



*Welcome!*

# Academic SIG

A COSUGI Special Interest Group



1:00 PM	<b>Introductions and What to Expect for Today</b>	Mark Witteman, University of Virginia Libraries
1:05 PM	Co-Presentation: My Account Web Services	Shelley Doljack, Stanford University  Mark Witteman, University of Virginia Libraries
1:35 PM	Co-Presentation: Managing WF User Accounts	Jeff Hill, Brigham Young University  Spencer Anspach, Indiana University  Adam Crandell, Indiana University
2:05 PM	Discovery File Manager: A New Discovery Companion App for Easy Creation and Management of Customizations	Adam Viator, SirsiDynix
2:25 PM	<b>Break</b>	
2:35 PM	Co-Presentation: Single Sign-On as Part of the User Experience Journey	Ranny Lacanienta, SirsiDynix  Mike Waugh, LOUIS Library Network
2:55 PM	BLUEcloud Staff Suite Update	Berit Nelson, SirsiDynix
3:15 PM	Co-Presentation: CloudSource OA and Course Lists Deep Dive	Rick Branham, SirsiDynix  Marcy Stevens, LOUIS Library Network
4:00 PM	Open Forum and SirsiDynix Q&A	Open Discussion
4:30 PM	Closing Remarks	Mark Witteman, University of Virginia Libraries



# *BLUEcloud Staff Suite Update*

Berit Nelson | Chief Product Officer



# BLUEcloud CENTRAL

Username

Password

Sign In

*BLUEcloud  
Central Latest  
Developments*

2021: Improved Role  
Management

## Use Cases

- As an admin user, I want to have delivered pre-canned user roles with specified privileges that I can use straight out of the box and assign to BLUEcloud staff users.
- As an admin user, I want to have all new privileges automatically assigned to my user so I don't have to manually add them once they are released into production

# BLUEcloud Central Latest Developments

## 2021: Improved Role Management

**Roles** Create Role

**Name** ▲

- Sales Advanced - Admin
- Selection List Manager
- Selector
- View-only Orders
- (SirsiDynix) Acquisitions Adm...
- (SirsiDynix) BLUEcloud Local...
- (SirsiDynix) BLUEcloud Syst...
- (SirsiDynix) BookMyne Mana...
- (SirsiDynix) Cataloger**
- (SirsiDynix) Cataloging Admi...
- (SirsiDynix) Circulation Admi...
- (SirsiDynix) Circulation Clerk
- (SirsiDynix) Commerce Mana...
- (SirsiDynix) Course Lists Ad...
- (SirsiDynix) Course Lists Inst...
- (SirsiDynix) Course Lists Libr...
- (SirsiDynix) Course Lists Ma...

**(SirsiDynix) Cataloger**

**Privileges** Users With This Role

**General Details**

Name: (SirsiDynix) Cataloger

**Role Level**: Staff

Archived

**Privileges**

Privilege ▲	Product ⇅	Privilege Level ⇅	Description
Add Bibliographic Field	BLUEcloud Cataloging	Staff	Lets users add bibliographic fields.
Cataloging Searches	BLUEcloud Cataloging	Staff	Lets users search in BLUEcloud Cataloging.
Create Bibliographic Reco...	BLUEcloud Cataloging	Staff	Lets users create bibliographic records.
Create Bibliographic Reco...	BLUEcloud Cataloging	Staff	Lets users create bibliographic records from brief templa...
Create Bibliographic Reco...	BLUEcloud Cataloging	Staff	Lets users create bibliographic records from full templa...
Delete Bibliographic Field	BLUEcloud Cataloging	Staff	Lets users delete bibliographic fields.
Delete Bibliographic Reco...	BLUEcloud Cataloging	Staff	Lets users delete bibliographic records.
Delete Bibliographic Reco...	BLUEcloud Cataloging	Staff	Lets users delete bibliographic records with holdings.
Edit Bibliographic Leader ...	BLUEcloud Cataloging	Staff	Lets users edit bibliographic leader and control fields.

Save Cancel

# BLUEcloud Central Latest Developments

## 2021: Improved Role Management

**Roles** [Create Role](#)

**Name** ▾

- Sales Advanced - Admin
- Selection List Manager
- Selector
- View-only Orders
- (SirsiDynix) Acquisitions Adm...
- (SirsiDynix) BLUEcloud Local...
- (SirsiDynix) BLUEcloud Syst...
- (SirsiDynix) BookMyne Mana...
- (SirsiDynix) Cataloger**
- (SirsiDynix) Cataloging Admi...
- (SirsiDynix) Circulation Admi...
- (SirsiDynix) Circulation Clerk
- (SirsiDynix) Commerce Mana...
- (SirsiDynix) Course Lists Ad...
- (SirsiDynix) Course Lists Inst...
- (SirsiDynix) Course Lists Libr...
- (SirsiDynix) Course Lists Ma...

**(SirsiDynix) Cataloger**

**Privileges** [Users With This Role](#)

**General Details**

Name: (SirsiDynix) Cataloger      Role Level: Staff

Archived

**Privileges**

Privilege	Product	Privilege Level	Description
Add Bibliographic Field	BLUEcloud Cataloging	Staff	Lets users add bibliographic fields.
Cataloging Searches	BLUEcloud Cataloging	Staff	Lets users search in BLUEcloud Cataloging.
Create Bibliographic Reco...	BLUEcloud Cataloging	Staff	Lets users create bibliographic records.
Create Bibliographic Reco...	BLUEcloud Cataloging	Staff	Lets users create bibliographic records from brief templ...
Create Bibliographic Reco...	BLUEcloud Cataloging	Staff	Lets users create bibliographic records from full templa...
Delete Bibliographic Field	BLUEcloud Cataloging	Staff	Lets users delete bibliographic fields.
Delete Bibliographic Reco...	BLUEcloud Cataloging	Staff	Lets users delete bibliographic records.
Delete Bibliographic Reco...	BLUEcloud Cataloging	Staff	Lets users delete bibliographic records with holdings.
Edit Bibliographic Leader ...	BLUEcloud Cataloging	Staff	Lets users edit bibliographic leader and control fields.

[Save](#) [Cancel](#)

# BLUEcloud Central Latest Developments

2021: Improved Role  
Management

2021: Ongoing  
improvements to  
staff Single Sign On

The screenshot shows the 'Roles' management interface in SirsiDynix. On the left is a list of roles, with '(SirsiDynix) Cataloger' selected. The main area shows the configuration for this role, including a 'Privileges' tab and a 'General Details' section. The 'Role Level' is set to 'Staff', and the 'Privileges' table lists various actions with 'Staff' as the assigned level.

