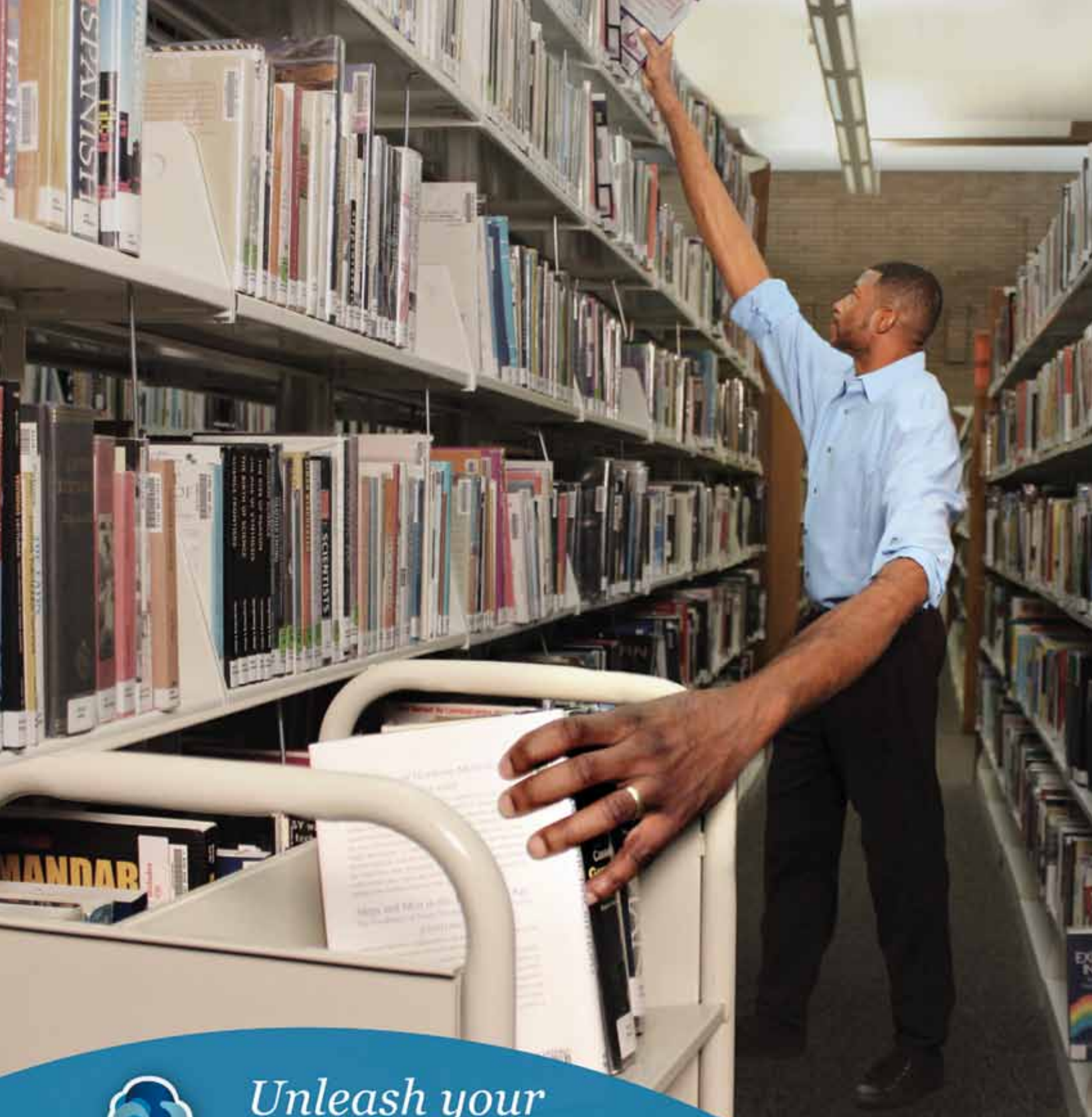




**COSUGI**  
PORTLAND 2015  
BLAZING THE TECHNOLOGY TRAIL







BLUEcloud

## *Unleash your natural abilities*



Extend your circulation reach with MobileCirc.  
See the unseen and predict the future with BLUEcloud  
Analytics. Effortlessly integrate all your e-content from a single  
interface with eResource Central. With the BLUEcloud Suite,  
there's more than enough power for every super librarian.



SirsiDynix®

# WELCOME



## Welcome to COSUGI 2015 and beautiful Portland!

We are so excited you have decided to join us for what promises to be a fantastic conference.

What an exciting time to be a customer of SirsiDynix, and a member of COSUGI. This past year has been full of exciting product announcements by SirsiDynix. COSUGI, in partnership with SirsiDynix, is blazing new technology trails with SirsiDynix product releases that we thought might never materialize. These products have opened up a whole world of possibilities. The BLUEcloud Suite of products appear to have endless growth potential and possibilities. BLUEcloud Analytics has the potential to provide enough data to make an analyst's head spin. It's fantastic! BLUEcloud Cataloging, PAC, and more. So many new things to learn about and tinker with.

The COSUGI board has also been working diligently to blaze new trails in our working relationship with the SirsiDynix team. I am very happy to report that the last few years have cultivated a relationship between the company and the users group that is unsurpassed by any other. Bill Davison, Eric Keith, Berit Nelson, and the rest of the SirsiDynix team have been eager to entertain our ideas, listen to our complaints, and make changes within the organization that have forged a bond I hope continues on with future generations.

When you take into consideration that COSUGI, as one group, is only about 6 years old, we have been a model users group that is ready and willing to make and test changes as situations change, as products change, and as technology changes. As long as we continue on this path we will continue to Blaze New Trails.

I would like to personally thank the COSUGI Board members for their dedication to the cause. Every member of this board has been very passionate about every decision made and every topic discussed. The entire board was patient with me when I had to take a few weeks off to deal with a family illness and Sean

Farrell, Chair-Elect, and Lynn Bertino, Immediate Past Chair, forged ahead without me during this time. I truly appreciate all their efforts. The Conference Committee, comprised of Kelli Staley, Conference Chair, Lori Berg, Conference Chair-Elect, Pia Jones of ICM Event Management, Rachell McConkie of SirsiDynix, and Chair-Elect Sean Farrell as advisor, have done a phenomenal job putting together a top-notch slate of sessions. Without their undying attention to detail, and organizational skills this conference would not be possible. I would also like to thank the employers of all the board members. Not only for allowing your employees to participate on this board, but for also allowing the COSUGI board to consume many of our lives in short bursts of activity. If your employees weren't allowed to help build a better mouse trap, the mice would be winning.

I would like to thank the whole SirsiDynix Team for working with us and all of your customers to provide better service by opening the lines of communication. You have allowed us all to vent our frustrations, and actually listened to what we've had to say. You followed these discussions with an almost immediate response in most areas. It has been refreshing to work with such an eager group of people.

Lastly, I'd like to thank all of you, the COSUGI members, for making the past year a success. Without you, these trails to new beginnings could not be blazed. You have been more than generous sharing your experiences and ideas with the entire membership, and working together to forge ahead with gusto. I hope you enjoy the conference, and I hope you are able to take some time to enjoy the beautiful city of Portland! It's been a great year!

Angie Strait  
COSUGI Chair 2014-15



# INFORMATION

## Table of Contents

- 1 Welcome from COSUGI Chair
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- 5 COSUGI Customer Appreciation Event
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- 16 Wednesday Schedule and Descriptions
- 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.

## Message Board

A message board is located near the registration desk and is available for your use during the conference. You are welcome to leave a message for another attendee on the message board. Other general conference announcements or job ads may be posted.

## Conference Information

*Locations listed are in the Hilton Portland & Executive Tower*

### Registration Desk

*Plaza Foyer, Plaza Level*

Sunday, March 29, 4:00 pm–7:00 pm

Monday, March 30, 7:00 am–5:30 pm

Tuesday, March 31, 8:00 am–3:00 pm

### Exhibits

*Grand II/Foyer, Ballroom Level*

Monday, March 30, 7:00–8:30 am & 1:00–5:00 pm

Tuesday, March 31, 9:00 am–5:00 pm

Wednesday, April 1, 8:00 am–12:00 pm

### Internet/Print Area

*Sponsored by EnvisionWare*

*Grand Foyer, Ballroom Level*

## Conference Welcome and SirsiDynix Opening Session

*Grand Ballroom I, Ballroom Level*

Monday, March 30, 9:00 am–12:15 pm

### Opening Reception

*Sponsored by SirsiDynix*

*Portland Art Museum, Kridel Grand Ballroom*

*1219 SW Park Avenue., Portland*

*Monday, March 30 6:00–9:00 pm*

## Ask SirsiDynix Room

New this year! General knowledge staff present all day with additional expert “office hours.” **All topics welcome any time.**

