



SWAN Acquisitions and Cataloging Networking Group

February 12, 2026

Processing Tonies

February 12, 2026

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Tonies & ownership labels

- Does anyone label/mark the Tonie figurines?
- For those with a Tonie collection, what type of case do you use?



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Acquisitions - EDI

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Acquisitions - EDI

- Best practice for EDI invoicing with Ingram's one processing account limit (ADD)
- Pros and cons to being an Acquisitions/EDI library (MED)
- EDI/Processing Procedures (OLS)

B&T vendors and EDI File Retrieval via FTP report errors

B&T vendors and EDI File Retrieval via FTP report errors

The screenshot shows a web form for vendor information. At the top, there are tabs for 'Vendor Information', 'Vendor Extended Information', 'Addresses', 'EDI Address', and 'Vendor Cy'. The 'Vendor Information' tab is active. The form contains the following fields:

- Library: SWS
- New ID: BT
- Name: BAKER & TAYLOR BOOKS
- Customer number: [empty field]
- Currency: US
- Group 1: [empty dropdown]
- Group 2: NOEDI (highlighted with a blue box)
- Group 3: [empty dropdown]
- Ordering allowed:
- Paying allowed:

Baker and Taylor ftp site disabled, which disrupted report runtimes for EDI File Retrieval via FTP

SWAN has updated all library B&T vendors with a Group 2 of NOEDI

New Acquisitions course

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Check out our new SWAN online learning course!

The banner features a teal background on the left with white text and a 'START COURSE' button. On the right, there is a photograph of a gold shopping cart. The text on the banner includes the instructor's name, a profile picture, and the course title.

 Samantha Dietel

TS402: Creating and Sending Symphony Acquisitions Orders

START COURSE



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Acquisitions rollover review

Acquisitions Rollover

Discussion and
take-aways



What worked well?



Pain points?



Importance of communication
with vendors

Call Numbers for Serials

Call Numbers for Serials

Call Numbers for Serials- Base call number vs. Analytic

The screenshot shows a library system interface with two tabs: 'Item Info' and 'Holds'. Under 'Item Info', there is a section for 'Call number information'. The 'Call number' field is highlighted with a red box and contains the text 'PERIODICAL|zJAN 12, 2026'. Below the text, there are two red labels: '1.' under 'PERIODICAL' and '2.' under '|zJAN 12, 2026'.

1. This is the base call number. Libraries can choose the base of their call number – it is not standardized
 - Things to consider when choosing for your library:
 - Default auto-generated call numbers beginning with "(XX-" or punctuation like "." may cause issues during batch work behind the scenes
 - This also displays to patrons in Aspen
2. This is the Analytic portion of a call number. This is standardized and a specific issue should be the same across all SWAN libraries. This is how hold functionality is determined in WorkFlows and Aspen
 - Always begins with |z

Analytic information - Common date formats

Frequency	Chronology Format	Example
Monthly	MMM YYYY	FEB 2026
Bimonthly	MMM/MMM YYYY	JAN/FEB 2026
Weekly/Daily (single date)*	MMM DD, YYYY	FEB 5, 2026 FEB 12, 2026
Weekly Double Issue (two issues combined)	MMM DD/DD, YYYY	FEB 5/12, 2026
Date ranges (Feb 5-11, 2026)**	MMM DD, YYYY	FEB 5, 2026
Quarterly/Seasonal***	SSS YYYY	WIN 2026 FALL 2025
Quarterly/Season (Month ranges)	MMM/MMM YYYY	JAN/MAR 2026
Yearly	YYYY	2026

*If the day of the month is one digit, only use one digit

**Only first date in a range is used

***The season of FALL is spelled out fully

Consistent Analytic content - Why it matters



- Any variation from the standards will be interpreted by WorkFlows and Aspen as different issues
 - A hold on the correct formatting (DEC 8, 2025) cannot be fulfilled by any item with the other variations in the |z
 - Patrons will not know which formatting is "correct" or has the most issues associated with it
 - If they choose an incorrectly formatted record, only issues with that exact |z content will fulfill the hold
 - Holds on incorrect call numbers will act more like item-level holds

Cataloging Working Group Update

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Cataloging Working Group Update

- Backstage update
- New Search Interpreter
- Library of Congress cease adding form subdivisions
- MARC Listener changes
- 89x Fields
- Documentation Update

Next Meeting – In Person!

Thursday, May 7, 2026, 10:00 AM – 12:00 PM (Warrenville Public Library District) -
[Register on L2 https://librarylearning.org/event/2026-05-07/swan-acquisitions-and-cataloging-networking-group](https://librarylearning.org/event/2026-05-07/swan-acquisitions-and-cataloging-networking-group)

Acquisitions and Cataloging Networking Co-chairs

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Bibliographic Services Manager

Mark your calendars now! Next meeting is **Thursday, May 7, 2026.**
In-person at Warrenville Public Library District, 10 AM- 12 NOON



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