BLUEcloud Acquisitions
Pilot Fact Sheet

Last updated November 2021

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Overview

This BLUEcloud Acquisitions Pilot Fact Sheet contains the list of features and system requirements for the current BLUEcloud Acquisitions pilot release.

This document contains these sections:

- **Feature list** on page 3
- **System requirements** on page 11

Comments and suggestions

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Let us know how you used this guide, your feelings about its strengths and weaknesses, and your ideas and suggestions for improvement. Please make sure that you include the title and version number of the guide with your comments and suggestions.

Thank you in advance for your feedback!

Product overview

BLUEcloud Acquisitions is a totally new and cloud-native service for managing a library's day-to-day purchasing workflows, including support for materials selection, ordering, budgeting, vendor account management, receipt handling, and invoice handling. An integral component of BLUEcloud Central, BLUEcloud Acquisitions has been developed using new technologies and is accessible using a modern web browser. Unlike other BLUEcloud modules, BLUEcloud Acquisitions stores your purchasing-related data centrally in SirsiDynix's secure BLUEcloud environment, while integrating with SirsiDynix Symphony's bibliographic and item data using Web Services for Symphony.

BLUEcloud Acquisitions can support centralized purchasing workflows, a hybrid model whereby fund accounts are centralized and ordering is decentralized, or complete separation between institutions sharing one system. Granular access control settings can be used to place separate monetary limits on each individual user for authorization of encumbrances and expenditure. Having been developed in close partnership with a large network of libraries, BLUEcloud Acquisitions meets the additional needs of multi-library and consortia customers, helping libraries to take advantage of their collective purchasing power through use of shared systems while maintaining an appropriate level of separation—or a system of checks and balances—as may be required.

> ℹ️ BLUEcloud Acquisitions is currently in pilot and will be made available to SirsiDynix Horizon and SirsiDynix Symphony customers on general release.

Feature list

The following features are available with the current release of BLUEcloud Acquisitions:

General administration

Acquisitions profiles

Administrators can configure Acquisitions profiles, which consist of a series of settings that control the behavior of BLUEcloud Acquisitions, and default values used for newly created records such as fiscal cycle and currency. Other settings can be used to set approval limits for ordering and invoicing for each authorized staff user.

Consortia support

For each Acquisitions profile, administrators can optionally define a group of institutions—called a *circle*—for which purchasing can take place. Fund accounts, vendors, selection lists, orders, and invoices inherently belong to each profile and its corresponding circle of institutions. Decentralized acquisitions can therefore be supported by creating multiple Acquisitions profiles, each with its own corresponding circle, with visibility of records restricted by profile.

Fund management

Fund accounts

Administrators can specify and allocate an institution's budget for the designated fiscal year using *fund accounts*. These accounts can be arranged hierarchically, so that amounts can be allocated at various levels to individual branches, departments, or for certain types of materials. Administrators can reorganize fund accounts using a drag-and-drop operation. BLUEcloud Acquisitions summarizes financial information at every level, with all amounts updated automatically and in real time. Financial information and other details can be exported to a CSV file for a selected parent-level fund account and its descendents.

Fund categories

Administrators can create a list of fund categories, to be used when ordering or when making selections using the selection lists feature. By allocating fund categories to individual fund accounts, BLUEcloud Acquisitions supports vendor fund account selection when importing orders or when making selections.

Fund controls

A fund account's *status* controls the availability of funds for ordering and invoicing. By changing the status, administrators can control when the fund is *open* for use when ordering

or invoicing, *frozen* for the purpose of ordering, or *closed*, as may be required at the end of the current fiscal year. Additionally, a flag can be used to allow or prevent access to a particular fund account as required.

Administrators can define encumbrance and expenditure limits for each fund account, expressed as a percentage or monetary amount, to a maximum of 999%. By doing so, administrators can prevent ordering and invoicing respectively against this fund account when the total amount reaches or exceeds the threshold defined.

While making changes to fund accounts, fund managers can transfer budget amounts from one account to another, or to several simultaneously. By doing so, fund managers can make changes to allocations while maintaining the integrity of the total budget figure.

Fund account ownership can be used to confine use of a fund to the purchase of stock for the designated institution and its descendents. For organizations adopting a hybrid acquisitions model—that is, where fund accounts are centralized and ordering is decentralized—fund account ownership helps prevent the accidental misuse of another institution's funds.

Audit trail

A budget history feature provides a tabular display of changes made to fund accounts, including a description of the change, the staff user responsible, and the date of the operation. The budget history can also be exported as a downloadable document in various formats, including CSV and PDF.

Fiscal year-end processing

Fund managers can allocate budgets for upcoming fiscal cycles based on settings and amounts defined for another cycle. While doing so, fund managers can apply a percentage increase or decrease as required.

After allocating budgets in the new fiscal year, fund managers can optionally roll over available funds—that is, funds not spent—from the previous fiscal year's budget. An Acquisitions profile setting controls the availability of this feature.

