SWAN Fireside Chat

November 24, 2026

Today's agenda

- BLUEcloud migration & outage
- ILS Search Update
- Backstage Update & Rebuild Indexes
- Aspen Update
- E-resource Update
- Resource Sharing Update
- Training & Documentation Updates
- User Group Updates
- Upcoming Events

BLUEcloud migration & outage

BLUEcloud Migration

Analytics

Commerce

Central

Circulation

Acquisitions

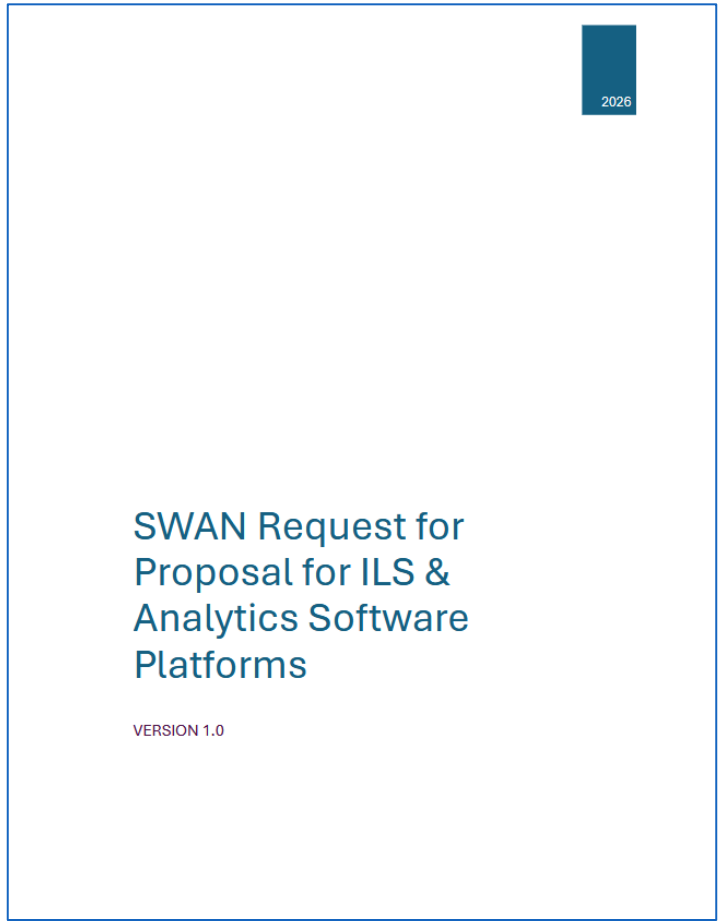
- Reasons for migration
- Announcements
- Issues encountered 11/3 – 11/13
- BLUEcloud Analytics
- BLUEcloud Commerce

WorkFlows commerce & magnetic swipes

- IF your library continued to use swipes from 11/3 – 11/13
- We recommend you check your ProPay accounts for any payments made 11/3 through 11/13
- Check to see if the bill is paid in WorkFlows; if not:
  - Check for the email from ProPay confirming payment
  - Select PROPAYUPD to pay the bill in WorkFlows.

