Minutes of the SWAN Coordinators Meeting
September 18, 2015
Drury University

Attendees:

BBC – Jon Jones
Cottey – Courtney Trautweiler
Crowder – Eric Deatherage
Evangel – Rick Oliver, Dale Jensen
MSSU –Xiaocan Wang, James Capeci
MSU – David Adams, Mark Arnold
OTC – Corky McCormack
SBU – Coleen Rose
Drury – Holli Henslee
MCO – Steve Strohl, Christopher Gould, and Scott Peterson

Old Business

WebPAC: Arrangement of Drop-Down Menus

One proposal suggested at the last meeting was to relabel the "Online Film" and "Online Map" MAT types in the Advance Keyword Search screen. After the meeting, Rick checked with catalogers and other staff involved in the creation and management of the MAT Types. The feedback Rick received indicates that the creation and management of MAT Type in cataloging is not affected by relabeling the MAT Types at the SWAN WebPAC. The Committee favored the proposal and agreed to relabel "Online Film" and "Online Map" with the new labels, "E-Film" and "E-Map."

WebPAC: PIN Creation

As agreed at the last meeting, MOBIUS added the instruction text in the WebPAC when a user creates or modifies a pin in May. This instruction is helpful in assisting users to create an acceptable PIN with a proper combination. The Committee further discussed the PIN creation process for new users and login process for existing users. The Committee was all in favor to separate the web screen of a new user's PIN creation from that of an existing user's log in. Rick suggested changing the text "Please enter or create your PIN" on the first login screen to simply say "Please enter your PIN." In addition, we could change the link text that currently says "Forget Your Pin?" to say "Need to Create or Change Your PIN?" This would help a new user to be more likely to access and read the instruction text before creating their PIN. The Committee agreed to make such change.

Considering the "ID followed by your institution code" varies from school to school and the first login screen is shared by all scopes, Lucy suggested making a modification to the "Institution

Code Help" section by adding the exact examples of "ID followed by your institution code" for individual institutions. For example, the exact example for MSSU would be S12345678MSSU and for OCC OCC12356OCC. The Committee agreed to make such change.

For the added instruction text, Lucy suggested making a minor change to "Your PIN must be 4 to 30 characters long and should contain a mix of alpha and numeric characters" since not all users can understand the meaning of "alpha". The suggested text reads as follows: "Your PIN must be 4 to 30 characters long and should contain a mix of letters and numbers." The Committee agreed to make such change.

In addition, Lucy noticed that the "Modify Patron Information" after logging in serves to modify the email address associated with a user account. Christopher informed the Committee that the changed email address would be erased after every data loading. This means a user can only have the school email address associated with his/her account and cannot really modify the email address. The Committee suggested removing the link, but MSU has a lingering issue with this process.

Increasing Max Record Review Files in Create Lists

Considering the needs from several large institutions within the cluster, the Committee agreed to increase Max record review files at the last meeting. Over the summer, MOBIUS informed SWAN that, in order for our recommendations to be made, III will have to empty out the data in ALL of our existing review files (*not* just the files we want to modify). The Committee did not think emptying all files would cause any problem as long as the timing of the changes made is right. The Committee agreed to have the changes made sometime next spring. The Committee agreed to revisit when to make changes at the next Coordinators' meeting.

As agreed, Jon developed a detailed recommendation of increasing the number of Max record review files after last meeting. Before this meeting, Jon tackled this task again and created a table to show empty reviews files in spring and winter periods for each record size. He also brought some important notes to the meeting, along with three questions and possible actions. Because there are several ways of combining smaller files, the Committee decided to reconsider Jon's recommendation with updated information at the next meeting.

Name convention protocol in Create Lists

The Committee discussed again the file naming protocol for review files. Because the review files in Sierra automatically have the date of the list creation or modification date, the Committee did not think it was necessary to have the initial list creation date as part of the file names. However, the Committee reiterated the minimum requirements when creating the name of a review file. For future reference, all the review file names will need to include the initials of the institution and the initials or name of the individual staff member. The Site Coordinators will relay the reinforcement to involved library staff.

Updates and Discussion with MCO: Data load/eMO and Courier issues

Due to the unexpected longer un-loading time of eMO books, Christopher updated the Committee with the un-loading progress. It was estimated that all eMO books would be completely deleted at the end of this week. As early as next Monday, MOBIUS will start to reload eMO books to Sierra and this may take up to two weeks.

MOBIUS listened to issues surrounding Courier services. At present, the prominent issue is the long delivery time from Prospector and Tulsa. Steve reassured the Committee that MOBIUS was aware of these issues and had been working hard in order to shorten the delivery time.

New Business

Extend the SWAN billing period for overdue items

To match MOBIUS' new 28 day loan period, the Committee discussed in June and agreed to extend the 21-day loan period to 28 days with two 28 day renewal periods. Considering the SWAN billing period is still 21 days and does not match the new 28-day loan period, Rick proposed to extend the SWAN billing period from 21 to 28 days. The Committee thought this agenda item should be passed to SWAN Circulation Committee that is in charge of circulation billing. Since Jon is serving as the chair of the Circulation Committee, Jon will take the item to the Circulation Committee.

Review the SWAN blue book band

Lucy compared the SWAN blue book bands with MOBIUS, Tulsa and Prospector's book bands during her circulation training. She discovered that the SWAN band does not have renewal information while the other bands do provide the information. Lucy suggested adding the renewal information to SWAN book bands. The Committee again thought this belonged to the SWAN Circulation Committee's charge. Jon will take this to the Circulation Committee and possibly add the renewal information if space allows.

Discuss FIPP information left in Sierra

Although FIPP closed at the end of July this year and is no longer part of SWAN, FIPP still has information "live" in Sierra, with approximately 17,345 item records, some location codes, loan rules, review files, etc. The Committee thought deleting some information should not create any problems, while deleting other information such as loan rules might cause problems if not done correctly. MOBIUS will be responsible for removing FIPP from SWAN, but there is no definite timeline on this process at this point.

Design a new SWAN interface?

Lucy proposed a new mockup for the front page of the SWAN public interface. The mockup was designed and developed by Lucy and her student worker. It is partially functional but fully responsive when being viewed at different screen sizes. The Committee was all in favor of the mockup. MOBIUS thought it might have difficulties implementing the mockup. Lucy will share the code with MOBIUS after the meeting. MOBIUS will test to see if the implementation of the new mockup is feasible.

Other Business

None

Next Meeting Date and Location

The next meeting will be at MSSU in Joplin on Friday, February 26, at 10:00am.