

# SWAN Platform survey analysis

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## Introduction

This analysis was completed using written comments from the survey on SWAN software platforms. The SWAN management team completed an analysis of the platforms WorkFlows, Analytics, MobileCirc, and Aspen Discovery. Priority at this stage was given to SirsiDynix products. We expect to complete the analysis of survey comments of MessageBee and OCLC by the April meeting of the SWAN Board.

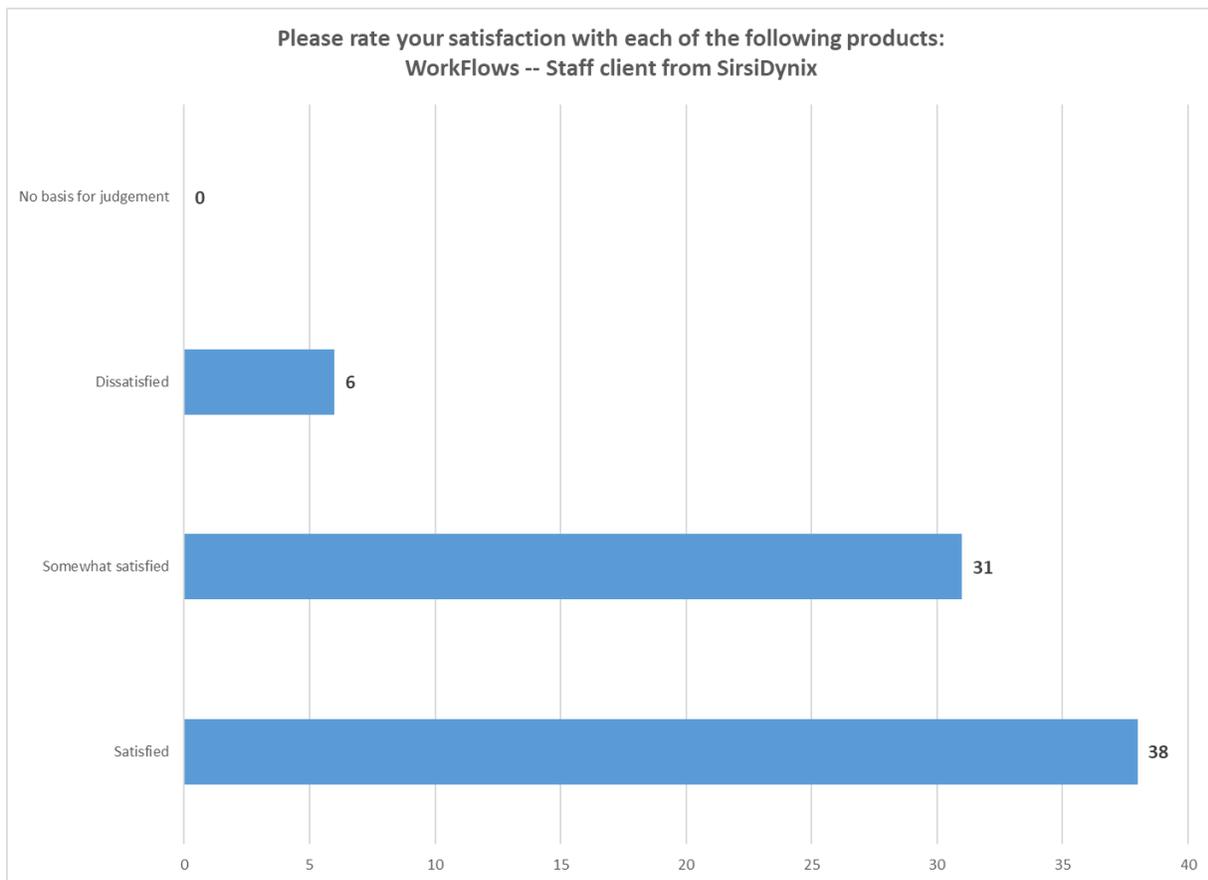
## Process

The SWAN management team organized and reviewed the platform survey submissions. The survey's written comments were analyzed using an affinity diagramming technique where comments were organized by the responding library and the specific platform into a spreadsheet. Some written comments were extensive depending on the library. These comments in spreadsheet form were then imported into a sorting tool called a Miro board. The sorting was further refined based on the comment. After the sorting activity, we met several times to develop the "themes and issues" under each software platform, and to come up with suggested solutions.



FIGURE 1: AFFINITY DIAGRAM WITH COMMENTS USING COLOR CODED SYSTEM FOR SOFTWARE PLATFORM.

## WorkFlows



### Issues and themes

- Some member libraries noted that the ability to be logged in on more than one computer simultaneously was beneficial to being able to complete daily tasks, highlighted the searching capability to successfully answer patrons' questions regarding title availability or the number of books checked out, and expressed overall satisfaction with WorkFlows and how easy it is to use to perform necessary tasks.
- Hold queues are confusing to library staff when asked by patrons "when will my requested item arrive?"
- Placing holds for several copies of a title is cumbersome, which was noted for book clubs and schoolteachers.
- Searching within WorkFlows presents challenges for misspellings and typos.
- Searching is also difficult when looking by topic/subject.
- Many staff reported that the Workflows interface is simply clunky, dated, and unintuitive.
- Workflows' stability was mentioned by libraries frustrated by crashes/freezes. One library mentioned indexing issues affecting technical services.
- The Acquisitions module received criticism for its complexity in performing simple tasks and frustrations with its reliance on the crowded Workflows reports queue.
- In Cataloging, staff mentioned a number of smaller frustrations with interface and behavior such as the inability to delete items with holds and search results display.

