



ATLANTA, GEORGIA | APRIL 16-18, 2018

# SAVE THE DATE

# COSUGI

# 2019

Hyatt Regency Minneapolis

Minneapolis, MN  
March 25-27, 2019



## *We believe in the*

# POWER

# OF LIBRARIES™

*We recognize the important role you play in your community.  
We know you transform, improve, and enrich the communities  
you serve. It is our passion to support you in an increasingly  
digital world. This passion shapes our company and our actions.  
We believe in libraries; we believe in you.*



**SirsiDynix®** To learn more, visit [SirsiDynix.com](http://SirsiDynix.com)



## Oh Atlanta, I hear you calling! COSUGI 2018 is calling as well.

This year's conference promises to be both fun and educational. Libraries may be Powering The Future, but COSUGI members are Powering This Conference. Once again, company and customer come together to bring us best practices, tips-n-tricks, and updates about various SirsiDynix products.

This past year the COSUGI board—and most especially Mike Dawe, your Enhancement Coordinator—has been working with SirsiDynix to revamp the Enhancements process, and move to a more user-friendly interface. Many, many thanks are due to Mike and the team of Enhancement Forum Moderators. Also, many kudos and thanks to Sam Farnsworth and the SirsiDynix team for developing the new Enhancements section of the Support Portal.


This conference wouldn't happen without the hard work of many people: Anita Winger, this year's Conference Chair, who along with the conference committee, has spent many hours organizing this event. Pia Jones, Conference Planner Extraordinaire, wrangles all the logistics of the conference venue. Frances Orton, Membership Coordinator, and her posse of volunteers makes sure that registration goes smoothly.

If you run into any of these people, or any of the COSUGI Board members, give them a "Thumbs Up and Thank You!" for all their dedication. I cannot begin to say how grateful I am to every one of them.

Nor are my thanks limited to COSUGI.... Vendors schlep their goods from all over to show us their latest and greatest and their sponsorships and presence help keep our registration fees down. SirsiDynix throws us a Reception Royale to give us a chance to relax and catch up with friends, and they send their folks cross-country to share their knowledge and expertise. Samantha Gustman, SirsiDynix's Marketing Events Maven, is the COSUGI liaison who magically aligns all the ducks for SirsiDynix's side of the conference.

Truly, the power of this conference is the cooperation and shared effort of all involved!

Enjoy your Conference!



Karla Smith  
Chair, Customers of SirsiDynix Users' Group, Inc.

## Table of Contents

- |                                      |  |
|--------------------------------------|--|
| 1 Welcome from COSUGI Chair          | 6 Tuesday Schedule and Descriptions    |
| 3 Meeting Rooms                      | 10 Wednesday Schedule and Descriptions |
| 4 Welcome from SirsiDynix CEO        | 16 Thursday Schedule and Descriptions  |
| 5 COSUGI Customer Appreciation Event | 22 Exhibitor Information               |

## Event Staff

ICM event staff will be stationed at tables in foyers outside meeting rooms. Look for tables with the teal "Event Staff" banners. Staff will be able to provide any assistance you may need.

## Conference Information

*Locations listed are in the Atlanta Marriott Marquis*

### Registration Desk

Sunday, April 15, 4:00-7:00 pm | *Atrium Foyer*  
Monday, April 16, 7:00 am-5:00 pm | *Reg. Desk 3 near A701*  
Tuesday, April 17, 9:00 am-5:00 pm | *Reg. Desk 3 near A701*  
***Bibliotheca is the sponsor of the conference lanyards***  
***TBS is the sponsor of the conference bags.***

### Exhibits

*Atrium B & C*  
Monday, April 16, 11:00 am-5:00 pm  
Tuesday, April 17, 9:00 am-5:00 pm  
Wednesday, April 18, 8:00 am-1:00 pm

### Internet/Copy/Scan/Print Area

***Sponsored by EnvisionWare***  
*Atrium B & C*  
Monday, April 16, 11:00 am-5:00 pm  
Tuesday, April 17, 9:00 am-5:00 pm  
Wednesday, April 18, 8:00 am-1:00 pm

### Conference Welcome: SirsiDynix and the Power of Libraries

*Atrium A*  
Monday, April 16, 8:00-11:00 am

### SirsiDynix Social

***Sponsored by SirsiDynix***  
*Atrium A*  
Monday, April 16, 6:00-9:00 pm

COSUGI 2018 conference logo and book design by Liz Burnett  
schlegelbagel.design.com • facebook.com/SchlegelBagelDesign

### Ask SirsiDynix Room

*Room A708*  
General knowledge staff present all day with additional expert "office hours". Coming again this year - The Psychology of User Behaviour: Your library is awesome but are your patrons feeling it? Joint the SirsiDynix user experience team in our UX Usability Lab and learn design secrets you can use to help patrons love your library. **All topics welcome any time.**

#### Monday, April 16

Experts: 1:30-3:00 pm	BCA
Experts: 1:40-3:00 pm	UX Lab
Experts: 2:30-4:15 pm	Symphony

#### Tuesday, April 17

Experts: 8:30-10:00 am	UX Lab
Experts: 9:30-11:00 am	Horizon
Experts: 11:00 am-12:30 pm	Enterprise
Experts: 1:30-4:00 pm	BLUEcloud Circulation
Experts: 1:40-4:00 pm	UX Lab
Experts: 3:30-5:00 pm	Web Services

#### Wednesday, April 18

Experts: 8:30-10:50 am	UX Lab
Experts: 10:30 am-12:00 pm	BLUEcloud Cataloging
Experts: 1:00-2:00 pm	SIP

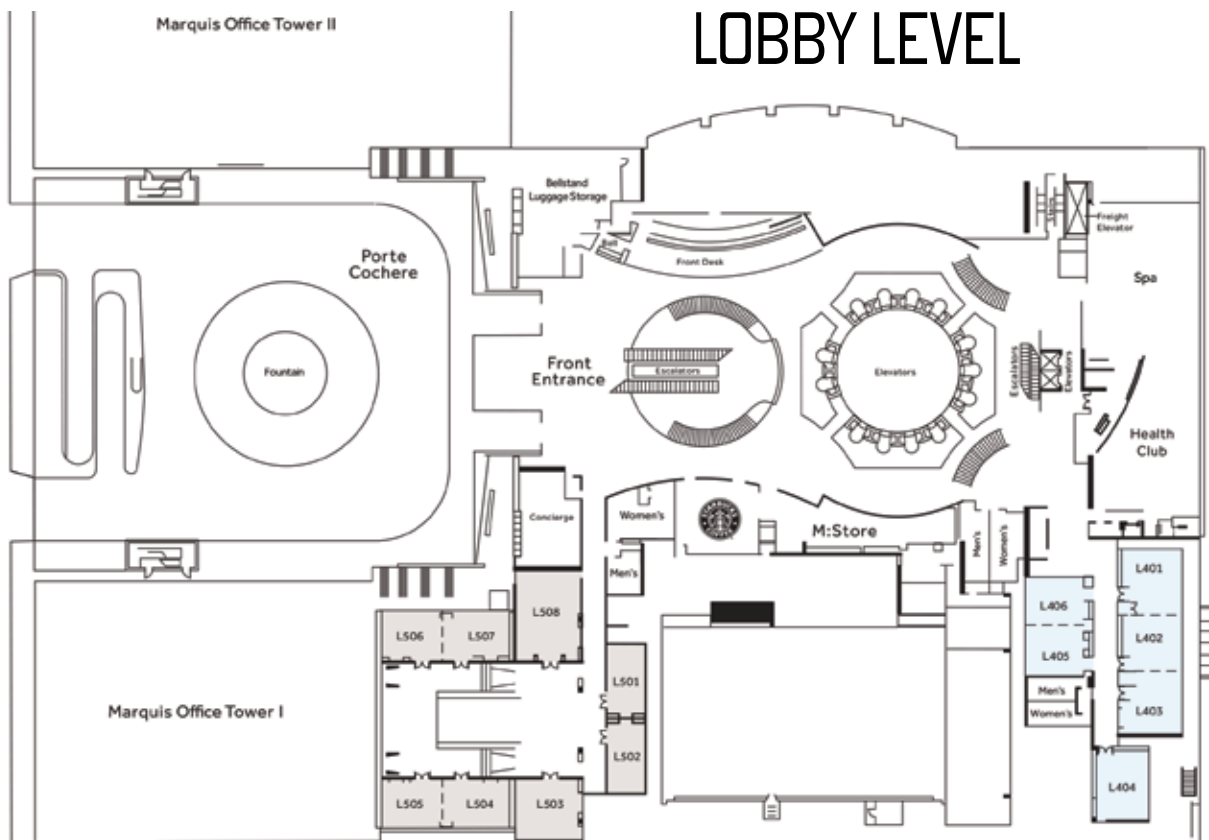
### COSUGI Business Meeting

*A706*  
Tuesday, April 17, 4:15-5:15 pm

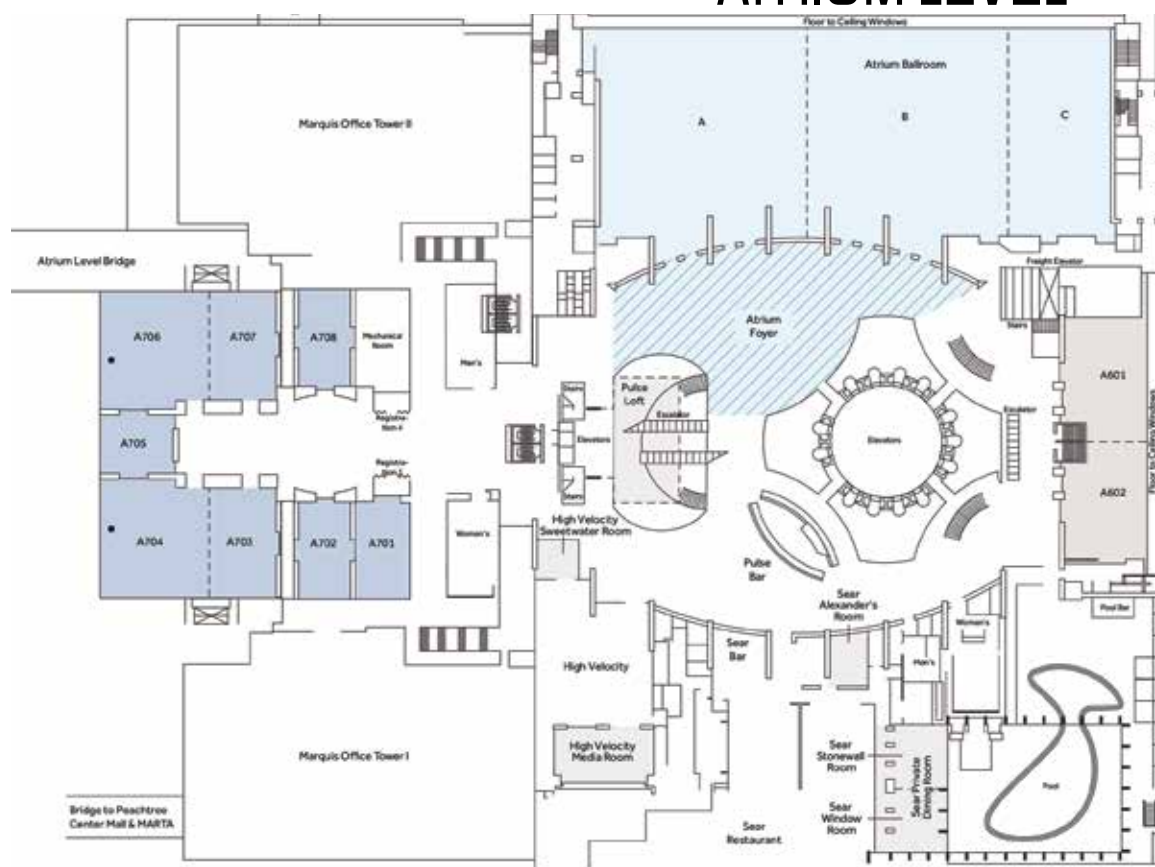
### SirsiDynix Executive Q&A

*A601-A602*  
Wednesday, April 18, 11:00 am-12:00 pm

## LOBBY LEVEL



## ATRIUM LEVEL



## SirsiDynix Welcome

### Welcome to Atlanta and COSUGI 2018!

This is one of my favorite weeks of the year. The week of COSUGI is very special to me, and in that regard, I'm not alone. At SirsiDynix, many of us feel the same way. When we come to together this time of year to meet and exchange ideas with all of you, it helps SirsiDynix improve. It makes us a better organization. We hope you share that same feeling.

