incidents as quickly as possible. We can never have too much information. And thank you to all of you that have used the ticket system.

### User Registration – duplicate checking

At present, the behavior allowing staff to check for duplicate records using the User Registration wizard is not enabled. If your library would like this behavior enabled, please complete the following form. You can choose up to eight fields to assist you in searching for a duplicate card before creating a new user. The following form should be submitted by the Circulation Manager/Supervisor.

If you should have any questions, please call our office at 630-734-5153 or send an email to [help@swanlibraries.net](mailto:help@swanlibraries.net).

Check Duplicate User in the User Registration wizard

Library Name \_\_\_\_\_

Library Contact person \_\_\_\_\_

Position \_\_\_\_\_

Please select **up to eight fields** to use in searching for duplicate patron records during User Registration.

User Duplicate Searching

Duplication checking:  on  off

<input type="checkbox"/> Birth Date	<input type="checkbox"/> Company
<input type="checkbox"/> Comment	<input type="checkbox"/> Daytime phone
<input type="checkbox"/> Email	<input type="checkbox"/> Group ID
<input type="checkbox"/> Home phone	<input type="checkbox"/> License#
<input type="checkbox"/> Name	<input type="checkbox"/> Note
<input type="checkbox"/> Phone	<input type="checkbox"/> Social Sec.#
<input type="checkbox"/> Staff	<input type="checkbox"/> Street
<input type="checkbox"/> Student ID	<input type="checkbox"/> User Group
<input type="checkbox"/> Web Authentication	<input type="checkbox"/> Work phone

Your completed request form can be scanned and sent to [help@swanlibraries.net](mailto:help@swanlibraries.net) .

If you prefer to send by fax, send to 630-734-5056.