



SWAN Acquisitions Users Group

March 11, 2021

BLUEcloud Acquisitions Update

What's working?

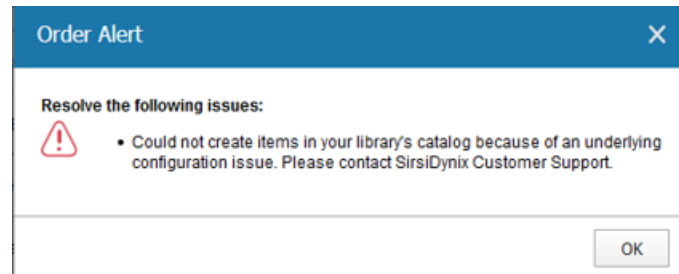
- Importing titles with 9xx order mapping
- Selection list import
- Fund encumbrance management
- EDIFACT ordering with Baker & Taylor and Midwest Tape

Outstanding Issues

- Matching on UPC results in duplicate bib records
- Invoicing not fully functional
 - Invoices must be in a specific format, which not all vendors can accommodate
 - Any non-title invoice lines are ignored by the system
 - Cannot yet create manual invoices

Outstanding Issues

- Orders cannot yet be cancelled
- Intermittent ordering issues



- SirsiDynix is tracking these issues with the product development team and hopes to have a resolution soon.

What does this mean for current Symphony Acquisitions libraries?

- Outstanding issues must be resolved before phasing existing Symphony Acquisitions libraries into using BLUEcloud Acquisitions
- We are closely tracking known issues with SirsiDynix and monitoring BLUEcloud Release Notes

Acquisitions Rollover Refresher

Step 1: Cleanup

- Find cleanup reports in BLUEcloud Analytics > Shared Reports > SWAN Reports > Acquisitions.



Fiscal Rollover Cleanup - List Open Orderlines - Received but not Loaded or Paid

Owner: SWANLIBSScheduler

Modified:

1/6/21 9:24:23 AM

Lists orders, orderlines, and titles where one copy has received but not loaded or paid, leaving the order open. May need to be rolled over to next fiscal cycle.



List Funds

Owner: SWANLIBSSamanthaDietel

Modified:

9/21/20 12:40:46 PM

Lists funds and activities by fund cycle, comparable to Review All Funds wizard or List Funds Report in Symphony.



List Open Orderlines - Paid or Received but not Loaded

Owner: SWANLIBSSamanthaDietel

Modified:

9/21/20 12:40:46 PM

Lists orders, orderlines, and titles where one copy has either been paid or received but not loaded, leaving the order is open.



List Orders, Orderlines

Owner: SWANLIBSSamanthaDietel

Modified:

9/21/20 12:40:46 PM

Lists orders, orderlines, and titles based on a wide variety of filters users can apply to target their results.



List Orders, Orderlines with Date Mailed of NEVER

Owner: SWANLIBSSamanthaDietel

Modified:

9/21/20 12:40:46 PM

Lists orders, orderlines, and titles based on a wide variety of filters users can apply to target their results.



List Vendor Cycle Amounts and Quantities

Owner: SWANLIBSSamanthaDietel

Modified:

9/21/20 12:40:46 PM

Lists vendor fiscal cycle amounts and quantities. Comparable to Symphony Review All Vendors wizard.

Step 2: Contact your vendors (if you use EDI)



Notify vendors of your intent to rollover.



Instruct them to convert all outstanding orders from your previous fiscal cycle to the new fiscal cycle.



Ask them to stop adding invoice files to their FTP site until your rollover is complete. Remember to notify them when you are ready to resume.

Step 3: Suspend EDI Invoice reports

- Suspend the EDI File Retrieval via FTP report **before** you begin your rollover.
- This prevents invoices from importing with the old fiscal cycle while you work through the rollover steps.
- Remember to update fiscal cycle and resume any suspended reports once the rollover is complete.

Step 4: Symphony Rollover Reports

Run

Run the Rollover Vendor Cycles report

Run

Run the Rollover Fund Cycles report

Run

Run the Rollover Basic Orders report

Rollover Basic Orders Report

- You may need to run more than one instance of the Rollover Basic Orders Report.

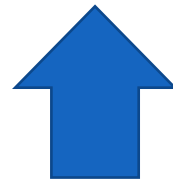
Number of copies received:	=0	⌵
Number of copies invoiced:	=0	⌵
Number of copies paid:	=0	⌵
Number of copies loaded:	=0	⌵



Rolls over orderlines that have not been received, invoiced, paid **or** loaded

March 17, 2021

Number of copies received:	>0	⌵
Number of copies invoiced:	=0	⌵
Number of copies paid:	=0	⌵
Number of copies loaded:	=0	⌵



Rolls over orderlines that have been received but not invoiced, paid, or loaded

SWAN Library Services

Number of copies received:	=0	⌵
Number of copies invoiced:	>0	⌵
Number of copies paid:	=0	⌵
Number of copies loaded:	=0	⌵



Rolls over orderlines that have been invoiced but not received, paid, or loaded

Step 5: Update Fiscal Cycle in Wizards and Reports

01

Update Session Settings Wizard in WorkFlows

02

Update fiscal cycle in all 9xx or EDI reports

- **Don't forget to update both templates and scheduled reports!**

Step 6: Modify Fund Budgets

Update fund budgets at the time of rollover or use the Modify Fund Budget Wizard post-rollover

Fund ID	Budget	Adjust	Option
ADNF		\$0.00	Replace
ADULTFIC		\$1500.00	
ADULT NONFICTION		\$25000.00	Decrease
APOPFIC		\$500.00	Increase
FICTION		\$18500.00	Replace

Step 7: Contact SWAN

- SWAN will run the Remove Selected Orderlines report for your library.
- If this step is skipped, you will encounter duplicate orders (one in each fiscal cycle) when you attempt to receive orders post-rollover.

Common Post-Rollover Errors

Invoices Fail to Import

Why does this happen?

- The vendor has sent an invoice file referencing an order ID from the previous fiscal cycle, causing the EDI File Receipt report to throw a “order does not exist” error.

What do I do if this happens to me?

- Send in a ticket to help@swanlibraries.net and we will investigate.

Invoices import, but invoice lines are for orders from previous fiscal cycle

Why does this happen?

- EDI File Retrieval via FTP report may not have been suspended
- The vendor was unable to update orders already invoiced

How do I fix this?

- Rollover Basic Orders with the “number of copies invoiced” set to **>0**
- Each invoice line needs to be modified, linking it to the orderline from the current fiscal cycle

How can I prevent this from happening again?

- Contact your vendor and ask them to stop adding invoice files to their FTP site
- Suspend your EDI File Retrieval via FTP report

New EDI Vendors

Let us help when you set up EDI with a new vendor

Holding Code Review

<https://support.swanlibraries.net/documentation/64757>

Open Discussion and Follow-up

Recording, PowerPoint, and chat log will be posted on the SWAN support site under Home»Meetings & Trainings»Meetings»Meetings & Documents

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SWAN Acquisitions Users

Date	Agenda	Minutes	Packet/Additional Files
Mar 11, 2021			Edit
Jun 10, 2021			Edit
Oct 14, 2021			Edit

SWAN Library Services