*Directors Suite, Level: 3*

### Monday, March 30

Experts: 1:30–2:30 pm

Experts: 2:30–3:30 pm

### 1:30 pm–4:00 pm

API, System Backup, Web Services

Training/Mentor, Enterprise Stump the Chump

### Tuesday, March 31

Experts: 9:30–10:30 am

Experts: 10:30–11:30 am

Experts: 1:45–2:45 pm

### 8:00 am–4:30 pm

Backup, Symphony Stump the Chump, Horizon SQL

Horizon Stump the Chump, Horizon SQL Training/Mentor

### Wednesday, April 1

Experts: 9:30–10:30 am

Experts: 1:00–2:00 pm

Experts: 2:00–3:00 pm

### 8:00 am–10:45 am; 11:45 am–4:15 pm

Backups

API, Backups

Horizon Stump the Chump, Symphony Stump the Chump

## COSUGI Business Meeting and Raffle

*Grand I, Ballroom Level*

Tuesday, March 31, 4:30–5:30 pm

## SirsiDynix Executive Q&A

*Grand I, Ballroom Level*

Wednesday, April 1, 10:45–11:45 am

## Conference Ends

Wednesday, April 1, 4:15 pm

## Credits

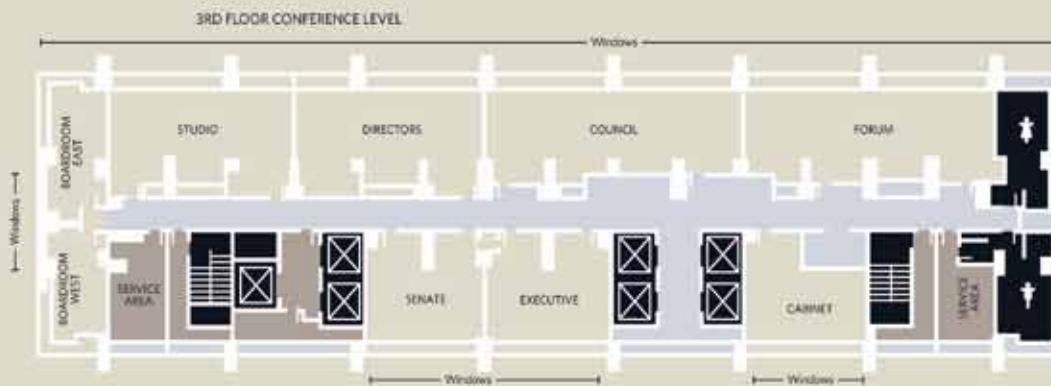
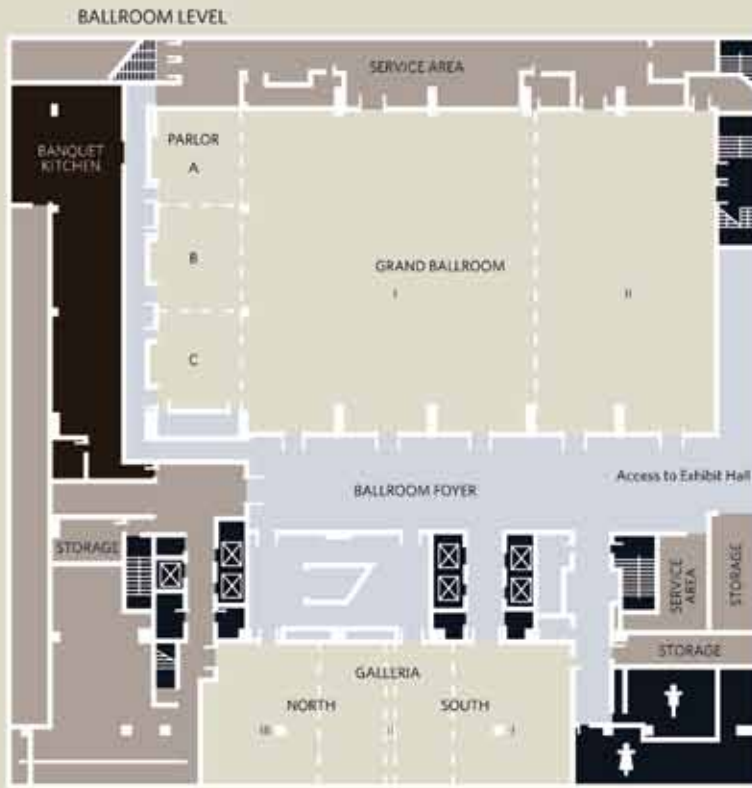
COSUGI 2015 conference logo by Bryan Wolf [www.bryan-wolf.com](http://www.bryan-wolf.com)

Book design by Liz Burnett [www.schlegelbageldesign.com](http://www.schlegelbageldesign.com)



# FLOOR PLAN FOR CONFERENCE & EVENT ROOMS

## FLOOR MAPS



## KEY

- Elevators
- Meeting/Conference Rooms
- Service Area
- Amenities
- Foyer Space

# SIRSIDYNIX WELCOME



## Welcome to Portland and COSUGI 2015!

Historically, Portland has been the destination of some of the most famous trails in our country's history. This year it serves as the destination for each of you to experience BLUEcloud! Join us in blazing the BLUEcloud technology trail leading to the most powerful and intuitive products we have ever developed.

We remain focused on the theme and direction of the past few years: BLUEcloud is real and we want all of you to experience it! I mentioned to my executive team that it feels great NOT to have some major new direction or product initiative to announce. Instead, we are working steadily, consistently, yet aggressively, to deliver the best library automation products the industry has ever seen. The BLUEcloud Library Services Platform gives you a new, powerful, open, state-of-the-art, browser-based system that doesn't require data migration or operational risk. And as I mentioned last year, many of the BLUEcloud products come as part of your regular maintenance payments! We want you to enjoy solid value for your maintenance dollars.

We've seen exponential growth not only in the number of BLUEcloud products being used, but also in the number of you taking advantage of them in your libraries. Enterprise, MobileCirc, eResource Central, Analytics, BLUEcloud Cataloging and PAC are just some of the new products in use at hundreds of libraries. We're committed to keeping that growth rate: this past year we've hired over 40 additional software development professionals to accelerate the delivery of the BLUEcloud vision!

This is an amazing time to be part of the information industry. From the global surge of digital content to the tsunami of mobile adoption, it is both an exciting and challenging time for libraries everywhere. Smartphones, tablets, ebooks, and eContent have forever changed the way we discover and consume information. These devices transform users' expectations about what services a library should offer. The BLUEcloud Library Services Platform provides the solid foundation that will keep your libraries and staff on solid footing at the center of your community's mindshare for decades to come as the role of libraries continues to evolve.

Whether you're on Horizon or Symphony, BLUEcloud is for you. And thanks to the magic of cloud architecture and web services, you don't have to "go" to BLUEcloud. The BLUEcloud trail comes directly to you: no migration, and no need to abandon the cherished functionality of your existing system. BLUEcloud is truly the best of all worlds.

On behalf of the SirsiDynix team, I want to recognize and thank the COSUGI Board for all the work they put into the user group and hosting this great event every year. It's a monumental task and we sincerely appreciate their efforts. Thank you for being here with us and being our partners as we move full speed ahead.

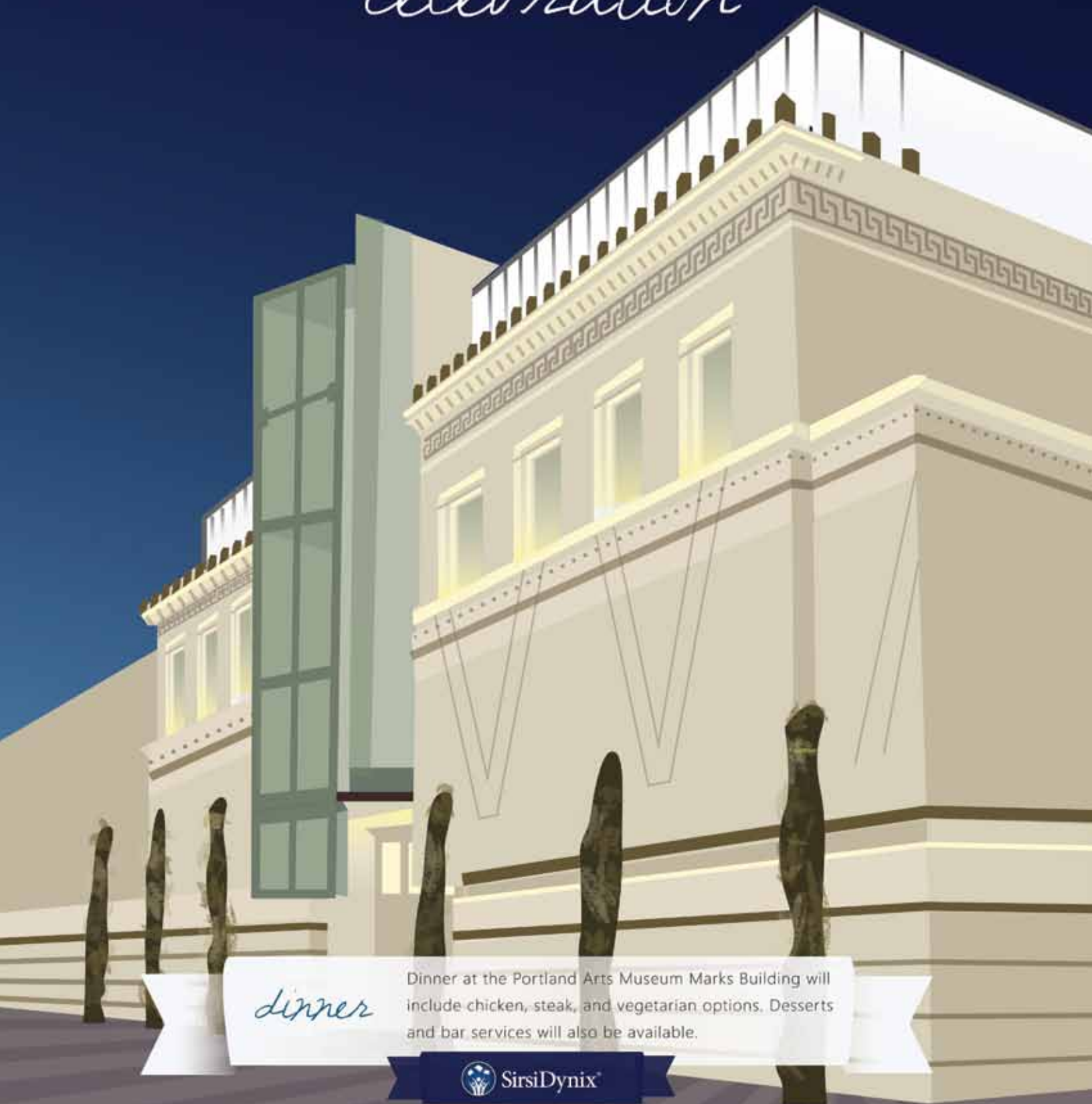
Bill Davison  
SirsiDynix Chief Executive Officer



YOU'RE INVITED

PORTLAND ART MUSEUM | MARCH 30 | 6-9 PM  
2015 COSUGI CUSTOMER

# *Celebration*



*dinner*

Dinner at the Portland Arts Museum Marks Building will include chicken, steak, and vegetarian options. Desserts and bar services will also be available.



SirsiDynix®



# MONDAY, MARCH 30

Daylong	7:30–8:30 am	9:00–9:30 am	9:30 am–12:15 pm
<b>7:00 am–5:30 pm</b> <b>Registration</b> <i>Plaza Foyer, Plaza Level</i>	<b>First Time Attendees' Breakfast</b> <i>Skyline II, 23rd Floor</i>  <i>Prior reservation required.</i>	<b>Conference Welcome</b> <i>Grand Ballroom I, Ballroom Level</i>  Opening comments and welcome by Angie Strait, Chair, Customers of SirsiDynix Users Group, Inc. (COSUGI) and Assistant Director, Cabell County Public Library	<b>Opening Session: Experience BLUEcloud!</b> <i>Grand Ballroom I, Ballroom Level</i>  Join Bill Davison and the SirsiDynix executive team as we blaze the BLUEcloud technology trail in Portland! Last year we brought you closer to the reality of BLUEcloud. This year we invite you to experience BLUEcloud. With your help, BLUEcloud products have gone from development to pilot and on to production. Get the very latest developments on all the BLUEcloud products from SirsiDynix management, our talented product managers, and a variety of wonderful SirsiDynix customers who are actively using and benefiting from the amazing power of the BLUEcloud. Find out what's available to you today as well as exciting, new features coming in 2015. Every trail brings an experience. Are you ready?  <b>10:30–10:50 am</b> <b>Morning Break</b> <i>Grand Foyer, Ballroom Level</i>
<b>7:00–8:30 am</b> <b>1:00–5:00 pm</b> <b>Visit the Exhibits!</b> <i>Grand II/Foyer, Ballroom Level</i>			
<b>7:00–8:30 am</b> <b>1:00–5:00 pm</b> <b>Internet/Print Area</b> <i>Grand Foyer, Ballroom Level</i> Sponsored by EnvisionWare			



Scan this QR code with your smartphone for access to the COSUGI conference app.  
<http://my.yapp.us/COSUGI2015>





# SCHEDULE

12:15–1:15 pm

1:30–2:30 pm

2:45–3:45 pm

3:45–9:00 pm

## Lunch



Included with your  
COSUGI Conference  
registration.