Libraries—and, you, the librarians that power them—touch the heart of society. The work you do every day helps your community. You provide services to the disadvantaged. You provide a literary escape to those seeking a break. You help students and faculty get what they need. You nurture the underprivileged and the disenfranchised with programming to meet their needs. You encourage. You entertain. You support. You inspire. We feel privileged to help you accomplish that.

If there's anything we hope you take away from COSUGI this year, it's that we believe in the power of libraries. It's not just a tagline. It's a truth we embrace. Everything we do at SirsiDynix

revolves around that belief. From enhancements in products to the collaboration in our Strategic Partner Programs for new products and services, our aim is to support you and your community.

We're all very excited for opening session this year. There you'll see stories from our Power of Libraries Award Winners and what we've been working on since the last time we met. I'm looking forward to sharing our progress with you during the opening session and speaking with you throughout the conference.

We believe in the power of libraries; we believe in you. We hope you have a great COSUGI!



Bill Davison, SirsiDynix Chief Executive Officer





YOU ARE INVITED TO SIRSIDYNIX'S

# COSUGI ROYALE PARTY

Atlanta Marriott →  
Monday April 16, 2018  
6PM - 9PM

Join us for  
Drinks, Dinner,  
and an evening  
of Entertainment.



## Monday, April 16 | Schedule at a Glance

Daylong	8:00-11:00 am	11:00-11:30 am
<b>7:00 am-5:00 pm</b> <b>Registration</b> <i>Reg. Desk 3 near A701</i>	<b>Conference Welcome &amp; Opening Session: SirsiDynix and the Power of Libraries</b> <i>Atrium A</i> Opening comments and welcome by Karla Smith, Chair, Customers of SirsiDynix Users Group, Inc. (COSUGI) and ILS Manager at Winnefox Library System  Join Bill Davison and the executive team at SirsiDynix as we kickoff COGUSI 2018! We'll be highlighting some of the inspirational work you do and the power of libraries. You'll see updates on our products and services and some exciting announcements of what we've been working on this past year. We're excited to be here in Atlanta for COSUGI 2018 and we look forward to seeing you!	<b>Exhibits</b> <i>Atrium B &amp; C</i>
<b>11:00 am-5:00 pm</b> <b>Visit the Exhibits!</b> <i>Atrium B &amp; C</i>	<b>9:40-10:00 am</b> <b>Morning Break</b> <i>Atrium A Foyer</i> Sponsored by Marcive	<b>First Timers Meet and Greet</b> <i>L508</i>
<b>11:00 am-5:00 pm</b> <b>Internet/Copy/Scan/Print Area</b> <i>Atrium B &amp; C</i> Sponsored by EnvisionWare		

## Monday, April 16 | Programs (continued page 8)

**8:00-11:00 am**

**Conference Welcome & Opening Session: SirsiDynix and the Power of Libraries**

**Audience:** General  
*Monday 8:00-11:00 am | Atrium A*

**Presenters:** SD Executive team



**11:30 am-12:30 pm**

**Enhancing the Enhancement Process**

This session will discuss the importance of the enhancements process. In it, the Enhancements Coordinator and the Program Manager for Customer Engagement will demonstrate the newly released Enhancement Forums Interface to show customers how their voices can help shape product development and help them make the most out of our direct line to product development.

**Audience:** General  
*Monday 11:30 am-12:30 pm | A601*

**Presenters:** Mike Dawe, Technology Librarian, Sonoma County Library; Rachel Howell, Program Manager, Customer Engagement, SirsiDynix

**Introducing BLUEcloud Analytics: Reporting Beyond the ILS**

BLUEcloud Analytics is primarily focusing on comprehensive ILS reporting that will be vastly improved as we bring in data from other BLUEcloud products, as well as from other products and services that centralize how libraries are being accessed and used in the modern library industry.

**Audience:** BLUEcloud Analytics  
*Monday 11:30 am-12:30 pm | A602*  
*Repeats: Tuesday, April 17; 3:00-4:00*

**Presenters:** Nate Berrett, Product Manager, SirsiDynix; Scott Wheelhouse, Senior VP, Operations, SirsiDynix

**With Our Powers Combined ...**

What happens when a cataloger and Horizon system administrator join forces? Using tools like marcout, marcinfo, MarcEdit, SQL, custom mq\_views, search filter queries, and python programming these Horizon Heroes work for the betterment of librarians and patrons and save the day-tabase. Join these two intrepid heroes as they show their data saving skills and work tirelessly to make batch edits, automate processes and produce a cleaner, more robust system!

**Audience:** Horizon  
*Monday 11:30 am-12:30 pm | A703*

**Presenters:** Becky Lashinski, Cataloging Librarian, SELCO; Cheryl Hill, Technical Services Librarian, SELCO

# Monday, April 16 | Schedule at a Glance

11:30 am-12:30 pm

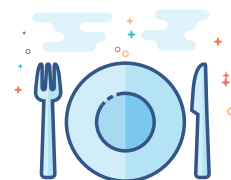
1:30-2:30 pm

3:15-4:15 pm

A601	<b>Enhancing the Enhancement Process</b> <i>Audience: General</i> Mike Dawe, Technology Librarian, Sonoma County Library; Rachel Bowell, Program Manager, Customer Engagement, SirsiDynix	<b>ILS Collaboration with Outside Organizations</b> <i>Audience: General</i> See presenter titles/institutions listed in full program description	<b>Stump the Chumps: Horizon Edition</b> <i>Audience: Horizon</i> See presenter titles/institutions listed in full program description
A602	<b>Introducing BLUEcloud Analytics: Reporting Beyond the ILS</b> <i>Audience: BLUEcloud Analytics</i> <i>Repeats: Tuesday, April 17; 3:00-4:00</i> Nate Berrett, Product Manager, SirsiDynix; Scott Wheelhouse, Senior VP, Operations, SirsiDynix	<b>BLUEcloud Analytics General Reporting: How to Bend BCA to YOUR Needs</b> <i>Audience: BLUEcloud Analytics</i> Kendal Orrison, Executive Director, Resource Sharing Alliance NFP	<b>Harness Your Collection Development with BLUEcloud Acquisitions</b> <i>Audience: BLUEcloud Acquisitions</i> Mike Hilmo, Product Manager, SirsiDynix
A703	<b>With Our Powers Combined ...</b> <i>Audience: Horizon</i> Becky Lashinski, Cataloging Librarian, SELCO; Cheryl Hill, Technical Services Librarian, SELCO.	<b>Symphony System Administration Sharing Session</b> <i>Audience: Symphony</i> Lynn Schlatter, Area Manager Access Services; Shreve Memorial Library	<b>Go for Gold Medal Glory with a Full Inventory</b> <i>Audience: Symphony</i> Sarah Ethier, Technical Services Coordinator, Scott County Library
A704	<b>BLUEcloud Mobile: Everything You Need, Anywhere You Are</b> <i>Audience: BLUEcloud Mobile</i> Michael Staten, Product Manager, SirsiDynix	<b>Horizon and BLUEcloud: Roadmaps, Strategic Partner Programs and Development Processes</b> <i>Audience: Horizon</i> Rachel Bowell, Program Manager, Customer Engagement, SirsiDynix; Brent Thompson, Product Manager, SirsiDynix	<b>Check it out! What's New In BLUEcloud Circulation</b> <i>Audience: BLUEcloud Circulation, Symphony, Horizon</i> <i>Repeats: Wednesday, April 18, 9:30-10:30</i> Carla Clark, Product Manager, SirsiDynix
A705	<b>Security, Privacy, SirsiDynix and You</b> <i>Audience: General</i> Ben Card, Corporate Information Security Officer, SirsiDynix	<b>Extend Your Services with BLUEcloud Campus</b> <i>Audience: BLUEcloud Campus</i> Rick Branham, Vice President of Global Accounts & Alliances, SirsiDynix	<b>API Transactions, or, When Are Edit Tools Just Not Enough?</b> <i>Audience: Symphony, API</i> Spencer Anspach, Library Systems Analyst, Indiana University
A706	<b>Integration Between SirsiDynix Symphony and the EBSCO Discovery Service</b> <i>Audience: Symphony; Enterprise/Portfolio</i> See presenter titles/institutions listed in full program description	<b>Look Towards the Future with the Enterprise Discovery Platform</b> <i>Audience: Enterprise/Portfolio</i> <i>Repeats: Wednesday, April 18; 1:00-2:00</i> Michael Staten, Product Manager, SirsiDynix	<b>How to Design and Deliver Effective Presentations 2—The Sequel!</b> <i>Audience: General</i> <i>Repeats: Tuesday, April 17, 3:00-4:00</i> See presenter titles/institutions listed in full program description
A707	<b>We All Need a Mentor</b> <i>Audience: General</i> Becky Muller, Instructional Designer, SirsiDynix	<b>Expanded Symphony Reporting Using Open Source Business Intelligence Reporting Tools (BIRT)</b> <i>Audience: Symphony</i> Gregory Testa, Systems Analyst II, Chesapeake Public Library	<b>Enterprise Patron Usability Study</b> <i>Audience: Enterprise/Portfolio</i> Aaron Skog, Executive Director, SWAN

12:30-1:30 pm  
Lunch

Marquis A & B



2:30-3:15 pm  
Break/Exhibits

Atrium B & C  
and 700s Foyer

6:00-9:00 pm  
SirsiDynix Social

Atrium A

Sponsored by SirsiDynix



## BLUEcloud Mobile: Everything You Need, Anywhere You Are

Learn about the features, adoption, latest development, and roadmap for the SirsiDynix mobile app for patrons, students, and other library users. BLUEcloud Mobile lets you meet your patrons where they are with library branding, discovery of physical and electronic resources, library programming, patron self-check and more.

**Audience:** BLUEcloud Mobile

*Monday 11:30 am-12:30 pm | A704*

**Presenter:** Michael Staten, Product Manager, SirsiDynix

## Security, Privacy, SirsiDynix and You

Come learn about the SirsiDynix security and privacy updates from the past year, what we have in progress, and where we're headed in the coming year.

**Audience:** General

*Monday 11:30 am-12:30 pm | A705*

**Presenter:** Ben Card, Corporate Information Security Officer, SirsiDynix

## Integration Between SirsiDynix Symphony and the EBSCO Discovery Service

Partnerships between software companies are undoubtedly beneficial. While this may be apparent, it sometimes behooves us to restate the purpose: partnering allows each company to focus their software development on their core competencies and then work together to deliver an integrated user experience across platforms. What's more, partnerships offer choice. When these types of partnerships are realized, libraries can choose the solution that works best for them—both in terms of the back-end and the front-end. This session will focus on the integration between SirsiDynix Symphony and the EBSCO Discovery Service. In this session we will discuss the different types of integration between Symphony and EDS, and demonstrate how interoperability delivers a better user experience for end-users.