**Roles** Create Role

**Name** +

- Sales Advanced - Admin
- Selection List Manager
- Selector
- View-only Orders
- (SirsiDynix) Acquisitions Adm...
- (SirsiDynix) BLUEcloud Local...
- (SirsiDynix) BLUEcloud Syst...
- (SirsiDynix) BookMyne Mana...
- (SirsiDynix) Cataloger**
- (SirsiDynix) Cataloging Admi...
- (SirsiDynix) Circulation Admi...
- (SirsiDynix) Circulation Clerk
- (SirsiDynix) Commerce Mana...
- (SirsiDynix) Course Lists Ad...
- (SirsiDynix) Course Lists Inst...
- (SirsiDynix) Course Lists Libr...
- (SirsiDynix) Course Lists Ma...

**(SirsiDynix) Cataloger**

**Privileges** Users With This Role

**General Details**

Name: (SirsiDynix) Cataloger Role Level: Staff

Archived

**Privileges**

Privilege +	Product +	Privilege Level +	Description
Add Bibliographic Field	BLUEcloud Cataloging	Staff	Lets users add bibliographic fields.
Cataloging Searches	BLUEcloud Cataloging	Staff	Lets users search in BLUEcloud Cataloging.
Create Bibliographic Reco...	BLUEcloud Cataloging	Staff	Lets users create bibliographic records.
Create Bibliographic Reco...	BLUEcloud Cataloging	Staff	Lets users create bibliographic records from brief templ...
Create Bibliographic Reco...	BLUEcloud Cataloging	Staff	Lets users create bibliographic records from full templa...
Delete Bibliographic Field	BLUEcloud Cataloging	Staff	Lets users delete bibliographic fields.
Delete Bibliographic Reco...	BLUEcloud Cataloging	Staff	Lets users delete bibliographic records.
Delete Bibliographic Reco...	BLUEcloud Cataloging	Staff	Lets users delete bibliographic records with holdings.
Edit Bibliographic Leader ...	BLUEcloud Cataloging	Staff	Lets users edit bibliographic leader and control fields.

Save Cancel





Staff ▾

Connections ▾

BLUEcloud Central

Summit Consortium (Beta) ▾

library.staff ▾



Search

*BLUEcloud*  
*Search Service:*  
*Latest*  
*Developments*

2020:

General  
Performance  
Improvements

- Improved error handling for import issues
- Improvements to indexing
- Updated Splunk logs for improved troubleshooting

# BLUEcloud Search Service Latest Developments

2020:

-Improved UI for creating search limits: Easily add multiple libraries, include/exclude shadowed records when building search limits

The screenshot displays the 'Spanish Language Limit' configuration page in the BLUEcloud Search Service. The page is divided into several sections:

- Search Limit Table:** A table listing existing search limits. The 'Spanish Language Limit' entry is highlighted.
- General Settings:** Fields for 'Name' (Spanish Language Limit), 'Owner' (SYM\_TEAMX\_MASTER [RIPON] root), and 'Usable by' (Owner and Descendants).
- Display Evaluation:** A section for creating search limits with multiple institutions, featuring a 'Multiple Institutions' button.
- Library Search Field Helper Dialog:** A modal dialog box for selecting a search source and institution. It includes a 'Search Source' dropdown, a 'Show Shadow Records' checkbox, and a list of institution names for selection.

The 'Library Search Field Helper' dialog box contains the following text and elements:

Select a search source and an institution to create the limit value.

Search Source: [Dropdown]

Show Shadow Records

Select desired institution names for search limit

- SYM\_TEAMX\_MASTER [NEENAH]
- SYM\_TEAMX\_MASTER [WINNECONNE]
- SYM\_TEAMX\_MASTER [BERLIN]
- SYM\_TEAMX\_MASTER [ENDEAVOR]
- SYM\_TEAMX\_MASTER [RIPON] root
- SYM\_TEAMX\_MASTER [WINNEFOX]
- Test 12345

Buttons: Save, Cancel

# BLUEcloud Search Service Latest Developments

2020:  
Search updates –  
Search by Bib #

The screenshot displays the BLUEcloud Search Service interface for a specific record. The top navigation bar includes menus for Staff, Admin, Connections, Developers, and Cataloging - Search. The current user is identified as poly+everything@gmail.com. The breadcrumb trail shows 'Staff > Cataloging > Search'. A search bar at the top contains the value '894183' and the search criteria 'SYM\_TEAMX\_MA...' and 'ILS Record ID'. The search results show '1 result'.

The record details are as follows:

- Title:** A visit from the Goon
- Author:** Egan, Jenn...
- ISBN:** 978030759... 2010
- Image:** Book cover for 'A visit from the Goon' by Jennifer Egan.

The **Control Data** section includes:

- Title Control No.:** i9780307592835
- Date Cataloged:** 06/01/2010
- Staff Only:**
- Bib Number:** 894183
- Created By:** ZJTOSH
- Modified By:** ADMIN
- Format (MARC21):** recorc type a
- Date Created:** 03/02/2010
- Date Last Modified:** 02/19/2021

The **MARC Data** section shows the following fields:

- 000: cam a22 8a 4500
- 001: ocn449844391
- 003: OCoLC
- 005: 20100301063235.0
- 008: 091112s2010 nyu 000 1 eng
- 010: |a 2009046496
- 040: |aDLC|cDLC|dBTCTA
- 030: |a9780307592835

At the bottom of the interface, there are buttons for 'Save', 'Smart Search', 'Cancel', 'Revert', and 'Delete'. A '+ New Record' button is also visible at the bottom center.