*Hilton Exhibit Hall (not  
COSUGI exhibit hall),  
Ballroom Level*

<i>Galleria North Ballroom Level</i>	<b>Coming Soon to Your Horizon System!</b> Audience: Horizon Track: Horizon Brent Thompson, Product Manager, SirsiDynix	<b>Discover the Northwest Passage with MobileCirc!</b> Audience: Horizon Track: Circulation Ranny Lacanienta, Director of Product Management, SirsiDynix
<i>Pavilion East Plaza Level</i>	<b>Enterprise Sharing Session</b> Audience: General Track: Discovery Lori Berg, Systems Administrator, St. Louis Public Library	<b>Stump the Chumps: Horizon Q&amp;A</b> Audience: Horizon Track: Horizon See presenter titles/institutions listed in full program description
<i>Broadway I-III Plaza Level</i>	<b>New Developments in RFID Self-Service</b> Audience: General Track: Circulation David Tuttle, Senior Market Consultant, SirsiDynix	<b>The Best Passage: BLUEcloud Platform and Technical Update</b> Audience: General Track: Admins/General Interest Sheridan Richey, VP Engineering and Product Management, SirsiDynix
<i>Parlor A-C Ballroom Level</i>	<b>Spread the Word: Using spreadsheets to streamline data entry into Symphony WorkFlows</b> Audience: Symphony Track: Cataloging See presenter titles/institutions listed in full program description	<b>Putting a New Face on Your Format Facet</b> Audience: General Track: Discovery Rosemary Groenwald, Head of Technical Services, Mount Prospect Public Library
<i>Galleria South Ballroom Level</i>	<b>Symphony Basic Administration</b> Audience: Symphony Track: Admins/General Interest Aaron Oldroyd, Customer Support Engineer II and other Senior Staff, SirsiDynix	<b>Where Do I Even Start?! Designing &amp; implementing a clean-up and maintenance plan for Symphony – a novice's perspective. (SirsiDynix Scholarship winner.)</b> Audience: Symphony Track: Blazing Trails Alexandra Felton, Electronic Resources Librarian/ILS Administrator, Cochise College Libraries
<i>Pavilion West Plaza Level</i>	<b>What's Circulating in the BLUEcloud?</b> Audience: General Track: Blazing Trails Melissa Kulmer, Product Manager, SirsiDynix <i>Repeats Tues. @ 3:15</i>	<b>BLUEcloud Cataloging – Bringing Features, Functionality &amp; the Futures</b> Audience: General Track: Cataloging Melissa Kulmer, Product Manager, SirsiDynix
<i>Grand 1 Ballroom Level</i>	<b>Securing Your Organization – Advanced Tips</b> Audience: General Track: Admins/General Interest Ben Card, Information Security Officer, SirsiDynix	<b>Coming Soon to Your Symphony System!</b> Audience: Symphony Track: Admins/General Interest Berit Nelson, VP Library Relations, SirsiDynix

Visit the Exhibits!  
1:00–5:00 pm

*Grand II/Foyer  
Ballroom Level*

Opening Party  
6:00–9:00 pm  
Sponsored by SirsiDynix

*Portland Arts Museum*



# MONDAY, MARCH 30

9:00–9:30 am

## Conference Welcome

*Monday 9:00–9:30 am  
Grand Ballroom I, Ballroom Level*

Opening comments and welcome by Angie Strait, Chair, Customers of SirsiDynix Users Group, Inc. (COSUGI) and Assistant Director, Cabell County Public Library

9:30 am–12:15 pm

## Opening Session: Experience BLUEcloud!

*Monday 9:30 am–12:15 pm  
Grand Ballroom I, Ballroom Level*

Join Bill Davison and the SirsiDynix executive team as we blaze the BLUEcloud technology trail in Portland! Last year we brought you closer to the reality of BLUEcloud. This year we invite you to experience BLUEcloud. With your help, BLUEcloud products have gone from development to pilot and on to production. Get the very latest developments on all the BLUEcloud products from SirsiDynix management, our talented product managers, and a variety of wonderful SirsiDynix customers who are actively using and benefitting from the amazing power of the BLUEcloud. Find out what's available to you today as well as exciting, new features coming in 2015. Every trail brings an experience. Are you ready?

### Opening presentation

- Bill Davison, SirsiDynix CEO
- Eric Keith, VP of Marketing and Strategic Alliances

### Followed by product presentations

- Sheridan Richey, VP Software Development
- Julie Williamsen, Product Manager, Universal Admin
- Nate Berrett, Product Manager, BLUEcloud Analytics
- Melissa Kulmer, Product Manager, BLUEcloud Cataloging, BLUEcloud Circulation
- Ranny Lacanienta, Director, Product Management
- Dain Berrett, Product Manager, eResource Central
- Jackie Ramos, Product Manager, BookMyne, Enterprise, BLUEcloud PAC
- Rick Branham, VP of Global Accounts and Academic Initiatives
- Carla Clark, Product Manager, BLUEcloud Campus

1:30–2:30 pm

## Securing Your Organization – Advanced Tips

User privacy is vital! Avoid becoming the latest organization to be raked over the coals because confidential data ended up in the wrong hands. You have limited time and budget to address security, so how will you protect your data? Using the latest information, let us help you prioritize your efforts and identify the best methods for protecting your data in 2015!

**Audience:** General

**Track:** Admins/General Interest

*Monday 1:30–2:30 pm  
Grand I, Ballroom Level*

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

## Coming Soon to Your Horizon System!

We'll review recent Horizon releases and preview upcoming capabilities in Horizon with some BLUEcloud discussion for good measure.

**Audience:** Horizon

**Track:** Horizon

*Monday 1:30–2:30 pm  
Galleria North, Ballroom Level*

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

## Symphony Basic Administration

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

**Audience:** Symphony

**Track:** Admins/General Interest

*Monday 1:30–2:30 pm  
Galleria South, Ballroom Level*

**Presenter:** Aaron Oldroyd, Customer Support Engineer II and other Senior Staff, SirsiDynix

## New Developments in RFID Self-Service

A review of new RFID products and functionality geared towards advancing RFID self-service even further, like RFID enabled shelves for returns and inventory, library remote RFID lockers, AV dispensing and new item acquisition receipt. And we'll look at the development path for further integration of RFID with the SirsiDynix circulation client and how the return on your RFID investment will not only enhance service to your patrons but also shore up your bottom line.

**Audience:** General

**Track:** Circulation

*Monday 1:30–2:30 pm  
Broadway I-III, Plaza Level*

**Presenter:** David Tuttle, Senior Market Consultant, SirsiDynix

## Enterprise Sharing Session

Bring your wishes, desires, and issues involving Enterprise. Let's talk about it.

**Audience:** General

**Track:** Discovery

*Monday 1:30–2:30 pm  
Pavilion East, Plaza Level*

**Presenter:** Lori Berg, Systems Administrator, St. Louis Public Library

## Spread the Word: Using spreadsheets to streamline data entry into Symphony WorkFlows

When the County of Los Angeles Public Library upgraded their ILS system from DRA Classic to Symphony WorkFlows, processing staff were thrilled to be able to use the "Add Ordered Items to Catalog" wizard UNTIL the World Book Encyclopedia was received. Using that wizard to add 90 copies with 22 volumes was excruciatingly slow and frustrated the staff. To solve the problem, the processors entered Item IDs, holding codes and prices into a spreadsheet. Using MarcEdit and the "bibload report," the items were created in WorkFlows. After this success, other uses benefited from this process such as by uploading periodical orders; the bibliographic and item data for 700+ Kindles distributed among 28 libraries; and correcting a duplicated barcodes issue. In addition, a spreadsheet is used to load budget amounts for over 1500 funds at the start of each fiscal year. The County of Los Angeles Public Library has 85 regional and community libraries, one institutional library and three bookmobiles. It has a service area of over 3,000 square miles and a service population of over 3,000,000 residents. As of June 30, 2013, annual circulation was over 15,300,000 and over 7,300,000 reference questions were answered. Technical Services adds nearly 500,000 items per fiscal year.

**Audience:** Symphony

**Track:** Cataloging

*Monday 1:30–2:30 pm  
Parlor A-C, Ballroom Level*

**Presenters:** Melody Holzman, Interim Head, Technical Services, County of Los Angeles Public Library; Sophia Wang, Head, Materials Management Team, County of Los Angeles Public Library; David Mill, Information Systems Supervisor I, County of Los Angeles Public Library



# PROGRAMS

## What's Circulating in the BLUEcloud?

Development for BLUEcloud Circulation is under way! Join this session to learn about planned first-release functionality, interface design, and opportunities to join our Strategic Partner Programs for Circulation.

**Audience:** General

**Track:** Blazing Trails

*Monday 1:30–2:30 pm*

*Pavilion West, Plaza Level*

*Repeated: Tues 3:15–4:15 pm*

**Presenter:** Melissa Kulmer, Product Manager, SirsiDynix

2:45–3:45 pm

## The Best Passage: BLUEcloud Platform and Technical Update

BLUEcloud is here! Join us for an update on SirsiDynix's technology trailblazing over the past year with focus on the technologies, architecture and technical underpinnings that make up BLUEcloud and why they matter.

**Audience:** General

**Track:** Admins/General Interest

*Monday 2:45–3:45 pm*

*Broadway I-III, Plaza Level*

**Presenter:** Sheridan Richey, VP Engineering and Product Management, SirsiDynix

## Stump the Chumps: Horizon Q&A

Pick the collective brain of our cavalcade of panelists on anything to do with the Horizon family of products.

**Audience:** Horizon

**Track:** Horizon

*Monday 2:45–3:45 pm*

*Pavilion East, Plaza Level*

**Presenters:** Michael Engelbrecht, Library Automation Systems Analyst, Charlotte Mecklenburg Library; Kay Dunker, Systems Librarian, Valley Library Consortium; Lisa Lee Broughman, Systems Administrator, Lynchburg Information Online Network; Kevin Smith, Senior Manager for Technology, Wake County Public Libraries; Phil Feilmeyer, Integrated Library System Manager, Hennepin County Library; Lynn Chandler Bertino, Library Systems Manager, Wake County Public Libraries

## Coming Soon to Your Symphony System!

We'll review recent Symphony releases and preview upcoming capabilities in Symphony with some BLUEcloud discussion for good measure.

**Audience:** Symphony

**Track:** Admins/General Interest

*Monday 2:45–3:45 pm*

*Grand 1, Ballroom Level*

**Presenter:** Berit Nelson, VP Library Relations, SirsiDynix

## Discover the Northwest Passage with MobileCirc!

MobileCirc frees you to explore the needs of your end users whether they are in the library, out and about the campus or community, or blazing the technology trail in search of more efficient ways to get things done. This session will focus on MobileCirc for Horizon libraries.

