**COSUGI – March 6-8, 2024 Provo, UT Bruce's Report**

**Opening Session**
Various SirsiDynix Employees and Management

General update on the company and the direction they are going, pushing forward on BLUEcloud products. A couple brief references were made to the problems with Solus and the BLUEcloud Mobile app that unexpectedly went down earlier this year. They mentioned they had cash flow problems, but were very nebulous about the problem with their contractor Solus. SirsiDynix is owned by a private equity firm. They mentioned having to ask their ownership for money to develop a new app from scratch in-house, called BLUEcloud Mobile 2, and they told us it was a positive thing because they are using the development of that product to speed up the development of other BLUEcloud products, many of which have been in development for a long time.

Later in the conference, an employee at another Symphony library shared an email with me that was from Solus, the UK company that wrote and supported the original BLUEcloud Mobile app that was abandoned. That email claimed that SirsiDynix had not paid them for services rendered. There has been a court case, "Solus v. Sirsidynix", and the two companies are currently in arbitration. Thankfully, UPRLC is not directly involved in this because we never used the SirsiDynix app.

**Circulation Training for Patron-Centred Service**
Kirsten Andersen, Systems Administrator, Greater Victoria Public Library (British Columbia).

This library has a hiring pool of staff for paraprofessional positions. When offered a position at the library, new staff are not assigned a specific library branch. They immediately go into a training environment instead, are evaluated, and eventually are assigned into a department at a branch library. I mention that because it seems to be key to allowing such an intensive training program. However, there are still takeaways from their training procedures that could benefit us libraries without this type of hiring practice.

Some points from the presenter.

- Always focus on training people to get them to think about what they do, from the patron's perspective.
- Build on whatever skills they bring from their past job background.
- Use role-specific training and practical exercises to build skills.
- Start with broad concepts, including teaching the library's organizational values first, before working on the technical part of accomplishing specific tasks.
- Use a variety of training approaches to adapt to different learning types: classroom style, 1-on-1, conversational, written exercises, "gamification", and self-directed learning.
- Training regimen involves: finding out what new staff already know, establishing learning objectives, pre-assessment, participation in training activities, post-training assessment, summarizing how training went.
- Some training steps.
    - Have them tell stories about their own recent positive or negative customer service interaction.
    - "Field Trip" – a focused walkaround of the library to show where everything is, how services work, and to illustrate their role in making the library function.

    - Conversations. One-on-one conversations with a branch manager to discuss the role they will be filling.
    - Self-Directed learning following video instruction.
    - Task-oriented learning. For example, how to renew a library account, place a hold, etc.
    - Role playing.
- Use a formalized training schedule, starting in a classroom, then moving to a library location.
- Analyze what are the most common interactions at the service desk and focus on training those tasks first.
- The presenter categorized the types of job duties for circulation staff: Finding Materials, Check In/Out, Holds, Patron Accounts, Collection Maintenance.

**Rebalancing and Reconnecting with Our Collection Using BLUEcloud Analytics (BcA)**
Multiple staff, Henrico County Public Library (Virginia).

This turned out to be a session about using BLUEcloud Analytics to manage floating collections within a large library system with branches. However, it did introduce me to the concept of BcA templates that are shared between SirsiDynix customers, which can be utilized and customized without using our SirsiDynix consulting time. It also introduced how they use BcA reports to do shelf-checks monthly. One of the more detailed things BcA can do is to be programmed to know the contents of each physical shelf in the library. This library uses that functionality to monitor shelving capacity. They use that data to keep shelves from overflowing, and to identify items that are not in demand at one branch, and move them to another branch to see if they do better there. Really advanced collection development! There are definitely ways we could use this type of knowledge at our library, without the floating collection component. We do have some multi-branch libraries in Superiorland, but to my knowledge they don't use floating collections. It will be a lot of work to set up BLUEcloud Analytics and use it to its potential.

**Preparing Your Library for Emerging Technologies**
Ricardo Mesa, IT Network Supervisor, Jefferson Parish Library (Louisiana).

Was mostly about Artificial Intelligence. Discussed pitfalls for being too reliant on AI and guarding against plagiarism in academic libraries. Librari is an AI tool that libraries can use to answer questions. This product is said to be expensive. General consensus, AI is not ready yet for libraries to use, and we should be careful about facilitating access to the public. TBH, not the most useful session I attended.