# BLUEcloud Search Service Latest Developments

2020:

-Extended Results  
List:

Added fields for  
display from  
a search target  
(Course Lists  
request)

The screenshot displays the 'Collection Targets' section of the BLUEcloud Search Service. It features a table with columns for 'Target Type', 'Target Name', 'Target Owner', and 'Search Target Sections'. The 'Target Name' column lists various targets such as 'ERC\_ST\_INST\_1', 'HZN\_1BACK\_RC\_A', 'HZN\_1BACK\_RC\_B', 'HZN\_2BACK\_RC\_A', 'HZN\_LATEST\_RC\_A', 'HZN\_LATEST\_RC\_B', 'HZN\_LATEST\_RC\_C', 'HZN\_TEAMX\_LATEST', 'HZN\_TEAMX\_MASTER', 'HZ\_&\_SYM', 'SYM\_1BACK\_RC\_A', 'SYM\_1BACK\_RC\_B', 'SYM\_2BACK\_RC\_A', 'SYM\_LATEST\_RC\_A', 'SYM\_LATEST\_RC\_ABCD', 'SYM\_LATEST\_RC\_B', 'SYM\_LATEST\_RC\_C', 'SYM\_LATEST\_RC\_D', 'SYM\_SINGLE\_DEV', 'SYM\_TEAMX\_LATEST', and 'SYM\_TEAMX\_MASTER'. The 'HZN\_TEAMX\_MASTER' target is highlighted. Below the table are buttons for 'New Collection Search Target' and 'Refresh Cache'. On the right side, there is a 'Select Search Sources' panel with a list of search sources, including 'ERC Fulano de Tal Memorial Library\_8\_overdrive ...', 'HZN\_1BACK\_RC\_A - Search Source', 'HZN\_1BACK\_RC\_B - Search Source', 'HZN\_2BACK\_RC\_A - Search Source', 'HZN\_LATEST\_RC\_A - Search Source', 'HZN\_LATEST\_RC\_B - Search Source', 'HZN\_LATEST\_RC\_C - Search Source', 'HZN\_TEAMX\_LATEST - Search Source', 'HZN\_TEAMX\_MASTER - Search Source', 'New Test Source', 'SYM\_1BACK\_RC\_A - Search Source', 'SYM\_1BACK\_RC\_B - Search Source', 'SYM\_2BACK\_RC\_A - Search Source', 'SYM\_LATEST\_RC\_A - Search Source', 'SYM\_LATEST\_RC\_B - Search Source', 'SYM\_LATEST\_RC\_C - Search Source', 'SYM\_LATEST\_RC\_D - Search Source', 'SYM\_SINGLE\_DEV - Search Source', 'SYM\_TEAMX\_LATEST - Search Source', and 'SYM\_TEAMX\_MASTER - Search Source'. The 'HZN\_TEAMX\_MASTER - Search Source' is checked. Below this list is an 'Extended Results List' section with a checkbox labeled 'Use the extended results list' which is checked. At the bottom right are 'Save' and 'Cancel' buttons.

## Extended Results List

Specifies whether the extended set of results list fields displays when a search is returned. The extended results lists includes the following additional fields:

- Edition
- Publisher
- Series title
- Additional contributor
- Place of publication
- Volume

*BLUEcloud  
Search Service  
Latest  
Developments*

2020:

Extended Results  
List:

Add a Linked Title  
Key field to extended  
hit list search fields  
(BC Mobile Request)

- Linked Title Key field allows you to link otherwise unrelated records. This field is utilized in the BLUEcloud Mobile app to facilitate the display of a title and all of the different manifestations of that title.

To use this field, sites must have a subscription to the "Title clustering key bibliographic record update" service.

# BLUEcloud Search Service Latest Developments

2020:

Added relevance  
option for sorting  
(BC Mobile Request)

Search Policy Sections

- General Settings
- Select Search Targets
- Configure Facets
- Select Search Limits

Edit Search Policy

Policy Name \*  
Carla's Search Policy

Zero Search Enabled

Minimum Sort Relevance Score

0.001

0

1

2

3

4

5

Spanish Language Limit

Er

# BLUEcloud Search

2022: Updates  
influences by  
CloudSource OA  
development:

Boolean support

Additional mapping

Metadata review



The screenshot displays the BLUEcloud Search interface. At the top, the 'enterprise' logo is visible on the left, and navigation links for 'Log In', 'My Account', 'My Lists', 'Send a Request', and 'Select Language' are on the right. Below the header, a search bar contains the query 'climate change and (health or insurance)' with a 'SEARCH' button and an 'Advanced Search' link. The main content area is titled 'CS\_Colin' and shows '93732 Results Found'. On the left, there are filters for 'Limit Search Results', 'License', and 'Open Access'. The 'Limit Search Results' section includes a search box and filters for 'Peer Reviewed: Yes' and 'Publication Date: Last 6 months'. The 'License' section lists various Creative Commons licenses with their respective counts. The 'Open Access' section lists 'Yes' and 'No' with counts. The main results area shows three items, with the first two visible. The first item is 'Climate Change and Health Equity' by Nealie Tan NT Ngo, published in the AMA Journal of Ethics. The second item is 'Climate change and insurance' by Stephen J. SJ Collier, Rebecca R Elliott, and Turo-Kimmo T Lehtonen, published in the Journal Economy and Society. Each item has a 'View Resource' button and other action buttons like 'Publisher Page', 'Text This To Me', 'PermaLink', and 'Citation'.

enterprise

Log In | My Account | My Lists | Send a Request | Select Language | ?

CS\_Colin General climate change and (health or insurance) SEARCH Advanced Search

CS\_Colin

Limit Search Results

Search Within These Results

Search X | Q

Narrowed by:

+ Peer Reviewed: Yes

+ Publication Date: Last 6 months

Clear all

License Include Exclude

BY (61245)

BY-NC-ND (14958)

Other OA (10292)

BY-NC (5688)

BY-NC-SA (527)

More

View All

Open Access Include Exclude

Yes (93403)

No (329)

93732 Results Found 1 2 3 4 5 ..

Select an Action

1.  **Climate Change and Health Equity**

By Nealie Tan NT Ngo

Journal AMA Journal of Ethics, v. 23 n. 2 p. 201-203

Published 2021-02-01, American Medical Association (AMA)

Abstract Physical environment, income, and access to education and food are all health determinants that situate whether, when, and to what extent patients or their communities have equitable access to ... more

Journal article

View Resource

Publisher Page

Text This To Me

PermaLink

Citation

2.  **Climate change and insurance**

By Stephen J. SJ Collier, Rebecca R Elliott, Turo-Kimmo T Lehtonen

Journal Economy and Society, p. 1-15

Published 2021-04-03, Informa UK Limited

Journal article Cites: 49 Cited: 1 Buzz: 5

View Resource

Publisher Page

Text This To Me

PermaLink

Citation

3.



