

Consortial Reports

CARLI/I-Share

- Ex Libris Alma has been chosen for our next I-Share platform! Alma will replace Voyager and SFX in 2020 for the 91 institutions that are part of CARLI's I-Share resource sharing system. We look forward to Alma helping CARLI extend and expand the resource sharing and collaborative programs that our consortium has offered our members for almost 40 years.
- On November 6, 2018, CARLI held its annual meeting. The presentations from that meeting can be found at <https://www.carli.illinois.edu/carli-annual-meeting-presentations-and-pdfs-now-online>.
 - Highlights include a report on I-Share Next; the IMLS Laura Bush 21st Century Librarian Grant, "CARLI Counts"; and Committee and Task Force Reports for the year.
 - At the meeting, key reports were distributed:
 - The updated "Value Graphics"
<https://www.carli.illinois.edu/sites/files/files/FY2018ValueGraphics.pdf>
 - The Strategic Priorities and Annual Report
<https://www.carli.illinois.edu/sites/files/governance/2018CARLIAnnualReport.pdf>
- Cohort 1 of "CARLI Counts: Analytics and Advocacy for Service Development," a grant project funded by IMLS, will hold their first in-person session at the I-Hotel in Champaign in February. Forty-eight CARLI institutions will be participating in Cohort 1.
- CARLI will hold a New Directors Institute on May 15–16, 2019 at the CARLI office in Champaign. The CARLI Program Planning Committee is currently working on the agenda for the institute.
- Don't miss any CARLI news! You don't need to be a CARLI member to sign up for our Announce email list; it's open to all: <https://carli.illinois.edu/mailman/listinfo/announce/>

Cooperative Computer Services (CCS)

- Morton Grove Public Library will go live with CCS the week of January 14. Offline for all CCS libraries will begin on January 11. Data will be loaded and indexed, followed by a bibliographic deduplication and reindex. The bibliographic deduplication process could take up to 24 hours. CCS has worked with Innovative Interfaces to provide ongoing, but limited, access to the public catalog and SIP authentication during downtime.
- The Governing Board will vote on Indian Trails Public Library District's request for membership on January 23.
- The Long Range Planning Committee will interview consultants on January 23 as part of our evaluation of our governance structure. Our goal is to recommend a structure to the Governing Board in September 2019 for implementation by July 1, 2020.

LINKin

- No report

Northern Illinois Cooperative (NIC)

- Preparation for NIC's migration into PrairieCat is continuing smoothly. The implementation team of staff members from the libraries, PrairieCat, and Innovative continue to meet monthly. PrairieCat's name for the NIC library group is Northern8. Training sessions for staff are planned for late winter/early spring of 2019 with a planned go-live date in mid-May.

Pinnacle Library Cooperative (PLC)

- No report

PrairieCat

- PrairieCat continues to grow. We recently added holdings for Byron CUSD #226, which has rejoined PrairieCat as a Union List member. Training is currently underway for Byron staff.
- We are also in full swing with our Northern8 project. All eight NIC member libraries will join PrairieCat, with a go-live date slated for the week of May 20, 2019. Work is proceeding with the Northern 8 implementation team, PrairieCat staff, and Innovative migrations staff.
- In addition, PrairieCat has filled our open Senior Systems Specialist position. William Wilson joined us on December 3, 2018 at the Coal Valley office. Another new staff member, Melissa Landis, will join the Bolingbrook staff on January 7. Melissa will fill the Library Systems and Data Coordinator position that was vacated by Gail Lien's retirement at the end of December. Melissa is a long-time PrairieCat member and has been very active on several committees. We are happy to welcome both new staff members to the PrairieCat team.
- Our website redesign is nearly complete, and our migration of documents is ongoing. Look for a launch announcement, complete with our new logo, in the near future.
- PrairieCat recently signed a contract to implement ProQuest's new Syndetics Unbound enhanced content in our Encore catalog. The new features will roll out soon.

Resource Sharing Alliance NFP (RSA-NFP)

- RSA finished the migration of two more libraries. We continue to work with three more libraries who are still in the process of joining RSA.
 - Prairie Creek Public Library District in Dwight is fully integrated.
 - Neponset Public Library is fully integrated.
 - Flanagan Public Library District is mostly finished with cataloging.
 - Ransom Memorial Public Library in Altona is cataloging.
 - Williamsfield Public Library District is cataloging.
- RSA's new Member Services Supervisor, Anna Hutson, started at RSA on October 15, 2018 and officially took over on January 1, 2019. The previous Member Services Supervisor, Martha Troxell, retired at the end of December. Martha had been with RSA since 1999 and was the last person with institutional memory prior to 2005, when Kendal Orrison became Executive Director.
- We have finally filled, after a couple rounds of interviews, our Senior Cataloging and Database Specialist position. Jane Bradbury will start on January 9. This will bring RSA back to the full current FTE. RSA has several new staff members who are currently in training and will continue to do so for the foreseeable future.
- In July 2019, RSA will add another full-time cataloger position and a user experience position to our Member Services department. We have begun revising all RSA's job descriptions to make them more accurately reflect what staff currently do and offer a better indicator of what they will be doing in the future.
- RSA's FY2020 budget received a clean-sheet rework and redesign to better allow member libraries to understand the true costs of running the consortium. It also allows the RSA board to make better decisions as they understand the data better. Our efforts to rework our membership levels and fee structure required a better base document to work from. Member libraries will receive additional information about their per-library support grant amounts in FY2020 to better inform their boards and school administrators of the true overall cost of their RSA membership.
- RSA staff continue working on several large projects, two of major note for this quarter. We are currently configuring the new BLUEcloud Mobile app for all our libraries. This project has required a lot of work, as each of our 145 members have many separate bits to configure. We could have the