- Some libraries mentioned issues with too many or too few wizards available in certain log-in profiles. Some staff would like more opportunity to customize their Workflows experience.
- Requests for a portable version came from one library who wished to take Workflows to offsite events and another that specifically requested we investigate SymphonyWeb.
- Management of patron information is a point of frustration. Users want the ability to manage more patron profile information and holds from one screen rather than having multiple tabs open. Multiple libraries requested the ability to quickly access more “previous user” profiles than the one currently available. Staff also expressed an interest in masking personal identifying information by default while viewing a patron profile.
- Frustrations with billing included a confusing interface with too many options and the loss of title information when an item is removed from a patron’s record prior to a referral.

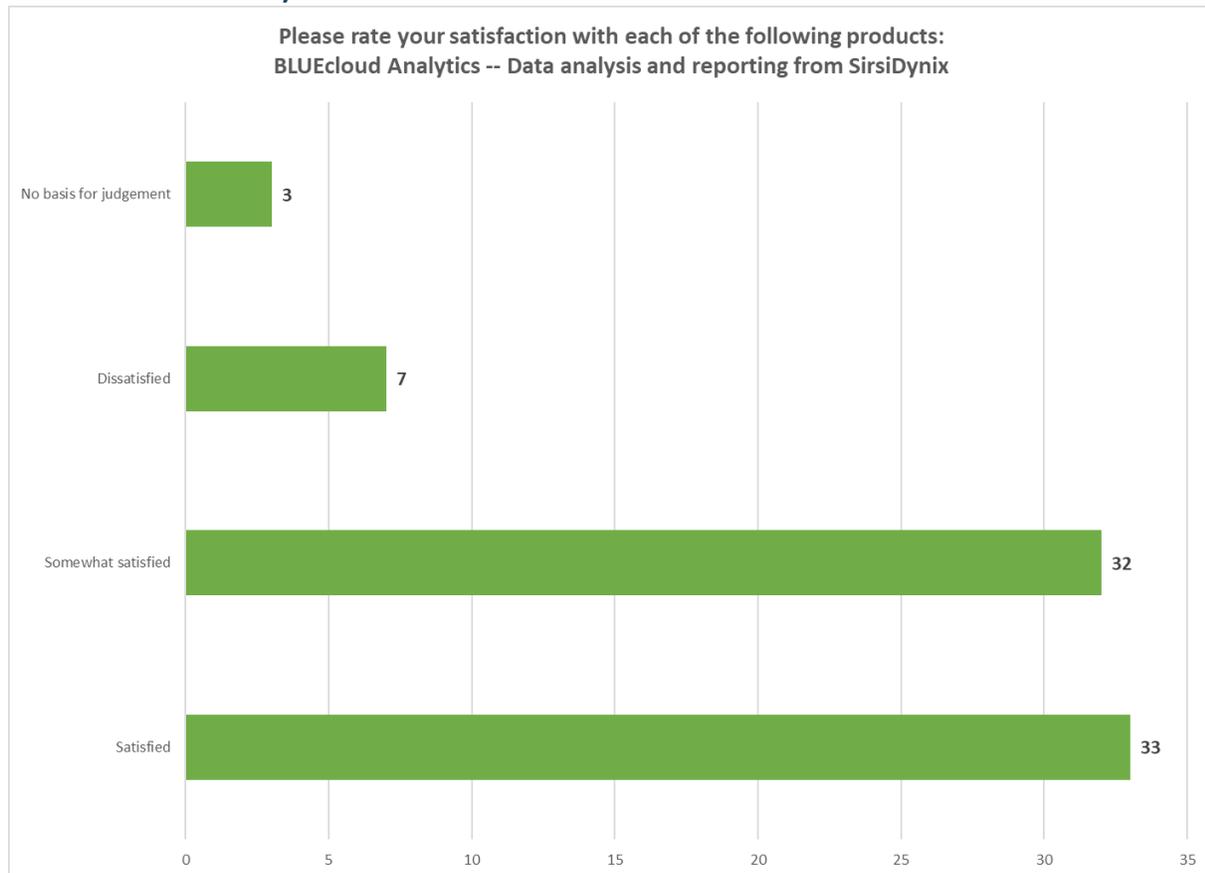
### Action steps

- As searching in Workflows does require specialized expertise, we can promote existing training resources on this topic and create further resources on specific user scenarios.
- Hold queues are difficult to interpret, and hold queue positions can be misleading. SWAN may benefit from developing unified messaging (through the patron interface and from library staff to patrons) to help manage patrons’ expectations regarding fulfillment.
- Continue providing priorities to SirsiDynix to influence the development of BLUEcloud Acquisitions and Cataloging to address pain points in the Workflows Acquisitions and Cataloging modules and current BLUEcloud version.
- We have two comments that we intend to follow up on with the library.