# BLUEcloud Search (and Beyond)

Universal Harvest:

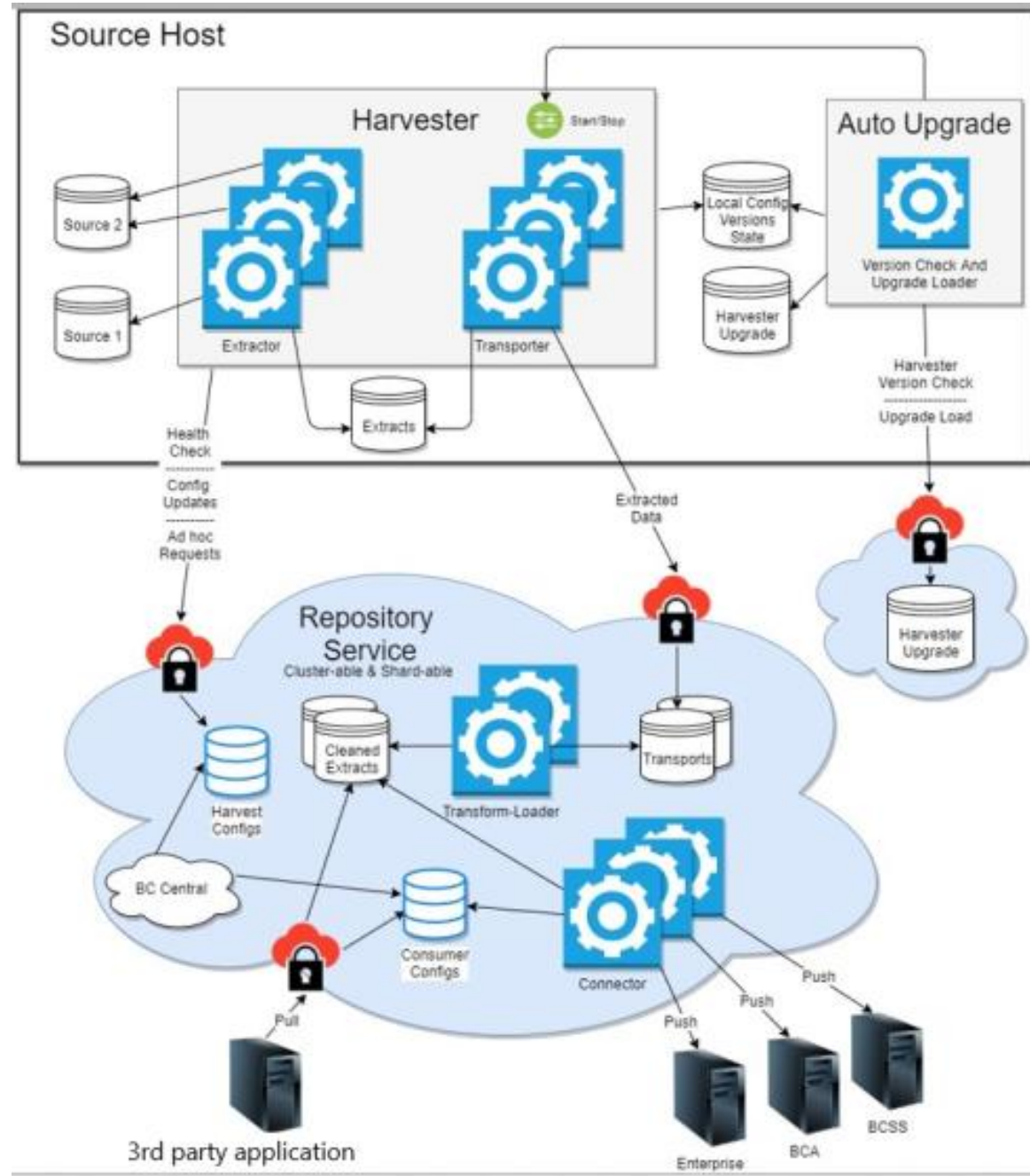
One agent, all SD  
products

Multi-tenant

More data (authority,  
etc.)

Dynamic updating

Third party  
integrations





Cataloging

# BC Cataloging

BC-based item security

Additional field displays

Next up:

Bibliographic Import!

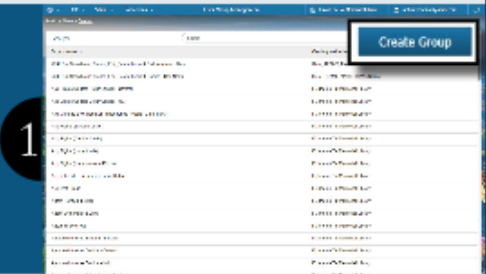
SirsiDynix BLUEprints

## Improved Item Security in BLUEcloud Cataloging

Did you  
know?

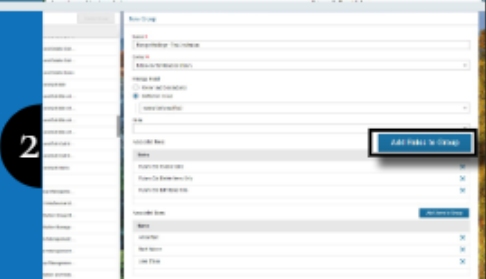
You can set up BLUEcloud Cataloging staff users so that they are limited to manage just the items, call numbers (Symphony) or copy records (Horizon) owned by libraries where they have privileges.

**Go to the Users Groups page**  
Admin → Users → Groups  
• Click "Create Group"



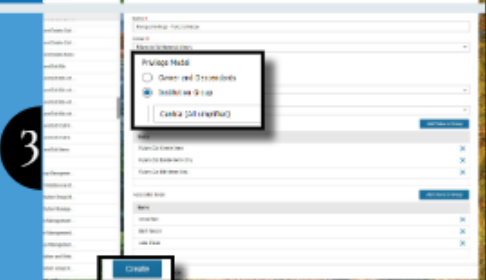
**Select User Roles** associated  
with managing item, call number or  
copy records.

**Select users** to be associated  
with these user privileges.



**Select the context** where  
users can exercise their privileges.

**Click "Create"**.



What's on  
your mind?

We love hearing from our customers on just about everything. If you have thoughts about this BLUEprint, the Bookmarket, or anything else, we'd love to know! [Click Here](#) to visit our Virtual Suggestion Box survey. Is there a feature you'd like to see covered in a BLUEprint? [Click Here](#) to submit your request.

