



# SWAN Fireside Chat

August 26, 2025

# Today's agenda

- Expo 2025 Recap
- Online patron registration
- Support site update
- Backstage Library Works
- Labor Day Weekend Rebuild
- MessageBee Reminder
- Circulating MobileStaff Kits
- IPLAR
- Aspen updates
- E-resource update
- Training & documentation updates
- Upcoming meetings

# SWAN Expo recap

- 208 attendees
- 18 sessions
- All presenter slides now available
- [swanlibraries.net/expo](https://swanlibraries.net/expo)



# Save the date: Expo 2026 NEW LOCATION

- Friday, August 21, 2026
- NIU Naperville (Northern Illinois University)
- Conference & Events
- 1120 E. Diehl Road, Naperville, IL 60563



# Attendee feedback open

- Attendee feedback open  
[SWAN Expo 2025 Attendee Survey](#)
- Watch for email later today



# Online Patron Registration

# We are live!



**June–July 2025**

Configuration



**June 16th**

Patron profile  
confirmation



**July 16th**

Circulation Working  
Group Activity



**Late July**

User Testing



**Mid-August**

Training and Q&A



**August 26th**

Go Live

## Updates

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CARE/OF field population

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“Uppering” of name and address

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Age gates available

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Change to “Already Has a Card”  
response



# “Already has a card” e-mail

Removal of current home library.  
We hope to restore it eventually.



Good news! You already have a library card at a SWAN member library.

If you have lost your card and wish to retrieve your barcode, you can [look up your library card number](#).

If you have moved and are trying to register a card at another library in our system, visit your new library to have your card transferred.

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## Additional Resources

- [Reset your PIN](#)
- [Access the shared catalog](#) for all SWAN libraries
- [Find Your Library](#)