### Big Ideas

- SWAN can develop a Holds Working Group from within our membership to re-evaluate holds strategy, develop goals, and implement changes. This could help to prioritize how we configure our current Symphony ILS or how we evaluate holds in a new ILS. Some solutions that were identified in the 2019 Clarity Report that a Holds Working Group should be considered:
  - Implement consistent lending policy across the membership (e.g. allow holds to be placed on all items).
  - Develop method where a hold can be placed on every title by any patron, essentially implementing a model of patron-driven acquisition based on first-copy trigger in SWAN.
  - Develop a tool to estimate hold wait time.
  - Provide alerts/reports when patrons have holds on titles that are not available for fulfillment and thus become purchase alerts for patron home library.
- Evaluate SirsiDynix’s SymphonyWeb as a tool for easier remote access to the Workflows staff client and improved connectivity. We will also investigate whether this tool will open a pathway to more customized user experiences. Currently, SymphonyWeb is an add-on product and it allows WorkFlows to run in a web-browser. This product was not under consideration as BLUEcloud is our future interface for library staff, but SymphonyWeb may have a role to play within SWAN.

## BLUEcloud Analytics



### Issues and themes

- Some members praised BLUEcloud Analytics' templates and ease of use, particularly for running yearly IPLAR reports. They also appreciated SWAN staff's expertise on the platform.
- The BLUEcloud Analytics platform was described as "difficult" or "intimidating" or "not user friendly."
- Comments indicate that the organization of reports within Analytics is confusing by the large number of created reports.
- Staff would like the ability to create custom reports and experiment, rather than rely on SWAN staff to create reports.

### Action steps

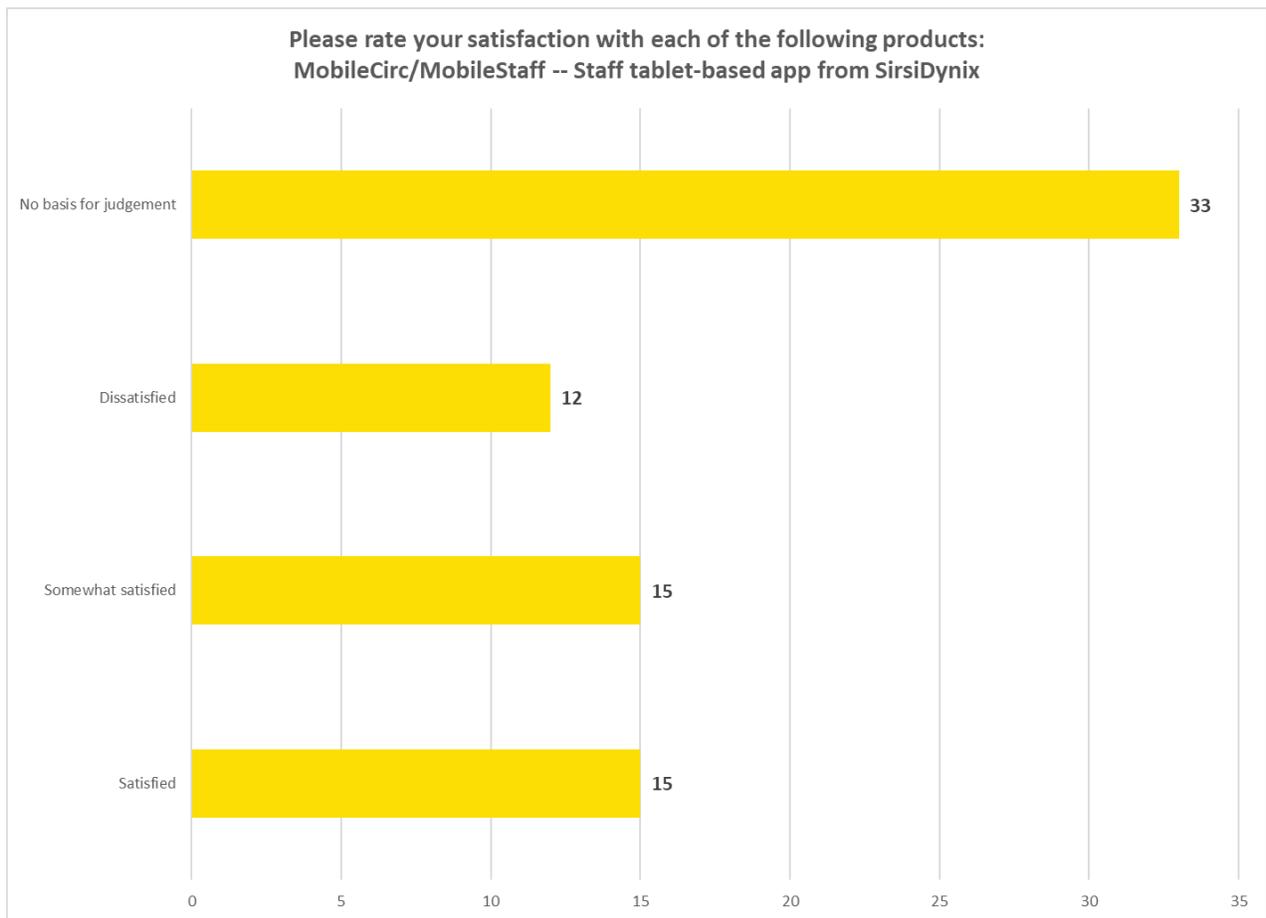
- We have several training opportunities based on comments, such as creating training videos on how to run different reports and customize them for the library.
- SWAN staff can conduct research with members to enhance report labeling and folder organization, and better understand the delivered reports that would be most helpful for members.
- SWAN staff can explore training opportunities, both internally created training and training available through SirsiDynix.

