**Date:** April 9, 2015
To: All Staff, SWAN Member Libraries
From: Kate Boyle, SWAN Member Services
Subject: Migration Memo 18: Circulation update

Well, here we are only days from Go-Live. Of course, there are a few reminders we want to send out regarding Circulation and Acquisitions.

__Reminder about Offline__- Every library that is open must use Workflows Offline to circulate and renew items to their patrons during Go-Live migration weekend. Migration weekend is Saturday, Sunday, and all day Monday (April 11th-April 13th).   On Monday, April 13th at close of business you must login to the Production server (10.120.131.25) to upload your Offline Circ files.   The upload is automatic when you login to the Production server. The file runs in the background.
Remember when you login at the end of the business on April 13th *__to upload your files__* you should not have the "Operate in Offline Mode" checkbox checked.

☐ Operate in Offline mode
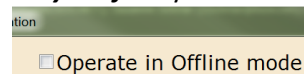
Watch the SWAN website on Tuesday morning for a banner telling you that SWAN is up before you log into Workflows.

__CPL and Non-SWAN RB holds__ – In order to block Chicago Public and Non-SWAN RB patrons from placing holds on the OPAC (Enterprise), we had to block their access to holds on all SWAN materials in both the OPAC and Workflows.   There was not a way to restrict them just from placing holds on the OPAC. For those libraries that have placed holds in the past for these patrons, this wouldn't be a problem if we could just override the block in Workflows, however, we can't. If one overrides the block in Workflows, it allows any item attached to the chosen title to be eligible to fill the hold, regardless of location, itype, and any restrictive policies.   As a result of these behaviors, we are asking those libraries that place holds for Chicago Public and Non-SWAN Reciprocal Borrowing to reconsider their policy. If you want to place holds for Chicago and Non-SWAN patrons only place "copy" holds on your own material with a pickup of your library only.

__Circulation Reports and Email Aliases__ – Beginning on Tuesday, April 14th libraries will begin using two Circulation Reports. Both of these reports will be run centrally by SWAN staff. Due to the fact that a number of SirsiDynix reports will be delivered by email you will need to verify what email accounts are aliased by your library before April 14th. This can be checked on the SWAN website by your Director or Asst. Director at https://support.swanlibraries.net/alias-emails . Each SWAN library can have 3 emails used as aliases. Please make certain all emails listed for your library are current (some of them are very old) and that one of them is accessible to the Circulation department in the library every day. You may need to create a new email account for the Circulation Department (for example:mpscirc@gmail.com) to make certain multiple staff members can access the account. If you create a new account make certain to share the account and password with all appropriate personnel.

The first report – "Clean Holds Shelf" – is scheduled to be run automatically by SWAN staff overnight. The report is similar to the Clear Holds Shelf report we ran in MilCirc. The report is sorted by library and automatically emailed to your generic aliased email account overnight.
The second report – "List Onshelf Items with Holds"- will be run twice a day once overnight and again at noon. This report is sorted by library and accessed by the libraries using the
"Onshelf Items" wizard under the Holds wizard group in the Circulation Module.

Onshelf Items
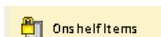
This is the "pull" or "pick" list of items to be retrieved from your library shelves and checked in to generate a hold.   Please refer to the SWAN website under SD Circulation, for step by step instruction on how to process the list of items generated by the "Onshelf Items" Wizard (this crib sheet will be available on Friday, April 10th).

Website Updates - There have been a number of updates to the SWAN website this past week.

Codes, policies, and mapping :   https://support.swanlibraries.net/documentation/sirsidynix
SD Circulation Wizard help sheets, Circulation crib sheets, SD terminology, and PowerPoint tutorials and
presentation pdfs :   https://support.swanlibraries.net/content/circ-documentation
Interlibrary Loan processing: https://support.swanlibraries.net/content/interlibrary-loan-processing
SD Acquisitions: https://support.swanlibraries.net/content/sd-acquisitions
SD Serials: https://support.swanlibraries.net/content/sd-serials-0

Notice preference: Notice preference does matter.   Please check with your patron as you interact with them as to their preference. If your patron had an email in their account, their preference has been set by default to "Email". However, if your patron wants to receive text messages instead, please review the "SMS Contact Info tab" with them and then set their Notice Preference to "Text".   Anyone that did not have a Notice Preference in Millennium and did not have an email address in their patron record, has had their Notice Preference set to "Phone" by default.   This will enable SVA "robocalling" for them.

Initially, we will be running a pilot on the SVA robocalling system with one library. Until the point that the pilot program is completed, we will be printing and mailing notices for anyone that has a Notice Preference set to "Phone". However, Hold Pickup notices will need to be manually called for anyone with a "Phone" Notice Preference in their record.

Language preference: While you are reviewing notice preference with your patron, please check their language preference. We will shortly be sending notices via email and text in Spanish and Polish. Our intent is to add more languages as we move forward.   Feel free to add any language your patron requests to be considered in the future.

Statistics - For the month of April - as stated previously we will be running the first two weeks of SWAN statistics on Millennium. These will be uploaded to the SWAN website as usual. The reports you normally find on the Report Server will be available on the Report Server probably around April 21st. The statistics for the last 3 weeks of April beginning on Go-Live date April 14th, will be available shortly after the end of the month. These will be run on SirsiDynix.

If you should have any questions, anytime (now, over the weekend, during Go-Live, or in the future) please send an email to help@swanlibraries.net with as much detail as possible, including screen shots if you think that would help explain your question. Emails are screened immediately and expedited to the appropriate staff member. Of course, you can call the main support number 630-734-5153 if you need to speak to a person, just be aware of the fact you may end up in a staff member's voicemail.

Good luck to all as we embark upon our mutual adventure. I know all of you have put in hours preparing for the transition to SirsiDynix and this will eliminate all but a few hiccups.   Thank you for all your efforts in making this migration as seamless as possible for our patrons.