**Roadmaps: The Big Picture**
Berit Nelson, SirsiDynix Product Manager

Most of these are behind the scenes type of updates that they are working on, but will make the product more usable, especially for those who are already on BLUEcloud, or have more advanced IT environments.

- The version of Java that SirsiDynix products use internally will be updated soon → Java 17. The older versions currently used are older versions. Newer version = better application security.
- Improved cookie handling coming to web-based staff products.
- Web services will improve third party support.
- More uptime monitoring of library systems by SirsiDynix staff.
- SIP2 to web products protocol will be updated, will improve OverDrive support.

- Single-sign-in for BLUEcloud products, along with Multi Factor Authentication, including third party single-sign-on using Microsoft Azure accounts.

**BLUEcloud Analytics Sharing Session**
Michelle Porter, Support Systems Manager, Lincoln City Libraries (Nebraska)
Heather Lubchansky, Systems Admin/Head of IT, Sussex County Library (New Jersey)
Sheri Glon, Data Coordinator, Kent District Library (Michigan)

They gave some use-case scenarios for how BcA is being used to develop reports at their libraries. Audience input as well. We have BcA in our new SirsiDynix renewal. BcA is not something that SirsiDynix developed by themselves, they work with a software consultant that primarily works with clients in the financial sector. It looks to have a lot of potential.

The presenter from Kent District Library (Michigan) showed how they used BcA to create a library dashboard tracking all their usage, using "Key Performance Indicators" (KPI). Their dashboard basically replaces what our library is currently trying to do with monthly emailed reports that we put into a master Excel spreadsheet to track usage. This is a big opportunity for UPRLC libraries to streamline their reporting, if we can get our heads around BcA. I hope to use this product. I am also hoping it is not extremely difficult to set up, and we can get good help from SirsiDynix consulting.

Another usage case for BcA is to easily find mistakes in how things are cataloged, to find outlying data that needs corrections. Cleaning up rogue bibliographic data is a never-ending job, so an easy tool to help find problematic data would be a nice thing to have.

SirsiDynix Mentor (their online training portal) has some Q&A sessions archived to illustrate how to use BcA. There is also a BcA listserve, and a BcA enhancements forums to investigate how other libraries are using BcA.

Sheri Glon from Kent DL has a video on YouTube that shows her dashboard in BcA. This is pretty neat… https://www.youtube.com/watch?v=wey7QRrJNG8

**Labels, Labels, Labels**
Karen Wickwire, Assistant Collection Development Manager, Johnson County Library (Kansas).

Outlined how they went about a project where they relabeled their entire adult fiction collection. They are interfiling all fiction types. They interfiled but kept an indicator on the bottom of the printed label that identifies the genre they assigned.

They received good feedback from staff, because everything is easier to shelve. Genres can be tricky to manage, since authors can write across several genres. They thought it better to shelve all fiction items by one author together. There wasn't much of a technical aspect to the presentation, was mainly about making it easier for their patrons to find things.

**BLUEcloud Circulation: A Day in the Life**
Carla Clark, SirsiDynix Product Manager

For anyone who says, "the WorkFlows interface is too outdated", there is BLUEcloud Circulation. This is a modernized interface that runs in a web browser. They have been working on this product for a very long time, and it's not quite done yet. The advantage of WorkFlows is that it is a mature product.

BLUEcloud Circ Positives / Recent Advancements:

- New "modern" structure.
- They have recently added these features already found in WorkFlows.
    - Can now edit due date without doing a renewal.
    - Improved printing of checkout receipts.

Things BLUEcloud Circ can do that WorkFlows cannot.

- Advanced view of the holds shelf. Can view everything on the holds shelf, and then limit to what items are expired.
- Can do a "brief" patron registration. Not sure our library would use this feature.
- Can suppress patron notes from showing up.
- Printing checkout receipts without having to acknowledge it to print, can just print automatically. IMHO, we prefer to be asked, but I think that it can handle either behavior.

Things that are still lacking in BLUEcloud Circ that we have in WorkFlows.

- Cannot do customized checkout receipts. PWPL puts our hours of operation and some other information on every checkout receipt. They hope to add this to BLUEcloud Circ by the end of 2024. This is a dealbreaker for me currently.
- Cannot view prior histories for patron checkouts, bills, and holds. They say this will come in 2025.
- No right-clicking on anything, but they say this is not needed once you get used to it.
- There are more refinements coming.

I think PWPL is willing to test BLUEcloud circulation, but I would not want to fully use it at the front desk just yet.