In addition, fund managers can roll over encumbrances—that is, purchase orders not yet invoiced—while simultaneously relieving encumbrances from the previous fiscal year. An Acquisitions profile setting determines whether the corresponding funds are simultaneously rolled over with these encumbrances, thereby increasing the budgeted amount in the new fiscal year.

Vendor management

Vendors

Administrators can set up and maintain vendor records for each library stock supplier. Multiple accounts can be designated for a single vendor, for example, so that purchases can be allocated different payment terms as may be required for some types of materials.

Multiple addresses and contact records for named persons can be associated with each vendor for informational purposes. SirsiDynix-supplied templates allow quick creation of vendors for the most popular international library stock suppliers.

Vendor communication

Orders, claims, cancellations, and remittances can be sent by email in a proprietary pipe-delimited format. Order responses can also be received by email in a proprietary pipe-delimited format. A different email address can be designated for each type of vendor correspondence. BLUEcloud Acquisitions also supports order and invoice communication sent by FTP using the EDIFACT standard.

Selecting titles

Selection lists

Administrators can create and maintain *selection lists*. Selection lists help staff users to make informed purchasing decisions from a list of preselected titles, which are typically suggested for purchase by the vendor or publisher. Administrators can import titles from multiple MARC files into a selection list as the basis for ordering.

Selection list controls

A selection list's *status* controls the availability of titles for selection. By changing the status, administrators can control when the list is *open* for purpose of making selections, or *closed*, after which administrators can generate orders for selected titles in batch. Additionally, a *preferred* flag can be used to allow or prevent selection of a particular title as required.

BLUEcloud Acquisitions can automatically compare the price of titles offered by two or more vendors. Using this feature, the lowest-priced offer is flagged as preferred while other offers for the same title are not, thereby preventing staff users from selecting higher priced offers. For information purposes, BLUEcloud Acquisitions can also automatically flag selection list titles that were previously included on another list.

Administrators can limit the institutions for which a staff user can make selections using *selector limits*. For organizations adopting a hybrid acquisitions model—that is, where fund accounts are centralized and ordering is decentralized—selector limits can help prevent the accidental misuse of another institution's funds.

Title metadata editing and validation

Selection list titles are stored separately from the library catalog prior to ordering, thereby minimizing any catalog cleanup that would otherwise be required. Prior to ordering, descriptive metadata for imported titles can nevertheless be modified by hand using the MARC editor.

Additionally, administrators can turn on a feature to have BLUEcloud Acquisitions automatically flag selection list titles according to whether certain metadata fields are present in the descriptive record. Using this feature, titles that meet the validation criteria

are flagged as *complete*, prompting staff to make changes to the descriptive record for those that do not meet the designated criteria.

Selection list workflows

Staff users can view selection list titles and make purchasing decisions accordingly, specifying the required quantity, fund account, and distribution information. A distribution template, which is saved to the browser's cache, can be used to simplify the selection process.

While making selections, staff users can view the following information for each selection list title:

- A count of institutions that have selected this title.

- A summary of holdings:

  - For those institutions for which the staff user can make selections.

  - For all institutions system-wide.

- A summary of copies on order:

  - For those institutions for which the staff user can make selections.

  - For all institutions system-wide.

Additionally, to aid decision making, staff users can view a summary of financial information for those fund accounts available to them.

Staff users can search each list for specific titles or limit the results displayed using a range of options. Staff users can also sort the list by author, genre, price, publication date, quantity selected, subject, or title.

Ordering

Orders

Staff users can input orders by hand, by entering title descriptive metadata and other information in a form. While entering order details, staff users can order extra copies of an existing title by searching the library catalog using BLUEcloud Search Service. Additionally, staff users can simultaneously search for titles from other library-configured MARC 21 repositories that support the Z39.50 protocol.

Ordering workflows

An order's *status* indicates the current stage in the ordering workflow. New orders are created with a status of *building* before they are submitted for approval. Authorized staff users must mark orders *approved* before sending the order to the vendor. Approved order files are sent to a vendor either by FTP using the EDIFACT standard or by email using a proprietary pipe-delimited format.

Approving an order generates a brief title record in the SirsiDynix Symphony catalog if there is no matching record currently. A temporary copy record is also added automatically so that patrons can start placing holds immediately, before the ordered item has been received.

A maximum currency amount can be specified for each authorized staff user with order approval permission.

9xx ordering

Staff users can create orders in batch by importing a file of MARC 21 records with embedded order data (contained in MARC fields 970 and 971).

Searching, displaying, and editing orders

Staff users can search for orders by a number of different criteria, singly or in combination, including but not limited to:

- Order number
- Title
- ISBN or UPC/EAN
- Order status
- Vendor
- Fund account
- Fiscal cycle
- Order source—whether manually created, imported from 9xx file, or ordered from a selection list
- Order date created
- Order date modified

Staff users with the requisite privileges can access a read-only view of order details. Other privileges determine whether staff users can makes changes to an order prior to its approval, or subsequently. Additionally, authorized staff users can delete orders which have not been approved.

