



SWAN Fireside Chat

October 27, 2026

Today's agenda

- ILS Search Update
- Aspen Update
 - Scan-and-Go
- E-resource Update
- Resource Sharing Update
- Training & Documentation Updates
- User Group Updates
- Upcoming Events

ILS & Analytics Search Update

RFP document issued & first milestone reached



The RFP process includes a step where vendors will notify SWAN on their "intent to propose" and as of Friday 10/23 4:00 p.m. we received the following:

- Clarivate will submit Polaris and components of Vega LX
- SirsiDynix will submit Symphony and the BLUEcloud Suite
- Equinox will submit the Evergreen ILS & Metabase for analytics, and they may submit a second proposal for the Koha ILS
- ByWater Solutions will submit the Koha ILS & Metabase for analytics

ILS Search Committee next steps

- Scoring rubric: points & weights
 - Based on written RFP questions
 - Weighting will prioritize some features over others
 - Decide number of Task Force groups required
 - Written purpose & deliverables for groups
 - Number of days & hours required in February during software demonstrations
- 
- 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 - Oct 2026	ILS Search Committee reviews Request For Proposal (RFP) document
October 14, 2026	Issue RFP
October 23, 2026	Deadline for Letter of Intent
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

Aspen update

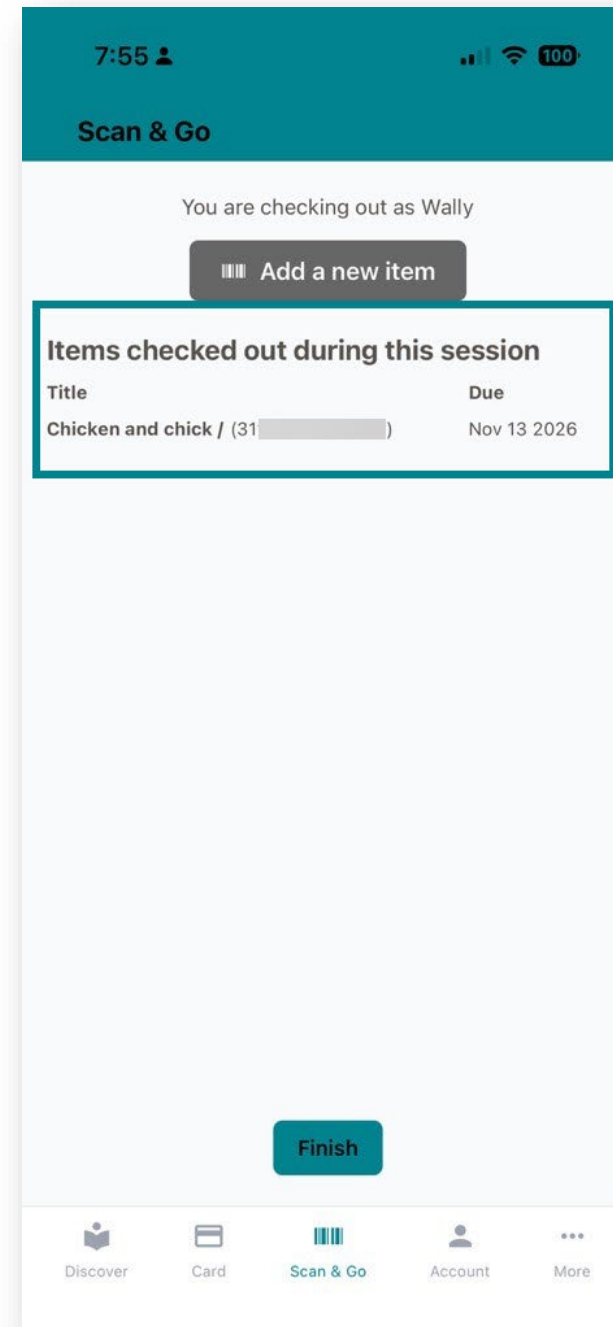
No release in September

Scan & Go public beta – Nov. 2

Downers Grove and Lansing will go live with a public beta of Scan & Go, the self check feature in the app.

Big thank you to our pilot libraries for testing!

We anticipate making this available to any library in January. This will be an opt-in, per library feature.



Customizable font sizes

Libraries can set a customizable font size for base themes.

Patrons can set a preferred text size in **My Account > Preferences > Preferred Text Size**.

×

Display Settings

Language to display catalog in

English

▼

Display Mode

Default

▼

Preferred Text Size

Large

▼

Close

Update Settings

App barcode display issues

- In 26.08, some users could not view their barcodes until they cleared their caches in More > Preferences > Support
- This was resolved with a patch (26.08.02)
- If you have reports that patrons are experiencing this issue
 1. Update to the most recent version of the app
 2. Take a screenshot of More > Preferences > Support

E-Resource update

Hoopla Checkout Error Update

Completed

- Updated Aspen's error message with account registration instructions and library support guidance.