Return to Hitlist

language learning

599 results

Library Catalog

All Fields



- View Record/Details
- Manage Holdings
- Edit Record
- Reviews

**Computer assisted language learning**  
 Hubbard, Philip, 1952-  
 9780415465397  
 2009

Hitlist Position: 3

Prev Next

Volumes: 2

418.00785 22	SOUTH	(1)	X
31120113361663 1	BOOK STACKS		X
418.00785 22	MAIN	(1)	
31120113361653 1	BOOK STACKS		

New Call Number New Item

Call Number/Item

Holds

Details

Last Checked Out	In-house Uses
	0
Last Checked In	Date Created
	11/20/2009
Date Inventoried	Last Activity

Call Number Information

Class Scheme \*  
 Dewey

Shelving Key  
 418.00785 22

Shadow Call Number

Call Number \*  
 418.00785 22

Volumetric

Call Library \*  
 South

Item Information

Item Barcode \*  
 31120113361663

Item Type \*  
 Book

Home Location \*  
 Stacks

Item Category 1

Item Category 3

Item Category 5

Copy Number  
 1

Item Library  
 South

Current Location \*  
 Stacks

Item Category 2

Item Category 4

Number of Discs \*

Save Revert

Return to Hitlist

language learning 599 results Library Catalog All Fields

View Record/Details

Manage Holdings

Edit Record

Reviews

**Computer assisted language learning**  
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New Call Number New Item

Call Number/Item

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	11/20/2009
Date Inventoried	Last Activity

Call Number Information

Class Scheme \* Dewey

Shelving Key 418.00785 22

Shadow Call Number

Call Number \* 418.00785 22

Volumetric

Call Library \* South

Item Information

Item Barcode \* 31120113361663

Item Type \* Book

Home Location \* Stacks

Item Category 1

Item Category 3

Item Category 5

Copy Number 1

Item Library South

Current Location \* Stacks

Item Category 2

Item Category 4

Number of Discs \*

Save Revert

language learning

599 results

Library Catalog

All Fields



View Record/Details

Manage Holdings

Edit Record

Reviews

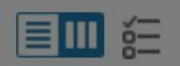
Computer assisted language learning  
Hubbard, Philip, 1952-  
9780415465397  
2009

Hitlist Position: 3

← Prev

Next →

Volumes: 2



418.00785 22 SOUTH (1)

31120113361663 1  
BOOK STACKS

418.00785 22 MAIN (1)

31120113361653 1  
BOOK STACKS

Call Number/Item

Holds

Details

Last Checked Out In-house Uses  
0

Last Checked In Date Created  
11/20/2009

Date Inventoried Last Activity

New Call Number

New Item

You do not have sufficient privileges to edit this call number or item for MAIN.

Call Number Information

Class Scheme \*

Dewey

Shelving Key

418.00785 22

Shadow Call Number

Item Information

Item Barcode \*

31120113361653

Item Type \*

Book

Home Location \*

Stacks

Item Category 1

Item Category 3

Call Number \*

418.00785 22

Volumetric

Call Library \*

Central

Copy Number

1

Item Library

Central

Current Location \*

Stacks

Item Category 2

Item Category 4

Save

Revert

# *BLUEcloud Cataloging – Product Roadmap*

2021- 2022

- Technical updates (updated end points, improved use of screen real estate)
- Batch bib import\*
- Display & Edit Item Note fields†
- Require MARC 245 field, allow sites to require other specified fields in templates \*  
*(Under review with SPP)*
- Display policy descriptions or codes\*
- Support custom policy lists (SYM)†
- Honor custom labels (SYM)\*



Staff ▾

Connections ▾

BLUEcloud Central

Summit Consortium (Beta) ▾

library.staff ▾



Acquisitions



# BLUEcloud Acquisitions Latest Developments

2020: Improved EDI Communication  
– FTP w/ EDIFACT standard (new)

Orders

**Use EDI for \***

Cancellations       Claims       Order Responses

Orders       Remittance

**Communication**

Type \*  
FTP

Format  
EDIFACT

Username \*  
install

Password  
Enter text to change the saved password.

Hostname \*  
ftp.sirsidynix.com

Server Directory  
AcqOrders

File Extension Override

Order File Prefix

Delete Remote Remittance Files       Send Title Metadata in Order File

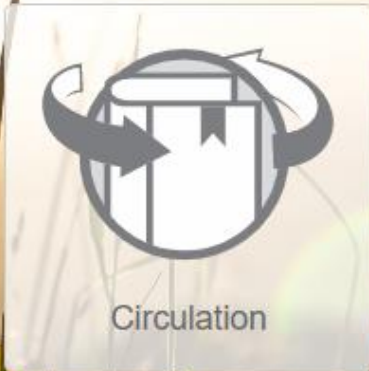
Save Cancel



# *BLUEcloud Acquisitions – Product Roadmap*

2021

- Invoicing improvements
- Cancelling orders
- Claiming orders
- Managing Vendor Returns
- Managing Vendor Refunds



Circulation

# BLUEcloud Circulation Latest Developments

2020: Pickup Library defaults to Institution Context (Patron Registration too!)

Honor ILS configs for expiration date

Honor expiration date of NEVER

Remember last selection of Hold level

Remember last selection of Hold range

The screenshot displays the 'New Hold' form in the SirsiDynix BLUEcloud Circulation system. The interface includes a navigation menu at the top with options like Staff, Admin, Connections, Developers, and Circulation. The breadcrumb trail shows: Staff > Circulation > Search > Patron Search > Goodbook, Rita > Holds > New Hold. The search bar contains 'goodbook' and the results are displayed in a table with columns for Title and Item ID. The 'New Hold' form is open, showing the book title 'The cat in the window : and other stories of the cats we love', the patron 'Goodbook, Rita' with ID '12321', and various hold configuration options such as Hold Level (Title), Pickup Library (Ripon), Range (System), Hold Expiration (NEVER), Recall Status (No), Date Suspended, and Suspend Until. The form also includes a Notes field and buttons for 'Place Hold' and 'Cancel'.

Title	Item ID
<input type="checkbox"/> Pete the cat and his magic sunglasses	30039001261686
<input type="checkbox"/> Seuss celebration [DVD]	0020207569516
<input type="checkbox"/> Seuss celebration [DVD]	0020207569516
<input type="checkbox"/> The Cat in the Hat knows a lot about that! Trick-or-Tre...	0040405297934
<input type="checkbox"/> Dr. Seuss	0060604457246
<input type="checkbox"/> The story of philosophy	33486001513797
<input type="checkbox"/> Pets on the couch : neurotic dogs, compulsive cats, an...	0040406248621
<input type="checkbox"/> Cat's lair	0020210091060
<input type="checkbox"/> Abyssinian cats	33486001777335
<input type="checkbox"/> The kite runner	33486001973108
<input type="checkbox"/> The hero's guide to being an outlaw	0040405730991
<input type="checkbox"/> Scatter my ashes at Bergdorf's [DVD]	0030304129114