**Audience:** Horizon

**Track:** Circulation

*Monday 2:45–3:45 pm*

*Galleria North, Ballroom Level*

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

## Putting a New Face on Your Format Facet

We heavily customized our format facet in Enterprise because we weren't happy with the SirsiDynix out-of-the box format facet configuration. I've also included a link to our catalog so you can look closer at the custom format facet we created. I will outline all the steps we took to create this custom format facet starting with the somewhat complicated custom MARC map we created, etc. and explain the how and whys of each step. Session will include lots of screenshots, as well as all of the MARC conditions we used in setting this up and then also include the JavaScript and HTML content that we used to link our custom format icons to our custom format facet. [http://mtpros.ent.sirsi.net/client/default](http://mtpros.ent.sirsi.net/client/defaulthttp://mtpros.ent.sirsi.net/client/default) Format Include/Exclude: Books (336976) DVDs (24473) E-books (16837) Music CDs (16523) Large Type (10985) Audiobooks on CD (10141) E-audiobooks (8942) Periodicals (1882) Video Games (1324) Playaways (765) Blurays (513) Online Reference (430) Software (380) Music Scores (355) Toys (345) Kits (200) Maps and Atlases (193) Art Prints (176) E-Journals (106) Microform (75) Playaway View (55) Mixed Materials (2) Fewer Collapse All

**Audience:** General

**Track:** Discovery

*Monday 2:45–3:45 pm*

*Parlor A-C, Ballroom Level*

**Presenter:** Rosemary Groenwald, Head of Technical Services, Mount Prospect Public Library

## BLUEcloud Cataloging – Bringing Features, Functionality & the Future

BLUEcloud Cataloging is available for Horizon and getting new features every month! We'll cover current capabilities and take a look at upcoming features like expanded merge, authority control and browse searching in BLUEcloud.

**Audience:** Symphony

**Track:** Cataloging

*Monday 2:45–3:45 pm*

*Pavilion West, Plaza Level*

**Presenter:** Melissa Kulmer, Product Manager, SirsiDynix

## Where Do I Even Start?! Designing & implementing a clean-up and maintenance plan for Symphony—a novice's perspective. (SirsiDynix Scholarship winner.)

What do you do when your Symphony database is out of control? The Cochise College Libraries implemented Symphony (then Unicorn) in the summer of 2000. Since that time, the perennially short-staff libraries did not have anyone who had both the knowledge and time to act as ILS administrator. As a result of minimal maintenance and too many people with too much access, the Cochise College Libraries were left with a Symphony database that was, frankly, a mess. Items, users, staff access, inventory—every area was out of control and in desperate need of an overhaul. Alex Felton will talk about her experience implementing a clean-up and maintenance plan, starting out with minimal Symphony experience (and complete panic) and ending up as Symphony administrator.

**Audience:** Symphony

**Track:** Blazing Trails

*Monday 2:45–3:45 pm*

*Galleria South, Ballroom Level*

**Presenter:** Alexandra Felton, Electronic Resources Librarian/ILS Administrator, Cochise College Libraries

# TUESDAY, MARCH 31

8:15–9:15 am

9:30–10:30 am

11:15 am–12:15 pm

<i>Galleria North Ballroom Level</i>	<b>Best Practices: Backups and Restores</b> Audience: General Track: Admins/General Interest Todd Roelens, Senior Technical Advisor, SirsiDynix	<b>Tools Administrators (and Others) Use</b> Audience: General Track: Blazing Trails Lynn Chandler Bertino, Library Systems Manager, Wake County Public Libraries	<b>Guides for the Technology Trail: Support Center, Training and Mentor Updates</b> Audience: General Track: Admins/General Interest Rebecca Muller, Instructional Designer, SirsiDynix; Reed Farnsworth, Knowledge Base Analyst, SirsiDynix
<i>Pavilion East Plaza Level</i>	<b>BLUEcloud Universal Admin: Get All Your Ducks in a Row</b> Audience: Horizon Track: Horizon Julie Williamsen, Product Manager, SirsiDynix; Melissa Kulmer, Product Manager, SirsiDynix	<b>Symphony: Roadmaps, Strategic Partner Programs and Development Processes</b> Audience: Symphony Track: Admins/General Interest Ranny Lacanienta, Director of Product Management, SirsiDynix; Rachel Bowell, Release Manager, SirsiDynix	<b>BLUEcloud Universal Admin: Get All Your Ducks in a Row</b> Audience: Symphony Track: Admins/General Interest Julie Williamsen, Product Manager, SirsiDynix; Melissa Kulmer, Product Manager, SirsiDynix
<i>Broadway I-III Plaza Level</i>	<b>Library Services Platforms: The New Library Systems</b> Audience: General Track: Admins/General Interest Steven K. Bowers, Executive Director, DALNET (Detroit Area Library System)	<b>The New Hennepin County Library Catalog, Part 1 – Overview and Demonstration</b> Audience: General Track: Horizon Phil Feilmeyer, Integrated Library System Manager, Hennepin County Library	<b>RDA? Authority control? Lexiles? Keep your database current and help your end users find all of your resources with SirsiDynix Data Services</b> Audience: General Track: Cataloging Tracy Moyers, Director of Product Implementation, SirsiDynix
<i>Parlor A-C Ballroom Level</i>	<b>Electronic Resource Central: eRC Grows by Leaps and Bounds</b> Audience: General Track: Circulation Dain Berrett, Product Manager, SirsiDynix <i>Repeats @ 3:15</i>	<b>What's in a (Web) Service?</b> Audience: Symphony Track: Admins/General Interest Brent Thompson, Product Manager, SirsiDynix	<b>What's in a (Web) Service?</b> Audience: Horizon Track: Horizon Brent Thompson, Product Manager, SirsiDynix
<i>Galleria South Ballroom Level</i>	<b>Customizing Enterprise to Fit Your Needs</b> Audience: General Track: Discovery Tyler Irvin, Technology Support Librarian, SELCO	<b>Online User Registration, Start to Finish at 3AM, no Special Coding Required</b> Audience: Symphony Track: Circulation Kathy Maenle, Principal ILS Systems Coordinator, KCMO	<b>Discover the Northwest Passage with MobileCirc!</b> Audience: Symphony Track: Circulation Ranny Lacanienta, Director of Product Management, SirsiDynix
<i>Pavilion West Plaza Level</i>	<b>Efficiency of BLUEcloud Cataloging</b> Audience: Symphony Track: Cataloging Jennifer Marshall, Collections Manager, Pioneer Library System	<b>Going BLUEcloud with Enterprise, Portfolio and Other Discovery Products!</b> Audience: Horizon Track: Discovery Jackie Ramos, Product Manager, SirsiDynix	<b>Going BLUEcloud with Enterprise, Portfolio and Other Discovery Products!</b> Audience: Symphony Track: Discovery Jackie Ramos, Product Manager, SirsiDynix
<i>Grand 1 Ballroom Level</i>	<b>Stump the Chumps: Symphony Q&amp;A</b> Audience: Symphony Track: Blazing Trails See presenter titles/institutions listed in full program description	<b>BLUEcloud Analytics: It's All about the Bass and the Treble</b> Audience: General Track: Admins/General Interest Nate Berrett, Product Manager, SirsiDynix <i>Repeats @ 3:15</i>	<b>BLUEcloud Analytics – A User's Status Report</b> Audience: General Track: Blazing Trails See presenter titles/institutions listed in full program description





**COSUGI**  
PORTLAND 2015  
BLAZING THE TECHNOLOGY TRAIL

# SCHEDULE

Daylong

1:45–2:45 pm

3:15–4:15 pm

4:30–5:30 pm

**8:00 am–3:00 pm**  
**Registration**

*Plaza Foyer, Plaza Level*

**9:00 am–5:00 pm**  
**Internet/Print Area**

*Grand Foyer,  
Ballroom Level*  
Sponsored by  
EnvisionWare

**9:00 am–5:00 pm**  
**Visit the Exhibits!**

*Grand II/Foyer,  
Ballroom Level*

**10:30–11:00 am**  
**Morning Break**

*Grand II/Foyer, Ballroom  
Level*

**10:30–11:15 am**  
**Exhibits**

**No Conflict Time**  
*Grand II/Foyer,  
Ballroom Level*

**12:15–1:15 pm**  
**Lunch**



Included with your  
COSUGI Conference  
registration.

*Hilton Exhibit Hall (not  
COSUGI exhibit hall),  
Ballroom Level*

**2:45–3:15 pm**  
**Afternoon Break**  
*Grand II/Foyer, Ballroom  
Level*

*Galleria  
North  
Ballroom  
Level*

## **Increase Library Support with Community Funded Services**

Audience: General  
Track: Admins/General Interest  
Eric Keith, VP Marketing, SirsiDynix;  
Justin Swain, Account Manager, SirsiDynix

*Pavilion  
East  
Plaza  
Level*

## **Symphony Cataloging Sharing Session**

Audience: Symphony  
Track: Cataloging  
Joel Hahn, Database Manager, Cooperative  
Computer Services

*Broadway  
I-III  
Plaza  
Level*

## **Help Your Patrons Find Their Way Out of the Rabbit Holes in e-Library**

Audience: Symphony  
Track: Discovery  
Mary Daubenspeck, Systems Librarian,  
SCILS Consortium

*Parlor  
A-C  
Ballroom  
Level*

## **The New Hennepin County Library Catalog, Part 2 – Under the Hood**

Audience: Horizon  
Track: Horizon  
Phil Feilmeyer, Integrated Library System  
Manager, Hennepin County Library

*Galleria  
South  
Ballroom  
Level*

## **A Map, a Compass, and a Little Luck: tools, tips, and troubleshooting techniques for getting the most out of symphony**

Audience: Symphony  
Track: Circulation  
Brenda Cameron, Library Systems  
Coordinator, Fort Vancouver Regional  
Library District

*Pavilion  
West  
Plaza  
Level*

## **Extend your Symphony System with Application Programming Interfaces (APIs) and Web Services**

Audience: Symphony  
Track: Blazing Trails  
Margaret Pelfrey, Manager of Training and  
Consulting, SirsiDynix

*Grand 1  
Ballroom  
Level*

## **From the Forums to the Roadmap**

Audience: General  
Track: Admins/General Interest  
See presenter titles/institutions listed in  
full program description

## **Electronic Resource Central: eRC Grows by Leaps and Bounds**

Audience: General  
Track: Discovery  
Dain Berrett, Product Manager, SirsiDynix

## **BLUEcloud Analytics: It's All about the Bass and the Treble**

Audience: General  
Track: Admins/General Interest  
Nate Berrett, Product Manager, SirsiDynix

## **BLUEcloud Acquisitions and Marketplace: Taking Collection Development to New Heights**

Audience: General  
Track: Cataloging  
Mike Hilmo, Product Manager, SirsiDynix  
*Repeats Wed. @ 2:00*

## **Horizon Basic Administration**

Audience: Horizon  
Track: Admins/General Interest  
Steve Christensen, Senior Support Analyst  
and other Senior Staff, SirsiDynix

## **SQLevate Horizon – A Query Discussion & Sharing Session**

Audience: Horizon  
Track: Horizon  
Lynn Chandler Bertino, Library Systems  
Manager, Wake County Public Libraries;  
Michael Engelbrecht, Library Automation  
Systems Analyst, Charlotte Mecklenburg  
Library

## **Consortia Sharing Session and SIG Meeting**

Audience: General  
Track: Blazing Trails  
Joel Hahn, Database Manager, Cooperative  
Computer Services; Berit Nelson, VP  
Library Relations, SirisiDynix

## **What's Circulating in the BLUEcloud?**

Audience: General  
Track: Circulation  
Melissa Kulmer, Product Manager, SirsiDynix

**COSUGI Business  
Meeting and  
Raffle**  
*Grand 1  
Ballroom Level*



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# TUESDAY, MARCH 31

8:15–9:15 am

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## Best Practices: Backups and Restores

Avoid roadblocks in your technology trail! We'll cover some of the most effective ways to keep your system forging ahead by ensuring that you know best practices for backups and restores.