**Audience:** Symphony; Enterprise/Portfolio

*Monday 11:30 am-12:30 pm | A706*

**Presenters:** Cathy Sicard, Assistant Commissioner, LOUIS: The Louisiana Library Network; Rick Branham, Vice President of Global Accounts & Alliances, SirsiDynix

## We All Need a Mentor

Learn about best practices and techniques for keeping your staff up-to-date on the latest features and products. Get a tour of great new tools in Support and Mentor that can greatly simplify your task as the training coordinator. Bring any questions you may have about keeping your staff well informed. We are passionate about how continuous training improves performance; and want to share our expertise with you.

**Audience:** General

*Monday 11:30 am-12:30 pm | A707*

**Presenter:** Becky Muller, Instructional Designer, SirsiDynix

1:30-2:30 pm

## ILS Collaboration with Outside Organizations

Panelists will discuss a Circulation of the local High School's copies of Summer Reading Titles, a Tribal Library as a Circulation Site, and Special libraries that are non-members, but "sponsored" by members who take responsibility for cataloging the special libraries' items.

**Audience:** General

*Monday 1:30-2:30 pm | A601*

**Presenters:** Kelli Staley, Head of Technology, Lansing Public Library; John Goodyear, Executive Director, Chemeketa Cooperative Regional Library Service; Chanel Wheeler, Programmer/Analyst, Yavapai Library Network

## BLUEcloud Analytics General Reporting: How to Bend BCA to YOUR Needs

Come find out how one large multi-type consortia is using BCA to replace Symphony, Directors Station and Web Reporter reports. Covers strategies to design, configure, setup and send various daily, weekly and monthly reports as well as all those one-off reports folks are always asking for. It all starts with a Grand Plan (which quickly goes off the tracks)...

**Audience:** BLUEcloud Analytics

*Monday 1:30-2:30 pm | A602*

**Presenter:** Kendal Orrison, Executive Director, Resource Sharing Alliance NFP

## Symphony System Administration Sharing Session

The session moderator will lead participants in a discussion of common issues for administrators of Symphony Systems, which include Unix and Windows.

**Audience:** Symphony

*Monday 1:30-2:30 pm | A703*

**Presenter:** Lynn Schlatter, Area Manager Access Services; Shreve Memorial Library

## Horizon and BLUEcloud: Roadmaps, Strategic Partner Programs and Development Processes

What's in a Horizon and BLUEcloud roadmap, anyway? We'll discuss the roadmap process, strategic partner programs, development processes and how they all come together into a release.

**Audience:** Horizon

*Monday 1:30-2:30 pm | A704*

**Presenter:** Rachel Howell, Program Manager, Customer Engagement, SirsiDynix; Brent Thompson, Product Manager, SirsiDynix

## Extend Your Services with BLUEcloud Campus

BLUEcloud Campus takes a progressive approach to delivering Best-of-Breed technology to academic libraries, using modern cloud technology and the industry's most extensive API/Web Services toolkit. Campus takes a comprehensive approach to managing all of your resources—both physical and electronic—with apps that cover Procurement, Resource Management, Fulfillment, and Discovery. While development is driven by the needs of the academic market, most of the development initiatives will benefit libraries of all types.

**Audience:** BLUEcloud Campus

*Monday 1:30-2:30 pm | A705*

**Presenter:** Rick Branham, Vice President of Global Accounts & Alliances, SirsiDynix

## Look Towards the Future with the Enterprise Discovery Platform

Learn about the latest features and the roadmap for Enterprise and Portfolio. Discuss platform changes to strengthen connections and collaborations between users, library staff, and SirsiDynix.

**Audience:** Enterprise/Portfolio

*Monday 1:30-2:30 pm | A706*

*Repeats: Wednesday, April 18, 1:00-2:00*

**Presenter:** Michael Staten, Product Manager, SirsiDynix

## Monday, April 16 | Programs

### Expanded Symphony Reporting Using Open Source Business Intelligence Reporting Tools (BIRT)

Using the eclipse open source BIRT project and a SQL server driver, we are able to create custom reports with improved reporting options and displays. We have created a custom "consolidated bill" with both overdue fines and fees on one invoice statement which we email out to our patrons. We create a report of new patrons each month, extract the email addresses and upload them to Wowbrary via their mass enroll tool. We can connect to other sql server databases too, such as our SAM database and create reports of current outstanding balances for patron SAM accounts.

**Audience:** Symphony

*Monday 1:30-2:30 pm | A707*

**Presenter:** Gregory Testa, Systems Analyst II, Chesapeake Public Library

3:15-4:15 pm

### Stump the Chumps: Horizon Edition

Bring your problems to our panel of Horizon "experts" and we'll try to answer them. While you're at it, bring your own great ideas and share them with us.

**Audience:** Horizon

*Monday 3:15-4:15 pm | A601*

**Presenters:** Lisa Broughman, Systems Administrator, LION of VA; Lynn Chandler Bertino, Digital Librarian, Wake County Public Library; Kay Dunker, Systems Librarian, Valley Library Consortium; Michael Engelbrecht, Library Automation Systems Analyst, Charlotte Mecklenburg Library; Phil Feilmeyer, Integrated Library System Manager, Hennepin County Library; Cheryl Hill, Technical Services Librarian, SELCO

### Harness Your Collection Development with BLUEcloud Acquisitions

From selection through receipt and invoicing, BLUEcloud Acquisitions is your future path for Collection Development. Join Mike Hilmo to learn how BLUEcloud Acquisitions is what you've been waiting for by saving you time and money and for all the latest developments.

**Audience:** BLUEcloud Acquisitions

*Monday 3:15-4:15 pm | A602*

**Presenter:** Mike Hilmo, Product Manager, SirsiDynix

### Go for Gold Medal Glory with a Full Inventory

Post-Olympic blues got you down? Come learn how you can go for gold with a full library inventory! Scott County Library decided that after 48+ years of existence, 2017 was as good a year as any to finally inventory their full collection of almost 260k items in 7 branches. They managed to finish ahead of schedule without closing any buildings, hiring extra staff, or limiting access to any collection areas. In this session, you'll learn helpful hints, things to avoid, and how anyone can motivate staff with small elements of fun.

**Audience:** Symphony

*Monday 3:15-4:15 pm | A703*

**Presenter:** Sarah Ethier, Technical Services Coordinator, Scott County Library

### Check it out! What's New In BLUEcloud Circulation

Please join Carla Clark, Product Manager for BLUEcloud Circulation (and a former Access Services Librarian) for a review of recent features added to BLUEcloud Circulation, and forthcoming development initiatives.

**Audience:** BLUEcloud Circulation, Symphony, Horizon

*Monday 3:15-4:15 pm | A704*

*Repeats: Wednesday, April 18, 9:30-10:30*

**Presenter:** Carla Clark, Product Manager, SirsiDynix

### API Transactions, or, When Are Edit Tools Just Not Enough?

API transactions are perceived as difficult or even impossible by some who have had the SirsiDynix API training. Whether it is flagging confidence due to a lack of practice or frustration with cryptic errors, many API-trained staff avoid API transactions and prefer to rely exclusively on edit tools where possible. This session will explore the differences between edit tools and API transactions, discuss where they overlap, and highlight where API transactions can't be avoided. Examples will be provided for creating and sending API transactions, parsing the data and errors returned, and suggestions will be made for building confidence and skill with API transactions that go beyond what edit tools can do. \*API Required\*

**Audience:** Symphony, API

*Monday 3:15-4:15 pm | A705*

**Presenter:** Spencer Anspach, Library Systems Analyst, Indiana University



### How to Design and Deliver Effective Presentations 2—The Sequel!

Back by popular demand, the How to Design and Deliver Presentations presentation team returns for a sequel. Last year they presented and are back to offer more design and delivery tips, tricks, hacks, and dad jokes to give you the know-how to wow. Learn how to avoid another set of 'Slide Crimes' and Ken's compelling compilation on how to be compelling. If you weren't able to make last year's presentation—don't worry—you'll be just as bored as you would have been because we'll be pointing to some of last year's pointers too.

**Audience:** General

*Monday 3:15-4:15 pm | A706*

*Repeats: Tuesday, April 17, 3:00-4:00*

**Presenter:** Eric Keith, Chief Marketing Officer, SirsiDynix; Ken Bonney, Director of Sales, SirsiDynix; Robert Storer, Director of Marketing, SirsiDynix

### Enterprise Patron Usability Study

Find out how the consortium went about customizing Enterprise through a series of library staff forums, working with adult and youth services staff at various library service desks, and culminating in a patron usability study performed by third party Web-developer, Merge Design + Interactive. SWAN, Merge Design, and SirsiDynix worked together to build a new way of looking at Enterprise. This presentation will cover Enterprise MARC map customizations, Javascript widgets, user experience recommendation, wire frames, and how our patrons "really" want to use the catalog.

**Audience:** Enterprise/Portfolio

*Monday 3:15-4:15 pm | A707*

**Presenter:** Aaron Skog, Executive Director, SWAN

## Tuesday April 17 | Schedule at a Glance

8:30-9:15 am

10:15-11:15 am

11:30 am-12:30 pm

A601	<b>Preparing for a Library of Things Collection (LOT)</b> <i>Audience: Symphony, Enterprise/Portfolio</i> Teresa Nelson, ILS Administrator, Spokane County Library District; Sandy Orr, Technical Services Manager, Spokane County Library District	<b>Tales from the BLUEcloud Mobile Pilot</b> <i>Audience: BLUEcloud Mobile, General</i> Lynn Jacobson, Systems and Technology Manager, Jacksonville Public Library; Hilary Prisbylla, Director of CLEVNET, CLEVNET Library Cooperative; Brian Leszcz, Database Administrator, CLEVNET Library Cooperative	<b>Horizon Lightning Talks</b> <i>Audience: Horizon</i> See presenter titles/institutions listed in full program description
A602	<b>Are You Afraid of the Big Bad Inventory?</b> <i>Audience: Horizon</i> Laura England-Biggs, Librarian II, Keene Memorial Library	<b>BLUEcloud Analytics: Extensive Reporting in One Place</b> <i>Audience: BLUEcloud Analytics</i> <i>Repeats: Wednesday, April 18; 3:15-4:15</i> Nate Berrett, Product Manager, SirsiDynix	<b>Importing and Integrating Data Sets into BLUEcloud Analytics Reports</b> <i>Audience: BLUEcloud Analytics</i> Lee Richards, Senior Software Engineer, Brigham Young University
A703	<b>Consulting Services: from Basic to Platinum</b> <i>Audience: General</i> Margaret Pelfrey, Director - Consulting and Training, SirsiDynix	<b>BLUEcloud: The Big Picture</b> <i>Audience: BLUEcloud</i> Berit Nelson, VP Software Development and Product Management, SirsiDynix	<b>Leverage Symphony APIs to Open Up Acquisitions</b> <i>Audience: Symphony, API</i> Margaret Pelfrey, Director- Consulting and Training, SirsiDynix
A704	<b>A Systems Analyst's Look at Helping Libraries Function: Using a Help Desk Ticketing System</b> <i>Audience: General</i> <i>Repeats: Wednesday, April 18; 8:30-9:15</i> Chadd Niles, Systems Analyst, Arrowhead Library System	<b>Library Services Platform RFI and Self-Assessment Summary</b> <i>Audience: General</i> Cathy Sicard, Assistant Commissioner, LOUIS: The Louisiana Library Network	<b>Why You and Your Patrons Will Love BLUEcloud Mobile</b> <i>Audience: BLUEcloud Mobile</i> Eric Keith, Chief Marketing Officer, SirsiDynix
A705	<b>BLUEcloud eRM: Get Those eResources Under Control!</b> <i>Audience: BLUEcloud eRM</i> Carla Clark, Product Manager, SirsiDynix	<b>Stay on Course with BLUEcloud Lists</b> <i>Audience: BLUEcloud Lists</i> James Goodman, Product Manager, SirsiDynix	<b>SirsiDynix User Experience: Coloring Inside the Product Lines</b> <i>Audience: General</i> Garr Ovard, Senior UI/UX Designer, SirsiDynix; Jared Masterson, UI/UX Designer, SirsiDynix
A706	<b>Redefining Customer Service in the Library: Designing Processes on the Foundation of Kindness and Empathy</b> <i>Audience: General</i> <i>Repeats: Wednesday, April 18; 1:00-1:45</i> Carrie Wilson, Patron Services Manager, Kent District Library	<b>Coming Soon to Your Horizon System</b> <i>Audience: Horizon, General</i> Brent Thompson, Product Manager, SirsiDynix	<b>Coming Soon to Your Symphony System</b> <i>Audience: Symphony</i> Matthew Phillips, Product Manager, SirsiDynix
A707	<b>ILS overview in Saudi Libraries and Successful Implementation of Symphony at the RCYCI, Saudi Arabia</b> <i>Audience: Symphony</i> Haider Ali, Manager Libraries & Learning Resources, Royal Commission Yanbu Colleges & Institutes, Saudi Arabia *Winner of the 2018 SirsiDynix Scholarship*	<b>Amp Up Your Enterprise with Custom Files</b> <i>Audience: Enterprise/Portfolio</i> Tyler Irvin, Technology Support Librarian, SELCO	<b>Lafayette Public Library's Implementation of Syndetics Unbound Dynamic Enrichment Content within Enterprise</b> <i>Audience: Enterprise/Portfolio</i> Danny Gillane, Librarian 4, Lafayette Public Library; Doug McMillan, VP Strategic Partnerships, Proquest