- We have three comments that we intend to follow up on with the library.

## Big Ideas

- SirsiDynix has released a new option for Analytics called “Private Suite” which has an expanded feature set that SWAN should consider migrating to if it resolves some of the library staff issues pertaining to report creation and organization.
- Consider a 3<sup>rd</sup> party data repository for improved interface, performance, and to plan for a future beyond Analytics should SWAN decide to make changes to its library services platform.

## MobileCirc/MobileStaff



## Issues and themes

- MobileCirc/MobileStaff is described as generally difficult to set up and use. Difficulty ranges from issues with app stability, clunky interface, and frustration creating library cards at off-site events, with one library reporting they were unable to do so at all.
- Product is described as “bare bones” and does not provide features like extensive patron information, and workarounds that are available in Workflows. It was not clear in the survey what these workarounds were.

- No specific mention was made of using MobileCirc/MobileStaff for pull lists or inventory/weeding, though these are the areas on which SWAN documentation focuses.

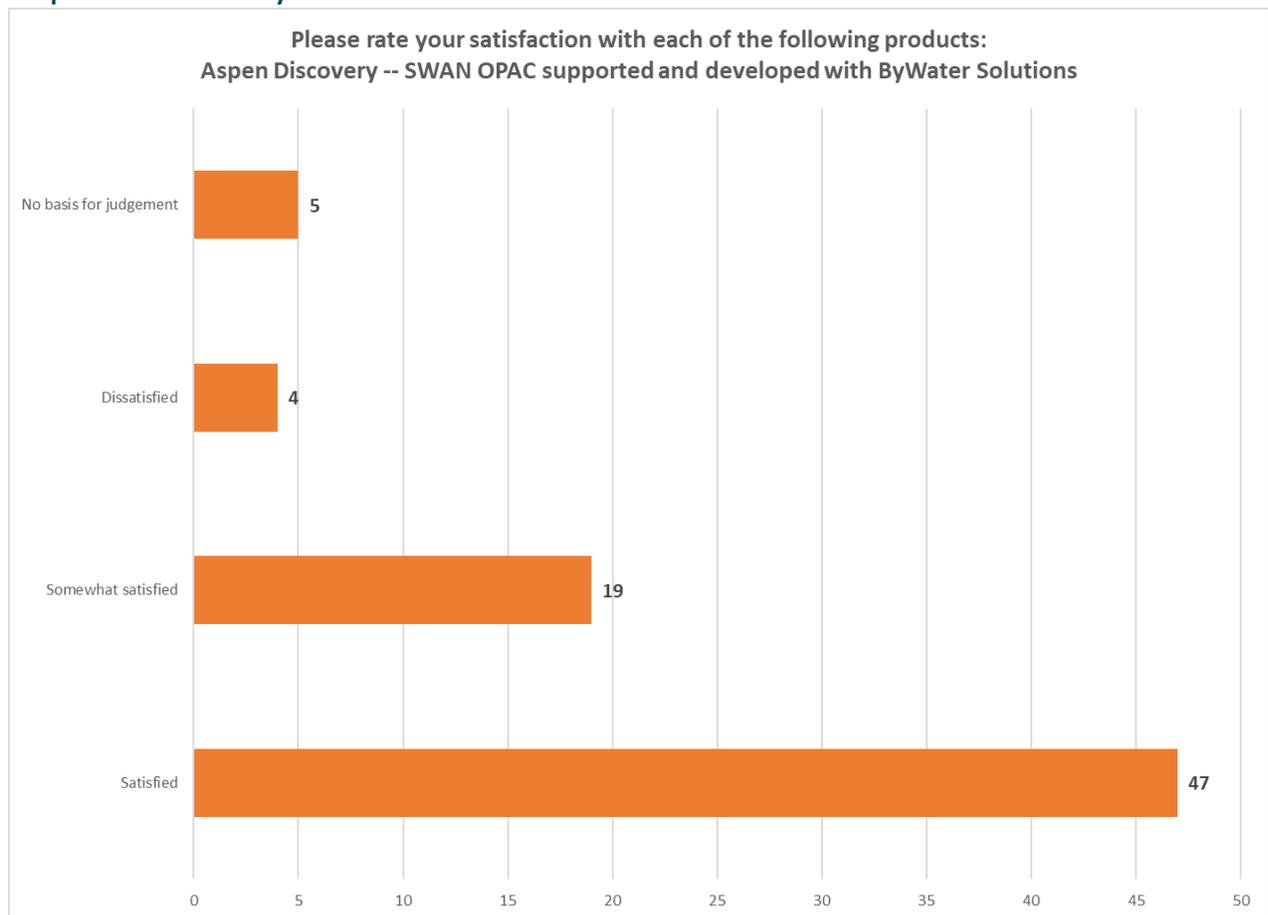
### Action steps

- Some functions of MobileCirc/MobileStaff could be soothed by a solid implementation of BLUEcloud Circulation, which can run in a tablet web browser. Evaluate BLUEcloud Circulation as a tool in this specific capacity.
- Review our SWAN documentation and training to better emphasize best use of MobileStaff off-site for card registration.
- Follow up with libraries having difficulty with patron registration to determine their hardware setup and whether we can make recommendations on obtaining the tools make MobileStaff more swift and reliable.
- Perform a MobileStaff device audit to verify that libraries are using compatible hardware and gain insight into how staff are accessing the tool.
- We have 2 comments that we intend to follow up on with the library.