app just search the entire catalog by default, but this doesn't serve our patrons' needs due to our size and makeup. We're having to manually set up a lot of new policies and search limits.

- The other major project revolves around a long-term circulation map revision. The circ map is being completely reworked, library by library, and we expect another six to nine months of work on it. We've already removed about 20% of the over 4,000 lines of circ map policies. We expect to remove an additional 50% or so over the next year, with a target of about 1,900 circ map lines in total at the end of the project. The new capabilities in Symphony allow item type, library, and user profile grouping for a single circ rule. This change has the additional upside of fixing per-item-type checkout limit issues we've encountered over the years. After libraries have their circ maps reworked, patrons will have to learn to live with DVD/Blu-ray checkout limits that actually limit correctly across multiple item types instead of separate limits per item type (we have over 30 item types for DVD/Blu-rays).
- RSA's cataloging team continues to work through a major backlog due to staffing shortages for the past eight months. They have slowly reduced the overall backlog and have most cataloging request queues under two weeks again. They are looking forward to the new staff members in 2019 to help them get fully back on track. Fixing the backlog allows additional services like brief record visits, catalog training visits, and more to restart as staff time frees up.
- Finally, RSA staff are starting to move our help desk and customer relationship management (CRM) functions into Salesforce. This will allow us to build a single place to store our institutional knowledge, site visits, library and staff member questions, tickets, and more. This type of information is not easily accessible at the moment and mostly lives in the heads or individual email accounts of RSA staff.

Rock River Library Consortium (RRLC)

- At our December meeting, the members approved the following agenda items:
 - Membership requests from Milledgeville Public Library and Rock Falls Elementary School District #13 (Dillon Elementary School, Merrill Elementary School, and Rock Falls Middle School)
 - RDA conversion to the database in December
 - Using the RAILS FY2020 grant to offset 10% of the consortium members' portions of the TLC invoice
 - Using the RAILS FY2020 grant to purchase Enhanced Content for the OPAC, which will provide reviews, summaries, author notes, table of contents, forewords, and first chapters of books

System Wide Automated Network (SWAN)

- Support Tickets
The slight upward trend of new tickets and slight decrease in closed tickets is due to projects underway requiring member interaction and verification (OCLC WorldCat/ILL configuration and patron cleanup prior to processing long-overdue items). We saw our first post-migration increase in monthly tickets in October. SWAN staff have been diligent in reviewing open tickets and responding in a timely fashion to new requests. Through this process we are also strengthening our cross-team communication and depth of expertise/coverage. We have returned to our pre-migration target of open tickets below 100; as of November 30, 2018, there are 73 open tickets somewhere in the process of resolution.
- Server Infrastructure Migration: Azure Project
The SWAN server migration is our top priority. SWAN IT, along with SirsiDynix support personnel, have found the solution to slow-running maintenance reports in our Azure test environment that

has thus far prevented us from completing this project. We resumed work on the server migration in June.