# Tuesday April 17 | Schedule at a Glance

Daylong	1:30-2:30 pm	3:00-4:00 pm	4:15-5:15 pm
<b>9:00 am-5:00 pm</b> <b>Registration</b> Reg. Desk 3 near A701	<b>A601</b> <b>I've Installed WordPress ... Now What?</b> <i>Audience: General</i> Francis Beaumier, IT Specialist, Brown County Library	<b>How NOT To Do Serial Orders Rollover</b> <i>Audience: Symphony</i> Marty Coleman, Assistant Professor, Acquisitions, Mississippi State University	<b>COSUGI Business Meeting</b> A706  Welcome to the annual COSUGI membership business meeting! Meet your current board, new candidates, and throw your hat into the ring to run for COSUGI Board. In addition to hearing what your board has been doing for you so far, this is an opportunity to ask questions and share ideas with your board and each other.  Karla Smith, Chair, Customers of SirsiDynix Users Group, Inc.
<b>9:00 am-5:00 pm</b> <b>Internet/Copy/Scan/Print Area</b> Atrium B & C Sponsored by EnvisionWare	<b>A602</b> <b>Automatic Renewal: Development, Implementation and Evaluation of a New Service at Hennepin County Library</b> <i>Audience: Horizon, General</i> Phil Feilmeyer, ILS Manager, Hennepin County Library	<b>How to Design and Deliver Effective Presentations 2—The Sequel!</b> <i>Audience: General</i> <i>Repeats: Monday, April 16, 3:15-4:15</i> See presenter titles/institutions listed in full program description	
<b>9:00 am-5:00 pm</b> <b>Visit the Exhibits!</b> Atrium B & C	<b>A703</b> <b>Be a Symphony Admin Superconductor</b> <i>Audience: Symphony</i> Chad Wright, Sr. Technical Advisor, SirsiDynix; Jeff Byrd, Sr. Technical Advisor, SirsiDynix; Tyler Cazier, Support Analyst, SirsiDynix	<b>Auto Balancing a Floating Collection</b> <i>Audience: Symphony</i> Todd Caviness, Library Systems Manager, Mid-Continent Public Library	
<b>9:15-10:15 am</b> <b>Morning Break Exhibits</b> Atrium B & C and 700s Foyer	<b>A704</b> <b>Academic Libraries Sharing Session</b> <i>Audience: General</i> Lisa Broughman, Director of the Library, Randolph College	<b>Introducing BLUEcloud Analytics: Reporting Beyond the ILS</b> <i>Audience: BLUEcloud Analytics</i> <i>Repeats: Monday, April 16, 11:30-12:30</i> Nate Berrett, Product Manager, SirsiDynix; Scott Wheelhouse, Senior VP, Operations, SirsiDynix	
<b>12:30-1:30 pm</b> <b>Lunch</b> Included with your COSUGI Conference registration. Atrium A	<b>A705</b> <b>Web Services: Taking You to the BLUEcloud and Beyond - Horizon</b> <i>Audience: Horizon</i> Brent Thompson, Product Manager, SirsiDynix	<b>SaaS: Your Host with the Most!</b> <i>Audience: General</i> Brett Hall, Director, Cloud Services, SirsiDynix	
	<b>A706</b> <b>Using MobileCirc to Track Program Attendance</b> <i>Audience: General</i> Carla Clark, Product Manager, SirsiDynix;	<b>Web Services: Taking You to the BLUEcloud and Beyond - Symphony</b> <i>Audience: Symphony</i> Brent Thompson, Product Manager, SirsiDynix	
<b>2:30-3:00 pm</b> <b>Break/Exhibits</b> Atrium B & C and 700s Foyer	<b>A707</b> <b>BLUEcloud Visibility: Linking Users and Library Resources</b> <i>Audience: BLUEcloud Visibility</i> Justin Swain, Product Manager, SirsiDynix	<b>Batch Loading of Students and Modifying User Records with More Info.</b> <i>Audience: Symphony</i> James Campbell, System Supervisor, Resource Sharing Alliance NFP	

8:30-9:15 am

### Preparing for a Library of Things Collection (LOT)

We rolled out a new collection – Library of Things. This presentation will cover what went into deciding to do this, gathering a team, configuring WorkFlows and cataloging the items. We will discuss the ups and downs, how we are presenting the collection to customers, how our members are responding to this collection and where we would like to take this collection in the future.

**Audience:** Symphony, Enterprise/Portfolio

*Tuesday 8:30-9:15 am | A601*

**Presenters:** Teresa Nelson, ILS Administrator, Spokane County Library District; Sandy Orr, Technical Services Manager, Spokane County Library District

### Are You Afraid of the Big Bad Inventory?

Some libraries are experts at running inventories on a regular basis and their listings in their catalog are almost 100% accurate. Many other libraries have either NEVER done an inventory, have only done one in the last 10 years, or have started an inventory and never finished. Inventory can be scary and the idea of it can frighten people away. Keene Memorial Library just completed their first inventory in at least 20 years – hear about the pros, cons, and what we learned from our mistakes. Come learn a few tips and tricks on completing a successful inventory using Horizon. Learn why it is important to do an inventory on a regular basis. Maybe that big, bad inventory won't keep you up at nights after you hear our secrets.

**Audience:** Horizon

*Tuesday 8:30-9:15 am | A602*

**Presenter:** Laura England-Biggs, Librarian II, Keene Memorial Library

### Consulting Services: From Basic to Platinum

Did you know that you can take advantage of expert SirsiDynix Consulting Services to simplify your workflows, create time-saving automated routines, and customize your public interface? Learn about APIs, Web Services and more. Even better, you can save yet more time and money by taking advantage of Platinum Services for consulting and other popular services.

**Audience:** General

*Tuesday 8:30-9:15 am | A703*

**Presenter:** Margaret Pelfrey, Director - Consulting and Training, SirsiDynix

### A Systems Analyst's Look at Helping Libraries Function: Using a Help Desk Ticketing System

We all know that there is a lot of "Hidden Gem" information with different workers in a library or library system. How do you go about getting that information in a localized location so staff members can access and use it? You need a Knowledge Base(KB) but how do you know that the workers need that info, you need a ticket system. At the Arrowhead library system in Northeast Minnesota, I pushed for a Help Desk Ticket system that will allow workers to submit tickets and will enable the Automation staff to reply and save a "Solution" in a KB. A Help Desk system for your library can also help you to find points or topics for training staff. If you have an extensive network or consortium, you will see that there are individuals that need training in certain aspects of your ILS. As your team puts in tickets and your Analysts and Automation experts answer the tickets, you can create KB solutions on any topic submitted. There are many types of Help Desk services/software out there. How do you pick the right service or software Help Desk setup?

**Audience:** General

*Tuesday 8:30-9:15 am | A704*

*Repeats: Wednesday, April 18; 8:30-9:15*

**Presenter:** Chadd Niles, Systems Analyst, Arrowhead Library System

### BLUEcloud eRM: Get Those eResources Under Control!

BLUEcloud eRM will provide comprehensive management of your eResource data: metadata, access, acquisitions, suppliers, licenses, customized workflows, analytics, and all documentation. Carla will provide an overview of eRM, including recent enhancements to connect BLUEcloud eRM to the EBSCO Knowledge Base, and to move acquisitions data from Symphony or Horizon into eRM, and back.

**Audience:** BLUEcloud eRM

*Tuesday 8:30-9:15 am | A705*

**Presenter:** Carla Clark, Product Manager, SirsiDynix

### Redefining Customer Service in the Library: Designing Processes on the Foundation of Kindness and Empathy

Let's take a break from tech specs and talk about the soft stuff that will help keep libraries relevant. In this interactive and informative session participants will learn the importance of using kindness and empathy to provide the kind of customer service that builds loyalty and lasting patron relationships. Participants will also learn the importance of building processes that allow staff to focus on relationship-focused service. Research on the benefits of human connection and acting with kindness will also be presented and discussed. Interactive exercises will then help participants identify biases and learn how to let go of judgment and negative emotions that can hinder exceptional service.

**Audience:** General

*Tuesday 8:30-9:15 am | A706*

*Repeats: Wednesday, April 18; 1:00-1:45*

**Presenter:** Carrie Wilson, Patron Services Manager, Kent District Library

### ILS overview in Saudi Libraries and Successful Implementation of Symphony at the RCYCI, Saudi Arabia

Join Haider Ali on his view point of how to have a successful implementation by using local partners. He will also discuss his experience regarding managing the Textbooks collection for small and mid size library.

**Audience:** Symphony

*Tuesday 8:30-9:15 pm | A707*

**Presenters:** Haider Ali, Manager Libraries & Learning Resources, Royal Commission Yanbu Colleges & Institutes, Saudi Arabia \*Winner of the 2018 SirsiDynix Scholarship\*

10:15-11:15 am

### Tales from the BLUEcloud Mobile Pilot

Panel members will discuss their experiences and provide feedback on the pilot process for developing the BLUEcloud Mobile App. Learn how libraries launched the new app to the public, including marketing and training materials, and view demonstrations of the finished product in action.

**Audience:** General, BLUEcloud Mobile

*Tuesday 10:15-11:15 am | A601*

**Presenter:** Lynn Jacobson, Systems and Technology Manager, Jacksonville Public Library; Hilary Prisbylla, Director of CLEVNET, CLEVNET Library Cooperative; Brian Leszcz, Database Administrator, CLEVNET Library Cooperative

## Tuesday April 17 | Programs

### **BLUEcloud Analytics: Extensive Reporting in One Place**

BLUEcloud Analytics gives you the big picture on your library services and magnifies how even small adjustments may help you better meet the needs of your community. Join us to learn about the latest capabilities and upcoming developments.

