



COSUGI 2010



CLOSING SESSION: COSUGI Closing Remarks and SirsiDynix Executive Q & A

Description: Get the answers straight from company leaders. Join the SirsiDynix executive staff for an open Q&A session. Whether you have specific queries about products, operations, plans for the future, or other topics, this will be a great opportunity for you to get the answers to your burning questions.

**Friday, March 5th
4:15 pm - 5:45 pm: Coronado J**



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Question # 1: The Symphony Acquisitions Rollover process presents major difficulties for sites that use EDI. For example: Many invoices and order acknowledgements for the current fiscal year will have been loaded and continue to be received after the new year rollover--but then cannot be handled by the system due to non-matching fiscal years. How and when will this issue be addressed?

Answer: We have made several updates to the EDI/x.12 process in Symphony 3.3 that will make it generally easier to use and easier to support.

Similarly, we have updated our rollover capabilities to allow optional rollover of claim and receipt information which will provide customers more flexibility in following our standard rollover recommendations to roll open transactions to the next fiscal year.

However, there is an ongoing issue with orders placed via EDI prior to the end of the fiscal year, but not received until the next fiscal cycle, in that the x.12 standard does not provide a mechanism for recording or updating fiscal data. Thus we have used a convention of pre-pending fiscal cycle data to the order ID.

SirsiDynix expects to implement the EDIFACT standard in the 2011 development cycle. EDIFACT will provide better mechanisms to handle this situation.

In the immediate future in order to avoid this situation, the best option is to regulate orders placed near the end of the fiscal year.

Question # 2: What are the steps for doing inventory (we don't have RFID) and getting print out for shelf check? Or what are the steps to take to do an inventory of the library's collection.

Answer: There are several options for conducting inventory and I hope those of you with interest in this had an opportunity to attend our sessions on that topic here at COSUGI. Those slides will also be available on the conference site after the conference.

In summary, the most commonly used methods are:

- Offline: Use a mobile device such as a laptop or Pocket Circ to gather barcode data from shelves that will be inventoried
- Load those barcodes into the system using a standard utility
- Produce a printable report alerting you to items that are misshelved or that have statuses in conflict with current reality (e.g., lost, missing, etc).
- Online: use a mobile device such as a laptop or pocket circ to collect barcodes; in this case there is no need to load the items in a separate process. Once items have been collected, you may run the inventory reports and print them as necessary.

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Question # 3: Why are new software releases sent out with obvious bugs? Last year you promised this would not happen again.

Answer: As part of the beta testing and release development cycle, SirsiDynix rates all known bugs with priorities.

We do not release software with known issues with 'showstopper' or 'critical' priorities. We have in the past and will continue in the future to delay releases if necessary to correct significant issues.

We DO sometimes continue on with a release for lesser bugs in the event that we cannot correct the issue without jeopardizing the quality of the entire release. These issues are then reported in the "Known Issues" section of the release notes.

Question # 4: Would SirsiDynix consider a training subscription that sites could purchase for the recorded and live webex training sessions instead of the pay-as-you-go option now in use?

Answer: Yes - absolutely! Based on customer feedback we have added a training subscription package that you can purchase.

In addition, our new Learning Management System (LMS) makes it easier than ever to track training and competency achievement for staff that take the training! The LMS will be introduced in Q2 2010 and allows managers to manage training for staff members, chart their progress toward completion and review the results of related assessment tests.

Contact your SirsiDynix sales representative for more information.

Question # 5: Would SirsiDynix consider publishing a pricing structure for new products when they are released? This would then give us an idea of the product costs and allow us to budget for these new products prior to asking for a formal bid.

Answer: The pricing is based on library system size and market served (Academic, Public, School, Special, Federal and Consortia).

As a result, the pricing can be very detailed and doesn't lend itself to standard price catalog.

Your SirsiDynix sales representative can provide budgetary or formal pricing for any of our products when they are released (and often before product release). Simply contact your representative to receive a quote anytime you need it.

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Question # 6: What are SirsiDynix's plans to support newer social media?