### Big Ideas

- Explore SymphonyWeb for use as an off-site and patron registration tool. This would focus on the tool on a tablet and a laptop.
- Look into creative use of online patron registration tools either through Aspen Discovery or a third-party tool.

## Aspen Discovery



### Issues and themes

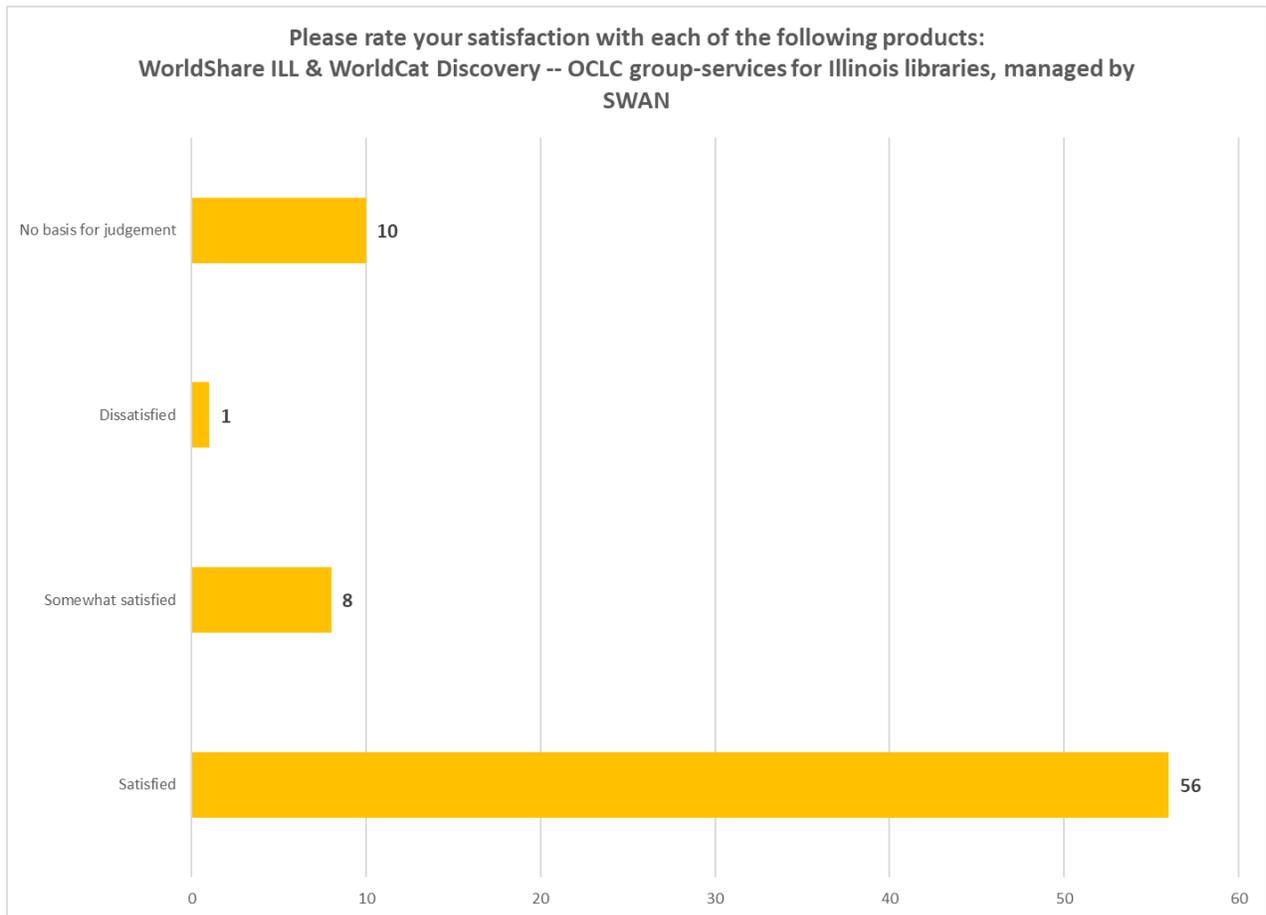
- Several libraries mentioned patron satisfaction with the catalog search.
- Library staff appreciate the patron service and readers advisory tools in Aspen: masquerade mode, search facets, lists, and browse categories.
- Some libraries also praised the frequency of development of new features in Aspen and specifically the support and development from ByWater Solutions.
- Searching was called out as a pain point, in particular searches for subjects or for items without a specific title. Fuzzy searching and searches for misspelled words were also highlighted as areas for improvement.
- Search filtering presents some problems: resetting filters between searches or logging into masquerade mode is frustrating, filtering for juvenile materials brings up some adult items, and being unable to set multiple filters at once.
- Libraries are overall very happy with the record grouping feature in Aspen, but there is room for improvement. Responses highlighted instances where e-resource and physical editions were not always combined. One library mentioned graphic novel editions being grouped with text copies, and another that translations are not grouped together.
- Cover images are not always present, and sometimes cover images or descriptions do not match the item. However, staff appreciate the ability to upload covers.

