

# SWAN Acquisitions Users Meeting - 10/10/2019

## 1. Introduction

Attendees introduced themselves. Meeting facilitated by Samantha Dietel (SWAN Bibliographic Services Consultant, co-chair) and Vickie Totton (Information Technology, Systems & Support Consultant, co-chair).

## 2. BLUEcloud Acquisitions SPP Update

Sam shared information about the BLUEcloud Acquisitions Strategic Partnership Program (SPP) Phase III Pilot that just wrapped up the previous week. SWAN, St. Charles PL (SCD), and La Grange PL (LGS) participated in this pilot, which began in July. BLUEcloud Acquisitions was installed in a test environment, and the participants completed weekly assignments for topics ranging from adding orders to fiscal rollover.

Rebecca Bartlett (LGS) demoed BLUEcloud Acquisitions, highlighting some of the features she liked best. Julie Tegtmeier (SCD) shared her experiences as well. Discussion followed, including:

- *When will this product be ready for us to use?* It is not yet ready for many of the libraries currently using acquisitions in Symphony. Some key features yet to be developed, such as creating manual invoices and EDI, make it not ready for prime time. However, SirsiDynix is actively improving this product with each release. SWAN sees potential for using BLUEcloud Acquisitions for libraries new to acquisitions. Sam also noted that for libraries interested in using 9xx/MARC Order Loading only, BLUEcloud Acquisitions may be ready now.
- *Will there be a migration for libraries using Symphony that may move to BLUEcloud Acquisitions in the future?* No, there will not be a migration. All data in BLUEcloud Acquisitions must be entered into that product. Both Sam and Rebecca pointed out that this is a good thing, because this provides you with the opportunity to a) review the data you have in Symphony and “bring over” only what you really need and b) reevaluate the way data is organized to yield the best result. For example, fund structure in BLUEcloud Acquisitions is very different from Symphony and allows a tiered, “parent-child” fund relationship. As with adopting any new product, it is important to have an open mind in order to use it to its full potential.
- *How easy was rollover?* Rebecca (LGS) reported that it was easy, but she had to rollover each fund individually. Julie (SCD) shared that she was able to rollover all her funds with only a couple clicks. The differing experiences were due to the way each library set up their funds - Julie set up a primary fund for SCD, which allowed for a simple rollover, where LGS created multiple primary funds.
- *Because BLUEcloud Acquisitions is separate from Symphony, will using it cut down on the number of items we cannot discard because of open orders?* Yes, it will. All Acquisitions data - funds, orders, etc. - are outside of Symphony. The only integration with the Symphony server is with respect to titles, items and call numbers created during the ordering process, so this will help eliminate a lot of the open orders that hold up our Discard process.

Libraries asked about the testing of other BLUEcloud products. SWAN continues to test with a few libraries however they are not yet ready for use in SWAN.

### 3. Remove Fiscal Cycle Update

Vickie provided an update about the Remove Fiscal Cycle report. Most of the fiscal cycles have been removed. However, 2015 and 2016 have some Serial Control records that have vendors attached. SWAN will provide a report of these serial records to libraries for removal. Once the cleanup is complete, we will be able to finish the removal of the fiscal cycles.

### 4. 9XX and EDI Report Consolidation Update

Sam displayed the [9xx](#), [EDI Order](#), and [EDI Invoice](#) Flowcharts and Acquisitions Overview documentation on the SWAN support site. She also shared that the recording of the Acquisitions Overview class is available on the [Tutorials and Training Resources](#) page.

SWAN made the distinction between 9xx and EDI. 9xx is about MARC record loading (including orders, call numbers, bibs and items). EDI refers to the sending of orders and the receiving of invoices.

In many cases, the 9xx reports cannot be consolidated. The Load Bibs with Order Info report sets the vendor for the order, so you can only combine MARC files that all belong to the same vendor. If you are relying on Symphony to auto-generate a P.O. number, you can only combine as many MARC files as should be under the same P.O. However, if you are reading the order ID from the MARC file (947 \$o), you can combine MARC files at the MARC Order Import step.

EDI, conversely, allows for a lot of consolidation. For EDI Ordering, the Book X12 Orders report can be run once for all vendors (no vendor selection made in the vendor selection tab). The EDI File Transmission report can be run the same way, though if you have multiple accounts with Baker & Taylor for book and AV, reach out to them first to check your configuration and make certain they receive all of your files correctly. SWAN can assist you with this.

For EDI Invoicing, the EDI File Retrieval via FTP report should be run without selecting a vendor to pull in all invoice files. The Book X12 Invoices report already does not allow you to select a vendor, but please do not run this report multiple times for different vendors as a “step”. Doing so is redundant and merely clogs the report scheduler.

Marge (MED) reported she had been a cynic regarding these changes but has not had an issue since she made the change.

### 5. Spine Label Demo

Cecilia and Christian (CIS) demoed the spine label printer. They use templates created by DGS to print labels for books right from Item Search & Display or Cataloging wizards, one-by-one. They showed how you can change the orientation of the label text, add spacing, and customize on the fly without making changes to the call number for the item record. BLD reported that they use this as well and have created their own labels.

LGS asked if the printer is a thermal printer, because their Dymo labels are fading. BLD and CIS reported that they have had no issue with these labels fading at all. CIS was also using the spine label printer in Millennium and have not had an issue. OBD reported that theirs faded but this might have been due to faulty labels.

## 6. SWAN Acquisitions Fact Finding Mission

### a. If you run any reports for a vendor, make sure you know your account rep info.

SWAN placed four large post-its around the room - 9xx/MARC Order Loading, EDI Ordering, EDI Invoicing, and Fiscal Cycles. Libraries were asked to write their library codes on smaller post-its and place them on the larger post-its if they use 9xx, EDI ordering, or EDI invoicing with any major vendors. They were also asked to share their fiscal cycle. SWAN will compile this information and share it on the support site, following up with libraries that were not present at the meeting. SWAN asked for the account representatives in order to assist with any issues that may arise with the importing of MARC records, orders, items, or invoices.

Libraries were then given 10 minutes to collaborate at their tables. A lively small-group discussion followed.

## 7. Open Discussion

Ann Marie (GED) reported her library is contemplating changing their main acquisitions vendor and asked what other libraries thought of Baker & Taylor and Ingram. The discount from both vendors is the same but Baker & Taylor changes shipping. Ingram is not able to change the fiscal cycle in purchase orders after a library performs their rollover. Christine (BDD) reported Ingram has promised they will be able to update the fiscal cycle next year. Most libraries reported they are very happy with the customer service at Ingram and their shipments seem to be faster than in the past. The Ingram rep most libraries have worked with has recently retired. SWAN will attempt to work with the representative that has taken her place. SWAN has been working with Curt Leppert at Baker & Taylor to resolve any outstanding issues our libraries may have.