Answer: SirsiDynix presented a COSUGI breakout session on our Web 2.0 strategy that covers much of this. The presentation will be available on the COSUGI website. Here are a few highlights:

- "Widgets" from social media sites like YouTube and Facebook can be embedded in "rooms" using the content management functionality in Enterprise 3.0.
- Meebo widgets can be embedded in Enterprise 3.0 or in e-Library 3.3.1 for "Ask a Librarian" functionality
- Enterprise 2.0 and above as well as e-Library 3.3.1 and above have built-in integration with ChiliFresh
- e-Library 3.3.1 includes the ability to integrate Novelist content into the search results and detailed display of library records.
- Enterprise 3.1 will include an integration option to use custom JavaScript for LibraryThing for Libraries for presenting patron tags
- Enterprise 3.1 will also include an integration option to use custom JavaScript for Goodreads

Many HIP customers have modified the HIP style sheets to add JavaScript or other code to enable Web 2.0 features, such as LibraryThing for Libraries, Novelist, and ChiliFresh

The SirsiDynix strategy is to provide tools that make it easy for libraries to tap into evolving communities where patrons and users already participate.

Question # 7: Several customers noted issues with missing or inconsistent data in Director's Station. Is the lost data issue the DS version 3.1.10.7.1 or another issue? Once corrected will the lost data be recaptured?

Answer: SirsiDynix has worked with many customers reporting this problem. While we can, and are, helping individual customers correct the missing data, we are taking a holistic approach to the issue.

Initial patches have been issued for the 4.x and 3.x platforms and an additional patch will be available for 4.x customers in April.

The latter patch includes many improvements to our load process and also incorporates a point release to the Director's Station software that allows it to be more forgiving to data anomalies, such as unexpected spaces.

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Question #8: Would SirsiDynix consider the purchase of an Oracle license that is not embedded for SaaS sites so that we can use other third party software for reports, i.e. Crystal Reports?

Answer: Yes. The good news is that the issue is not the use of embedded Oracle for SaaS sites, but rather access and security considerations required to maintain the integrity of the SaaS environment. SirsiDynix does not use embedded licenses in the SaaS environments.

Based on customer feedback, we do now have a way to accommodate this type of access; you can get additional detail from your Sales representative.

Question #9: Symphony does not seem to have the same ease of use as Horizon and seems to lack Horizon flexibility and critical features. Is this something that can be addressed? Will Horizon functionality be introduced into Symphony?

Answer: SirsiDynix has focused extensively on adding popular Horizon capabilities and workflows into Symphony versions and will continue to do so.

Examples in releases 3.2-3.3.1 include:

- Addition of VIP support in Acquisitions
- Support for credit accounts
- Support for Web Reporter
- Updates to statistical fields associated with titles and items
- Expansion of fund record structures
- Updates to patron My Account functions
- Inclusion of “My List”, permlinking and bookmarking capabilities in e-Library

We continue this development policy in Symphony 3.4, which will include significant updates to options for group editing of patron and item records, similar to what Horizon customers enjoy in Item Group editor, among other capabilities.

We believe that these updates benefit the entire customer base.

For a more complete comparison of Horizon and Symphony capabilities, please visit the SirsiDynix Client Care Portal:

http://clientcare.sirsidynix.com/index.php?goto=Knowledge&pid=16&docs&kcat_id=1

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Question # 10: Given that support for Horizon and HIP running on VMWare virtual servers was announced in December 2009, do you have an approximate date for when SirsiDynix will support Symphony running in virtual environments?

Answer: Yes. SirsiDynix has completed testing for similar virtualization scenarios for both Symphony and Horizon. White papers related to the testing are now available on the Client Care Portal. The SirsiDynix breakout session *Introduction To Virtualization*, which encompasses both platforms, will be available on the COSUGI web site with other conference presentations.

Please find the Symphony Virtualization white paper on the Client Care Portal at:

http://clientcare.sirsidynix.com/index.php?goto=Knowledge&pid=2&docs&kcat_id=3

The Horizon Virtualization white paper is accessible via:

http://clientcare.sirsidynix.com/index.php?goto=Knowledge&pid=16&vid=37&docs&kcat_id=3

Question # 11: The last enhancements that were formally acted upon by SirsiDynix were submitted in 2008. Where do you see the enhancement process going in the future? It is frustrating to see so many excellent suggestions ignored.

Answer: SirsiDynix agrees that the current enhancement process can be improved and creates an understandable sense of frustration on behalf of the users.

We have been talking to Joel Hahn about how we can improve the process and make the submission of enhancement requests more effective, as well as provide a much quicker turnaround between the submission and the enhancement making it into the actual product.

We are discussing merging the enhancement forum inputs into the Strategic Partner Program and having the forum moderators participate in the SPP.

We see this as a way of garnering the input from the enhancement forums, refining it with interactions between the moderators and the development teams, and providing quicker results in terms of features in products.

Question # 12: Is it possible to block the use of accepting a past date when using the Modify Due Dates Wizard?

Answer: At this time it is not possible to prevent the use of a past due date. We will consider adding a property flag in a future release. We suggest you submit this as an enhancement request.