- The LiDA app can be slow to load, and one library mentioned preferring the browser version for this reason.
- Some libraries mentioned difficulties in List maintenance, including the inability to sort by call number or upload custom cover art.
- Issues related to locating items included being unsure whether their library owns an item and needing to check Workflows to verify, displaying other libraries' items when filtered to the home library only, available items appearing below unavailable items due to the fixed order of formats in a grouped work, and the inability to filter to a library other than the home library.
- Libraries also suggested a number of small-scale tweaks to the user interface such as a bolder "Where Is It?" button and color-coded e-resources.

### Action steps

- SWAN will investigate the ability to lock filters and strategize with ByWater on ways the filters can be made easier to use, such as selecting multiple or providing a "not" option.
- We can investigate means to improve native record grouping, including re-evaluating whether integration of name authority data would lead to more groups.
- Difficulties with searching and determining item availability may benefit from focused usage testing with member staff and patrons or targeted work with our Discover and User Experience Advisory Group to determine what the biggest pain points truly are. Though we had many comments and suggestions in this area, we did not observe many repeated comments that point to an obvious change to behavior or user interface.
- Address issues with record grouping through work with ByWater Solutions on their work to streamline grouping of graphic novels, abridgements, and distinct editions. Foreign language editions do not group by design, a choice made by the Aspen community at large. SWAN can work to better document the intricacies of grouping so the membership knows what to expect.
- SWAN is already working on a report of items using the default generated cover in Aspen. Using this report, members could upload covers for items that do not have cover art in Syndetics, our cover image provider.
- SWAN continues to work with ByWater Solutions on performance of the LiDA app and would like to investigate performance enhancements for the Web Services API.
- We will re-evaluate how we collect feedback on Aspen outside of user groups, regular meetings, and tickets. Based on the survey results, we need to smoother pipeline to transmit ideas for improvement from member staff to the Aspen community.

## OCLC



### Issues and themes

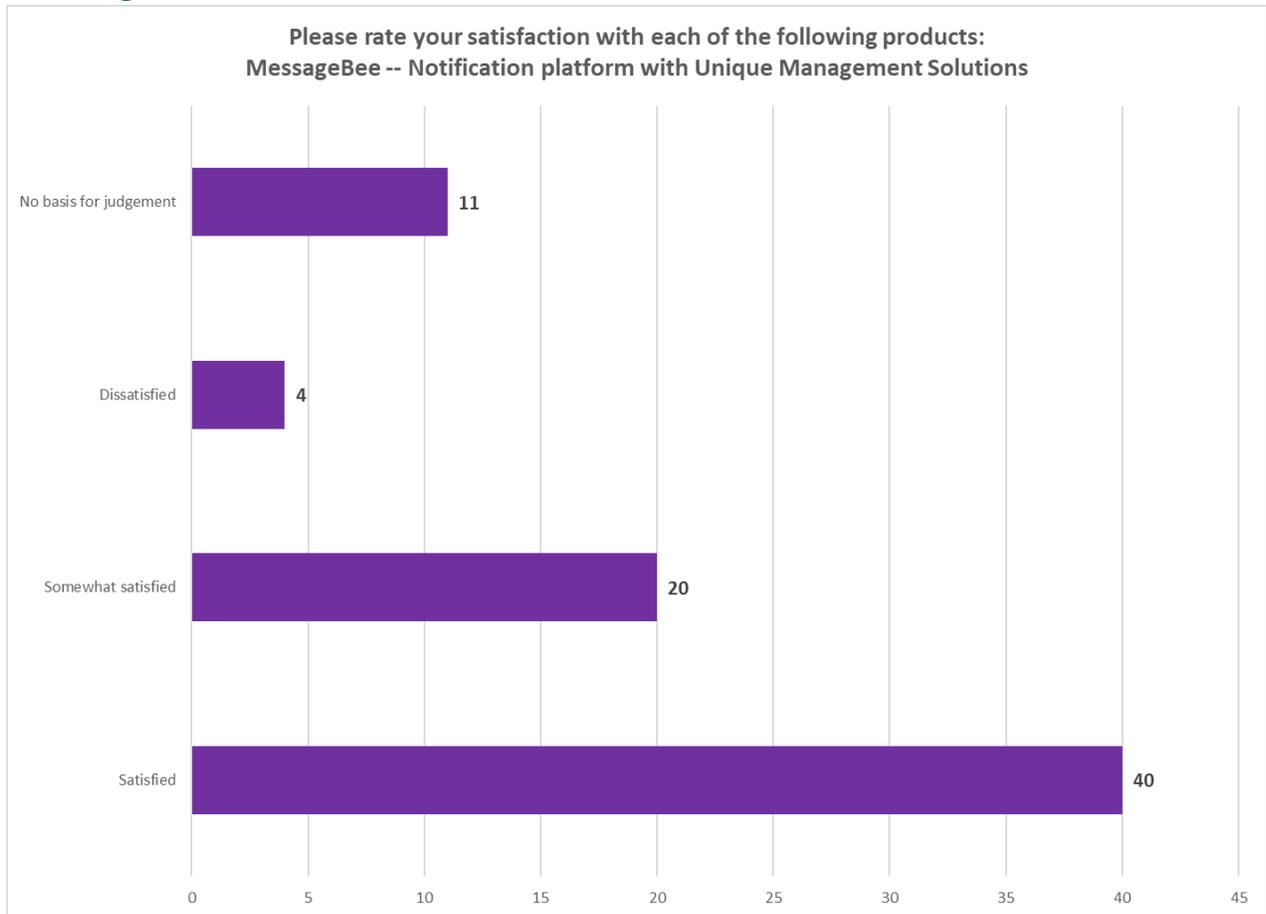
- WorldCat and WorldShare are easy to use, and in general, the library staff appreciated the efforts SWAN has put in to make ILL run efficiently.
- A couple of staff requested training in OCLC's further functions or suggested that no training at all is offered.
- WorldShare ILL is by far the most common point of interaction for our members, and they are generally satisfied. Some pointed out UI issues such as general clunkiness or the inability to copy requests for decrease input. Some mentioned intermittent error messages and performance issues.
- Two libraries mentioned issues with holdings not accurately reflecting library collections.
- A library highlighted Record Manager's difficulty of use and suggested an update to WebDewey's interface.
- A couple of interface updates to WorldCat were also requested.