ILS & Analytics Search Update

RFP document issued & second milestone reached



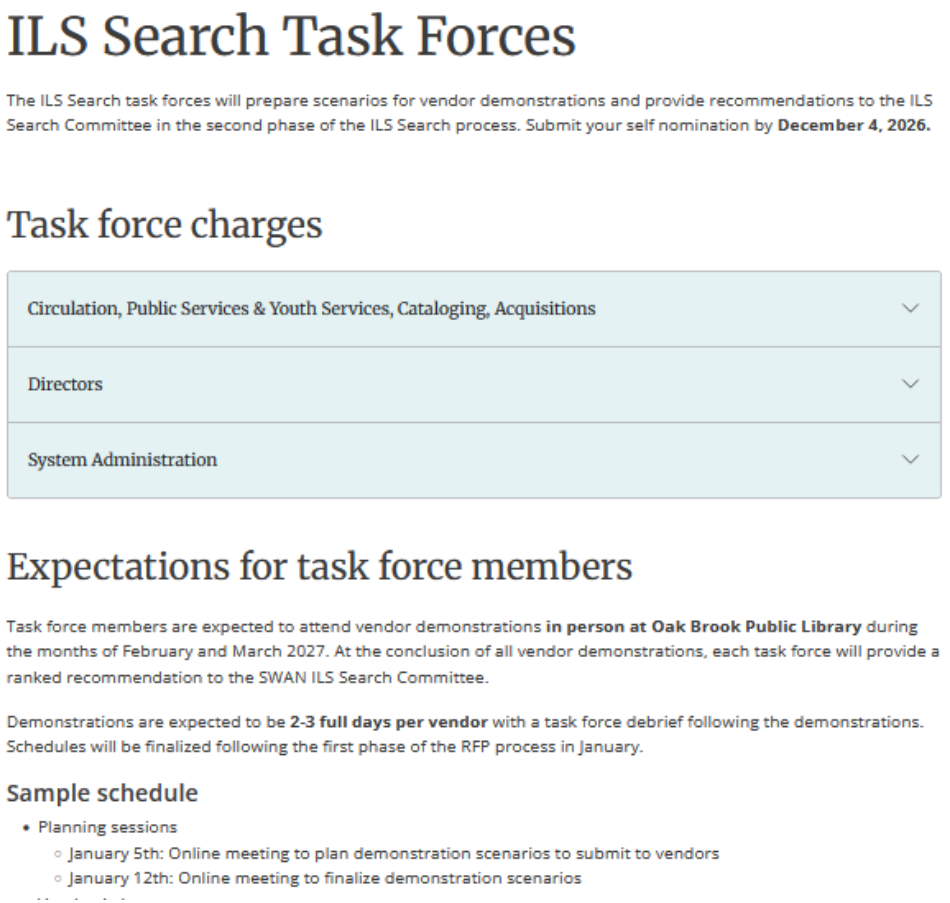
Proposals received

- Equinox – Evergreen ILS
- Innovatve – Polaris ILS
- SirsiDynix -- BLUEcloud

Call for membership participation: submit your self-nomination by December 4th

Task Force Groups

- Public services
- Youth services
- Directors
- Circulation
- Acquisitions
- Cataloging



ILS Search Task Forces

The ILS Search task forces will prepare scenarios for vendor demonstrations and provide recommendations to the ILS Search Committee in the second phase of the ILS Search process. Submit your self nomination by **December 4, 2026.**

Task force charges

Circulation, Public Services & Youth Services, Cataloging, Acquisitions

Directors

System Administration

Expectations for task force members

Task force members are expected to attend vendor demonstrations **in person at Oak Brook Public Library** during the months of February and March 2027. At the conclusion of all vendor demonstrations, each task force will provide a ranked recommendation to the SWAN ILS Search Committee.

Demonstrations are expected to be **2-3 full days per vendor** with a task force debrief following the demonstrations. Schedules will be finalized following the first phase of the RFP process in January.

Sample schedule

- Planning sessions
  - January 5th: Online meeting to plan demonstration scenarios to submit to vendors
  - January 12th: Online meeting to finalize demonstration scenarios

ILS Search Committee next steps

Scoring rubric: points & weights

- Based on written RFP questions
- Weighting will prioritize some features over others

- Review proposals
- Request clarifications with proposers

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

Backstage Processing

Backstage Update & Rebuild Indexes

- Backstage Library Works Bi-annual update
  - Extract of bib records
    - Editing of older cataloged records will be frozen from 12/18-12/22
  - Load updated bib records & authority records
- Headings Index/Rebuilds & Authority Index/Thesauri
  - Holiday weekend 12/24-12/25
    - Start after libraries are closed 12/24
    - Only SWAN **Aspen catalog will be available**
    - Please refrain from accessing WorkFlows during this process
    - All clear message will go out when WorkFlows is accessible again
    - Reports may be behind on the 26th.

BLUEcloud Analytics Permissions

BLUEcloud Analytics Permissions

- Update to all member library staff profiles
- Bridging gap in features between libraries
- Everyone will see some new features!

