



SWAN Fireside Chat

August 25, 2026

Agenda

- SWAN Expo Recap
- ILS Search
- Labor Day Authority Rebuilds
- Aspen Update
- E-resource Update
- Resource Sharing Update
- Training & Documentation Update
- Upcoming Events

SWAN Expo

SWAN Expo 2026

- 205 member attendees
- 15 breakout sessions
 - 11 led by member staff
- Presentation Slides available:
<https://swanlibraries.net/expo/archive>

Thank you all attendees and presenters!



SWAN Expo 2026 Feedback Form



ILS Search Announcement

Aaron Skog, Executive Director

ILS Search overview

Board decision to move forward with a request for proposals (RFP) for ILS & analytics software platforms.

The ILS Search Committee will consist of 5 SWAN staff members and 5 representatives from SWAN member libraries.

The committee will make a recommendation to the SWAN Board on the future direction of SWAN's ILS and analytics platforms, meeting throughout the request for proposal (RFP) and vendor demonstration process.

A teal-colored triangle is located in the bottom right corner of the slide, pointing towards the top right.

ILS & Analytics search timeline

Timeline	Activity
July - Sept 2026	Create instrument that will outline all of our initial questions and requirements, with scoring worksheet
September 18, 2026	SWAN Board meeting - approval of ILS Search Committee and first draft of RFP submitted for review
Sept 21 - 26, 2026	ILS committee kick-off meeting
October 2026	Issue RFP
November 2026	Compile and review Round 1 responses
December 2026	Request clarification of proposals
January 2027	Scoring of proposals & pricing
February 2027	Round 2 finalist demonstrations & membership feedback/scoring
March 2027	Request for best & final offer pricing
April 2027	Final scoring & recommendation
May 2027	Contract negotiation

Opportunity to participate in ILS review & recommendation process

- We need your help!
- The group of member library staff and SWAN staff will complete a written draft of the RFP document
- Evaluate the proposed solutions based on the written responses and software demonstrations.
- The search timeline is outlined on the dedicated page on the SWAN website, along with a self-nomination form to submit your name and statement on your experience and background.
- The submission deadline is **September 8th, 2026**
- Group will be selected and approved at the SWAN Board meeting on September 18th, 2026
- Go to swanlibraries.net for details

Labor Day Authority Rebuilds

What's happening?

- Rebuilding the Authority Index and Thesauri
- Beginning September evening 5th (9/5)
- Anticipate delays in scheduled Symphony Reports on Labor Day (9/7)
- SWANcom will be sent prior to and after scheduled maintenance has concluded

Important notes:

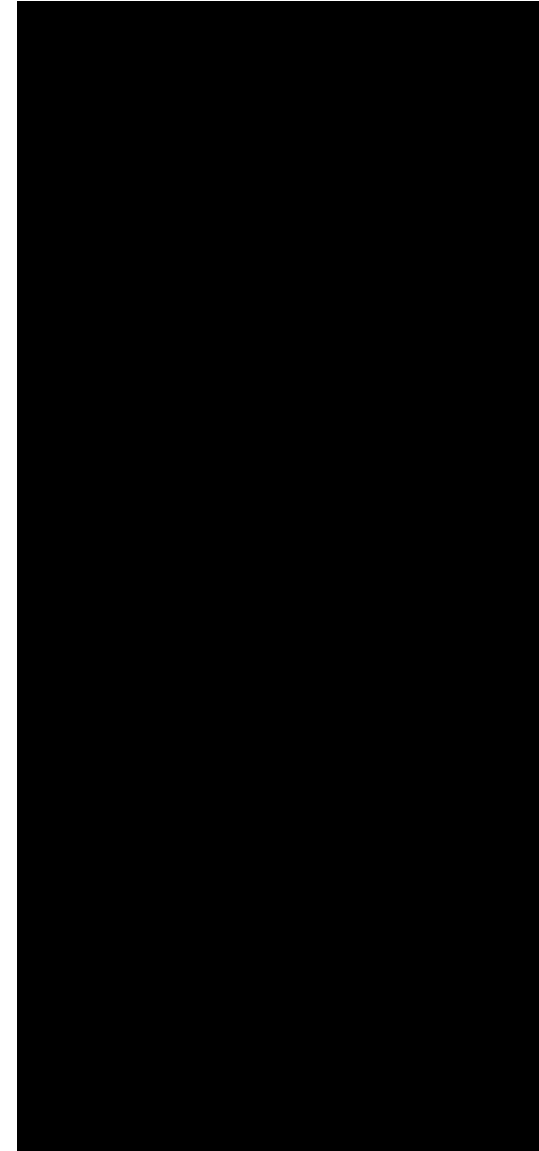
- WorkFlows will not be available during the system maintenance
- Aspen online catalog will still be available
 - My Account features may be briefly unavailable during maintenance window

Aspen Update

Coming tomorrow: Major speed improvements for the app

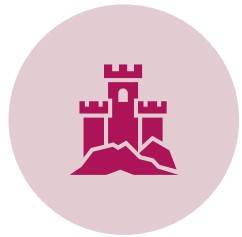
After you log in for the first time, the app will load much, much faster – almost instantaneous.