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Question #13: We've had a constant problem with items not being properly discharged from a patron's record even though we do double checkins/discharges specifically for this reason. The discharged item will then list the message *Item Not Charged* after the second discharge session. Later we find the item still shows up on the patron record as *Charged*. We have several of these a week. Will this problem be corrected soon?

Answer: Note that this is a Symphony question. SirsiDynix has made some changes to Discharge to help alleviate this problem.

Customers seeing this issue should contact Client Care to make sure that they have the latest patches. And, if the patches are installed we'd like to pursue this for possible future corrections so please do open a Client Care case.

Question # 14: I understand that Symphony is developed on a Unix platform. What specific operating system and release of Unix (eg. Sun Solaris, AIX, HP, RHELinux, Suse), is Symphony developed on? Thank-you!

Answer: Most developers use a Windows-based platform for their coding work - this is simply because some of the best development tools are available on Windows (e.g. Visual Studio, code profilers, etc.).

We perform the initial system build on Solaris - because this is a platform that is used by a large number of customers, as well as in our SaaS centers.

We test on every platform that we support: Windows, Solaris, Red Hat Linux, SuSE Linux, HP-UX, and AIX.

We also test during the development process - in each development sprint - and we test on all of these platforms during the sprint testing.

We do not develop on one platform and test everything else at the end - we test on all platforms throughout the development cycle.

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Question # 15: Why invest time and energy in Enterprise instead of simply making e-Library better? We'd like to see all of the Enterprise capabilities in e-Library rather than purchasing an overlay.

Answer: We are making significant enhancements to e-Library while also focusing on Enterprise.

Recent updates to e-Library include:

- Updated presentation layer supporting standard CSS
- Additional options for enhanced content
- Significant improvements to My Account
- New web-based, easy to use administrative tool that supports common customizations
- Persistent "My Lists"
- Improved LDAP authentication
- Support for bookmarking and permalinking

As we look toward improvements to the base public interface for both Symphony and Horizon, we are exploring additional improvements such as faceting that we will be able to support in a common platform compatible with both underlying ILS systems.

Enterprise goes beyond the base interface in offering a new search engine, state of the art fuzzy match capabilities, content management, and Discovery Web services. Enterprise also becomes a foundation component of other options such as our upcoming Digital Asset Management system. As such, Enterprise is an option in its own right.

Question # 16: What plans does SirsiDynix have for enhancing Collection Exchange -- specifically to make it possible for non-reciprocal branch to branch exchange? Unless all the branches of one's library system are exactly the same size, the delivered branch to branch exchange does not work.

Answer: SirsiDynix made several updates to Collection Exchange in 3.3 and 3.3.1 and expects to make modest updates in future releases.

It would be helpful to get additional details on the workflow desired by this library and we would request that a Client Care case be filed with the details so that we can review it further.

Question # 17: We are looking at replacing the SUNFIRE 250 with an HP server running Solaris. Will SirsiDynix (1) support this hardware move and (2) would they aid in the software installation? All this due to SUN distancing from SirsiDynix.

Answer: Assuming that the HP server running Solaris will be a Proliant system running on an Intel x86 processor, then yes, we will support this configuration. With the release of Symphony 3.3.1, we added support for Solaris running on Intel x86 servers.

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With regards to providing assistance with software installation, yes, SirsiDynix does offer standard platform migration services. Customers requiring this assistance should contact your Sales Representative for more information.

Question # 18: What is the current development cycle for Serials and Acquisitions?

Answer: We continue to support and enhance both products. Both Acquisitions and Serials received numerous updates in the Symphony 3.3 development cycle.

Acquisitions auditing capabilities will be significantly enhanced in 3.4 and we expect to incorporate EDIFACT (in addition to the existing x.12 support) in Symphony 4.0.

We will announce Serials updates in future development cycles.

Question # 19: When will you give Macro instructions for Sirsi tasks easier to follow?

Answer: SirsiDynix product management is currently working with our macro expert Jim Wilson to better document the process.

We are also making numerous updates in Symphony 3.4 that may lessen the need for some macros.

For example, "right click" next steps will be added to commonly used circulation functions and item and patron group editing wizards will be introduced.

Customers running Horizon will see the influence the Horizon Item Group Editor has had on this development.

Question #20: With the recent acquisition of Sun by Oracle, what is SirsiDynix's projection as to how long they will be able to support the ISAM database structure, and how long will it be before SD will only support MySQL or Oracle?

Answer: SirsiDynix does not see any links between Sun, Oracle, and ISAM. ISAM is a database developed by Informix, which is now owned by IBM.