**New Hold**

The cat in the window : and other stories of the cats we love

**Patron** Goodbook, Rita  
**Patron ID** 12321

**Hold Level \***  
Title

**Pickup Library \*** Ripon  
**Range \*** System

**Hold Expiration \*** NEVER  
**Recall Status** No

**Date Suspended**  
**Suspend Until**

**Notes**

**Place Hold** **Cancel**

# BLUEcloud Circulation

Circulation alerts

Improved UI

Support for custom labels (patron categories)

Omit unused categories

Hold improvements galore

Coming soon:

- BC Circ specific privileges
- Item edit tools
- Pull on shelf holds

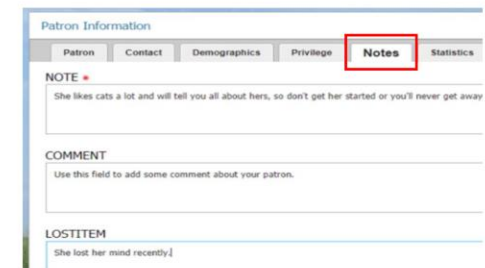
## BLUEcloud Circulation 20.05.0

Adding user information to the User Extended Info fields

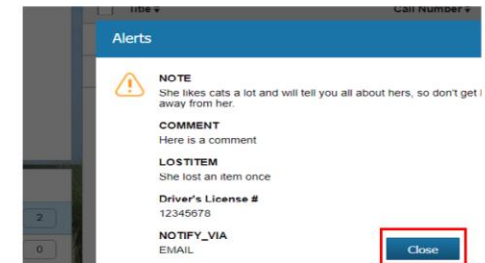
### Did you know?

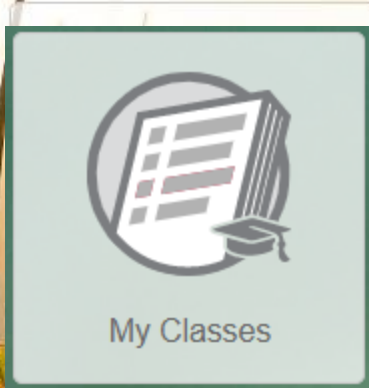
Symphony sites can include User Extended Information fields to capture additional details about a patron. These fields are accessible in BLUEcloud Circulation in the Patron Information pane on the Notes tab. When populated, the Alerts modal will immediately display the data when a staff member navigates to the patron.

- 1
  - Log in to BLUEcloud Circulation
  - Navigate to the patron that needs more information
  - Select > Notes tab
  - Add or edit information in one or more fields
  - Click > Save



- 2
  - When a search for the patron is performed, the information from the extended information fields displays in the Alerts modal
  - Click > Close when finished reviewing the notes





My Classes

# BLUEcloud Course Lists

Improved BookMarklet

CoINS Widget (free from  
consulting catalog)

Localization Options

CMS or Standalone

Bibliographic citation  
format selector

Link in at "chapter" level

More Reports!



SirsiDynix  
**BLUEPRINTS**

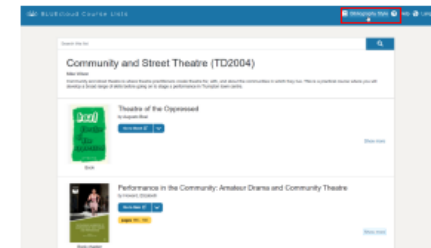
## BLUEcloud Course Lists 20.12.0

How to use Citation Style Language in the student interface

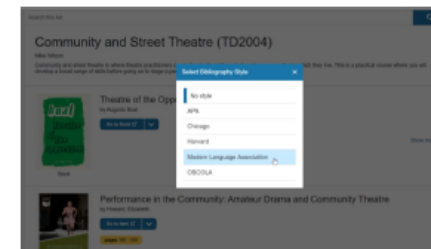
### Did you know?

Instructors can add a bibliography style tool for the BLUEcloud Course Lists student interface. Students can select the bibliography style recommended by the school or instructors to use in their resource list. This helps students visualize and learn the referencing style.

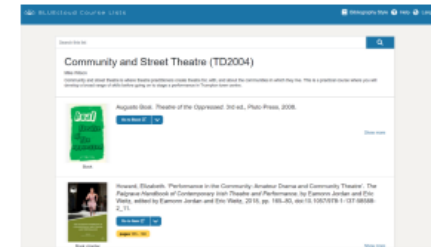
- 1 • Go to the student interface  
• Click > Bibliographic Styles



- 2 • Select the style you would like to use



- 3 • View the style in the interface



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# BLUEcloud Course Lists : 2021

Report Updates:  
manage lists

Focus on staff:

Tools to manage more  
metadata types

Improved Search—CSOA  
access and beyond

Metadata improvement:  
find something better?  
Add the additional fields!



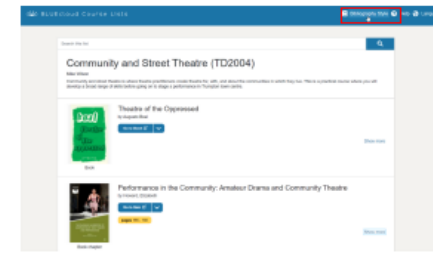
## BLUEcloud Course Lists 20.12.0

How to use Citation Style Language in the student interface

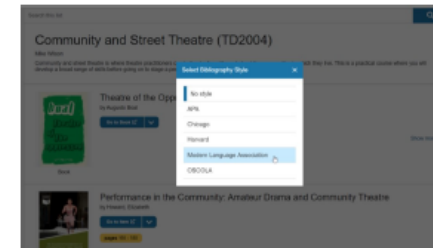
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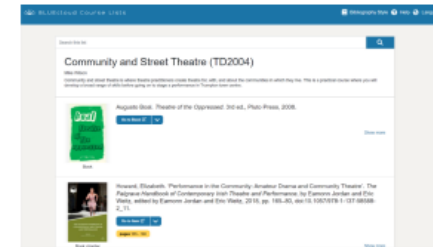
- 1 • Go to the student interface  
• Click > Bibliographic Styles