New BLUEcloud Analytics Permissions



- Create new reports and folders
- Report details
- Report SQL
- Number formatting, column widths, and visual threshold editor
- Add notes

Timeline

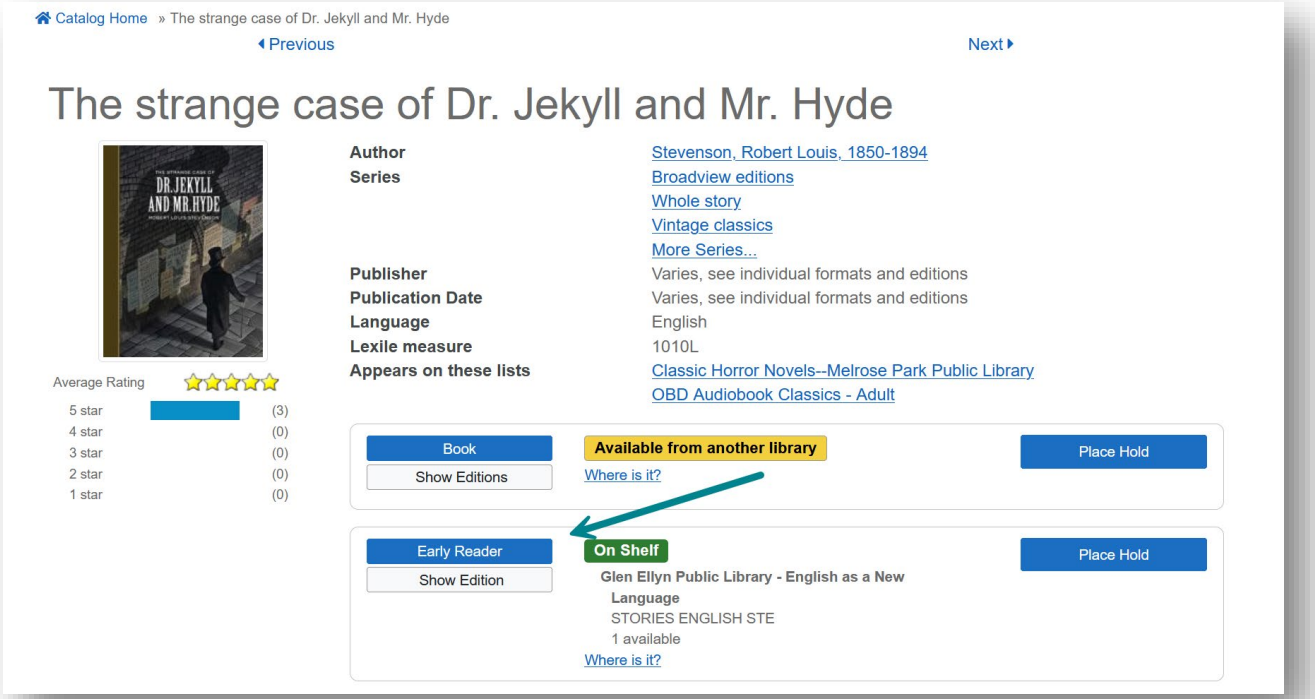
	Nov. 2026	Testing/Pilot (Complete)
	1 Dec. 2026	Rollout
	8 Dec. 2026	BLUEcloud Analytics Office Hours (11:00 a.m.)

Aspen update

New Early Reader format

Appears if "Readers (Publications)" is in the 655$a field.

If both Picture books and Readers (Publications) headings are present, the Early Reader format will be applied.