This update is in the 26.09 release – going out August 26th. Update your app to see the changes.



E-Resource Update

Palace Project Web Catalog



JUNE 2026, PALACE PROJECT
ANNOUNCED THE LAUNCH OF
THE PALACE WEB CATALOG



EACH LIBRARY WILL HAVE A
UNIQUE, WEB CATALOG URL



PATRONS CAN BROWSE THE
CATALOG, CHECK OUT ITEMS,
MANAGE LOANS AND HOLDS,
AND READ EBOOKS AND
AUDIOBOOKS ALL WITHIN THE
WEB BROWSER



PATRONS WILL CONTINUE TO
BE DIRECTED TO THE MOBILE
APP IF THE TITLE IS
UNAVAILABLE IN THE WEB
BROWSER



SWAN IS WORKING TO UPDATE
ASPEN TO REFLECT WEB
CATALOG ACCESS IN THE
INSTRUCTIONS

Resource Sharing update

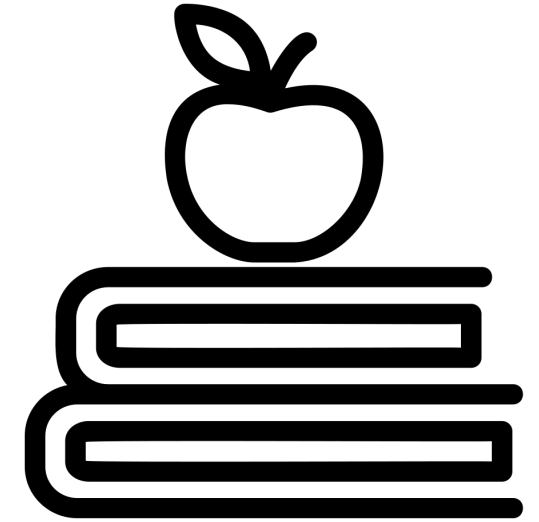
OCLC Training

Self-Paced Courses

- [Intro to WorldShare ILL self-paced course](#)
- [Automation self-paced course as Public Library](#)

Live Training:

- **17-Sep-2026** [WorldShare ILL Borrowing - Borrowing requests](#)



Training & Documentation

Documentation

External Resources for Cataloging Libraries

The Library of Congress, OCLC, and other websites house a lot of information that is useful for anyone cataloging. Below are some of the specific highlights that we use within SWAN Bibliographic Services.

Authority records

- [MARC 21 Format for Authority Data](#): Access descriptions of the data elements found in Authority Records and what they mean
- [Search Authorities](#): Browse and view authority headings, including for subjects, genres, and names of persons, organizations, and meetings/conferences
- [Library of Congress Genre/Form Terms](#): Narrow down your authority search to Genre/Form terms
- [Library of Congress Genre/Form Terms PDF files](#): PDF versions of authorized LCGFT terms and use manual
- [Subject Heading and Term Source Codes](#): List of other subject heading lists, thesauri, and databases beyond Library of Congress



On this page

- | [Authority records](#)
- [Codes and vocabularies](#)
- [MARC and Fixed Fields information](#)
- [Non-English and format specific resources](#)
- [Staying up-to-date](#)

Cataloging

Create pre-cats, find local cataloging practices and policies, and learn about the

Documentation

[Cataloging Libraries](#)

[Cataloging Workflow](#)

[External resources](#) **New**

[Requirements for SWAN Cataloging Libraries](#)

[Responsibilities and Expectations](#)

[WorkFlows Search Indexes and Types](#)

Training



**New
Training
Alert**



Learn: Receiving and Invoicing Symphony Acquisitions Orders

Self-Paced Interactive Training 60 minutes [Acquisitions](#)

Last Updated: August 18, 2026

Presenters

Samantha Dietel, *Bibliographic Services Consultant*

This course teaches library staff all about the receiving and invoicing process in Symphony Acquisitions. Learn how to receive materials on-order and create item records either by updating existing records or creating new ones. You will also learn how to create invoices manually or use EDI invoicing to import invoices directly from your vendor. This course will also cover displaying invoices, paying invoices, reversing payment, and how to link invoice lines to titles or funds.

You will need to register for an account on [SWAN Online Learning](#) before enrolling in this course.

TS403: Receiving and Invoicing Symphony Acquisitions Orders

[Sign Up Today](#)

Upcoming Events

Register now for **2026** user groups,
governance meetings, and office hours!

swanlibraries.net/meetings

Registration, sign up, and self-
nominations for 2027 coming in October!

- SWAN Quarterly (9/3)
- Aspen Networking (9/8)
- Acquisitions and Cataloging Networking (9/10)
- E-Resource Working Group (9/24)



Next Fireside Chat: September 29th@ 11AM