# Additional information

## Documentation

- <https://support.swanlibraries.net/documentation/68769>

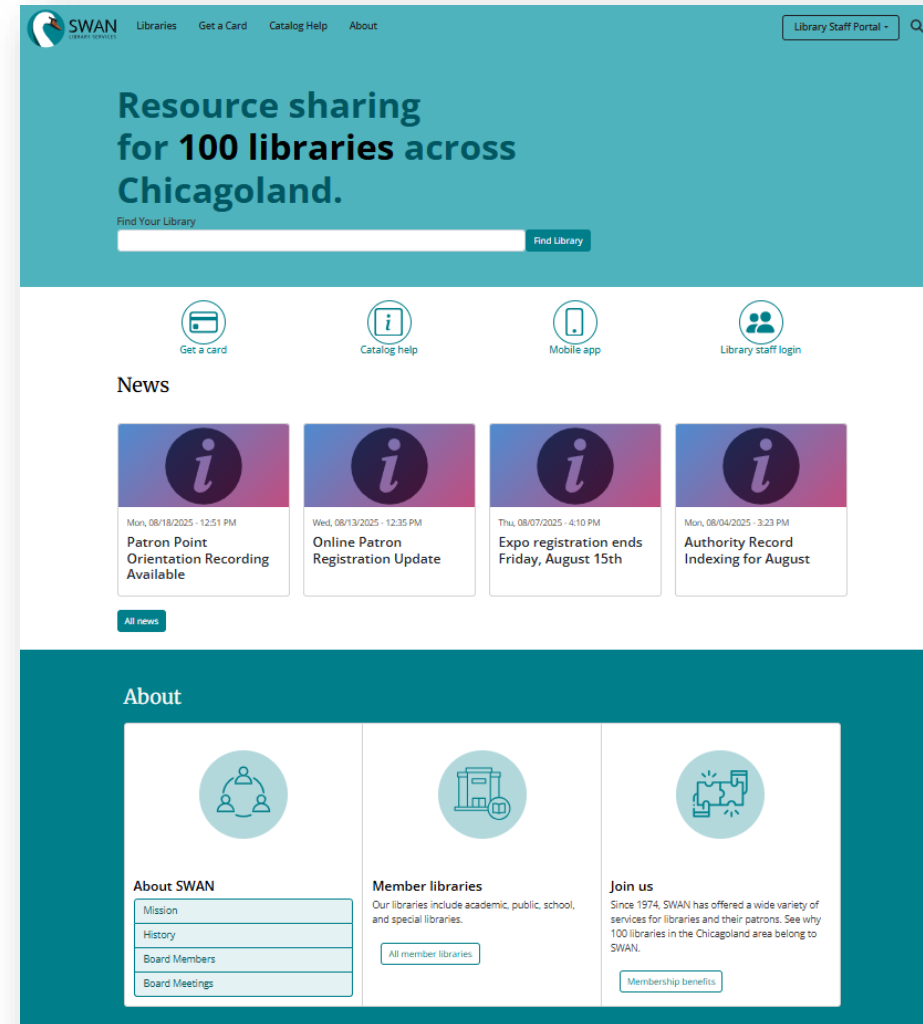
## Orientation Recording

- <https://support.swanlibraries.net/training/94937>

# Support site update

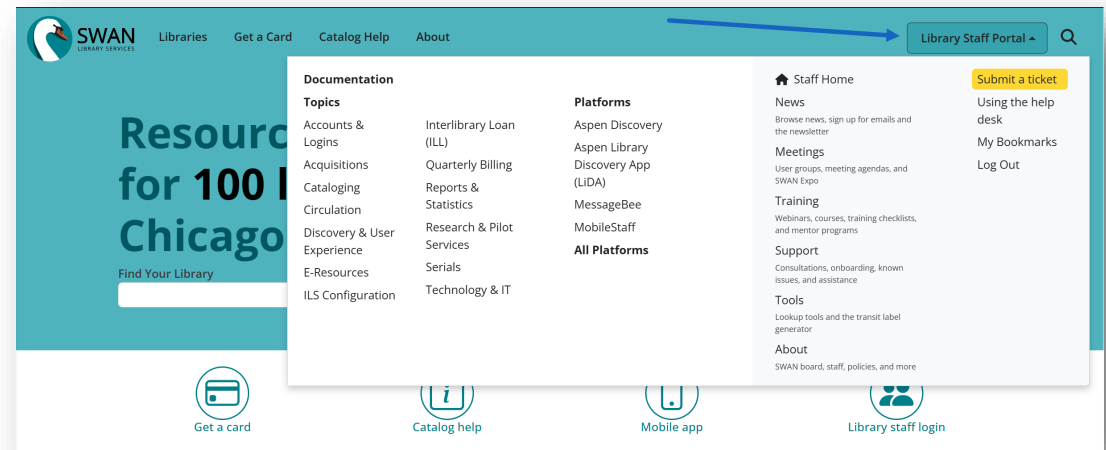
We will have one website at [swanlibraries.net](https://swanlibraries.net)!

Redirects are in place to ensure you can still use your bookmarks, etc. Open a ticket if you come across any broken links.



# Support site update

- Former patron site will be retired
- New site menu
  - Go to Library Staff Portal for documentation and more
- Most documentation is unchanged, but is no longer behind a log in
- Log in for access to your bookmarks, training, and logins
- Tickets can still go to [help@swanlibraries.net](mailto:help@swanlibraries.net) or to the SWAN Help Desk portal



## Backstage Library Works

- Sent over 1.3 million bib records for clean-up
  - RDA updating
  - Authorizing headings
- Implemented an updating freeze
- Enhanced Records imported
- Labor Day Weekend is planned Symphony indexing downtime

## Labor Day Headings and Text Database Rebuilds

### What's happening?

- Rebuilding the Headings and Text DB indexes
- Beginning Sunday evening (8/31)
- Anticipate delays to regularly scheduled Symphony Reports on Labor Day (9/1)
- SWANcom will be sent prior to and after scheduled maintenance has concluded

