



SWAN Acquisitions Users Group Notes

Thursday, March 12, 2020, 9:30 AM – 12:00 PM

RAILS - Burr Ridge Main Meeting Room and online

Register on L2 - <https://www.librarylearning.info/events/?eventID=30233>

Facilitators:

- Samantha Dietel, co-chair, SWAN
- Vickie Totton, co-chair, SWAN

Agenda/Notes:

- I. Welcome and introductions
- II. SWAN Community Forums for Acquisitions

Vickie introduced SWAN Community Forums to the acquisitions group. A new acquisitions forum has been added with subcategories pending. The forum is by invite-only. Samantha reported that all attendees for today's session as well as at least one person from each acquisitions library not in attendance will receive an invite. The forum will be a good place to discuss things among your peers, including questions about workflow. It also provides a good opportunity to reach out to fellow acquisitions workers when you receive notice of a canceled title and want to ask if others have received similar notices. Forum discussions should not take the place of Help Desk tickets, but discussion taking place there may sometimes lead to submission of a ticket.

Since the meeting, all attendees as well as at least one person from each acquisitions library not in attendance have received invites. Any staff member who did not receive an invite but would like to participate in the forum discussion should send in a ticket to help@swanlibraries.net.

- III. Status of Baker & Taylor known issue
 - a. <https://support.swanlibraries.net/node/67273>

Samantha provided an update on the known issue with MARC downloads from Baker & Taylor, where titles are not downloaded when the 20th position of the leader portion contains a 3; this position should always contain a 4. SWAN has been advised by Baker & Taylor that this is a sporadic issue that is still occurring but has received no further update. SWAN asked for feedback from the libraries attending that order with Baker & Taylor.

Some libraries reported that this had happened to them, while others said they never experienced this issue at all. This points to the sporadic nature of the problem. One library noted that this sounded like an issue they had experienced with Children's Plus which caused them to cease ordering with that vendor. Of the libraries that had experienced this issue, none had seen it occur since February. It is possible that Baker & Taylor has resolved this issue and not reported back to SWAN, so SWAN will follow up with the vendor and ask for an update.

IV. Remove Fiscal Cycle Report update

Vickie reported the status of the Remove Fiscal Cycle Report. SWAN continues to work with SirsiDynix to troubleshoot the report that performs this function. We began to experience issues when we removed fiscal cycle 2014 but SirsiDynix was able work through the issues. We experienced similar issues when we removed fiscal cycle 2015, along with a few new issues. SirsiDynix was able to resolve some of the issues. However, they have not yet been able to resolve the new issues that appeared for 2015. They are currently working with the person who created the custom report for us. Once they have resolved the issues, we will continue to remove fiscal cycles. SWAN plans on retaining only 3 years of fiscal cycles. Rebecca Bartlett expressed LGS does not rollover purchase orders for titles they purchase on a multi-year cycle and would like to retain more of the fiscal cycles to accommodate this practice. Suggested solutions to this were to move the titles to a dated purchase order and roll them over or to run reports for these purchase orders to save for later information.

a. Vendor records in serial control records

We were going to remove the vendors from the serial control records because they were preventing fiscal cycles from being removed. We have since found you should be able to retain the vendor in the control record as long as you rollover these vendors when you perform your yearly rollover.

V. Generic ONORDER user cleanup

Samantha reported that there are a number of very old records from 2015 on a system generic ONORDER user. SWAN is moving to purge these old records soon. Because they are associated with an old fiscal cycle, there should not be any negative impact for libraries. Additionally, a few libraries were checking out to this generic ONORDER user; they have been given library-specific ONORDER users to use in the future. This user may eventually be purged itself.

VI. BLUEcloud Acquisitions update

Samantha provided an update about BLUEcloud Acquisitions. The Phase III Pilot concluded in fall of 2019. The product is still in BETA and has not been released to the general public, but as participants in the pilot, SWAN has been able to turn BLUEcloud Acquisitions on in production. SWAN plans to set up a vendor account with Baker & Taylor and begin ordering materials. SirsiDynix hopes to add EDIFACT functionality to BLUEcloud Acquisitions in the next release (May 2020), so SWAN is excited to test this and other new features as they are developed.

VII. Acquisitions documentation update

- a. New Rollover documentation
<https://support.swanlibraries.net/documentation/64746>
- b. Acquisitions library vendors

SWAN has recently added some new acquisitions documentation to the support site. Samantha displayed this new documentation, most notably the Acquisitions Rollover Documentation. She asked that libraries with a fiscal rollover in May or July look this over and submit feedback. SWAN is also planning to supplement existing documentation, so any suggestions are welcome.