- 2 • Select the style you would like to use

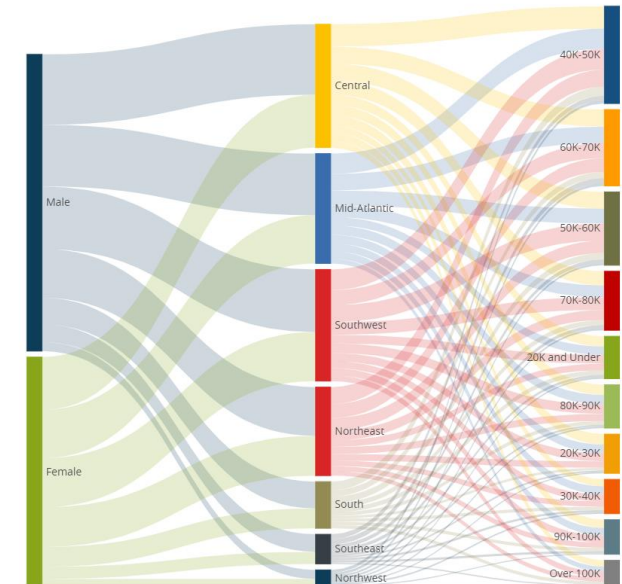
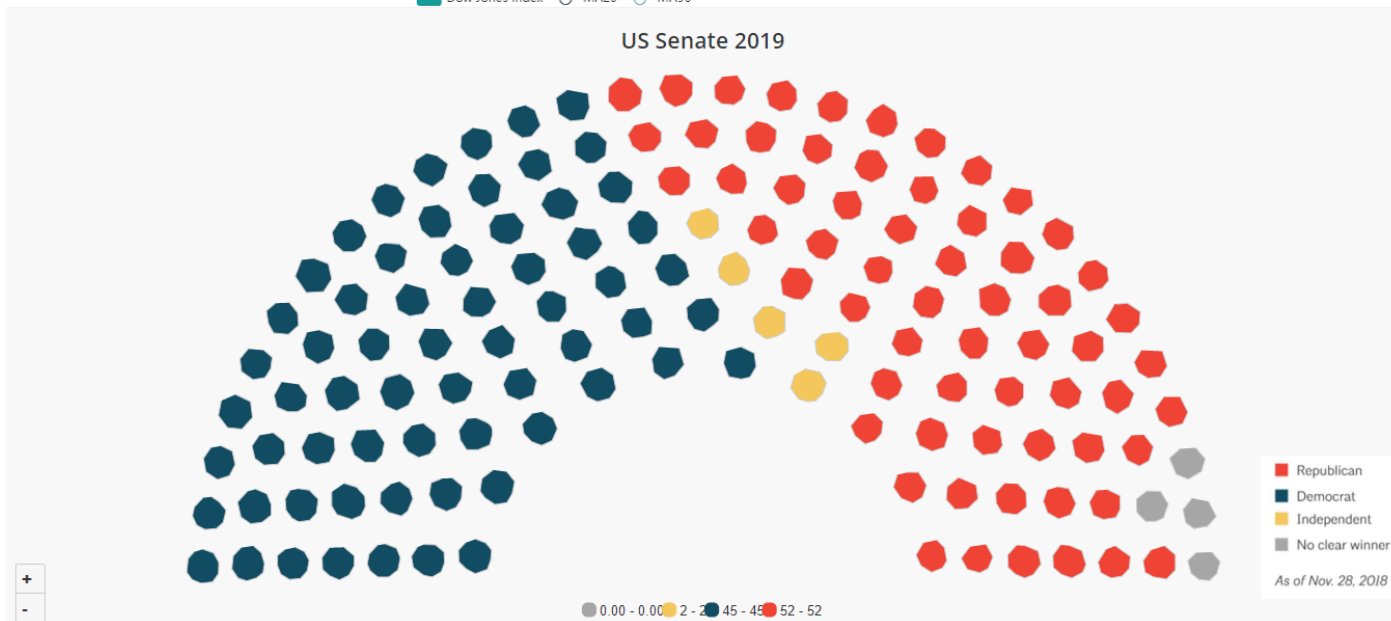
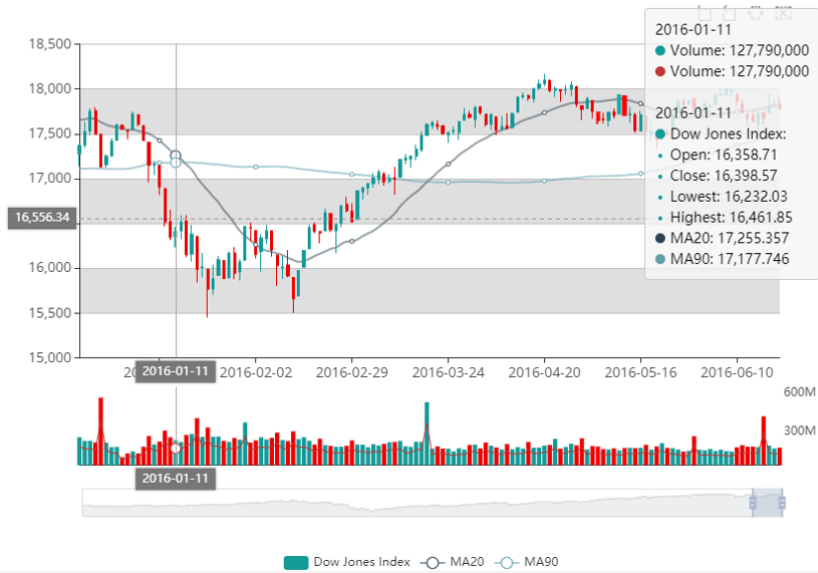