**Audience:** BLUEcloud Analytics

*Tuesday 10:15-11:15 am | A602*

*Repeats: Wednesday, April 18; 3:15-4:15*

**Presenter:** Nate Berrett, Product Manager, SirsiDynix

### **BLUEcloud: The Big Picture**

Join us for an update on everything else going on in BLUEcloud! We'll cover BLUEcloud Central, BLUEcloud Cataloging, BLUEcloud Commerce and other general updates.

**Audience:** BLUEcloud

*Tuesday 10:15-11:15 am | A703*

**Presenter:** Berit Nelson, VP Software Development and Product Management, SirsiDynix

### **Library Services Platform RFI and Self-Assessment Summary**

In 2017, the LOUIS Consortium completed a Request for Information (RFI) and a self-assessment to gather information and determine the current state of the library automation market and to gain a general assessment of satisfaction with the Symphony ILS and EBSCO Discovery Service. This presentation will provide a summary of these two projects and the outcomes.

**Audience:** General

*Tuesday 10:15-11:15 am | A704*

**Presenter:** Cathy Sicard, Assistant Commissioner, LOUIS: The Louisiana Library Network

### **Stay on Course with BLUEcloud Lists**

BLUEcloud Course Lists will give your students, professors, and staff tools for managing and discovering course reading lists. Join us to learn how Course Lists will optimize the student experience by bringing course materials to them through the Learning Management System (LMS) or SirsiDynix discovery platform; increase professor's engagement with the library through easy-to-use list creation tools; and simplify course resource management with straightforward staff workflows, ensuring that students always have access to the items they need.

**Audience:** BLUEcloud Lists

*Tuesday 10:15-11:15 am | A705*

**Presenter:** James Goodman, Product Manager, SirsiDynix

### **Coming Soon to Your Horizon System**

We'll review recent Horizon releases and preview upcoming capabilities in Horizon!

**Audience:** Horizon, General

*Tuesday 10:15-11:15 am | A706*

**Presenters:** Brent Thompson, Product Manager, SirsiDynix

### **Amp Up Your Enterprise with Custom Files**

Enterprise has a number of ways in which it can be customized for your library. In addition to the admin console defaults, you can power up with your own CSS (Cascading Style Sheets) or JavaScript. These areas venture out from standard support so come learn how to locate that text you want to emphasize and then do it. Or put a banner up notifying your borrowers that the site will be undergoing maintenance. Your imagination is the limit once you get the basics down for how these work!

**Audience:** Enterprise/Portfolio

*Tuesday 10:15-11:15 am | A707*

**Presenter:** Tyler Irvin, Technology Support Librarian, SELCO

11:30 am-12:30 pm

### **Horizon Lightning Talks**

Seasoned Horizon administrators will present five, 10-minute talks on topics they think you should know: Importing and exporting data; Creating a bib control edit view; Using SQL tables in Horizon; Using the Horizon hold shelf capabilities to manage a 3D printer queue; Location-specific item reports.

**Audience:** Horizon

*Tuesday 11:30 am-12:30 pm | A601*

**Presenters:** Tyler Irvin, Technology Support Librarian, SELCO; Lynn Chandler Bertino, Library Systems Manager, Wake County Public Library; Kay Dunker, Systems Librarian, Valley Library Consortium; Jake Rundle, Technology Librarian, Hastings Public Library; Phil Feilmeyer, ILS Manager, Hennepin County Library

### **Importing and Integrating Data Sets into BLUEcloud Analytics Reports**

The process our library used to decide on what data to import, and then how we integrated that data into our BLUEcloud Analytics reports.

**Audience:** BLUEcloud Analytics

*Tuesday 11:30 am-12:30 pm | A602*

**Presenter:** Lee Richards, Senior Software Engineer, Brigham Young University

### **Leverage Symphony APIs to open up Acquisitions**

Learn what can be accomplished in Symphony Acquisitions using APIs. Discover possible third party integrations, eRM seamless integration, and possible batch processing.

**Audience:** Symphony, API

*Tuesday 11:30 am-12:30 pm | A703*

**Presenter:** Margaret Pelfrey, Director- Consulting and Training, SirsiDynix

### **Why You and Your Patrons Will Love BLUEcloud Mobile**

Come learn about SirsiDynix's new mobile discovery app BLUEcloud Mobile! Join the always-entertaining Eric Keith as he gives you a tour of the new easy-to-use app for patrons. He will be taking you through some of its benefits including the patron experience with real-time availability, event integration, easy-to-administrate staff experience, analytics, and its library branding and customization options.

**Audience:** BLUEcloud Mobile

*Tuesday 11:30 am-12:30 pm | A704*

**Presenter:** Eric Keith, Chief Marketing Officer, SirsiDynix

### **SirsiDynix User Experience: Coloring Inside the Product Lines**

Somewhere amidst a mountain of features and requirements exists an ideal solution for you. Come see how we pursue beauty and efficiency in our BLUEcloud products.

**Audience:** General

*Tuesday 11:30 am-12:30 pm | A705*

**Presenters:** Garr Ovard, Senior UI/UX Designer, SirsiDynix; Jared Masterson, UI/UX Designer, SirsiDynix

### **Coming Soon to Your Symphony System**

We'll review recent Symphony releases and preview upcoming capabilities in Symphony!

**Audience:** Symphony

*Tuesday 11:30 am-12:30 pm | A706*

**Presenter:** Matthew Phillips, Product Manager, SirsiDynix

### Lafayette Public Library's Implementation of Syndetics Unbound Dynamic Enrichment content within Enterprise

What is 'dynamic enrichment', how does it differ from classic 'display' enrichment and how is this integrated and displayed within Enterprise? What are the key benefits to Lafayette patrons and librarians? What is the implementation process for Sirsi customers and how much control does the library have over content, display, order of enrichments, etc? How does Syndetics Unbound help drive circulation? And what are the tools available to track usage?

**Audience:** Enterprise/Portfolio

*Tuesday 11:30 am-12:30 pm | A707*

**Presenters:** Danny Gillane, Librarian 4, Lafayette Public Library; Doug McMillan, VP Strategic Partnerships, Proquest

1:30-2:30 pm

### I've Installed WordPress ... Now What?

WordPress is the #1 content management software (CMS) for your Web site. Absolute WordPress beginners, get up to speed. Timid tinkers, find out what else you can do. Wizards, come share your knowledge with the group. We'll start with a brief tour of the dashboard and an explanation of WordPress lingo. Then we'll dive into themes and plug-ins, including those that can help secure your site. If you feel the need to tinker, we'll look at what you need to know. Come ready to share the cool plug-ins you've found and the neat hacks you've done.

**Audience:** General

*Tuesday 1:30-2:30 pm | A601*

**Presenter:** Francis Beaumier, IT Specialist, Brown County Library

### Automatic Renewal: Development, Implementation and Evaluation of a New Service at Hennepin County Library

On January 1, Hennepin County Library launched a new service to automatically renew material as it approaches the due date. Since Horizon does not offer this functionality, the application had to be developed in-house. Hear about what techniques and technology were used to create application, integrate it into Horizon, and then evaluate the effect this new service is having on patron behavior and the circulating collection.

**Audience:** Horizon, General

*Tuesday 1:30-2:30 pm | A602*

**Presenter:** Phil Feilmeyer, ILS Manager, Hennepin County Library

### Be a Symphony Admin Superconductor

Are you a new administrator or perhaps would just like a basic refresher? Join us for the Symphony admin essentials!

**Audience:** Symphony

*Tuesday 1:30-2:30 pm | A703*

**Presenters:** Chad Wright, Sr. Technical Advisor, SirsiDynix; Jeff Byrd, Sr. Technical Advisor, SirsiDynix; Tyler Cazier, Support Analyst, SirsiDynix

### Academic Libraries Sharing Session

Session moderators will lead attendees in a discussion of common topics encountered by libraries in today's academic environment.

**Audience:** General

*Tuesday 1:30-2:30 pm | A704*

**Presenter:** Lisa Broughman, Director of the Library, Randolph College

### Web Services: Taking You to the BLUEcloud and Beyond-Horizon

Journey with us to discover how Web Services plays an integral role in the SirsiDynix Library Services Platform, BLUEcloud, and your Horizon system.

**Audience:** Horizon

*Tuesday 1:30-2:30 pm | A705*

**Presenter:** Brent Thompson, Product Manager, SirsiDynix

### Using MobileCirc to Track Program Attendance

MobileCirc now includes the option to track attendance at your library's programs. Join us for an overview of the event tracking features in MobileCirc.

**Audience:** General

*Tuesday 1:30-2:30 pm | A706*

**Presenters:** Carla Clark, Product Manager, SirsiDynix; Lisa Wells, Executive Director at Pioneer Library System

### BLUEcloud Visibility: Linking Users and Library Resources

Get the latest on updates and enhancements with BLUEcloud Visibility. Learn what we are doing to expand the web footprint of your catalog records and how to take advantage of the Linked Data tools to help promote your information.

**Audience:** BLUEcloud Visibility

*Tuesday 1:30-2:30 pm | A707*

**Presenter:** Justin Swain, Product Manager, SirsiDynix

3:00-4:00 pm

### How NOT To Do Serial Orders Rollover

The Acquisitions Rollover was going great. Firm orders were no problem - there were only a few. The report to remove orders was carefully documented and executed. There should have been 4 orders deleted - NOT 1729!! Recovering from this error has forced an in depth look at the Serials Module - how it works and how orders are linked to control records. Come hear about our process for fixing this major error and improving our implementation of Serials.

**Audience:** Symphony

*Tuesday 3:00-4:00 pm | A601*

**Presenter:** Marty Coleman, Assistant Professor, Acquisitions, Mississippi State University

### How to Design and Deliver Effective Presentations 2—The Sequel!

Back by popular demand, the How to Design and Deliver Presentations presentation team returns for a sequel. Last year they presented and are back to offer more design and delivery tips, tricks, hacks, and dad jokes to give you the know-how to wow. Learn how to avoid another set of 'Slide Crimes' and Ken's compelling compilation on how to be compelling. If you weren't able to make last year's presentation—don't worry—you'll be just as bored as you would have been because we'll be pointing to some of last years' pointers too.

**Audience:** General

*Tuesday 3:00-4:00 pm | A602*

*Repeats: Monday, April 16, 3:15-4:15*

**Presenter:** Eric Keith, Chief Marketing Officer, SirsiDynix; Ken Bonney, Director of Sales, SirsiDynix; Robert Storer, Director of Marketing, SirsiDynix

### Auto Balancing a Floating Collection

Learn how one library system moved to a floating collection and automated the process of balancing material between branches. The session will cover the setup and preparation to get ready for floating, the reports developed for implementation, and outstanding issues and feedback from staff and the public.

**Audience:** Symphony

*Tuesday 3:00-4:00 pm | A703*

**Presenter:** Todd Caviness, Library Systems Manager, Mid-Continent Public Library

# Award Winning Technology



## Tuesday April 17 | Programs

### Introducing BLUEcloud Analytics: Reporting Beyond the ILS

BLUEcloud Analytics is primarily focusing on comprehensive ILS reporting that will be vastly improved as we bring in data from other BLUEcloud products, as well as from other products and services that centralize how libraries are being accessed and used in the modern library industry.

**Audience:** BLUEcloud Analytics

*Tuesday 3:00-4:00 pm | A704*

*Repeats: Monday, April 16; 11:30-12:30*

**Presenters:** Nate Berrett, Product Manager, SirsiDynix; Scott Wheelhouse, Senior VP, Operations, SirsiDynix

### SaaS: Your Host with the Most!

Relieve your library of the stress of server maintenance by hosting your data at one of SirsiDynix's secure data centers. With SirsiDynix SaaS, you don't have to worry about backing up your system, replacing hardware, or having enough security—we'll take care of it for you.