VIII. Canceled Publication Patron Notification Tool demo

From the SWAN support site: The Canceled Publication Notification Tool is a custom report that SWAN staff have access to through Symphony WorkFlows. The report takes the input of a Catalog Key and performs two functions:

1. Sends a form e-mail to all patrons with a hold attached notifying them that this hold is no longer able to be filled
2. Removes all holds

Removing the holds allows libraries to follow up with order cancellation and item deletion processes that may otherwise be forbidden by Symphony due to pending holds.

Only patrons with valid e-mail addresses will be notified. No paper notifications can be provided by this tool. Patrons without a valid e-mail address will still have their holds removed without notification.

Samantha and Vickie demoed this tool and the email that is sent to patrons with holds. If a library receives notification that a title is canceled, please submit a ticket to help@swanlibraries.net with the title and any other information you have received. SWAN will investigate, and if the title is determined to be truly canceled will proceed with this report to cancel patron holds.

IX. Small group discussion and brainstorming

- a. Future training ideas
- b. Topics for next 2020 meeting

Participants in the room met in small groups for 15 minutes to brainstorm the two topics above. Then, they reported back to the group with training ideas and topics for the next 2020 meeting in June. SWAN compiled this feedback and will review. Thanks to those who participated!

X. Open Discussion

A library reported having to use the Change Title Link Helper recently when an order was disconnected from a title. They said this happens infrequently. SWAN pointed to documentation for the [Change Title Link Helper](#) on the SWAN support site.

LGS reported that sometimes Midwest Tape orders have disappeared and think this might be related to merging bibliographic records. This may likely be the case. SWAN can investigate any new occurrences.

LGS also reported that, after rollover, a number of titles disappear from EDI invoices and have to be pulled in manually. SWAN encouraged the library staff to contact their vendors after rollover and ask for all outstanding orders to be updated to the new fiscal cycle. Other libraries are doing this with many vendors, and this solves the problem of empty lines on EDI invoices post-rollover.

BLD reported an issue where they were using 9xx to import a MARC file. All titles imported, but two P.O.s were created instead of one; one title was pushed to its own P.O. This is a known issue with 9xx. If multiple instances of a title are listed separately in the same MARC file, Symphony will create a new P.O. for the additional instances of the title.

SWAN was asked to demo the two new wizards included with the last Symphony release - Receive Multiple Orderlines and Add Packing List Items to Catalog. The Receive Multiple Orderlines wizard allows you to receive multiple orderlines across several P.O.s; however, it requires you to search for those orders by order ID. This wizard requires you to name a packing list for these orderlines or will auto-generate one for you. The Add Packing List Items to Catalog wizard requires you to enter a packing list number. Any received but not loaded orderlines on that packing list can then be added into the catalog and loaded. A library asked if the Add Packing List Items to Catalog wizard allows you to modify the holding code and class scheme like the Add Ordered Items to Catalog wizard allows. SWAN tested this and can report that this wizard does allow you to modify both the holding code and the class scheme.

FPD reported an issue where some items created around the upgrade were given LC call numbers and a class scheme of LCPER. Scott reported that during the upgrade, some XX call numbers were updated to an LC call number in the bib record. This only occurred around the upgrade and is not an ongoing issue.

XI. Next Meeting

Thursday, June 11, 2020, 9:30 AM -12:00 PM (RAILS - Burr Ridge) - Register on L2

<https://www.librarylearning.info/events/?eventID=30234>

Attendees*:

1. Kathleen Alberts (Alsip-Merrionette Park Public Library District)
2. Margaret Anderson (Messenger Public Library of North Aurora)
3. Rebecca Bartlett (La Grange Public Library)
4. Cecilia Canales (Cicero Public Library)
5. Marie Costuna (Eisenhower Public Library District)
6. Linda Ertler (La Grange Public Library)
7. Laura Folliard (Westmont Public Library)

8. Mary Jane Frank (Franklin Park Public Library District)
9. Kerry Halter (Batavia Public Library District)
10. Christian Hernandez (Cicero Public Library)
11. Cheryl Ida (Cicero Public Library)
12. Jackie Latham (West Chicago Public Library District)
13. Susana Leyva (Palos Heights Public Library)
14. Sandra Leyva (Alsip-Merrionette Park Public Library District)
15. Ann Marie Lindsay (Glen Ellyn Public Library)
16. Janet Miranda (Geneva Public Library District)
17. Michael Novy (West Chicago Public Library District)
18. Jan Perry (Hinsdale Public Library)
19. Erica Sanchez (Woodridge Public Library)
20. Sarah Sperry (Franklin Park Public Library District)
21. Pam Taylor (Oak Lawn Public Library)

*some virtual participants may not have been recorded

SWAN staff in attendance:

1. Scott Brandwein (SWAN)
2. Ian Nosek (SWAN)