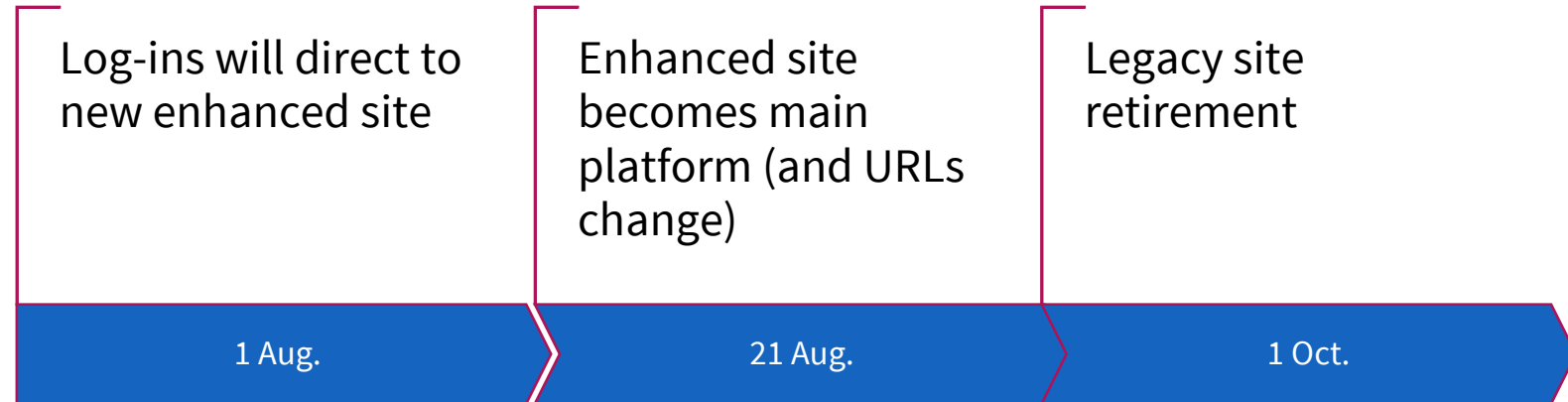
### In preparation:

- BACKSTAGE enhanced records loaded

### Important notes:

- WorkFlows will not be available during the system maintenance
- Aspen online catalog will still be available
  - My Account features may be briefly unavailable during maintenance window

# MessageBee Reminder



## Access starting August 21st

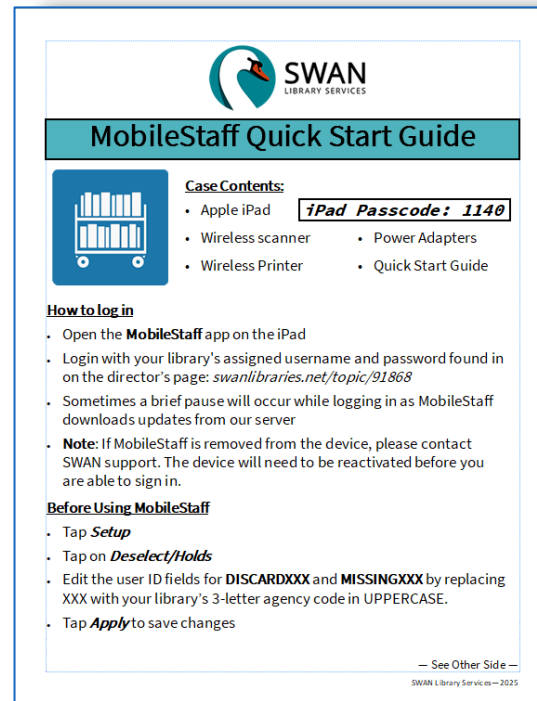
Main site: <https://messagebee.uniquelibrary.com>

Legacy site: <https://legacy.messagebee.uniquelibrary.com>



# Circulating MobileStaff Kits

- Contains everything library staff needs to:
  - *Conduct Inventory*
  - *Issue Patron Cards*
  - *Circulate Material Offsite\**
- Three week checkout
  - *May request multiple*
- Available beginning this week
  - *Shadowed in Aspen – Use WorkFlows*
  - *Lock Combo in Circ note*
- Cases kept at Oak Brook when not in use
- Watch for a SWANcom with further information!