**Audience:** General

**Track:** Admins/General Interest

*Tuesday 8:15–9:15 am*

*Galleria North, Ballroom Level*

**Presenter:** Todd Roelens, Senior Technical Advisor, SirsiDynix

## BLUEcloud Universal Admin: Get All Your Ducks in a Row

Universal Admin is your starting point for all things BLUEcloud. We'll discuss administrative and staff functions in Universal Admin with a Horizon slant.

**Audience:** Horizon

**Track:** Horizon

*Tuesday 8:15–9:15 am*

*Pavilion East, Plaza Level*

**Presenter:** Julie Williamsen, Product Manager, SirsiDynix; Melissa Kulmer, Product Manager, SirsiDynix

## Library Services Platforms: The New Library Systems

Library systems are progressing from traditional Integrated Library Systems (ILS) to new Library Services Platforms (LSP). This presentation will explore the common components of new and emerging LSPs, including system components and desired effects. Cloud-Computing, Multi-Tenant systems, and Service Oriented Architecture (SOA) will be defined in non-technical terms so that attendees can gain a basic understanding of the technology and purpose behind LSPs. The presentation will end with a brief summary of current and emerging systems, as well as provide links to various websites for further exploration.

**Audience:** General

**Track:** Admins/General Interest

*Tuesday 8:15–9:15 am*

*Broadway I-III, Plaza Level*

**Presenter:** Steven K. Bowers, Executive Director, DALNET (Detroit Area Library System)

## Electronic Resource Central: eRC Grows by Leaps and Bounds

eRC is growing in every way imaginable: more use, more titles, more downloads, more vendors, more SirsiDynix interfaces! We'll cover the basics and beyond in this session.

**Audience:** General

**Track:** Circulation

*Tuesday 8:15–9:15 am*

*Parlor A-C, Ballroom Level*

*Repeated: Tues 3:15–4:15 pm*

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

## Customizing Enterprise to Fit Your Needs

The Enterprise catalog is a great resource for libraries to communicate with their patrons and present their resources. Some of the greatest resources are the Custom JavaScript file, access to the CSS themes, and widgets. This session will review uses such as getting alerts of outages out to patrons via the catalog, allowing only certain items to have item-specific requesting, making Rooms more versatile across profiles, and making links search their related index.

**Audience:** General

**Track:** Discovery

*Tuesday 8:15–9:15 am*

*Galleria South, Ballroom Level*

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

## Efficiency of BLUEcloud Cataloging

We will be presenting the results of a study we are performing that compares the time it takes to catalog in Symphony Workflows vs. cataloging in BLUEcloud Cataloging.

**Audience:** Symphony

**Track:** Cataloging

*Tuesday 8:15–9:15 am*

*Pavilion West, Plaza Level*

**Presenter:** Jennifer Marshall, Collections Manager, Pioneer Library System

## Stump the Chumps: Symphony Q&A

Pick the collective brain of our panel of experts on anything to do with SirsiDynix Symphony or SirsiDynix Medley products (BookMyne, Enterprise, etc.)

**Audience:** Symphony

**Track:** Blazing Trails

*Tuesday 8:15–9:15 am*

*Grand 1, Ballroom Level*

**Presenter:** Joel Hahn, Database Manager, Cooperative Computer Services; John Wohlers, Library Technology Coordinator, Waubesa Community College; Kendal Orrison, Director, Resource Sharing Alliance NFP

9:30–10:30 am

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## BLUEcloud Analytics: It's All about the Bass and the Treble

BLUEcloud Analytics is here! Analytics will give you the big picture on your library services and magnify how even small adjustments may help you better meet the needs of your community.

**Audience:** General

**Track:** Admins/General Interest

*Tuesday 9:30–10:30 am*

*Grand 1, Ballroom Level*

*Repeated: Tues 3:15–4:15 pm*

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

## The New Hennepin County Library Catalog, Part 1 – Overview and Demonstration

Hennepin County Library spent 18 months developing a new catalog from scratch, finally launching in October. Get an in-depth demonstration and hear all the gory details of what it's like to design and build your own catalog. Highlights include super-responsive request and add-to-list buttons, real-time local availability, reader's advisory information, full integration of OverDrive downloadables, login with barcode/pin or username/password, patron reviews, and much more.

**Audience:** Horizon

**Track:** Horizon

*Tuesday 9:30–10:30 am*

*Broadway I-III, Plaza Level*

**Presenter:** Phil Feilmeyer, Integrated Library System Manager, Hennepin County Library



# PROGRAMS

## 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  
**Track:** Admins/General Interest  
*Tuesday 9:30–10:30 am*  
*Pavilion East, Plaza Level*

**Presenter:** Ranny Lacanienta, Director of Product Management, SirsiDynix; Rachel Howell, Release Manager, SirsiDynix

## Online User Registration, Start to Finish at 3AM, no Special Coding Required.

Starting with online registration from Enterprise, and adding in a few pages from e-library and a PIN Notice, Kansas City Public Library is able to allow folks to sign-up for a library card, be minimally validated, place holds and download eResources, all at 3AM with no staff intervention. I'll share all the files that brought us through this process. Kind of out of the box, since no special coding was used.

**Audience:** Symphony  
**Track:** Circulation  
*Tuesday 9:30–10:30 am*  
*Galleria South, Ballroom Level*

**Presenter:** Kathy Maenle, Principal ILS Systems Coordinator, KCMO

## Going BLUEcloud with Enterprise, Portfolio and Other Discovery Products!

The discovery roadmap leads directly to BLUEcloud: Horizon sites can join us to explore the latest updates for Enterprise and Portfolio and learn about the larger discovery roadmap for the BLUEcloud architecture.

**Audience:** Horizon  
**Track:** Discovery  
*Tuesday 9:30–10:30 am*  
*Pavilion West, Plaza Level*

**Presenter:** Jackie McDonough, Product Manager, SirsiDynix

## What's in a (Web) Service?

Learn about how SirsiDynix Web Services play an integral role in the SirsiDynix Library Services platform, BLUEcloud, and your Symphony system

**Audience:** Symphony  
**Track:** Admins/General Interest  
*Tuesday 9:30–10:30 am*  
*Parlor A-C, Ballroom Level*  
**Presenter:** Brent Thompson, Product Manager, SirsiDynix

## Tools Administrators (and Others) Use

Using blat to send report logs. Blat runs on Windows, it's simple to configure, and it's free. If you have a system that can schedule and create reports but isn't able to email those reports, blat can be a great tool. Using Evernote in your day, and then opening up the floor as a sharing session to trade information!

**Audience:** General  
**Track:** Blazing Trails  
*Tuesday 9:30–10:30 am*  
*Galleria North, Ballroom Level*  
**Presenter:** Lynn Chandler Bertino, Library Systems Manager, Wake County Public Libraries

**11:15 am–12:15 pm**

## Guides for the Technology Trail: Support Center, Training and Mentor Updates

It's easier to blaze the technology trail with the right tools! This session will ensure that you have the right directions to all of the training, documentation, solutions and collaborative options that will allow you to make the most of your system.

**Audience:** General  
**Track:** Admins/General Interest  
*Tuesday 11:15 am–12:15 pm*  
*Galleria North, Ballroom Level*  
**Presenter:** Rebecca Muller, Instructional Designer, SirsiDynix; Reed Farnsworth, Knowledge Base Analyst, SirsiDynix

## What's in a (Web) Service?

Learn about how SirsiDynix Web Services play an integral role in the SirsiDynix Library Services platform, BLUEcloud, and your Horizon system.

**Audience:** Horizon  
**Track:** Horizon  
*Tuesday 11:15 am–12:15 pm*  
*Parlor A-C, Ballroom Level*  
**Presenter:** Brent Thompson, Product Manager, SirsiDynix

## BLUEcloud Universal Admin: Get All Your Ducks in a Row

Universal Admin is your starting point for all things BLUEcloud. We'll discuss administrative and staff functions in Universal Admin with a Symphony slant.

**Audience:** Symphony  
**Track:** Admins/General Interest  
*Tuesday 11:15 am–12:15 pm*  
*Pavilion East, Plaza Level*  
**Presenter:** Julie Williamsen, Product Manager, SirsiDynix; Melissa Kulmer, Product Manager, SirsiDynix

## Discover the Northwest Passage with MobileCirc!

MobileCirc frees you to explore the needs of your end users whether they are in the library, out and about the campus or community, or blazing the technology trail in search of more efficient ways to get things done. This session will focus on MobileCirc for Symphony libraries.

**Audience:** Symphony  
**Track:** Circulation  
*Tuesday 11:15 am–12:15 pm*  
*Galleria South, Ballroom Level*  
**Presenter:** Ranny Lacanienta, Director of Product Management, SirsiDynix

## Going BLUEcloud with Enterprise, Portfolio and Other Discovery Products!

The discovery roadmap leads directly to BLUEcloud: Symphony sites can join us to explore the latest updates for Enterprise and Portfolio and learn about the larger discovery roadmap for the BLUEcloud architecture.

**Audience:** Symphony  
**Track:** Discovery  
*Tuesday 11:15 am–12:15 pm*  
*Pavilion West, Plaza Level*  
**Presenter:** Jackie McDonough, Product Manager, SirsiDynix



# TUESDAY, MARCH 31

## **RDA? Authority Control? Lexiles? Keep Your Database Current and Help Your end Users Find All of Your resources with SirsiDynix Data Services**

Would you like to improve the quality of your Horizon or Symphony bibliographic and authority records? Do you need to add RDA or reading program information to your catalog (Lexile, Accelerated Reader and Reading Counts)? 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. We will be discussing the SmartSource upgrade to BC Marc, enhancing bibliographic records, authority processing services, RDA and our reading program updates. All attendees will receive a free bibliographic data analysis report from SirsiDynix—a \$250 value.

**Audience:** General

**Track:** Cataloging

*Tuesday 11:15–12:15 pm*

*Broadway I-III, Plaza Level*

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

## **BLUEcloud Analytics – A User's Status Report**

Where BLUEcloud Analytics stands right now from both Symphony and Horizon perspectives. What's in, what's coming, and a discussion of what we all want to see in this evolving product.

**Audience:** General

**Track:** Blazing Trails

*Tuesday 11:15–12:15 pm*

*Grand 1, Ballroom Level*

**Presenter:** Kendal Orrison, Director, Resource Sharing Alliance NFP; Michael Engelbrecht, Library Automation Systems Analyst, Charlotte Mecklenburg Library

1:45–2:45 pm

## **From the Forums to the Roadmap**

A panel discussion on the current enhancement process, direction of SirsiDynix development teams, strategies for BLUEcloud, and how the enhancement process is being integrated into the SirsiDynix roadmap.