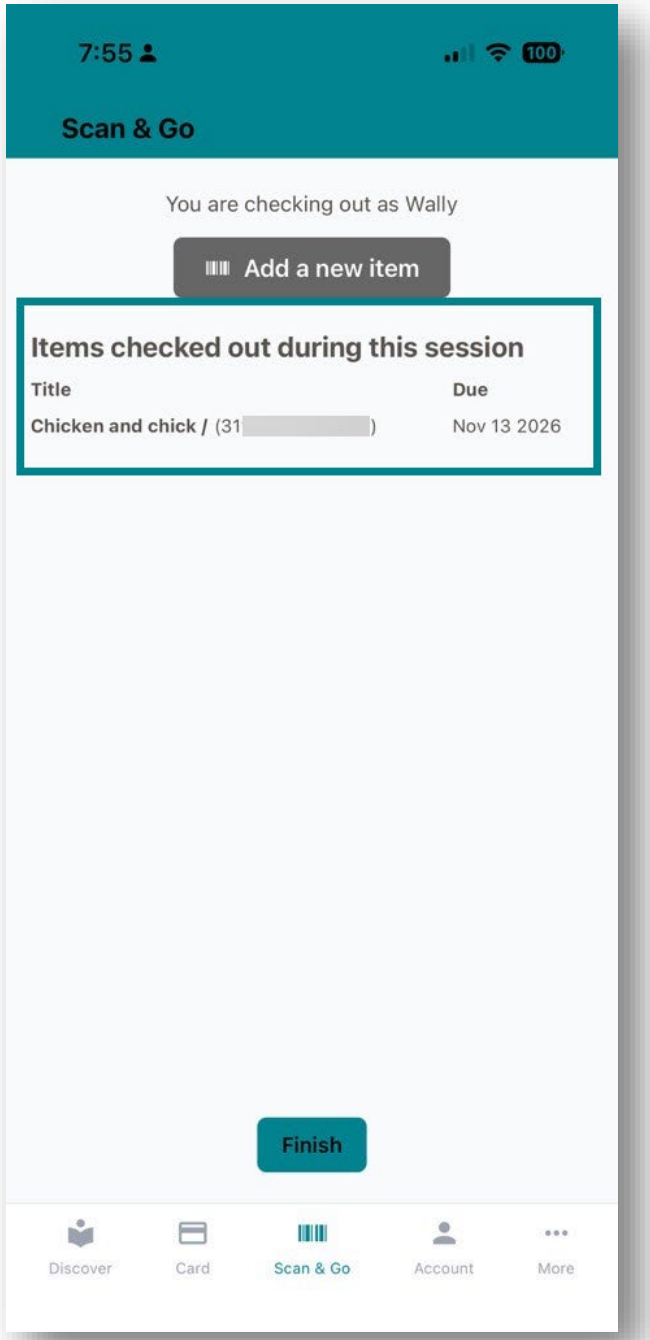


Reminder: Scan & Go available in January

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

This is an opt-in, per library feature.

Open a ticket to enable Scan & Go for your library's app instance.



E-Resource update

The Palace Project

Coming to all Illinois libraries in December

Offered through RAILS

One app for all your e-content

Palace is an aggregator: libraries can offer e-collections from different vendors to users in a single app.

Palace Marketplace

Libraries can purchase content directly from Palace, including Audible exclusive audiobooks.

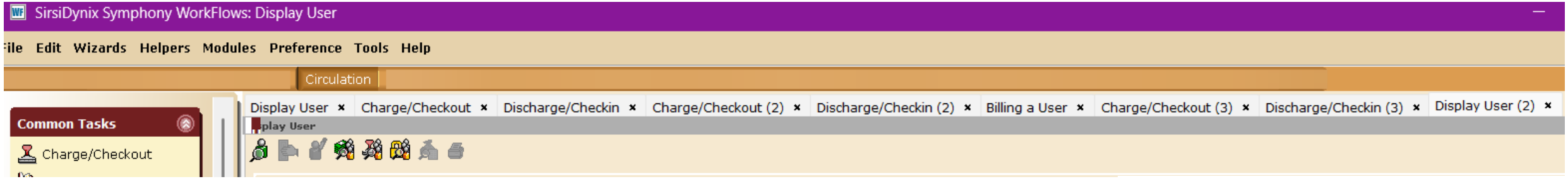
Free to Illinois libraries

The Palace Project platform comes at no cost to libraries in Illinois.

Interested in Palace without the eRead Illinois collection? Details will be posted in December on the **RAILS Deals & Discounts** website.

Resource Sharing update

Reminder: Close your windows



Reduce errors by closing out windows between tasks.
ALT + C



SWAN Merch Coming soon!

(Hopefully)



SWAN Merch Coming soon!

(Hopefully)



Are you an artist?

Art submissions sought

for SWAN apparel

Send in a support ticket

Attn: SWAN Member Merch Art



Training & documentation

Documentation Update



Reciprocal Borrowers and Quarterly Billing

Losses incurred by non-SWAN Reciprocal Borrowers are reconciled via Quarterly Billing. At the point where an invoice is sent to the patron's home library, the WorkFlows bill is cleared with "RBLIBREIMB" as the payment type to indicate the Reciprocal Borrower's Library has been billed for the item library in SWAN. A note is inserted to indicate the bill period and instructs SWAN Member Library Staff to re-verify before reinstating. Reverification is critical!