Order history

Staff users can access a history of changes to orders including changes to the number of copies ordered, received, invoiced, and changes to the vendor, offer price, list price, and order status. The order source—whether manually created, imported from 9xx file, or ordered from a selection list—is also displayed.

Receiving

Receiving workflows

Staff users can receive orders by searching for an order number, title, or ISBN, or by either typing or scanning an item's UPC/EAN. After identifying the correct order, staff users can record receipt by typing or scanning an item's barcode. Staff users can also make changes to the item template and call number before and after receipt. Upon receipt, BLUEcloud Acquisitions creates copy records in SirsiDynix Symphony using the information entered.

Invoicing

Invoices

Staff users can create invoices in batch by importing a vendor-supplied file either by FTP using the EDIFACT standard or by email using a proprietary pipe-delimited format.

Payment workflows

An invoice record's *status* indicates the current stage in the payment workflow. New invoices are created with a status of *building* before they are submitted for approval. Authorized staff users must mark invoices *approved* before the summary of financial information is updated. After approving invoices, fund encumbrances are relieved automatically and invoice amounts are shown as expended.

After importing invoices, authorized staff users can approve invoices by searching for an invoice number, order number, title, or ISBN, or by either typing or scanning an item's UPC/EAN. Staff users can make minimal changes to invoices before submitting them for approval. Staff users with the requisite privileges can subsequently approve invoices. A maximum currency amount can be specified for each authorized staff user with invoice approval permission.

Reporting

Reports

Staff users can produce a limited range of reports using BLUEcloud Acquisitions. Each report has variable selection and output criteria, with the option to produce output in the following formats:

- CSV (comma-delimited) (.csv)
- Excel Workbook (.xlsx)
- OpenDocument Spreadsheet (.ods)
- PDF (.pdf)
- PowerPoint Presentation (.pptx)
- Rich Text Format (.rtf)

- Text document (.txt)

- Webpage (.html)

- Word Document (.docx)

- XML (.xml)

Available Funds report

Staff users can run the Available Funds report to output a financial summary for each fund account during a specified fiscal cycle.

Budget History export

Staff users can run the Budget History export to view the history of the budget's changes. The export includes monetary allocations, transfers, and status changes.

Expenditure by Fund Category report

Staff users can run the Expenditure by Fund Category report to identify the average item price for each vendor and fund category during a specified fiscal cycle.

Fund Accounts export

Staff users can run the Fund Accounts export to display all details related to a primary fund account, all associated child accounts, and the budgets of the selected fiscal cycle.

Note: Unlike all other reports in BLUEcloud Acquisitions, this export is only available in .csv format.

Fund Accounts report

Staff users can run the Fund Accounts report to output selected information for a primary fund account and its descendants during a specified fiscal cycle. The report helps staff evaluate how money has been allocated across fund accounts, or to gather information for auditing and reconciliation.

Invoice Cost Breakdown report

Staff users can run the Invoice Cost Breakdown report to output a break down of an invoice by financial grouping, to identify which financial group paid for each portion of the invoice.

Outstanding Orders report

Staff users can run the Outstanding Orders report to output a list of orders submitted to a vendor which have not yet been received or invoiced, broken down by vendor. Staff users have the option to exclude or include orders where the invoice is in progress; i.e., the order has been received by the vendor but has not yet been processed.

Price Variance for Paid Orders report

Staff users can run the Price Variance for Paid Orders report to identify the difference between the order price and the invoice price during a specified fiscal cycle, broken down by each of the following:

- The currency amount and percentage difference for each order/invoice selected.

- The total difference in currency amount for selected orders/invoices for each vendor.

- The average percentage difference for selected orders/invoices for each vendor.

Selection List Performance report

Staff users can run the Selection List Performance report to output information about selection list titles, broken down by vendor and fund category, for one or more specified selection lists with a closed status. The report helps staff determine which titles were or were not selected and on what basis.

Order data export

After searching for orders, staff users can export a list of selected results to a file. Staff users can filter out distributions that do not apply to their current institution from the order data before exporting, if desired.

System requirements

> For the best experience, SirsiDynix recommends you use the most recent versions of Symphony and Web Services.

Note: To schedule your implementation of BLUEcloud Acquisitions, contact your SirsiDynix representative. To update your Symphony or Web Services software to a later version, submit an upgrade request on the SirsiDynix Support Center.

To ensure full functionality with BLUEcloud Acquisitions 21.04.0, your library system must meet one the configurations specified in the *SirsiDynix Upgrade Compatibility Matrix*. Access the *SirsiDynix Upgrade Compatibility Matrix* on the SirsiDynix Support Center. The link below will open the SirsiDynix Support Center in a browser window. You may be required to log in.

[SirsiDynix Upgrade Compatibility Matrix](#)

Other requirements

BLUEcloud Acquisitions uses the BLUEcloud Search Service. To use BLUEcloud Search, your library system must have the BLUEcloud Harvester extension installed and running. For installation and updates, contact SirsiDynix Customer Support.