# Illinois Public Library Annual Report (IPLAR)

<https://www.ilsos.gov/departments/library/libraries/IPLAR/home.html>

## Deadline for submitting your IPLAR

- Municipal libraries - 60 days after end of fiscal year
- Library districts – September 1 of each year

## SWAN assistance with reporting

- Count of users and resources
- Use of resources

# Illinois Public Library Annual Report (IPLAR)



BLUEcloud Analytics Instructions

<https://support.swanlibraries.net/documentation/64734>



Video Walkthrough

<https://support.swanlibraries.net/training/90589>

# Aspen update

## App improvements for log outs!

- The app should now log patrons out less frequently
  - This happened when devices were on an unstable network or switching between networks
- It will also save your barcode if you are logged out, so you just have to re-enter your PIN

## Library of Things Visibility Filter

- Limit library-specific records to the home library as much as possible
  - Based on Item Type
- Downers Grove is live as of today
  - General search removes over 35,000 records
  - Search of "Roku" for their six devices
    - Results before – 12, 16, 17, 18, 26, 37
    - Results with filter – 5, 6, 7, 9, 10, 11
- 9/30 : Go live with all libraries
- To opt in early or opt out fully, please submit a ticket

# E-Resource update

# Hoopla in the library catalog

- Each library with Hoopla in the catalog has a scope
  - The scope customizes which formats should be indexed and discoverable in the library catalog
  - The scope can also be customized with the maximum cost per circ set for each format
  - This is not an automatic process! You must inform SWAN when your max cost per circ is updated with Midwest Tape

| Name | Exclude Records With Copies from other eContent Vendors (OverDrive, cloudLibrary, Boundless, etc.) available | Include Instant | Include Flex | Include eAudio books | Max Cost Per Checkout for eAudio books | Include eBooks | Max Cost Per Checkout for eBooks | In eC |
|------|--|-----------------|--------------|----------------------|--|----------------|----------------------------------|-------|
| 1    | Hide Hoopla title if other copies are available  | Yes             | No           | Yes                  | \$3.99                                 | Yes            | \$3.99                           | Ye    |
| 2    | No show all titles   | Yes             | No           | Yes                  | \$5.00                                 | Yes            | \$5.00                           | Ye    |
| 3    | No show all titles   | Yes             | No           | Yes                  | \$3.99                                 | Yes            | \$3.99                           | Ye    |

# Training & documentation



# New Training Checklists



## Training Checklists

Job area

☐ Acquisitions ☐ Cataloging ☒ Circulation ☐ Interlibrary Loan ☐ Pre-Cat Cataloging

### Onboarding

[Circulation Policy](#) [Documentation](#) [For managers](#)

[Days Closed](#) [Documentation](#) [For managers](#)

[Offline Circulation](#) [Documentation](#) [For managers](#)

[SWAN Members ILS & Delivery Codes](#) [Documentation](#)

[Using the HaloTSM Help Desk](#) [Documentation](#)

### Notices

[Materials Recovery Service](#) [Documentation](#) [For managers](#)

[Patron Notices](#) [Documentation](#) [For managers](#)

[Processing Notice Errors in MessageBee](#) [Documentation](#)

### Patron and other accounts

[Book Discussion Best Practices](#) [Documentation](#)

[Patron Record Maintenance](#) [Documentation](#)

[Student Online Protection Act-Student Cards](#) [Documentation](#) [For managers](#)

[Teacher Cards](#) [Documentation](#)

## Training Checklists

Job area

☐ Acquisitions ☐ Cataloging ☐ Circulation ☐ Interlibrary Loan ☐ Pre-Cat Cataloging

Select any job area to see recommended trainings and documentation.

# User Group Updates – Not today!

Recordings of group meetings on the SWAN support site:  
<https://support.swanlibraries.net/meetings-trainings/meeting-documents>

# Upcoming Events

Register now for 2025 user groups, governance meetings, and office hours! On L2 and the SWAN Support Site:

<https://support.swanlibraries.net/calendar>





# Next Fireside Chat September 30th