**Audience:** General

*Tuesday 3:00-4:00 pm | A705*

**Presenter:** Brett Hall, Director, Cloud Services, SirsiDynix

### Web Services: Taking You to the BLUEcloud and Beyond-Symphony

Journey with us to discover how Web Services plays an integral role in the SirsiDynix Library Services Platform, BLUEcloud, and your Symphony system.

**Audience:** Symphony

*Tuesday 3:00-4:00 pm | A706*

**Presenter:** Brent Thompson, Product Manager, SirsiDynix

### Batch Loading of Students and Modifying User Records with More Info.

I will show my Excel spreadsheet with formulas that will convert to a file of student information for upload to WorkFlows. Topics covered will show how to create new users and also add information to existing users to be able to mass change the Group ID, User Cats, Pins, or even add an email address and alternate ID or many other things. We will also show how a fingerprint scanner uses the students fingerprint to check out books at the library. We will also show how to get a report of the users with their barcode and the user pin for school libraries.

**Audience:** Symphony

*Tuesday 3:00-4:00 pm | A707*

**Presenter:** James Campbell, System Supervisor, Resource Sharing Alliance NFP

4:15-5:15 pm

### COSUGI Business Meeting

Welcome to the annual COSUGI membership business meeting! Meet your current board, new candidates, and throw your hat into the ring to run for COSUGI Board. In addition to hearing what your board has been doing for you so far, this is an opportunity to ask questions and share ideas with your board and each other.

*Tuesday 4:15-5:15 pm | A706*

**Presenter:** Karla Smith, Chair, Customers of SirsiDynix Users Group, Inc.



Computer Booking & Access Management



### Payment Kiosks-Coin, Bill, Credit Card & Card



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## Wednesday, April 18 | Schedule at a Glance

Daylong	8:30-9:15 am	9:30-10:30 am
<b>8:00 am-1:00 pm</b> <b>Internet/Copy/Scan/</b> <b>Print Area</b> <i>Atrium B &amp; C</i> Sponsored by EnvisionWare	<b>A601</b> <b>Why BLUEcloud: a Panel Discussion</b> <i>Audience: BLUEcloud</i> Adam Williamson, Systems Manager, Pickens County Library System; Cherie Hohertz, Dean, University Libraries and Research, University of Dallas; Carla Clark, Product Manager, SirsiDynix	<b>How Do Libraries Dive into the 'Experience Economy' Resulting in a Transformation?</b> <i>Audience: General</i> Ranny Lacanienta, Director, Product Management, SirsiDynix
<b>10:30-11:00 am</b> <b>Break/Exhibits</b> <i>Atrium B &amp; C and 700s Foyer</i>	<b>A602</b> <b>Does Fine Amnesty Work?</b> <i>Audience: Symphony</i> Jim Benson, Library Systems and Applications Analyst, CLEVNET	<b>Check it out! What's New In BLUEcloud Circulation</b> <i>Audience: BLUEcloud Circulation, Symphony, Horizon</i> <i>Repeats: Monday, April 16, 3:15-4:15 pm</i> Carla Clark, Product Manager, SirsiDynix
<b>11:00 am-12:00 pm</b> <b>SirsiDynix Executive Q&amp;A</b> <i>Audience: General</i> SirsiDynix Executive Team <i>A601-A602</i>	<b>A703</b> <b>A Systems Analyst's Look at Helping Libraries Function: Using a Help Desk Ticketing System</b> <i>Audience: General</i> <i>Repeats: Tuesday, April 17; 8:30-9:15</i> Chadd Niles, Systems Analyst, Arrowhead Library System	<b>BLUEcloud Analytics Sharing Session</b> <i>Audience: BLUEcloud Analytics</i> Kendal Orrison, Executive Director, Resource Sharing Alliance NFP
<b>12:00-1:00 pm</b> <b>Lunch</b> Included with your COSUGI Conference registration. <i>Atrium A</i>	<b>A704</b> <b>Introducing SirsiDynix' Community Engagement Platform—A Marketing Platform</b> <i>Audience: General</i> Eric Keith, Chief Marketing Officer, SirsiDynix; Robert Storer, Director of Marketing, SirsiDynix	<b>Enterprise - JQuery and Web Services: Polishing the Rough Edges</b> <i>Audience: Symphony, Enterprise/Portfolio</i> John Pas, Library Systems and Applications Analyst, CLEVNET; Brian Leszcz, Database Administrator, CLEVNET
	<b>A705</b> <b>Adventures in Data Services</b> <i>Audience: General</i> Tracy Moyers, Director of Product Implementations, SirsiDynix	<b>Be a High-Voltage Horizon Admin</b> <i>Audience: Horizon</i> Keith Oviatt, Sr. Support Analyst, SirsiDynix
<b>1:45-2:00 pm</b> <b>Afternoon Break</b> <i>700s Foyer</i>	<b>A706</b> <b>Symphony API Sharing Session</b> <i>Audience: Symphony, API</i> Spencer Anspach, Library Systems Analyst, Indiana University	<b>SirsiDynix SymphonyWeb: Using Java WorkFlows via Web Browser</b> <i>Audience: Symphony</i> Matthew Phillips, Product Manager, SirsiDynix
	<b>A707</b> <b>Enterprise Sharing Session</b> <i>Audience: Enterprise/Portfolio</i> Tyler Irvin, Technology Support Librarian, SELCO	<b>Course Support in Academic Libraries: Reimagining the Service</b> <i>Audience: General, Academic Reserves</i> Sarah Seestone, Assistant Head of Access Services; Stanford University Libraries

## Wednesday, April 18 | Schedule at a Glance

1:00-1:45 pm

2:00-3:00pm

3:15-4:15pm

A601	<b>♪ We Are Family ♪</b> <i>Audience: General</i> See presenter titles/institutions listed in full program description	<b>Status Summary of Popular Items Using Web Services</b> <i>Audience: Symphony</i> Michael Pullin, Systems Librarian, UNT Health Science Center	<b>Horizon Lightning Talks 2</b> <i>Audience: Horizon</i> See presenter titles/institutions listed in full program description
A602	<b>Redefining Customer Service in the Library: Designing Processes on the Foundation of Kindness and Empathy</b> <i>Audience: General</i> <i>Repeats: Tuesday, April 17; 8:30-9:15</i> Carrie Wilson, Patron Services Manager, Kent District Library	<b>SQL and Web Services for You</b> <i>Audience: General</i> Jeremy Newville, Consultant, SirsiDynix	<b>API Lightning Talks</b> <i>Audience: Symphony</i> See presenter titles/institutions listed in full program description
A703	<b>Developing Inventive Library Partnerships</b> <i>Audience: General</i> Melissa Schneider, Head of Patron & Material Services, Winter Park Public Library	<b>Harnessing the Power of Web Services</b> <i>Audience: General</i> Cheryl Hill, Technical Services Librarian, SELCO; Tyler Irvin, Technology Support Librarian, SELCO	<b>MobileCirc Overview for Horizon and Symphony</b> <i>Audience: General</i> Andrea Downing, Product Specialist, SirsiDynix
A704	<b>Look Towards the Future with the Enterprise Discovery Platform</b> <i>Audience: Enterprise/Portfolio</i> <i>Repeats: Monday, April 16; 1:30-2:30</i> Michael Staten, Product Manager, SirsiDynix	<b>Consortia Sharing/Business Meeting</b> <i>Audience: General</i> John Goodyear, Executive Director, Chemeketa Cooperative Regional Library Service; Mandy Fleming, ILS & Tech Services Manager, Southern Tier Library System; Jeff Henry, IT Manager / System Administrator, Four County Library System	<b>BLUEcloud Analytics: Extensive Reporting in One Place</b> <i>Audience: BLUEcloud Analytics</i> <i>Repeats: Tuesday, April 17; 10:15-11:15</i> Nate Berrett, Product Manager, SirsiDynix
A705	<b>MobileCirc Sharing Session</b> <i>Audience: General, MobileCirc</i> Melissa Klein, ILS Specialist, Winnefox Library System	<b>Horizon Admin Sharing Session</b> <i>Audience: Horizon</i> Michael Engelbrecht, Library Automation Systems Analyst, Charlotte Mecklenburg Library	<b>SDSC: More than just a Support Center</b> <i>Audience: General</i> Reed Farnsworth - Knowledge Base and Training Manager, SirsiDynix
A706	<b>Using Perl in Custom Reports (Symphony)</b> <i>Audience: Symphony, API</i> Judi Rudisill, Programmer Analyst - ILS Administrator, Virginia Beach Public Library	<b>SirsiDynix Application Upgrade Q&amp;A</b> <i>Audience: General</i> Tracy Moyers, Director of Product Implementations, SirsiDynix	<b>SirsiDynix Symphony: Roadmaps, Strategic Partner Programs and Development Processes</b> <i>Audience: Symphony</i> Rachel Bowell, Program Manager, Customer Engagement, SirsiDynix ; Matthew Phillips, Product Manager, SirsiDynix
A707	<b>Managing School District User Data: Using Jupyter Notebook to Process Deltas and Remove Users</b> <i>Audience: Symphony</i> Somer Newland, ILS Administrator, HALAN; Fred Schumacher, Division Manager, HALAN	<b>S.O.S. Or SSO? Which One Would Your Library Employ?</b> <i>Audience: Symphony</i> Ranny Lacanienta, Director, Product Management, SirsiDynix; Matthew Phillips, Product Manager, SirsiDynix	<b>Electronic Resource Central: from Discovery to Download</b> <i>Audience: BLUEcloud; Enterprise/Portfolio</i> Nathan Peterson, Product Manager, SirsiDynix

8:30-9:15 am

### Why BLUEcloud: a Panel Discussion

BLUEcloud is upon us and as the web based modules become closer to their client counterparts, more libraries are making the switch. Join us for a panel discussion to hear Symphony and Horizon libraries share why they have made the switch to BLUEcloud and what kinds of hiccups have come along the way. This will also be an opportunity for comments from the audience on "Why Not BLUEcloud" and what pieces your library system is waiting for anxiously so you too can make the leap.

**Audience:** BLUEcloud

*Wednesday 8:30-9:15 am | A601*

**Presenter:** Adam Williamson, Systems Manager, Pickens County Library System; Cherie Hohertz, Dean, University Libraries and Research, University of Dallas; Carla Clark, Product Manager, SirsiDynix

### Does Fine Amnesty Work?

Fine amnesty drives offer to blocked or delinquent library patrons a chance to amend their ways with a clean slate. The goals for the library are to promote library usage, especially among school-age children, and good public relations. Skeptics will say, however, that amnesty programs encourage patrons to take advantage of their library. In September of 2016, the CLEVNET consortium's member libraries in Cuyahoga County, Ohio, initiated a study in conjunction with their September Amnesty and New Card Sign-up drive. In this study, patrons who received amnesty (or their guardians) agreed to have their library usage tracked in subsequent months. In those subsequent months, API tools were used to take periodic snapshots of patron usage data. Did these snapshots allow us to determine whether the amnesty drive was a "success"? Come and find out.

**Audience:** Symphony

*Wednesday 8:30-9:15 am | A602*

**Presenters:** Jim Benson, Library Systems and Applications Analyst, CLEVNET

### A Systems Analyst's Look at Helping Libraries Function: Using a Help Desk Ticketing System

We all know that there is a lot of "Hidden Gem" information with different workers in a library or library system. How do you go about getting that information in a localized location so staff members can access and use it? You need a Knowledge Base(KB) but how do you know that the workers need that info, you need a ticket system. At the Arrowhead library system in Northeast Minnesota, I pushed for a Help Desk Ticket system that will allow workers to submit tickets and will enable the Automation staff to reply and save a "Solution" in a KB. A Help Desk system for your library can also help you to find points or topics for training staff. If you have an extensive network or consortium, you will see that there are individuals that need training in certain aspects of your ILS. As your team puts in tickets and your Analysts and Automation experts answer the tickets, you can create KB solutions on any topic submitted. There are many types of Help Desk services/software out there. How do you pick the right service or software Help Desk setup?