However, we have no plans to stop supporting ISAM as a Symphony database. We still have a large number of customers running on ISAM.

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Question # 21: What is your philosophy for supporting turnkey sites in the future? This used to be one of Sirsi's strengths, but in recent years I've felt the level of support for turnkey libraries has decreased. As a small library, we rely on Sirsi to help us with advanced system issues and can't afford to pay a consulting fee whenever these issues occur. Do turnkeys have an affordable future with SirsiDynix?

Answer: SirsiDynix continues to support turnkey sites, and we have added more options for turnkey sites this year.

In addition, we have two other options intended to move any site toward Turnkey Services:

Our new Platinum Services offerings provide additional training, consulting, and additional Client Care support services.

Our SaaS option also provides a cost-effective way to reduce local costs. In the SaaS environment, SirsiDynix handles server hardware, security, backups, patch applications, and upgrades for much broader turnkey services.

Your SirsiDynix sales representative can provide additional details.

Question # 22: Have you given any consideration to develop a way to allow hosted libraries to have greater access to their servers in order to customize their OPACs?

Answer: Yes. In Symphony 3.3.1, we have introduced a web-based management tool that supports common e-Library customizations.

This will make customization easier for all sites, but is particularly helpful in allowing SaaS sites to perform much more extensive customization without involving SirsiDynix staff.

Similarly, Horizon's HIP also features web-based administrative tools which are similarly useful to customers running Horizon in the SaaS environment.

Question # 23: What is your stance toward all of the open source software that is appearing on the horizon? Do you think Sirsi/Dynix can adapt to this new environment? If so, in what ways? Customers of Sirsi hope the answer will be reduced prices for their services.

Answer: There are proven open source software components that we support and incorporate in our software including Java, JBoss, and Apache.

Our software architecture is such that we can accommodate a variety of connections to other systems through API and web services.

In fact, we are expanding our web services initiatives to encompass our Horizon environment as well as the Symphony platform. We are very comfortable in this "new environment" and will

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continue to emphasize our development model that is geared toward allowing our customers to collaboratively expand your systems via use of APIs, web services, and database access.

SirsiDynix also considers open source solutions for integrated library systems, along with the commercial companies that support them, as welcome competition. The entry of new ideas and competitors tends to encourage innovation in all entities that wish to remain viable, and thus ultimately benefits libraries. Certainly SirsiDynix has expanded our focus on new products and technologies based on many emerging trends. We, and our customers, benefit from having a rich foundation, including all of the functionality expected in a mature product, on which to build.

We anticipate that our customers will review open source solutions with the same criteria that they would any product or technology that will be used to support enterprise activities critical to end users and support for daily library operations. This includes consideration of total cost of ownership (the actual staff and support costs that will be required in some cases to build and to support the functions expected in a mature marketplace), risk management and mitigation (for example the typical contractual terms around performance, uptime, indemnity, etc. that are typical with enterprise solutions), and review of existing investments, among other factors.

Based on feedback from many customers, we believe that funding bodies' total cost of ownership for open source library management systems is similar or higher than that of commercial.

Our services pricing is based on the software package purchased by the library. Again, based on market trends, SirsiDynix is pleased to introduce new service packages intended to control costs over time for multi-year agreements and also to offer platinum services for institutions wishing to expand services in the most cost effective manner.

Question # 24: It seems there's been an exodus of talented people leaving SirsiDynix in the past months. Any comment on why this is, and what efforts are being taken to retain knowledgeable and helpful SD employees? New, skilled employees do not equate to long-time, knowledgeable employees.

Answer: While we are always disappointed when talented staff leave the company, we face the same challenges that all of you face in attracting and retaining talented employees.

We make every effort to retain and reward talented, hardworking employees. In fact, our average tenure among employees is 11.2 years.

Customers attending the COSUGI conference were able to hear and interact with many of our talented, dedicated employees. We continue to hire and recruit experienced software engineers, support personnel and sales representatives.

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Question # 25: Will Symphony Serials ever be given the same functionality as the Horizon 7.xx Serials module?

Answer: SirsiDynix continues to add Horizon favorite features to Symphony and will certainly review updates to Serials.

As we approach our next active Serials cycle, we propose to engage Horizon and Symphony customers in a Strategic Partner Program to identify high priority candidates for serials updates.

Question # 26: Our library system consists of 10 branches. It is possible to logon as multiple branches from one location. Could Sirsi display at the top of each window which branch you are logged in as?

Answer: We will consider this in a future release.

Question # 27: Is it possible for patrons to carry a credit balance in the billing records?