- 3 • View the style in the interface



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# BLUEcloud Analytics



# BLUEcloud Analytics

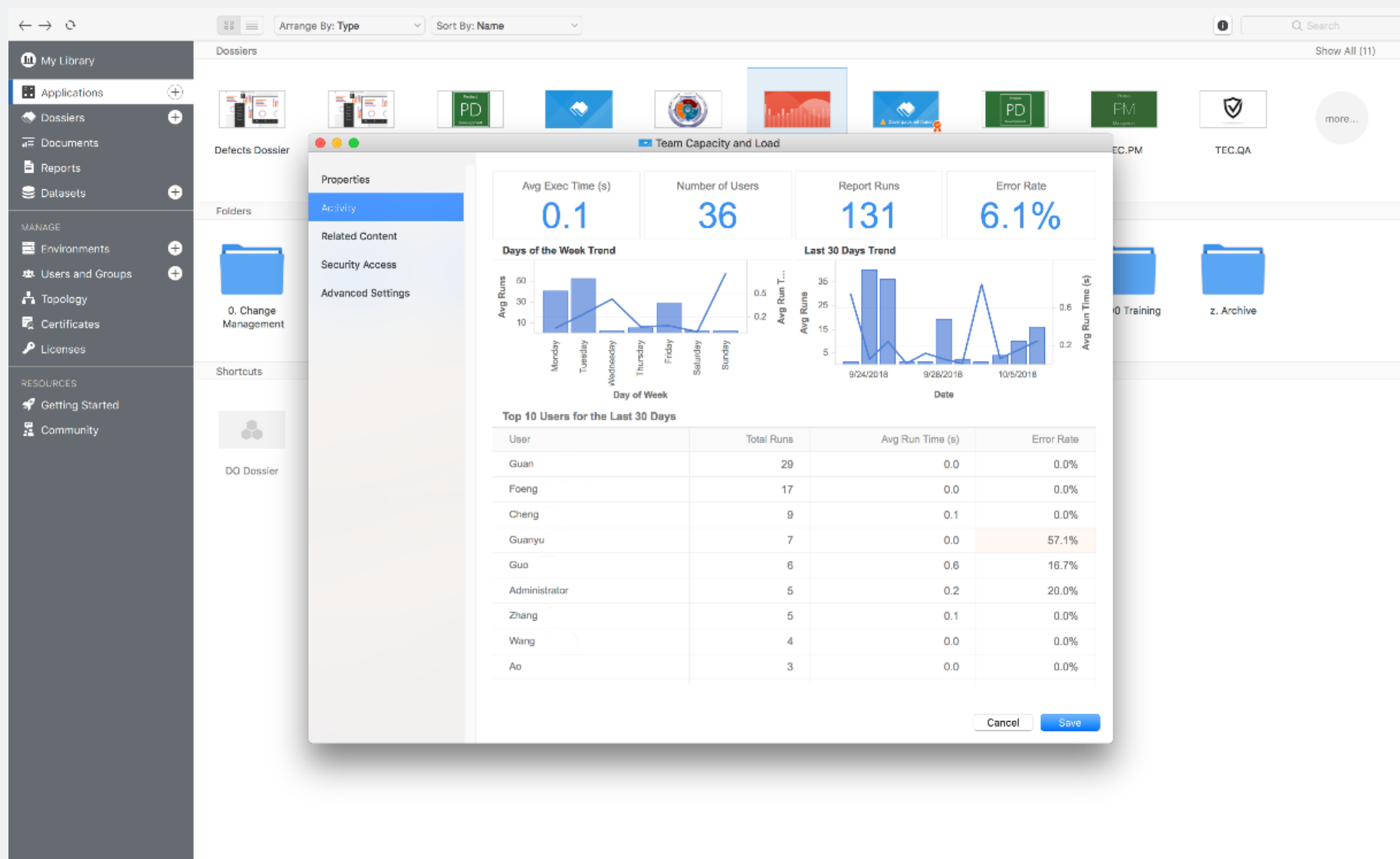
Ongoing Report  
Updates

Horizon ODBC  
integration  
(Symphony  
Planned)

Push API

Platform Analytics

Private Intelligence  
Server



# *What's Next for BCA?*

- New Report Packages in Catalog
- Reporting on BLUEcloud Products
- PUSH API Integrations with Other Vendors and Sources
- New Visualizations
- Improved Performance
- BC Central User Management
- Maps Update

# *Folio and other Open Source*

- SirsiDynix Symphony NCIP 2.x tested with ReShare (PA libraries)
- Consulting delivers OAI-PMH feed from Symphony for ReShare (or other uses); future Universal Harvest integration
- Coral eRM continues to be supported
- Folio eRM may offer new capabilities
- Other ideas?

*We Believe in the*

# POWER *of* LIBRARIES

*We believe in the power of libraries. You transform, improve, and enrich our communities. We recognize the importance of libraries and want to help you thrive. It is our goal to support libraries as you evolve in an increasingly digital world.*





# *Appendix (CEP)*





# Community Engagement

P L A T F O R M

CALENDAR,  
EVENTS, &  
BOOKINGS

MARKETING  
AUTOMATION





# *Undergrad Email*

CEP EXAMPLE



## Emails

[+ New](#) 

<input type="checkbox"/>	Name	Category	Stats	ID
<input type="checkbox"/>	<input checked="" type="checkbox"/> Welcome New Patrons #1	<input type="checkbox"/> Uncategorized	<span>0 Sent</span> <span>0 Read</span> <span>0% Read</span>	1
<input type="checkbox"/>	<input checked="" type="checkbox"/> Undergrad Library Services Intro	<input type="checkbox"/> Uncategorized	<span>0 Sent</span> <span>0 Read</span> <span>0% Read</span>	3
<input type="checkbox"/>	<input checked="" type="checkbox"/> CEP Newsletter	<input type="checkbox"/> Uncategorized	<span>0 Sent</span> <span>0 Read</span> <span>0% Read</span>	2

- Dashboard
- Calendar
- Contacts
- Companies
- Segments
- Components
- Campaigns
- Channels
  - Marketing Messages
  - Emails**
  - Focus Items
  - Social Monitoring
- Points
- Stages
- Reports
- [Collapse Menu](#)



# *Campaigns*



CEP EXAMPLE



- Dashboard
- Calendar
- Contacts
- Companies
- Segments
- Components
- Campaigns**
- Channels
- Points
- Stages
- Reports
- Collapse Menu

# Campaigns

[+ New](#) 

<input type="checkbox"/> 	Name 	Category	ID
<input type="checkbox"/> 	 Welcome New Patrons	<input type="checkbox"/> Uncategorized	1

1 item, 1 page in total





# *Reports*

CEP EXAMPLE



Dashboard

Calendar

Contacts

Companies

Segments

Components

Campaigns

Channels

Points

Stages

Reports

Collapse Menu

## Dashboard

Save

From 01/01/2021 To 02/28/2021 Apply

### Contacts created

All contacts



### Visits

Total visits



### Marketing Pipeline

#### Contacted Us

Contacted Us All Contacts



### Contact map



- Dashboard
- Calendar
- Contacts
- Companies
- Segments
- Components
- Campaigns
- Channels
- Points
- Stages
- Reports
- Collapse Menu

Engagements



- 9 History
- 0 Notes
- 0 Social
- 0 Integrations
- 2 Audit log

Filter...

1	Event Name	Event Type	Event Timestamp
✉️	Newsletter 2	Email sent	Today, 12:45 pm

20 points

Contact

**Address**  
 123 Street #32  
 New York, New York, United States  
 10002

**Email**  
 david.olliver@example.name

**Phone - home**

**Phone - mobile**  
 +1234567890

Companies



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*We believe in the power of libraries. You transform, improve, and enrich our communities. We recognize the importance of libraries and want to help you thrive. It is our goal to support libraries as you evolve in an increasingly digital world.*