### Action steps

- Promote the existing SWAN training on WorldShare ILL at SWAN events such as Fireside and user group meetings.

- Discover what areas of OCLC are in demand by our membership. Were requests for training related to ILL, Collection Manager, Catalog and Record Manager? Investigate existing OCLC training options to promote or opportunities to create our own when necessary.
- Holdings issues will be remedied by the launch of the 2.0 version of the Metadata API, which will fix an error in holdings maintenance we have been experiencing. We can also follow up with the two libraries who mentioned holdings issues to better understand the issue since tickets related to this issue are infrequent.
- SWAN will continue to track development Record Manager’s cataloging and holdings maintenance abilities, but at the moment we don’t recommend it as a central tool in the SWAN toolbox. OCLC Connexion client meets the needs of our catalogers.

## MessageBee



## Issues and themes

- MessageBee is easy to use and considered an excellent product with a lot of options and is a “fantastic upgrade.”
- Notification reporting features are valuable.

- The simplicity of the two-way SMS messaging tool was brought up as a criticism. The interface only displays phone number and no other patron information, and it cannot be turned off with an auto-response programmed. One library expressed interest in integrating it with their existing SMS platform.
- Reliability of notification receipt was a major concern for one library, including the possibility for patrons to opt out of e-mail messages without it being reflected in the interface.
- The interface and e-mails for reports and statistics can be clumsy for some users, who wish they could filter categories in which no notifications were sent. One library requested more granular statistics.
- Ten libraries mentioned the lack of autorenewal notifications. This is a similar number of libraries as was reflected in our user group discussions at the end of 2023.