Answer: Yes. In Symphony 3.2 we added support for credits associated with the patron record. These credits can be used to manually or automatically pay outstanding bills as configured by the site.

Note that additional improvements to credit handling have been made in Symphony 3.3.1, and we encourage sites that wish to take advantage of this feature to upgrade to 3.3.1.

Horizon also supports use of credit balances and many customers have taken advantage of this feature.

The Symphony development around credit support was heavily influenced by support for credit accounts in the Dynix and Horizon platforms.

Question # 28: Are there any plans for an iPhone application for Horizon like "BookMyne" for Symphony?

Answer: Yes. We intend to provide a web service that will allow Horizon customers to offer BookMyne to their patrons later this year.

Question # 29: Why has SirsiDynix chosen not to support the Bibliocommons discovery layer, but instead the ChiliFresh product which offers fewer features?

Answer: Chilifresh offers a set of features that complement the SirsiDynix discovery layer offerings like e-Library and Enterprise.

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Bibliocommons is intended as a replacement for the SirsiDynix discovery layer. The openness of the Symphony architecture allows for that alternative and there are several customers that have taken advantage of the Bibliocommons interface.

We believe, in the end, that the SirsiDynix discovery layer products will provide a better and more complete patron discovery experience than any competitive offering. But we do not inhibit customers from implementing alternate discovery products.

Question # 30: Please can e-Library and Enterprise be given the print and email capability of WebCat? In WebCat you can easily print or email all selected - ie even a big reading list, but in e-Library you have to do it a page at a time etc.

Answer: We will look into this functionality across all user experience products to try to find the best way to keep popular functionality from previous OPACs in the new products.

Question # 31: Will Horizon EVER be web-available, so we can dump Citrix??

Answer: This is not likely. While we continue to improve Horizon with bug fixes and enhancements, the effort to create a web staff client for Horizon would require tremendous effort as the Horizon architecture does not readily accommodate this type of client.

Horizon sites wishing to minimize use of local Citrix may wish to consider running Horizon on SaaS. You may also wish to review the Staff Web Client in SirsiDynix Symphony to see whether this would fill your requirements.

Question # 32: As libraries look to reduce their operating costs due to loss of revenue, what is SirsiDynix doing to retain customers who are considering less expensive open source software options?

Answer: SirsiDynix has implemented several new options with an emphasis on cost control and reduction in total cost of ownership.

We have instituted our Value Bundle - Long Term Contract program to help our customers save money.

In addition, our SaaS offering provides an attractive alternative to increasing maintenance costs on hardware and internal support costs for system maintenance.

The new Platinum Services options bundles many popular services to provide advantageous pricing on expanded services.

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Note that we have also seen an interesting trend among early adopters of open source that illustrates the *Total Cost of Ownership* for such solutions are not as "inexpensive" as assumed and greater value is placed on stable, viable and reliable solutions from SirsiDynix.

Please contact your SirsiDynix sales representative for more information on our Value Bundle, SaaS, and Platinum Services solutions.

Question # 33: What hardware and software support is included with the annual maintenance for Symphony? For example, if we switch ISP's, would support for updating the system files be provided?

Answer: SirsiDynix supports hardware and software that a library has purchased and included on an annual maintenance contract with SirsiDynix.

If your system is included on an annual maintenance contract then support for updating files for a change in ISP's is supported.

Question # 34: Will the online help be available soon in French when there is a new release of Symphony comes out?

Answer: Oui! We have released a French version of the Symphony UI and Online Help for Symphony 3.3.

We are currently updating this translation for Symphony 3.3.1.

Every subsequent release of Symphony will provide support for both English and French in the UI and Online Help.

We are also adding support for German and Spanish later in 2010.

Question # 35: Will SirsiDynix offer a better editor to modify Symphony reports? The reports look often terrible and are hard to manage. A better presentation would help.

Answer: Yes. We are making improvements to many reports in Symphony 3.4 by offering XML output for an expanded set of reports, along with default style sheets that will provide more attractive default output and ease moving reports into other formats such as Excel.

Those of you who are comfortable with style sheets will also be able to create your own to do far more creative styling.

Those of you who take advantage of the APIs will find many Print Tools with expanded XML output options in 3.4 as well.

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Question # 36: Is it possible to have a user-friendly Report Module? It could help a lot if there could be online assistance (showing examples) in parameter selection and the report final look. We know the look of the report only when we asked for it. We have to try many reports to be sure to find the one that we are looking for.

Answer: We will certainly consider further improvements to Help. As mentioned in response to the previous question, many commonly used reports will indeed have more attractive final look options with the release of Symphony 3.4.

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