Next Steps

- Direct redirection to Hoopla registration remains an open enhancement request, with completion not expected until 2027.

Resource Sharing update

OCLC Training for Illinois Libraries

Introduction to cataloging at OCLC

Wednesday, Nov 04, 2026 | 1:00 pm - 2:00 pm

Introduction to WorldShare Interlibrary Loan

Wednesday, Nov 18, 2026 | 1:00 pm - 2:00 pm

Introduction to FirstSearch and WorldCat Discovery

Wednesday, Dec 02, 2026 | 1:00 pm - 2:00 pm

Prepared for the Illinois State Library

Focus areas: Cataloging · WorldShare Interlibrary Loan · FirstSearch · WorldCat Discovery

But wait, there's more!

Cataloging — Connexion Client

Connexion Client 2: Bibliographic Searching

Tue, Oct 20, 2026 – 2:00–3:00 PM

Connexion Client 3: Record Editing and Processing

Tue, Nov 3, 2026 – 2:00–3:30 PM

Connexion Client 4: Save Files and Batch Processing

Tue, Nov 17, 2026 – 2:00–3:30 PM

Connexion Client 5: Automation and Customization

Tue, Dec 1, 2026 – 2:00–3:30 PM

Connexion Client 6: Authority Control

Tue, Dec 15, 2026 – 2:00–3:30 PM

Cataloging — WorldShare Record Manager

Create and Manage WorldCat Bibliographic Records

Tue, Nov 10, 2026 – 2:00–3:00 PM

Authority Control

Tue, Dec 8, 2026 – 2:00–3:00 PM

Prepared for the Illinois State Library

Focus areas: Cataloging · WorldShare Interlibrary Loan · FirstSearch · WorldCat Discovery

But wait, there's more!

Cataloging — WorldShare Collection Manager

Collection Manager: Use KBART Files to Edit WorldCat Knowledge Base Collections

Tue, Oct 27, 2026 – 2:00–3:30 PM

WorldShare Interlibrary Loan (WorldShare ILL)

WSILL Lending – Configurations for Lenders

Thu, Oct 29, 2026 – 1:00–2:00 PM

WSILL Lending – Manage and Respond to Requests

Thu, Nov 5, 2026 – 1:00–2:00 PM

WSILL Borrowing – Borrowing Requests

Thu, Sep 17, 2026 – 1:00–2:00 PM

WSILL Borrowing – Manage ILL Requests as Borrower

Thu, Sep 24, 2026 – 1:00–2:00 PM

Prepared for the Illinois State Library

Focus areas: Cataloging · WorldShare Interlibrary Loan · FirstSearch · WorldCat Discovery

Self-Paced Training

- Connexion Client — Cataloging — recordings covering copy and original cataloging workflows in Connexion client.
- WorldShare Record Manager — Cataloging — recordings, simulations, and videos for editing and creating WorldCat records online.
- WorldShare Record Manager Fundamentals — Cataloging — introductory recordings and videos for staff new to WorldShare Record Manager.
- WorldShare Collection Manager — Cataloging — recordings and videos on managing WorldCat knowledge base collections and metadata.
- WorldShare Collection Manager Fundamentals — Cataloging — shorter introductory videos for libraries using the Fundamentals tier.
- WorldShare Interlibrary Loan — WorldShare ILL — quizzes, recordings, simulations, and videos covering borrowing and lending workflows.
- FirstSearch — recordings and videos on searching and using the FirstSearch interface.
- WorldCat Discovery — recordings and videos on searching, discovery features, and end-user experience.

Prepared for the Illinois State Library

Focus areas: Cataloging · WorldShare Interlibrary Loan · FirstSearch · WorldCat Discovery

Training & documentation

Documentation



Partial Payments

Accepting partial payments when patrons have incurred a significant balance is a service-focused way to encourage payment and continued library use. The documentation on this page includes suggestions for managing and tracking these payments as well as some pitfalls to avoid.

When negotiating terms of the payment plan, it's important to remember there is no one-size-fits-all payment plan. Local policy and the prevailing service culture will inform the agreement between the library and the patron. Be sure you consider the following:

- The frequency and amount of payments
- The duration of the payment plan
- Can the patron continue to borrow while the payments are regularly made? (i.e. Override user block.)
- Should Referral to Unique Management Services (UMS) be prevented or suspended while the payments are regularly made?
- Consequences for a patron who falls behind on payments or otherwise violates terms.