Reimbursement may not occur if materials are checked out that are not of a type allowed to be borrowed by RB patrons. e.g. Chicago Public Library will not reimburse for console games. Registration errors, or granting privilege without verification may result in your items *not* being reimbursed. Register RB patrons carefully as described above. Re-verify prior to lifting a bar on a record. Refer patron questions about reimbursed bills to their home library. Refer library questions to SWAN HQ.

SWAN patrons as reciprocal borrowers

SWAN patrons can register as reciprocal borrowers at some non-SWAN libraries. If a library contacts you to verify the status of your patron, you can direct them to the patron lookup tool for non-SWAN libraries.

Training Reminder

1. Make sure that you have an L2 Account
2. Register with your work email
3. Username should be your work email

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



Online registration form

User Group Updates

Recordings of group meetings available on the SWAN support site

Circulation Networking Group

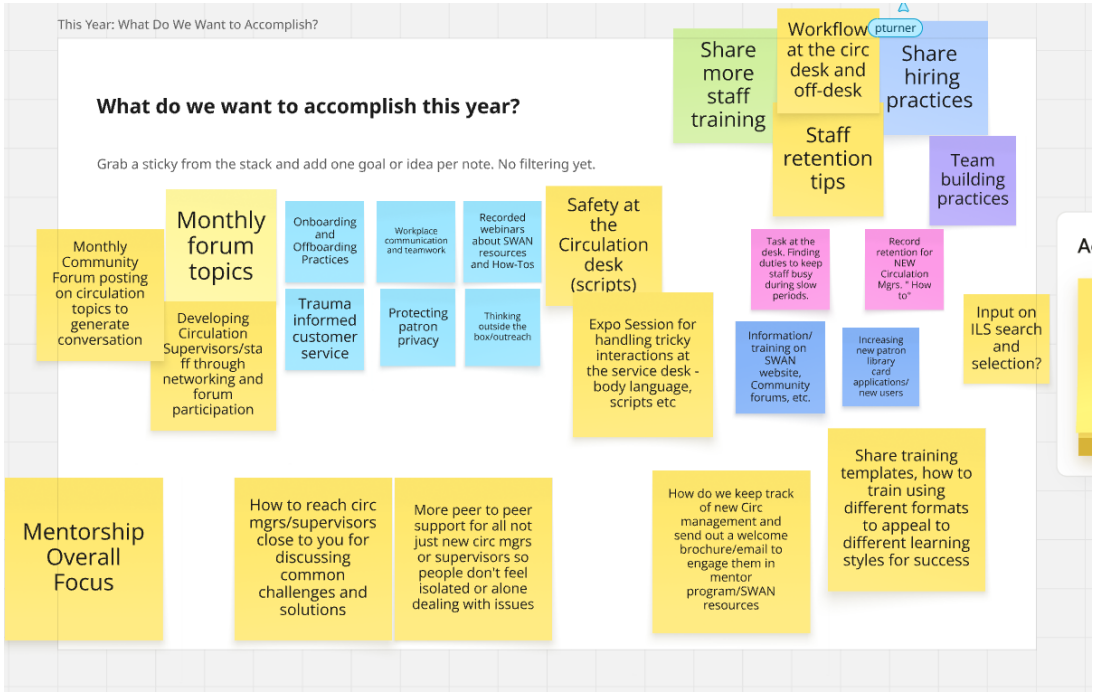
- Victoria Muraiti, River Forest Public Library
- Melissa Willer, Downers Grove Public Library

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

Circulation Working Group

New Members

- Kathy Welko, Addison Public Library
- Sky Stopen, Indian Prairie Public Library
- Parish Turner, Bensenville Community Public Library
- Karen Christiansen, Glen Ellyn Public Library
- Kristen Wunder, Itasca Community Library



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

Upcoming Events

- Register now for 2027 user groups, governance meetings, and office hours!
- On L2: Library Learning
- SWAN site: https://swanlibraries.net/calendar


Next
Fireside Chat
January 26, 2027