**Audience:** General

**Track:** Admins/General Interest

*Tuesday 1:45–2:45 pm*

*Grand 1, Ballroom Level*

**Presenter:** Natalie Palermo, Assistant Director for Technical Services, Louisiana State University Law Center Library; representatives from SirsiDynix Product Management

## **The New Hennepin County Library Catalog, Part 2 – Under the Hood**

What does it take to build a catalog from scratch? This session will examine the various back-end systems and components that make up the new Hennepin County Library catalog. Integration points include indexing (Solr), authentication (LDAP), a home-grown Horizon API, as well as several vendor APIs (Novelist, Syndetics, and OverDrive)

**Audience:** Horizon

**Track:** Horizon

*Tuesday 1:45–2:45 pm*

*Parlor A-C, Ballroom Level*

**Presenter:** Phil Feilmeyer, Integrated Library System Manager, Hennepin County Library

## **Increase Library Support with Community Funded Services**

Community Funded Services offer new ways to extend your Library's reach into the community via expanded access to materials, payment options and other services. Best of all, these services promote library fund raising while they work!

**Audience:** General

**Track:** Admins/General Interest

*Tuesday 1:45–2:45 pm*

*Galleria North, Ballroom Level*

**Presenter:** Eric Keith, VP Marketing, SirsiDynix; Justin Swain, Account Manager, SirsiDynix

## **A Map, a Compass, and a Little Luck: tools, tips, and troubleshooting techniques for getting the most out of Symphony**

A description of how we configure and use WorkFlows to meet the needs of our library. Including tips for using Custom Policy Lists, User Access Policies, and Scheduled Reports to make life easier for staff. Also how to set up and configure SIP ports. Basic troubleshooting using the Scan History Log report and how to investigate notice problems.

**Audience:** Symphony

**Track:** Circulation

*Tuesday 1:45–2:45 pm*

*Galleria South, Ballroom Level*

**Presenter:** Brenda Cameron, Library Systems Coordinator, Fort Vancouver Regional Library District

## **Help Your Patrons Find Their Way Out of the Rabbit Holes in e-Library**

Do your patrons find e-Library's "0 Matches Found" page almost useless? Our patrons complained that it was a dead end. Also when someone finds a list of titles, but they don't contain what they need, would you like to give them more options? This presentation shows how SCILS Consortium customized the "0 Matches Found" page in eLibrary to be more useful to patrons and added links that carry over searches in "Continue Search in" in e-Library. Also it includes information capturing searches using Google Analytics in the "Continue Search" if you use Google Analytics for collection development.

**Audience:** Symphony

**Track:** Discovery

*Tuesday 1:45–2:45 pm*

*Broadway I-III, Plaza Level*

**Presenter:** Mary Daubenspeck, Systems Librarian, SCILS Consortium

## **Symphony Cataloging Sharing Session**

The session moderator will lead participants in a discussion of common Symphony Cataloging issues. A short update will be provided on current enhancement requests.

**Audience:** Symphony

**Track:** Cataloging

*Tuesday 1:45–2:45 pm*

*Pavilion East, Plaza Level*

**Presenter:** Joel Hahn, Database Manager, Cooperative Computer Services

# PROGRAMS

## Extend your Symphony System with Application Programming Interfaces (APIs) and Web Services

APIs 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:** Symphony

**Track:** Blazing Trails

*Tuesday 1:45–2:45 pm*

*Pavilion West, Plaza Level*

**Presenter:** Margaret Pelfrey, Manager of Training and Consulting, SirsiDynix

3:15–4:15 pm

## BLUEcloud Analytics: It's All about the Bass and the Treble

BLUEcloud Analytics is here! Analytics will give you the big picture on your library services and magnify how even small adjustments may help you better meet the needs of your community.

**Audience:** General

**Track:** Admins/General Interest

*Tuesday 3:15–4:15 pm*

*Pavilion East, Plaza Level*

*Repeated: Tues 9:30–10:30 am*

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

## SQLevate Horizon – A Query Discussion & Sharing Session

A presentation/sharing session of useful SQL queries and a discussion of resources like the SirsiDynix Developer Community and the Horizon-L listserv.

**Audience:** Horizon

**Track:** Horizon

*Tuesday 3:15–4:15 pm*

*Galleria South, Ballroom Level*

**Presenter:** Lynn Chandler Bertino, Library Systems Manager, Wake County Public Libraries; Michael Engelbrecht, Library Automation Systems Analyst, Charlotte Mecklenburg Library

## Horizon Basic Administration

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

**Audience:** Horizon

**Track:** Admins/General Interest

*Tuesday 3:15–4:15 pm*

*Parlor A-C, Ballroom Level*

**Presenter:** Steve Christensen, Senior Support Analyst and other Senior Staff, SirsiDynix

## What's Circulating in the BLUEcloud?

Development for BLUEcloud Circulation is under way! Join this session to learn about planned for first release functionality, interface design, and opportunities to join our Strategic Partner Programs for Circulation.

**Audience:** General

**Track:** Circulation

*Tuesday 3:15–4:15 pm*

*Grand 1, Ballroom Level*

*Repeated: Mon 1:30–2:30 pm*

**Presenter:** Melissa Kulmer, Product Manager, SirsiDynix

## Electronic Resource Central: eRC Grows by Leaps and Bounds

eRC is growing in every way imaginable: more use, more titles, more downloads, more vendors, more SirsiDynix interfaces! We'll cover the basics and beyond in this session.

**Audience:** General

**Track:** Discovery

*Tuesday 3:15–4:15 pm*

*Galleria North, Ballroom Level*

*Repeated: Tues 8:15–9:15 am*

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



## BLUEcloud Acquisitions and Marketplace: Taking Collection Development to New Heights

BLUEcloud Acquisitions and Marketplace are the passage to the future of Collection Development. Join Mike Hilmo for the latest developments.

**Audience:** General

**Track:** Cataloging

*Tuesday 3:15–4:15 pm*

*Broadway I-III, Plaza Level*

*Repeated: Wed 2:00–3:00 pm*

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

## Consortia Sharing Session and SIG Meeting

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

**Audience:** General

**Track:** Blazing Trails

*Tuesday 3:15–4:15 pm*

*Pavilion West, Plaza Level*

**Presenter:** Joel Hahn, Database Manager, Cooperative Computer Services; Berit Nelson, VP Library Relations, SirsiDynix

4:30–5:30 pm

## COSUGI Business Meeting and Raffle

The Membership Business Meeting will include an open forum for discussion and new ideas. The big raffle will also take place throughout the meeting. You must be present to win!

*Tuesday 4:30–5:30 pm*

*Grand 1, Ballroom Level*

**Presenter:** Angie Strait, Chair, Customers of SirsiDynix Users Group, Inc.



# WEDNESDAY, APRIL 1

Daylong	8:15–9:00 am	9:15–10:00 am	10:45–11:45 am
<b>8:00 am–12:00 pm</b> <b>Internet/Print Area</b> <i>Grand Foyer, Ballroom Level</i> Sponsored by EnvisionWare	<i>Galleria North Ballroom Level</i> <b>Bike Lending Made Easy Using the Library System</b> Audience: Symphony Track: Academic Andy Gulati, Systems Librarian, Franklin & Marshall College	<b>Digital Signage Using Reserves and Web Services</b> Audience: Symphony Track: Academic Teri Gallaway, Library Systems & Web Coordinator, Loyola University New Orleans	<b>SirsiDynix Executive Q&amp;A</b> Audience: General SirsiDynix Executive Team <i>Grand 1, Ballroom Level</i>
<b>8:00 am–12:00 pm</b> <b>Visit the Exhibits!</b> <i>Grand II/Foyer, Ballroom Level</i>	<i>Pavilion East Plaza Level</i> <b>Horizon Admin Sharing Session: Not Just for Admins Anymore!</b> Audience: Horizon Track: Horizon Michael Engelbrecht, Library Automation Systems Analyst, Charlotte Mecklenburg Library	<b>Your Library Account Summary</b> Audience: Symphony Track: Circulation Pat Beers, ILS Coordinator / System Administrator, Johnson County Library	<b>12:00–1:00 pm</b> <b>Lunch</b>  Included with your COSUGI Conference registration.
<b>10:00–10:45 am</b> <b>Morning Break</b> <i>Grand II/Foyer, Ballroom Level</i>	<i>Broadway I-III Plaza Level</i> <b>Using OpenRefine to Analyze and Clean Data from Symphony and e-Library</b> Audience: Symphony Track: Discovery Mike Waugh, Systems Librarian, LSU Libraries	<b>Embedded Call Number Search Tools in e-Library</b> Audience: Symphony Track: Discovery Hongfei Li, Systems and Cataloging Librarian, University of the Fraser Valley	<i>Hilton Exhibit Hall (not COSUGI exhibit hall), Ballroom Level</i>
	<i>Parlor A-C Ballroom Level</i> <b>Integration of collectionHQ with a Statewide Symphony Platform</b> Audience: Symphony Track: Cataloging Robert Wetherall, State Data Coordinator, Delaware Division of Libraries	<b>Are You Using All the Bells and Whistles?</b> Audience: Horizon Track: Horizon Jake Rundle, Collections Librarian, Hastings Public Library	
	<i>Galleria South Ballroom Level</i> <b>Instantaneous Gratification Is Not Good Enough</b> Audience: Symphony Track: Admins/General Interest See presenter titles/institutions listed in full program description	<b>Réseau des bibliothèques de l'Université de Moncton – Custom projects (SirsiDynix Scholarship winner.)</b> Audience: Symphony Track: Admins/General Interest Lynn Bissonnette, ILS System Administrator, Université de Moncton	<b>3:00–3:15 pm</b> <b>Afternoon Break</b> <i>Plaza and Ballroom Foyers</i>
	<i>Pavilion West Plaza Level</i> <b>Serial Sharing Session</b> Audience: General Track: Serials Lori Berg, Systems Administrator, St. Louis Public Library	<b>Symphony Reports Sharing Session</b> Audience: Symphony Track: Admins/General Interest Natalie Palermo, Assistant Director for Technical Services, Louisiana State University Law Center Library	
	<i>Grand 1 Ballroom Level</i> <b>Consulting Services: from Basics to Platinum</b> Audience: General Track: Blazing Trails Margaret Pelfrey, Manager of Training and Consulting, SirsiDynix	<b>Symphony API Sharing Session</b> Audience: Symphony Track: Blazing Trails Mark Witteman, Technical Consultant, LOUIS: The Louisiana Library Network	