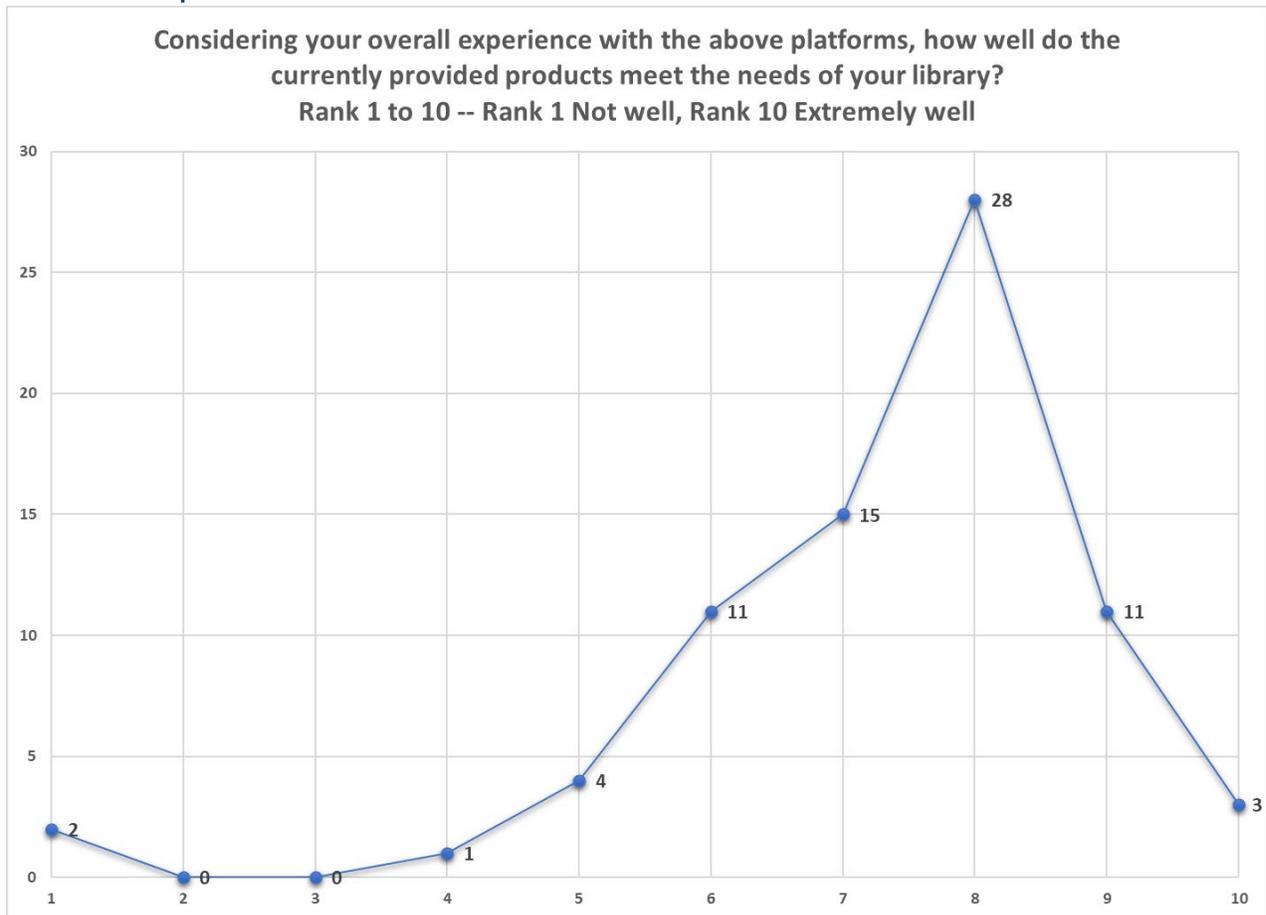
### Action steps

- The Two-Way SMS messaging is something that we are expecting to see updated as Unique Management continues its overall user interface update this year. SWAN staff will talk with Unique staff to communicate member concerns with this tool and attempt to steer the update.
- Patron opt-outs that are not reflected in the interface include marking messages as spam in e-mail and replying “STOP” to an SMS notification. Neither of these things are well-communicated in MessageBee and rely on library staff to discover these message rejections by viewing reports. SWAN would like to work with Unique to build a better tool for catching these situations.
- The reports interface upgrade is underway, and SWAN members have access to the beta. Some of the issues pointed out in this survey are addresses in the beta site. SWAN can discuss with Unique Management when these changes can be reflected in automated e-mail reports.
- We will perform a cost-analysis of how re-implementation of autorenewal notices would impact the consortium.

### Big ideas

- We plan to investigate improving autorenewal processing to include more attempts over a period of days to try and increase the proportion of successful autorenewed items.

## Overall experience



This analysis of the survey on the six platforms focused on creating actions for the issues identified with each of the software platforms. It is also worth noting that the overall rating for the software platforms shows a majority of the respondents rating 7 or higher, which is 76% of the total.

### ILS Migration comments

There were five libraries that left comments on a possible ILS migration. Two mentioned Polaris as a choice to consider. The comments below reflect the difficult balance SWAN is attempting with the complexity of our resource sharing and the staff client.

#### St Charles

“I would hesitate to change ILS unless the alternate product has been proven in a consortium of our size. Every ILS has problems, and it is a laborious process to change.”

#### Steger

“From my own experience in other libraries and from speaking with my peers in other library systems, I would be very happy to see a different ILS as this one isn't very intuitive and is difficult to train new staff to use.”

## General satisfaction

When praise for a specific platform was shared, those were inserted into the Issues and Themes above. Some of the comments were more general about the overall satisfaction of the software platforms provided. We have included three of them below.

### **Warrenville**

“After speaking with managers, it is generally felt that all staff have loved the decision to join SWAN in 2020. The overall service is good, and the easy, increased access to more material for our patrons is wonderful. Managers stated that what is done well is great. And on the whole, SWAN is on the cusp of being great, but does need some improvements to address some of the frustrations many deficiencies in some of the platforms are more than made up for by the friendly, responsive, and comprehensive support we get from SWAN staff.”

### **Roselle**

“For the products we are satisfied with, I think it's fair to say that the interfaces and functionality are clear and easily fit into our workflow. It's really about being able to do your job quickly and efficiently without an overly burdensome learning curve or needing to constantly retrain yourself on how to use basic features. I'm optimistic based on the platforms we are satisfied with, that it's just a matter of time before the other products meet those same criteria as they are replaced one by one...”

### **Bloomingtondale**

“SWAN staff utilize the current platforms and with thoughtful planning and innovative ideas enhance the resource-sharing experience of our users. The best example of that is how SWAN deployed the Aspen Mobile app in record time when the Sirsi app was unexpectedly dropped.”

## Comments on survey design

There was one comment about the survey itself, requesting more granular ratings below and above “somewhat.” Two comments noted that the library used a survey tool internally to obtain all library staff feedback, which was then aggregated with individual comments into the full response submitted.

## Conclusion

The analysis of the survey comments on SWAN software platforms has provided valuable insights into the strengths and weaknesses of each platform. The detailed examination of issues and themes, along with suggested action steps and big ideas for improvement, will help the SWAN management team address the challenges faced by member libraries. Overall, the majority of respondents rated the software platforms positively, indicating a general satisfaction with the services provided. The feedback gathered from the survey will guide future decisions on software enhancements and potential ILS migration, ensuring that SWAN continues to meet the needs of its member libraries effectively. By implementing the proposed action steps and big ideas, SWAN can enhance the user experience and further strengthen its resource-sharing capabilities.