**Audience:** General

*Wednesday 8:30-9:15 am | A703*

*Repeats: Tuesday, April 17; 8:30-9:15*

**Presenter:** Chadd Niles, Systems Analyst, Arrowhead Library System

### Introducing SirsiDynix' Community Engagement Platform—A Marketing Platform

New in 2018, the SirsiDynix Community Engagement Platform (CEP) helps you overcome the challenge of marketing your library's services and materials to your community in a unified, targeted, and measurable way. Up your marketing game with SirsiDynix' crack squad of creative services as they work with you to use email marketing, event marketing, marketing automation, and analytics to go beyond the vanity email metrics of clicks and opens to truly measurable and meaningful community engagement.

**Audience:** General

*Wednesday 8:30-9:15 am | A704*

**Presenter:** Eric Keith, Chief Marketing Officer, SirsiDynix; Robert Storer, Director of Marketing, SirsiDynix

### Adventures in Data Services

Would you like to improve the quality of your Horizon or Symphony bibliographic and authority records? Make it easy for your patrons to access great courses and educational content? Do you need to add RDA or reading program information to your catalog (Lexile, Accelerated Reader and Reading Counts)? Have better data for BC Visibility and BIBFRAME? Maybe you have duplicate records in your current database. If yes, then please join us as we discuss services designed to enhance the quality of your data. Our goal is to save time for your technical services department and to help your patrons find your material. All attendees will receive a free bibliographic data analysis report from SirsiDynix--a \$250 value.

**Audience:** General

*Wednesday 8:30-9:15 am | A705*

**Presenter:** Tracy Moyers, Director of Product Implementations, SirsiDynix

### Symphony API Sharing Session

The session moderator will lead participants in a discussion of SirsiDynix Symphony API topics. \*API Required\*

**Audience:** Symphony, API

*Wednesday 8:30-9:15 am | A706*

**Presenter:** Spencer Anspach, Library Systems Analyst, Indiana University

### Enterprise Sharing Session

Sharing sessions are to conferences what mitochondria are to cells: the power house behind them. Come and share your successes with Enterprise, your ideas for the future, your problems, your questions.

**Audience:** Enterprise/Portfolio

*Wednesday 8:30-9:15 am | A707*

**Presenter:** Tyler Irvin, Technology Support Librarian, SELCO

# Wednesday, April 18 | Programs

9:30-10:30 am

## How Do Libraries Dive into the 'Experience Economy' Resulting in a Transformation?

B.L.U.E. – Best Library User Experience. What does “BLUE” mean to your library and how can SirsiDynix assist you in achieving your goals and objectives? Gone are the days of commodities, products and services. The key to succeeding in our industry is to offer experiences that would keep our end users coming back for more. Let's start the conversation!

**Audience:** General

*Wednesday 9:30-10:30 am | A601*

**Presenter:** Ranny Lacanienta, Director, Product Management, SirsiDynix

## Check it out! What's New In BLUEcloud Circulation

Please join Carla Clark, Product Manager for BLUEcloud Circulation (and a former Access Services Librarian) for a review of recent features added to BLUEcloud Circulation, and forthcoming development initiatives.

**Audience:** Symphony, Horizon, BLUEcloud Circulation

*Wednesday 9:30-10:30 am | A602*

*Repeats: Monday, April 16, 3:15-4:15*

**Presenter:** Carla Clark, Product Manager, SirsiDynix

## BLUEcloud Analytics Sharing Session

Come share your joys and pains of BLUEcloud Analytics with other like minded Analytics users. It's like therapy for the soul.

**Audience:** BLUEcloud Analytics

*Wednesday 9:30-10:30 am | A703*

**Presenter:** Kendal Orrison, Executive Director, Resource Sharing Alliance NFP

## Enterprise - JQuery and Web Services: Polishing the Rough Edges

Enterprise is a powerful and robust catalog application. Like all powerful applications, there are parts that don't work like you need them to work - or maybe there is missing functionality that you'd like to have. Fortunately there are tools that can help. JQuery, CSS and DOM manipulation can help tweak the UI experience, while the Web Services API can interface directly with the ILS. By putting these tools together with others like PHP and CuRL, you can extend Enterprise in exciting ways. This presentation will focus on how the CLEVNET library consortium has utilized JQuery and Web Services to improve and extend the patron self-editing features of Enterprise's "My Account".

**Audience:** Symphony, Enterprise/Portfolio

*Wednesday 9:30-10:30 am | A704*

**Presenter:** John Pas, Library Systems and Applications Analyst, CLEVNET; Brian Leszcz, Database Administrator, CLEVNET

## Be a High-Voltage Horizon Admin

Are you a new administrator or perhaps would just like a basic refresher? Join us for the Horizon admin essentials!

**Audience:** Horizon

*Wednesday 9:30-10:30 am | A705*

**Presenter:** Keith Oviatt, Sr. Support Analyst, SirsiDynix

## SirsiDynix SymphonyWeb: Using Java WorkFlows via Web Browser

SirsiDynix SymphonyWeb is a browser-based WorkFlows staff client requiring no client-side upgrades or special permissions to use. Printing receipts on demand, downloading report attachments and processing transactions in encrypted form are just some of the many possibilities of using Java WorkFlows from the Web.

**Audience:** Symphony

*Wednesday 9:30-10:30 am | A706*

**Presenter:** Matthew Phillips, Product Manager, SirsiDynix

## Course Support in Academic Libraries: Reimagining the Service

Stanford University Libraries staff continue to think on how best to support faculty and lecturers as the classroom environment becomes increasingly interdisciplinary, team-taught, flipped, innovative, and technology-infused, and yet still relies heavily on library resources (even print books!) We'll discuss some of our experiences and observations on how current library technology helps and hinders this support, what problems we've solved, and what still irks us. We also hope to hear from you about what Course Support tools are helping you, and how you use the Symphony Academic Reserve module in your workflow.

**Audience:** General, Academic Reserves

*Wednesday 9:30-10:30 am | A707*

**Presenter:** Sarah Seestone, Assistant Head of Access Services; Stanford University Libraries

11:00 am-12:00 pm

## SirsiDynix Executive Q&A

Join the SirsiDynix executive staff for an open Q&A session. It will be a great opportunity for you to get the answers to your burning questions.

*Wednesday 11:00 am-12:00 pm | A601-A602*

**Presenters:** SirsiDynix Executive Team

1:00-1:45 pm

## ♪ We Are Family ♪

With the recent release of Horizon 7.5.4.1, both Symphony and Horizon libraries now have access to a very powerful and handy tool: the Family card. However, with the ease of use that comes with linking borrower accounts together also comes the murky business of policy, privacy, and patron access. Join us for a panel discussion of both Symphony and Horizon libraries to talk about the administrative work that goes into turning this feature on for your library system and how these libraries have seen benefits from utilizing the family card.

**Audience:** General

*Wednesday 1:00-1:45 pm | A601*

**Presenters:** Margaret Holder, Circulation Supervisor, Pickens County Library System; Janice Bailey, Systems Administrator, Wichita Falls Public Library; Kelli Staley, Head of Technology, Lansing Public Library; Moderator: Jake Rundle, Technology Librarian, Hastings Public Library



### Redefining Customer Service in the Library: Designing Processes on the Foundation of Kindness and Empathy

Let's take a break from tech specs and talk about the soft stuff that will help keep libraries relevant. In this interactive and informative session participants will learn the importance of using kindness and empathy to provide the kind of customer service that builds loyalty and lasting patron relationships. Participants will also learn the importance of building processes that allow staff to focus on relationship-focused service. Research on the benefits of human connection and acting with kindness will also be presented and discussed. Interactive exercises will then help participants identify biases and learn how to let go of judgment and negative emotions that can hinder exceptional service.

**Audience:** General

*Wednesday 1:00-1:45 pm | A602*

*Repeats: Tuesday, April 17; 8:30-9:15*

**Presenter:** Carrie Wilson, Patron Services Manager, Kent District Library

### Developing Inventive Library Partnerships

In this presentation, hear how the Winter Park Public Library has developed inventive partnerships with local organizations to establish new types of library memberships, create innovative programming, and gain additional funding for cutting-edge library services. We'll talk through the challenges, triumphs, and everything in-between. Leave feeling ready to develop partnerships that will enable your library to provide 21st century services and collections.

**Audience:** General

*Wednesday 1:00-1:45 am | A703*

**Presenter:** Melissa Schneider, Head of Patron & Material Services, Winter Park Public Library

### Look Towards the Future with the Enterprise Discovery Platform

Learn about the latest features and the roadmap for Enterprise and Portfolio. Discuss platform changes to strengthen connections and collaborations between users, library staff, and SirsiDynix.

**Audience:** Enterprise/Portfolio

*Wednesday 1:00-1:45 pm | A704*

*Repeats: Monday, April 16; 1:30-2:30*

**Presenter:** Michael Staten, Product Manager, SirsiDynix

### MobileCirc Sharing Session

In addition to traditional circ on the move, did you know that MobileCirc will now also track event registration? MobileCirc is also handy for weeding, holds lists, and inventory. How is your library using MobileCirc? Come learn about what's new with MobileCirc and hear how other libraries are using the product.

**Audience:** General

*Wednesday 1:00-1:45 pm | A705*

**Presenter:** Melissa Klein, ILS Specialist, Winnefox Library System

### Using Perl in Custom Reports (Symphony)

This session is geared toward the entry level API user. Learn how copy an existing Symphony Workflows report and modify it with some basic Perl code. Topics covered include: • Understanding directives, filters and the default.set files • Perl Syntax • Perl statements and expressions • Working with variables • Using special variables • Perl operators • Regular expressions • Subroutines (functions) . \*API Required\*

**Audience:** Symphony, API

*Wednesday 1:00-1:45 pm | A706*

**Presenter:** Judi Rudisill, Programmer Analyst - ILS Administrator, Virginia Beach Public Library

### Managing School District User Data: Using Jupyter Notebook to Process Deltas and Remove Users

Houston Public Library's partnership with Houston Independent School District means we have a large number of user changes to process daily. Since the district sends us a full data load nightly, we had to come up with an efficient way to process these changes. We have developed a process using Jupyter Notebook to create daily loaders to update existing user data and to add new users, as well as a process for removing users at the end of the school year.

**Audience:** Symphony

*Wednesday 1:00-1:45 pm | A707*

**Presenters:** Somer Newland, ILS Administrator, HALAN; Fred Schumacher, Division Manager, HALAN

2:00-3:00 pm

### Status Summary of Popular Items Using Web Services

Using some pretty basic web programming skills and being willing to toss in a few things you might not fully understand (but are able to edit), you can create a web page to display the status of popular items. The web page can be displayed in the library so patrons don't have to check each item to see if it is available. Developed as a result of a program at COSUGI 2017, this session will provide you with a template you can customize or use as-is (but with the catkeys for your popular items).

**Audience:** Symphony

*Wednesday 2:00-3:00 pm | A601*

**Presenter:** Michael Pullin, Systems Librarian, UNT Health Science Center

### SQL and Web Services for You

SQL and Web Services offer you the flexibility to extend your system to better meet local staff and end user needs. Join us to learn of projects you can consider, development community starting points and a little Q&A time.

**Audience:** General

*Wednesday 2:00-3:00 pm | A602*

**Presenter:** Jeremy Newville, Consultant, SirsiDynix

### Harnessing the Power of Web Services

Web Services lurks in the background of most work, silently chugging along. But what can you really do with it? SELCO has been working on channeling the power of web services to enhance their systems. From creating a custom book river based on ILS data to extracting the pull list onto a website, there's work to be done as we move into the future. Some of the topic will be Horizon-centric but much will be applicable to anyone using Web Services.