# SCHEDULE

1:00–1:45 pm

2:00–3:00pm

3:15–4:15pm

<i>Galleria North Ballroom Level</i>	<b>Academic Reserves Sharing Session</b> Audience: Symphony Track: Academic Gloria Shutter, Senior Library Specialist, Harrisburg Area Community College	<b>Transitioning Libraries to Learning Commons – A Systems Approach</b> Audience: Symphony Track: Academic See presenter titles/institutions listed in full program description.	<b>Dacapo: Enriching the Library Experience with Historical Symphony Data</b> Audience: Symphony Track: Blazing Trails Scott Bertagnole, Library Developer, Brigham Young University
<i>Pavilion East Plaza Level</i>	<b>Symphony Circulation Sharing</b> Audience: Symphony Track: Circulation Kathy Maenle, Principal ILS Systems Coordinator, KCPL	<b>Online Patron Registration Two Ways: API vs Web Services</b> Audience: Symphony Track: Circulation Peter Brandt, Director Information Technology, Palm Beach County Library System; Gregory Testa, Systems Analyst II, Chesapeake Public Library	<b>BLUEcloud Products Sharing Session</b> Audience: General Track: Circulation Kelli Staley, Head of Circulation, Collection & Computer Services, Lansing Public Library
<i>Broadway I-III Plaza Level</i>	<b>LibraryThing and Enterprise – Enhancing the User Experience</b> Audience: General Track: Admins/General Interest Lori Berg, Systems Administrator, St. Louis Public Library	<b>BLUEcloud Campus: From Lists to ERMs, Discovery and Beyond, We've Got You Covered. Repeats @ 3:15</b> Audience: General Track: Admins/General Interest Carla Clark, Product Manager, SirsiDynix; Rick Branham, VP Global Accounts and Academic Library Initiatives, SirsiDynix	<b>BLUEcloud Campus: From Lists to ERMs, Discovery and Beyond, We've Got You Covered.</b> Audience: General Track: Academic Carla Clark, Product Manager, SirsiDynix; Rick Branham, VP Global Accounts and Academic Library Initiatives, SirsiDynix
<i>Parlor A-C Ballroom Level</i>	<b>Just Another Day in the Lab</b> Audience: General Track: Blazing Trails Sean Farrell, Assistant Director, Library of Hattiesburg Petal & Forrest County	<b>Extend Your Horizon System with SQL and Web Services</b> Audience: Horizon Track: Horizon Jeremy Newville, Consultant, SirsiDynix	<b>Using the Horizon Database as a Source for Patron Authentication</b> Audience: Horizon Track: Horizon Janet Horne, Manager Library Systems, Vancouver Public Library
<i>Galleria South Ballroom Level</i>	<b>Using Horizon Web Services With an Open SourceDiscovery Layer.</b> Audience: Horizon Track: Horizon Kevin Smith, Senior Manager for Technology, Wake County Public Libraries	<b>EDI Case Study: How I Learned to Stop Worrying and Love EDI</b> Audience: Symphony Track: Acquisitions Melissa Carle, Library Systems and Service Program Manager, The Kansas City Public Library	<b>Symphony System Administration (Unix) Sharing Session</b> Audience: Symphony Track: Blazing Trails Pat Beers, System Administrator / ILS Coordinator, Johnson County Library
<i>Pavilion West Plaza Level</i>	<b>Customizing Enterprise Using jQuery Widgets</b> Audience: General Track: Discovery John Wohlers, Library Technology Coordinator, Waubonsee Community College	<b>BLUEcloud Acquisitions and Marketplace: Taking Collection Development to New Heights</b> Audience: General Track: Blazing Trails Mike Hilmo, Product Manager, SirsiDynix	<b>BLUEcloud Cataloging – Bringing Features, Functionality &amp; the Future</b> Audience: Horizon Track: Cataloging Melissa Kulmer, Product Manager, SirsiDynix
<i>Grand 1 Ballroom Level</i>	<b>Working 3 to 5: Implementing the New Item Categories</b> Audience: Symphony Track: Cataloging Joel Hahn, Database Manager, Cooperative Computer Services	<b>Horizon: Roadmaps, Strategic Partner Programs and Development Processes</b> Audience: Horizon Track: Horizon Ranny Lacanienta, Director of Product Management, SirsiDynix; Rachel Howell, Release Manager, SirsiDynix	<b>Web Services Sharing Session: Sparking New Ideas</b> Audience: General Track: Admins/General Interest John Wohlers, Library Technology Coordinator, Waubonsee Community College

# WEDNESDAY, APRIL 1

8:15–9:00 am

## Bike Lending Made Easy Using the Library System

Franklin & Marshall College is using our Symphony system to catalog and circulate bicycles for our Bike Loan program. Many considerations went into establishing this process, including types of bikes. Now after two successful school terms, we can share what we've learned about the process.

**Audience:** Symphony

**Track:** Academic

*Wednesday 8:15–9:00 am*

*Galleria North, Ballroom Level*

**Presenter:** Andy Gulati, Systems Librarian, Franklin & Marshall College

## Horizon Admin Sharing Session: Not Just for Admins Anymore!

Seasoned veterans and Horizon rookies come together to share their successes and lingering issues. Spent some time in the BLUEcloud? Tell us about it. Can't figure out a problem? We are here to help.

**Audience:** Horizon

**Track:** Horizon

*Wednesday 8:15–9:00 am*

*Pavilion East, Plaza Level*

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

## Instantaneous Gratification Is Not Good Enough

The Kansas City, Kansas Public Library just launched its eCommunity web site. Register for an eCard and immediately get access to our eContent without ever stepping foot in the library. We'll share the philosophy and mechanics of the creation and success of this step toward lowering the barriers to access for our patrons.

**Audience:** Symphony

**Track:** Admins/General Interest

*Wednesday 8:15–9:00 am*

*Galleria South, Ballroom Level*

**Presenter:** David Hanson, Assistant Director of Libraries, Kansas City, Kansas Public Library; Nancy Haag, Information Technology Manager, Kansas City, Kansas Public Library; Carol Levers, Director of Libraries, Kansas City, Kansas Public Library

## Serials Sharing Session

Serials in Symphony and Horizon will be discussed. Have issues? Let's talk!

**Audience:** Symphony

**Track:** Serials

*Wednesday 8:15–9:00 am*

*Pavilion West, Plaza Level*

**Presenter:** Lori Berg, Systems Administrator, St. Louis Public Library

## Using OpenRefine to Analyze and Clean Data from Symphony and e-Library

OpenRefine is a free, open source tool that is great for working with messy data. Learn how to use OpenRefine to analyze your data, to clean up your data and to match your data to other data sets. Examples will include data extracted from Symphony reports (standard and custom reports) and e-Library web logs.

**Audience:** Symphony

**Track:** Discovery

*Wednesday 8:15–9:00 am*

*Broadway I-III, Plaza Level*

**Presenter:** Mike Waugh, Systems Librarian, LSU Libraries

## Integration of collectionHQ with a Statewide Symphony Platform

The workshop will feature a case study of more than 50 multitype libraries in Delaware utilizing a collectionHQ account to maximize efficiency. Through the application of evidence based selection, Delaware libraries are able to better serve all Delaware residents. The State of Delaware provides the Delaware Library Catalog, a statewide ILS (Symphony) which includes all public libraries in Delaware, as well as many academic, school and special libraries. Combining this with collectionHQ helps libraries provide excellent service to their patrons.

**Audience:** Symphony

**Track:** Cataloging

*Wednesday 8:15–9:00 am*

*Parlor A-C, Ballroom Level*

**Presenter:** Robert Wetherall, State Data Coordinator, Delaware Division of Libraries

## Consulting Services: From Basics 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 and 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

**Track:** Blazing Trails

*Wednesday 8:15–9:00 am*

*Grand 1, Ballroom Level*

**Presenter:** Margaret Pelfrey, Manager of Training and Consulting, SirsiDynix

9:15–10:00 am

## Digital Signage Using Reserves and Web Services

This session describes Loyola University New Orleans desire to create digital signage to display equipment and library room availability. This project was accomplished using the Reserves module, Web Services and a little bit of JavaScript, HTML, and CSS.

**Audience:** Symphony

**Track:** Academic

*Wednesday 9:15–10:00 am*

*Galleria North, Ballroom Level*

**Presenter:** Teri Gallaway, Library Systems & Web Coordinator, Loyola University New Orleans

## Are You Using All the Bells and Whistles?

Horizon has some pretty neat bells and whistles, but knowing all of them and seeing them in a working context is sometimes akin to pulling teeth. This session will be a working demonstration by a few libraries on some of the neat things that Horizon has the capability to do, but maybe haven't had someone show you just how it's done and you don't have the time to learn it all on your own. A few specific items: self-service checkout, batch print spine label, user self registration (through HIP or Enterprise) and long-term circ history. Other topics can be brought up as the discussion progresses.

**Audience:** Horizon

**Track:** Horizon

*Wednesday 9:15–10:00 am*

*Parlor A-C, Ballroom Level*

**Presenter:** Jake Rundle, Collections Librarian, Hastings Public Library



# PROGRAMS

## Réseau des bibliothèques de l'Université de Moncton - Custom projects (SirsiDynix Scholarship winner.)

As an only French-language university in Atlantic Canada, we have developed partnerships with four hospitals of New Brunswick, as well as the provincial French-language Community Colleges. This allowed us the opportunity to offer our expertise to these organizations and to create a network of French-language post-secondary libraries. That has raised some challenges. In an era of environment awareness and requested by our customers, we have programmed circulation payment receipts send by email and the automatized accounting reports for those payments. Also, we have developed a few in-house products such as conversion scripts and translation scripts for data upload.

**Audience:** Symphony

**Track:** Admins/General Interest

*Wednesday 9:15–10:00 am*

*Galleria South, Ballroom Level*

**Presenter:** Lynn Bissonnette, ILS System Administrator, Université de Moncton

## Your Library Account Summary

Your Library Account Summary is a HTML formatted account summary report. The report includes summary information (No. of checkouts, No. of active holds, amount owed) and the report the details of items checked out, available holds and bills. The report also contains links to patron account information, a link to pay on line and a link that allows patrons to post questions or comments.

**Audience:** Symphony

**Track:** Circulation

*Wednesday 9:15–10:00 am*

*Pavilion East, Plaza Level*

**Presenter:** Pat Beers, ILS Coordinator / System Administrator, Johnson County Library

## Embedded Call Number Search Tools in e-Library

It has been always hard for users to make a call number search in e-Library if they do not have a particular call number. Usually users don't know where to find LC classification, and are not willing to get into the details even if they know. The call number search tools used in University of the Fraser Valley help users quickly find the call number ranges they want to browse. The tools are embedded in e-Library call number search page. Users get AJAX search suggest for LC classification as soon as they start typing in the call number search box. Additional tools provide

users a complete drill-down LC classes browse, and a search interface for finding multiple ranges of LC classes. The codes and tools will be shared to COSUGI members.

**Audience:** Symphony

**Track:** Discovery

*Wednesday 9:15–10:00 am*

*Broadway I-III, Plaza Level*

**Presenter:** Hongfei Li, Systems and Cataloging Librarian, University of the Fraser Valley

## Symphony Reports Sharing Session

The session moderator will lead participants in a discussion of Symphony Reports issues.

**Audience:** Symphony

**Track:** Admins/General Interest

*Wednesday 9:15–10:00 am*

*Pavilion West, Plaza Level*

**Presenter:** Natalie Palermo, Assistant Director for Technical Services, Louisiana State University Law Center Library

## Symphony API Sharing Session

The session moderator will lead participants in a discussion of questions, achievements, and common issues with the Symphony API.

**Audience:** Symphony

**Track:** Blazing Trails

*Wednesday 9:15–10:00 am*

*Grand 1, Ballroom Level*

**Presenter:** Mark Witteman, Technical Consultant, LOUIS: The Louisiana Library Network

10:45–11:45 am

## SirsiDynix Executive Q&A

Join the SirsiDynix executive staff for an open Q&A session and get answers straight from company leaders. 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.