Notes and guidance

An unreturned item that has become LOST should be paid in full before a year passes following the original due date. At the 1-year point, the Custom Longoverdue Report will remove the LOST bill; erasing any payment history and replace it with a LONGOVRDUE bill using the price in the item record.

If it seems likely the patron will need longer than a year to pay off the LOST bill, consider discarding the item and replacing the LOST bill with a LOSTX bill.

No other [bill reason](#) has a timeline like this that would impact the payment record.

If your library uses Unique Management Services (UMS) for [Material Recovery Service](#) and the patron is over your library's selection threshold you can prevent them being referred by adding NO_UNIQUE to the User Cat 9 (Library Defined) field. Removing this from the field will make them a candidate for referral again.

Training Update



SWAN Online Learning

Library staff can register, enroll in online courses developed by SWAN, and track learning and certificates of completion. We are using the software platform Inquisiq to support our online SWAN Learning.

Note that the learning management system will include interactive online courses only. To view the full selection of SWAN webinars and training, [view our full listing of trainings](#).

Launch SWAN Online Learning

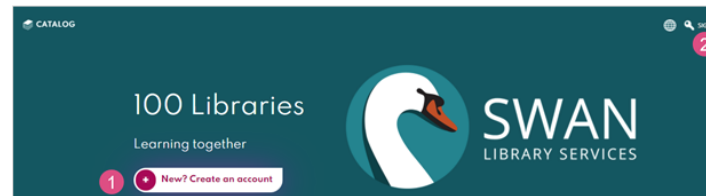
Registering

Before registering in the learning management system all learners must first have an L2 account set up.

Learners can self-register.

Learners will follow links from our SWAN Learning home page:

1. First time - Create an account
2. Once approved - SIGN IN



Be sure to have an L2 account!

User Group Updates

Recordings of group meetings available on the [SWAN support site](#)

Cataloging Working Group

Agenda:

Representative from Pre-cat library

Change in meeting times 2028

Subject heading reminders

- Forms
- Large type subject removal
- Non-English language subject headings

590 Field and pre-cat formats

130 title field for film remakes

Fields for video games

Title consistency for numeric volumes

Working Group Page:

<https://swanlibraries.net/user-group/67165>

Circulation Networking Group

- Victoria Muraiti, River Forest Public Library
- Melissa Willer, Downers Grove Public Library

1.Welcome and Introductions

2.Transit Labels – Best practices, wishes, and misuse (Community Forum)

3.Job Titles and Descriptions (Community Forum)

4.Outreach (Community Forum)

5.SWAN Updates

1. SWAN ILS Search Update
2. Update to Chicago Public RB Item Type Block

6.Around the Zoom meeting

DUX Working Group

- Wrapped up the My Account project
 - Reviewed the results of usability testing on My Account features
 - Finalized development requests to submit to Aspen developers



In person @

Indian Prairie
Public Library

SWAN Discussion: Outreach – Meeting Patrons Where They Are

Wednesday, Oct 28, 2026 | 10:00 am – 11:30 am

REGISTER

37 seats left

 Add to Calendar

About This Event

Not every patron can come to you, so how do you bring library services to them? This peer discussion session will focus on outreach strategies that extend library services into the community through pop-up events, mobile services, homebound delivery programs, and more. Can also discuss using the Symphony Outreach module for those managing circulation to homebound patrons. Bring your questions, your challenges, and your success stories.

This is a one-time discussion, not a presentation or training event, and as such it will not be recorded.

[Register Today](#)



In person @

Oak Brook Public
Library

SWAN Discussion: MobileStaff Applications and Ideas

Monday, Nov 09, 2026 | 10:00 am - 11:30 am

REGISTER

67 seats left

 Add to Calendar

About This Event

Join us for a discussion of MobileStaff applications and the MobileStaff kits available to SWAN libraries for events and conducting inventories. This will be a peer-driven discussion, so we encourage libraries that are already familiar with MobileStaff to attend and share their experiences!

This is a one-time discussion, not a presentation or training event, and as such it will not be recorded.

[Register Today](#)

Upcoming Events

Register now for 2026 user groups,
governance meetings, and office hours!
On L2 and the SWAN Support Site:
<https://swanlibraries.net/calendar>

- Outreach: Meeting Patrons Where They Are – 10/28 – In-person @ Indian Prairie
- MobileStaff Applications and Ideas – 11/9 – In-person @ Oak Brook
- Circulation Working Group – 11/18
- SWAN Board Meeting – 11/20 – In-person @ West Chicago
- Fireside Chat – 11/24



Next
Fireside Chat
November 24th