**Audience:** General

*Wednesday 2:00-3:00 pm | A703*

**Presenter:** Cheryl Hill, Technical Services Librarian, SELCO; Tyler Irvin, Technology Support Librarian, SELCO

# Wednesday, April 18 | Programs

## Consortia Sharing/Business Meeting

The session moderators will lead participant discussion of common issues for Symphony and Horizon consortia as well as a brief update of the Symphony consortia forum's enhancement requests. The Consortia SIG will also conduct it's business meeting and elections.

**Audience:** General

*Wednesday 2:00-3:00 pm | A704*

**Presenter:** John Goodyear, Executive Director, Chemeketa Cooperative Regional Library Service; Mandy Fleming, ILS & Tech Services Manager, Southern Tier Library System; Jeff Henry, IT Manager / System Administrator, Four County Library System

## Horizon Admin Sharing Session

Bring your ideas and questions to this gathering of Horizon veterans and rookies. What parts of the BLUEcloud are you using?

**Audience:** Horizon

*Wednesday 2:00-3:00 pm | A705*

**Presenter:** Michael Engelbrecht, Library Automation Systems Analyst, Charlotte Mecklenburg Library

## SirsiDynix Application Upgrade Q&A

Join Tracy for an update on the process for scheduling upgrades, including getting more information on what SirsiDynix Platinum Services has to offer for after-hours upgrade services. This session will discuss planning future priorities and will highlight areas of concern from the customers' perspective in order to set 2018 project priorities.

**Audience:** General

*Wednesday 2:00-3:00 pm | A706*

**Presenters:** Tracy Moyers, Director of Product Implementations, SirsiDynix

## S.O.S. Or SSO? Which One Would Your Library Employ?

Learn about SirsiDynix's new authentication solutions both for your library staff and public users. Whether or not your institution has CAS, ADFS, Shibboleth or SAML, we've got you covered. Enjoy the benefits of Single Sign-On for your library products and services.

**Audience:** Symphony

*Wednesday 2:00-3:00 pm | A707*

**Presenter:** Ranny Lacanienta, Director, Product Management, SirsiDynix; Matthew Phillips, Product Manager, SirsiDynix

3:15-4:15 pm

## Horizon Lightning Talks 2

Seasoned Horizon administrators will present five, 10-minute talks on topics they think you should know: Library applications with Horizon Web Services; Creating SQL view and mq\_views; Custom mq\_views to find duplicate authority records; Batch editing MARC records; MARC Syntax and Validation.

**Audience:** Horizon

*Wednesday 3:15-4:15 pm | A601*

**Presenters:** Michael Engelbrecht, Library Automation Systems Analyst, Charlotte Mecklenburg Library; Mike Dawe, Technology Librarian, Sonoma County Library; Kevin Smith, Digital Resources Manager, Wake County Public Libraries; Cheryl Hill, Technical Services Librarian, SELCO; Becky Lashinski, Cataloging Librarian, SELCO

## API Lightning Talks

Join us to hear about the work we have done on our various systems. Topics include: API with Voicents Auto Dialer for automated phone notifications solutions; find ON-THE-FLY records; custom bill notices; and showing bill payments among consortia members.

**Audience:** Symphony

*Wednesday 3:15-4:15 pm | A602*

**Presenter:** Jim Benson, Library Systems and Applications Analyst, CLEVNET; Judi Rudisill, Programmer Analyst - ILS Administrator, Virginia Beach Public Library; Francis Beaumier, IT Specialist, Brown County Library; Anita Winger, Automations System Manager, Mississippi State University

## MobileCirc Overview for Horizon and Symphony

MobileCirc frees you to meet your users where they are: in the library or out and about the campus or community. Come see an overview of the popular features included in MobileCirc.

**Audience:** General

*Wednesday 3:15-4:15 pm | A703*

**Presenters:** Andrea Downing, Product Specialist, SirsiDynix

## BLUEcloud Analytics: Extensive Reporting in One Place

BLUEcloud Analytics gives you the big picture on your library services and magnifies how even small adjustments may help you better meet the needs of your community. Join us to learn about the latest capabilities and upcoming developments.

**Audience:** BLUEcloud Analytics

*Wednesday 3:15-4:15 pm | A704*

*Repeats: Tuesday, April 17; 10:15-11:15*

**Presenter:** Nate Berrett, Product Manager, SirsiDynix

## SDSC: More Than Just a Support Center

See how the SDSC has evolved from being a mere SUPPORT center into a powerful, multifaceted SERVICE center.

**Audience:** General

*Wednesday 3:15-4:15 pm | A705*

**Presenter:** Reed Farnsworth - Knowledge Base and Training Manager, SirsiDynix

## SirsiDynix Symphony: Roadmaps, Strategic Partner Programs and Development Processes

What's in a Symphony roadmap, anyway? We'll discuss the roadmap process, strategic partner programs, development processes and how they all come together into a release.

**Audience:** Symphony

*Wednesday 3:15-4:15 pm | A706*

**Presenters:** Rachel Howell, Program Manager, Customer Engagement, SirsiDynix; Matthew Phillips, Product Manager, SirsiDynix

## Electronic Resource Central: from Discovery to Download

Join us to discover the basics and beyond for eRC. eRC includes more vendors, more titles, more single point access so your patrons can use all of the library's resources from one starting point!

**Audience:** BLUEcloud; Enterprise/Portfolio

*Wednesday 3:15-4:15 pm | A707*

**Presenters:** Nathan Peterson, Product Manager, SirsiDynix



## Exhibitors

### Altarama Information Systems

#302

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#108

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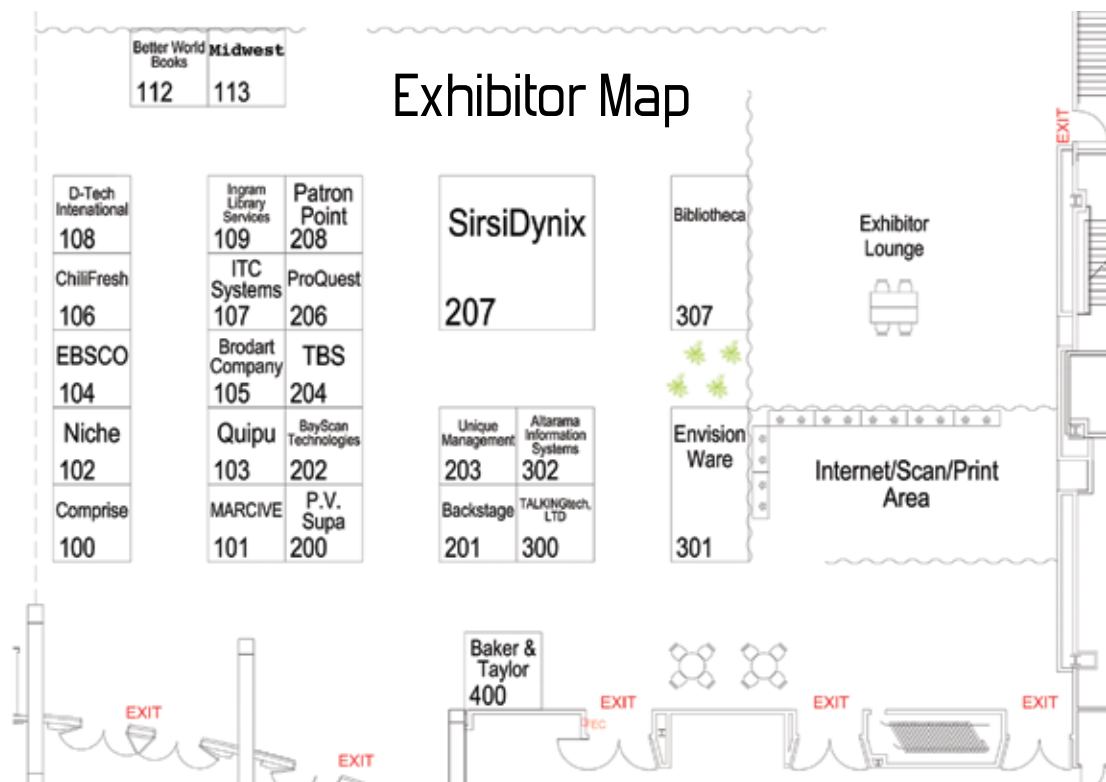
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### Quipu Group, LLC

#103

Online software solutions for verified patron registration, patron incident tracking and more.

Melissa Stockton, Robert Anderson

820 S. Monaco Parkway, #453  
Denver, CO 80224  
800-764-8018  
<http://www.quipugroup.com/>



### Patron Point

#208

Patron Point is the first Patron Relationship Management Platform that helps libraries add new users, increase use, and deepen patron engagement.

Gene Shimshock

6418 Newgrange Dr.  
Dublin, OH 43016  
650-678-2443



### SirsiDynix

#207

SirsiDynix Technology Centre  
3300 N. Ashton Boulevard, Suite 500  
Lehi, UT 84043  
800-288-8020  
[www.sirsidynix.com](http://www.sirsidynix.com)

*SirsiDynix is the sponsor of the Monday Evening Party.*



### TALKINGtech, LTD.

#300

TALKINGtech is a manufacturer of telephone and text messaging notification, as well as in-bound self-service.

Sean Young

13785 Research Blvd. # 125  
Austin, TX 78750  
800-631-0315  
[www.talkingtech.com](http://www.talkingtech.com)



**TALKINGTECH**  
engaging customers... better, smarter.

### Today's Business Solutions

#204

TBS providers of library management solutions; computer reservation, print management, mobile-printing, scanning solutions, and payment kiosks.

Nathan Handlon, Lou Flavio, Jim Farrell

7820 S. Quincy St.  
Willowbrook, IL 60527  
630-537-1370  
630-537-1369  
[www.singlecard.com](http://www.singlecard.com)

***TBS is the sponsor of the conference bags.***



### Unique Management

#203

Web Chat / Material Recovery / Service Solutions

Dick Neal, Josh Neisler, Rob Klaus

119 E Maple Street  
Jeffersonville, IN 47130  
800-879-5453  
[www.unique-mgmt.com](http://www.unique-mgmt.com)

**UNIQUE** Management  
Services, Inc.



# EnvisionWare ProLine RFID System

*Big on Performance. Small on Price.*

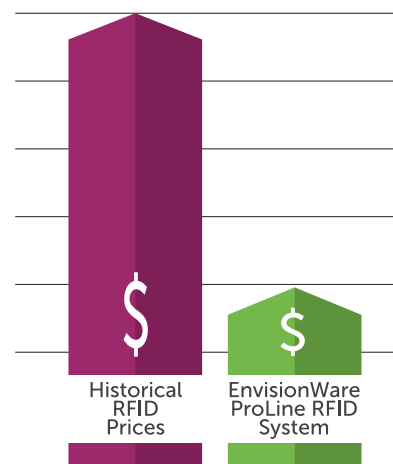
Libraries of all sizes are focused on how to best serve their communities.



But some services, like RFID, have been out of reach due to price and complexity.

EnvisionWare's ProLine RFID System is designed to make RFID more affordable and easier. This new RFID package bundles:

- ✓ EnvisionWare's best-in-class RFID and self checkout software
- ✓ Quality, reliable gates
- ✓ Self checkout hardware
- ✓ Inventory and monitoring software
- ✓ Customizable rollout materials



With EnvisionWare's ProLine RFID System, many libraries will see prices up to **40%** lower than historical prices.

Providing libraries with an RFID system that's big on performance, but small on price.

For more information, visit the EnvisionWare booth #301  
or contact your EnvisionWare representative.