**Audience:** General

*Wednesday 10:45–11:45 am*

*Grand 1, Ballroom Level*

**Presenters:** SirsiDynix Executive Team

1:00–1:45 pm

## Academic Reserves Sharing Session

The session moderator will lead participants in a discussion of common Symphony Academic Reserves issues. A short update will be provided on current enhancement requests.

**Audience:** Symphony

**Track:** Academic

*Wednesday 1:00–1:45 pm*

*Galleria North, Ballroom Level*

**Presenter:** Gloria Shutter, Senior Library Specialist, Harrisburg Area Community College

## Using Horizon Web Services With an Open Source Discovery Layer.

Wake County Public Libraries, in conjunction with the Marmot Library Network is implementing a new Discovery Layer product using the newest release of Horizon Web Services. Learn how HWS has improved performance and allowed us to move away from our strained SIP connection and direct calls to the Horizon database.

**Audience:** Horizon

**Track:** Horizon

*Wednesday 1:00–1:45 pm*

*Galleria South, Ballroom Level*

**Presenter:** Kevin Smith, Senior Manager for Technology, Wake County Public Libraries

## LibraryThing and Enterprise – Enhancing the User Experience

St. Louis Public Library has been using LibraryThing to provide recommended reading lists and additional content to Enterprise. I'll be sharing what works, what doesn't seem to work. See if LibraryThing is The Thing for you.

**Audience:** General

**Track:** Admins/General Interest

*Wednesday 1:00–1:45 pm*

*Broadway I-III, Plaza Level*

**Presenter:** Lori Berg, Systems Administrator, St. Louis Public Library

# WEDNESDAY, APRIL 1

## Symphony Circulation Sharing

The session moderator will lead participants in a discussion of common Symphony Circulation issues. Includes tips and tricks and general discussion from the audience.

**Audience:** Symphony

**Track:** Circulation

*Wednesday 1:00–1:45 pm*

*Pavilion East, Plaza Level*

**Presenter:** Kathy Maenle, Principal ILS Systems Coordinator, KCPL

## Customizing Enterprise Using jQuery Widgets

Using the power of jQuery it is possible to heavily customize Enterprise. This presentation will cover the basics of inserting jQuery based JavaScript into Enterprise, and interacting with Enterprise and Web Services data to allow you to tailor Enterprise to the needs of your library.

**Audience:** General

**Track:** Discovery

*Wednesday 1:00–1:45 pm*

*Pavilion West, Plaza Level*

**Presenter:** John Wohlers, Library Technology Coordinator, Waubensee Community College

## Working 3 to 5: Implementing the New Item Categories

A case study in one consortium's implementation of the new Item Category 3, 4, and 5 fields, including integration into Enterprise & local statistics reports and also the retrospective conversion of existing records.

**Audience:** Symphony

**Track:** Cataloging

*Wednesday 1:00–1:45 pm*

*Grand 1, Ballroom Level*

**Presenter:** Joel Hahn, Database Manager, Cooperative Computer Services



## Just Another Day in the Lab

The Library of Hattiesburg Petal & Forrest County has three public computing labs (Public Access, Homework Center, and Early Learning) as well as numerous OPAC stations. The machines run Windows XP, Windows 7, and Windows 8. Multiple missions and operating systems make control of the machines a challenge. See what free and commercial solutions our library has adopted – come with your own experiences to share.

**Audience:** General

**Track:** Blazing Trails

*Wednesday 1:00–1:45 pm*

*Parlor A-C, Ballroom Level*

**Presenter:** Sean Farrell, Assistant Director, Library of Hattiesburg Petal & Forrest County

2:00–3:00 pm

## Transitioning Libraries to Learning Commons – A Systems Approach

In September 2012 School District 57, Prince George, BC began transitioning the district resource center to a district learning commons. Working within the framework of continuous inquiry, learning collaboratively, reflective practice and learning by doing, they have realized the importance of the library system in moving forward. This presentation will focus on the importance of the library system as an integral part of the journey. The presenters will share their experiences in this transition of libraries to learning commons.

**Audience:** Symphony

**Track:** Academic

*Wednesday 2:00–3:00 pm*

*Galleria North, Ballroom Level*

**Presenter:** Monica Berra, District Vice Principal Learning & Innovation - Learning Commons, SD57 Prince George BC; Cathy Gordy, Sr. Library Technician, SD5757 Prince George, BC

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

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

**Audience:** Horizon

**Track:** Horizon

*Wednesday 2:00–3:00 pm*

*Grand 1, Ballroom Level*

**Presenter:** Ranny Lacanienta, Director of Product Management, SirsiDynix; Rachel Bowell, Release Manager, SirsiDynix

## BLUEcloud Campus: From Lists to ERMs, Discovery and Beyond, We've Got You Covered.

Join Carla and Rick in exploring how BLUEcloud Campus and the SirsiDynix Library Services Platform can break down the silos at your institution.

**Audience:** General

**Track:** Admins/General Interest

*Wednesday 2:00–3:00 pm*

*Broadway I-III, Plaza Level*

*Repeated: Wed 3:15–4:15 pm*

**Presenter:** Carla Clark, Product Manager, SirsiDynix; Rick Branham, VP Global Accounts and Academic Library Initiatives, SirsiDynix

## Online Patron Registration Two Ways: API vs Web Services

A look at Online Patron Registration from two approaches. Palm Beach County Library System and Chesapeake Public Library share how they created an online registration form giving patrons a new user experience. We will cover development of the form using webpage coding, API, perl as well as the approach to use SirsiDynix's WebServices for form validation (setting mandatory fields and editing masks - email, phone number, valid pin length and type, etc.) and ILS record creation.

**Audience:** Symphony

**Track:** Circulation

*Wednesday 2:00–3:00 pm*

*Pavilion East, Plaza Level*

**Presenter:** Peter Brandt, Director Information Technology, Palm Beach County Library System; Gregory Testa, Systems Analyst II, Chesapeake Public Library

## EDI Case Study: How I Learned to Stop Worrying and Love EDI

EDI is a big, hairy, scary monster in the corner with Sirsi documentation that does not feel like warm-fuzzies. But it can be done! We embarked upon a 12-month process of re-imagining our Acquisitions routine with 9XX ordering and EDI. This presentation will walk through the steps in our project management as we brought on two vendors to EDI/9XX ordering. We will show you what you can "set and forget", and what parts of the process need an occasional checkin, and what parts will need constant monitoring, all with a YMMV. Throughout this process, we sought to use delivered tools, which are more long-term sustainable, and did make use of some SirsiDynix consulting hours over the long-haul and Instructor Led Training. There were points in the

# PROGRAMS

process where this was really necessary for us, so I will present those as, here's how you go it alone or here's where you may want to ask for help (because we did).

**Audience:** Symphony

**Track:** Acquisitions

*Wednesday 2:00–3:00 pm*

*Galleria South, Ballroom Level*

**Presenter:** Melissa Carle, Library Systems and Service Program Manager, The Kansas City Public Library

## Extend Your Horizon System with SQL and Web Services

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:** Horizon

**Track:** Horizon

*Wednesday 2:00–3:00 pm*

*Parlor A-C, Ballroom Level*

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

## BLUEcloud Acquisitions and Marketplace: Taking Collection Development to New Heights

BLUEcloud Acquisitions and Marketplace are the passage to the future of Collection Development. Join Mike Hilmo for the latest developments.

**Audience:** General

**Track:** Blazing Trails

*Wednesday 2:00–3:00 pm*

*Pavilion West, Plaza Level*

*Repeated: Tues 3:15–4:15 pm*

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

3:15–4:15 pm

## BLUEcloud Campus: From Lists to ERMs, Discovery and Beyond, We've Got You Covered.

Join Carla and Rick in exploring how BLUEcloud Campus and the SirsiDynix Library Services Platform can break down the silos at your institution.

**Audience:** General

**Track:** Academic

*Wednesday 3:15–4:15 pm*

*Broadway I-III, Plaza Level*

*Repeated: Wed 2:00–3:00 pm*

**Presenter:** Carla Clark, Product Manager, SirsiDynix; Rick Branham, VP Global Accounts and Academic Library Initiatives, SirsiDynix

## Using the Horizon Database as a Source for Patron Authentication

At VPL, patrons use their library cards to access many library services beyond traditional borrowing of physical materials. This session will describe how we use our Horizon database to count the number of individuals using public computers, wifi, and electronic databases. Tracking these uses in one place enables us to count the number of users and identify as active users borrowers who never check out physical materials.

**Audience:** Horizon

**Track:** Horizon

*Wednesday 3:15–4:15 pm*

*Parlor A-C, Ballroom Level*

**Presenter:** Janet Horne, Manager Library Systems, Vancouver Public Library

## Web Services Sharing Session: Sparking New Ideas

Share your experiences with using Web Services. There is no use that is too small to share. Remember, anything you have created may just provide that spark of inspiration to someone else. Trying to think of a good use for web services in your library? Come to this session and listen in. Have a great idea, but don't know how to turn that idea to reality? Come to this session and share your idea.

**Audience:** General

**Track:** Admins/General Interest

*Wednesday 3:15–4:15 pm*

*Grand 1, Ballroom Level*

**Presenter:** John Wohlers, Library Technology Coordinator, Waubesa Community College

## BLUEcloud Products Sharing Session

Pilot participants, SPP participants and the curious can gather together to share.

**Audience:** General

**Track:** Circulation

*Wednesday 3:15–4:15 pm*

*Pavilion East, Plaza Level*

**Presenter:** Kelli Staley, Head of Circulation, Collection & Computer Services, Lansing Public Library

## Dacapo: Enriching the Library Experience with Historical Symphony Data

In 2013, the Harold B. Lee Library (HBL) at Brigham Young University developed a new open-source software program called Dacapo. This new program harvests historical transaction data as well as real-time updates from Symphony and makes it available via a suite of RESTful web services. This presentation will briefly discuss the technology behind the software, explain how to download and install it, and demonstrate how the HBL has used it to solve a number of previously difficult problems and challenges.

**Audience:** Symphony

**Track:** Blazing Trails

*Wednesday 3:15–4:15 pm*

*Galleria North, Ballroom Level*

**Presenter:** Scott Bertagnole, Library Developer, Brigham Young University

## BLUEcloud Cataloging – Bringing Features, Functionality & the Future

BLUEcloud Cataloging is available for Horizon and getting new features every month! We'll cover current capabilities and take a look at upcoming features like expanded merge, authority control and browse searching in BLUEcloud.

**Audience:** Horizon

**Track:** Cataloging

*Wednesday 3:15–4:15 pm*

*Pavilion West, Plaza Level*

**Presenter:** Melissa Kulmer, Product Manager, SirsiDynix

## Symphony System Administration (Unix) Sharing Session

General Symphony Administration Sharing Session

**Audience:** Symphony

**Track:** Blazing Trails

*Wednesday 3:15–4:15 pm*

*Galleria South, Ballroom Level*

**Presenter:** Pat Beers, System Administrator / ILS Coordinator, Johnson County Library





# EXHIBITORS

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# EXHIBITORS

## Public Information

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#4

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### Rasmussen Software

#14

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Bob Rasmussen

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www.anzio.com



### SirsiDynix

#6

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