- On November 6, 2018, SWAN successfully completed the second of three upgrades on the road to Azure. The operating system upgrade went more smoothly than we could have hoped and resulted in no library downtime and very few post-upgrade issues. The final jump to the Azure cloud is being coordinated with SirsiDynix and the IT team and is set for January 13, 2019 with the go-live Monday, January 14.
- Support Site Redesign
The upgraded support site was launched on December 11, 2018. Various SWAN user groups reviewed the site prior to launch and a beta link was sent to the membership on November 26. SWAN staff is collecting membership feedback on the site, and we will provide more information as available. While the new site will have most documentation from the current support site, it will not be a one-to-one copy. SWAN staff will continue to work on content rewrites and updates into the new year.
- Brian Smith at RAILS completed the initial set up of our development site, and SWAN staff has been learning the editing functions of the site and adding content. We have been testing the functionality of the content management system and exploring the available configuration options, and we are working with Brian to make tweaks as needed.
- SWAN wants to pass along our thanks to Brian Smith for all his work in developing our Drupal infrastructure, integrating new features that work with L2 and authentication, and his constant assistance in answering questions and building features as we throw them at him. He has been responsive, creative, and we greatly appreciate having him as a core member of this Support Site team.
- Brian helped us at each step in the process and worked with us in analyzing user feedback to make site usability our priority. We have received much positive feedback already in the first day since launch. <https://support.swanlibraries.net>
- Green Hills Public Library District: Joining SWAN
Now that the SWAN membership vote is complete, this project is in full swing. RAILS has unsuspended the LLSAP grant, which was used to migrate the New 19, and we completed this grant application. RAILS approved the funding that will cover most of the migration costs for Green Hills (as discussed at the September SWAN Quarterly meeting). As of now, our go-live date is set for January 29, 2019, though there is a chance that date may change.
- Automated Delivery Label
Outside of the Azure project, SWAN has made a breakthrough in the custom development for a delivery label printing app, having now created an interface that runs from the SWAN support site rather than through WorkFlows. The interface is still in an early beta stage, with an expected launch alongside the new SWAN support site. Steven Schlewitt and Ian Nosek have also continued work on documentation updates for the new support site.
- Bibliographic Database Deduplication
 - The addition of 19 new libraries to SWAN in May 2018 resulted in a large number of duplicate bibliographic records that the automated de-duplication process was unable to merge. The SWAN Bibliographic Services team has made significant progress on the deduplication cleanup. They have completed the first phase of the project—“known duplicates”—and are now evaluating record pairs that were flagged but that the automated process could not confidently combine. So far, about 90% of these pairs have resulted in merges. We have been evaluating about 1,000 records per week.

- Bibliographic Services merged about 2,000 matched pairs in October 2018, and this process has included record cleanup and overlays along the way. The team prioritized records with one or more active holds and have fully processed this portion of the matched pairs. The project will take SWAN past the first of the year, but the highest demand items are now complete.
- For the Green Hills migration, Scott Brandwein developed a method to extract unique bibliographic fields (OCLC numbers, ISBNs, Library of Congress Control Numbers, ISSNs, and UPCs) from the Green Hills bibliographic catalog to compare with our own. This was used to generate a list of matching records that SirsiDynix can use during the data load to attach Green Hills' items directly to SWAN records and avoid a deduplication process entirely. We generated nearly 59,000 matching records out of their full bibliographic count of 62,000 records. This should be an enormous time saver when the migration takes place. Some manual work will still be required, but it should be minimal and easy to complete before they go live. We will retain a copy of the Green Hills extract for reference in case of any errors.
- OCLC Holdings Reclamation
 - The OCLC holdings reclamation project is complete. Our representative at OCLC informed us that the added holdings are completely processed, so libraries' complete collections as of the August 2018 extract should be currently represented in OCLC. Deletes were processed and finished in October. This will place us back on our regular holdings maintenance schedule with the MARC of Quality.
 - The reclamation will also provide us with information we can use to coordinate a cleanup project once deduplication is finished. This project will involve evaluating approximately 100,000 SWAN records that do not have OCLC numbers. Many of these records represent special collections and records for devices and equipment for which OCLC numbers don't apply, but the reclamation should provide us guidance in determining which of those 100,000 can be updated with OCLC numbers. They will likely require updated cataloging as well. The data should help us complete this project swiftly and allow us to employ a simpler process for updating OCLC holdings once The MARC of Quality company/staff retires.
- National Change of Address (NCOA) Project

SWAN staff completed the NCOA project in December 2018 with the goal of providing this as an annual, ongoing service. We are incorporating consolidation and cleanup of user data, as patron records imported from LINC and MAGIC created some duplication within SWAN's Symphony ILS.
- WorldCat Discovery and WorldShare ILL Configuration

SWAN libraries now have all OpenAthens patron authentication links for each member's WorldCat Discovery instances, and OCLC has set up groups for SWAN and Illinois libraries. Completing the configuration settings for our 97 member libraries was no small feat. On October 17, 2018, Dawne Tortorella conducted a workshop for libraries to learn more about configuration settings and using these services. Another workshop will be announced.
- Enterprise Usability Test

The Fall 2018 Enterprise catalog usability testing is complete. Tara Wood, SWAN User Experience Manager, tested with a total of six participants at Tinley Park, Oak Lawn, and St. Charles. The usability testing report with a summary of our findings and recommended next steps for Enterprise was shared with the SWAN Board at its November 16 meeting, and the SWAN membership at the December 2018 SWAN Quarterly meeting.
- Article Search and OpenAthens
 - Robin Hofstetter, SWAN Electronic Resources Consultant, is developing an inventory of libraries' Article Search and OpenAthens settings. She is working on a set of best practices

and an improved process to onboard the remaining libraries that are not set up with Article Search.

- Robin worked with EBSCO to get a dedicated customer service representative for EBSCO Discovery Service (EDS). She will work with this person to improve our EDS integration in Enterprise (what we call Article Search) for all our 97 libraries and identify a good baseline setup for libraries that they can customize if they chose. In addition, she met with EBSCO to talk about potential group purchases for EBSCO databases, and she is conducting an overlap analysis to see which purchases would be most beneficial for members.