**Symphony Update**
Shawn Andary, SirsiDynix Product Manager 😊😊

4.1.0 has been out since November 2023. 4.1.1 is coming soon during Q2 of 2024. Jeremy Morelock says we will be going to 4.1.1 directly. UPRLC is currently on version 3.7.1.

4.1.0 Notes (out now):

- There will be more control over the user display interface. Longer addresses for one, and other improvements.
- Better keyword search capabilities.
- Within consortia like UPRLC there will be improved item sorting. Will show home library items first, then the other libraries alphabetically.
- IMMS intelligent materials management system is an additional product to do demand management. Uses item categories 6-10 (available to non IMMS customers too.)

- SSO single sign on capable. Can use BLUEcloud authentication (optional).
- Improved data control and bug fixes.
- Larger csv files will no longer crash the server.

4.1.1 Notes (coming Q2 of 2024):

- Mac M1 and M2 hardware compatible.
- Apache 9 server compatible.
- New RFID integration with vendor products.
- Symphony web has easier printing (don't have to say yes to every slip – see my reference in the BLUEcloud Circulation product, they are adding this feature to WorkFlows too).
- Can use a separate printer for hold wrappers. We don't use hold wrappers, but if you library does, such as for a self-service holds shelf, you can route hold wrappers to a different printer, such as a laser printer that gives a bigger wrapper for more item privacy.
- More patron account security between libraries.
- Many enhancements for IMMS (a product we have not purchased, and probably will not).
- Bug fixes. Symphony web global item modifications fix. sFTP scripts fix (vendor acquisitions users). Fix for delta harvest. Update for iMac user's notification fix.

4.2 Notes (2025?):

- Fix various vulnerabilities as they are identified.
- Better security with an audit trail for transactions.
- Multiple ownership of reports.
- Single sign on support for multiple IdP's (the method of login, like BLUEcloud login, MS Azure etc.).
- Improved control over keeping display order correct.
- Auto population of ZIP code based on city field.
- Auto population of item price taken from 020 or 024 bibliographic sub fields.
- Ability to limit pickup library based on item type (helpful for library of things items that do not go into transit between branches in a multi-branch system).
- Mandatory return at original library for big items.
- Report clean up module.

**Getting Better Organized with Trello (web-based list-creation application)**
Eric Sisler, Library Network Specialist, Westminster Public Library (Colorado)

Trello is a web-based project management application. It allows a team to work together on a "kanban" style interface. Kanban literally means "signboard" in Japanese. They use it to show where a job is in the process, such as: Backlogged, Doing It, Under Review, Done. It helps them keep tasks organized among a large staff. Also, reminders and recurring reminders, much in the way I personally use Microsoft Outlook Calendar. Speaking of Microsoft, there are some of these features found in Trello in MS Teams. Trello has a free and a paid version.

**Integrating BLUEcloud Analytics with Geographical Information Systems (GIS)**
Burr Osoinach, Electronic Resource and Technology Librarian, Cobb County Public Library System (Georgia).

This was an interesting session. Their county government gave them access to their professional GIS system (Esri ArcGIS Pro), which is an expensive product they likely would not buy on their own. At first, they were skeptical about using GIS as a tool. It can be difficult to learn, you must keep your data points anonymous, etc. They were asking themselves, "do we really need it?"

GIS software uses census data, allowing the library to compare its own data. It gives a better understanding of their service area and the community being served. Most of what they map is at the census tract level. They use BLUEcloud analytics to prepare the Sirsi side of the data. They remove patron PII like names and addresses and use GIS to put them into census tracts to visualize them. They use GIS for their own purposes, and to answer questions for others.
Examples: usage dashboard by tract, a map of what patrons are using what libraries in their system. Could be used to map digital vs physical circulation.

There is a free open-source version of GIS software that could be used, called QGIS. According to the presenter, "QGIS is fine". He showed some data that was collected with ArcGIS Pro, and the same data collected with QGIS, which was similar.

Other examples of what they have mapped:

- Poverty status vs unpaid bills in the SirsiDynix system.
- Heat maps for percentage of library card users, or any other variable.
- CDC social vulnerability index to identify populations in need of more services, such as bookmobile, etc.

Need upgraded video cards to do the intensive stuff. Our City has ArcGIS, but I'm not sure they would let us use it.

**Introducing BLUEcloud Discovery**
Adam Vistor, SirsiDynix Product Manager

This is the public online catalog product in the BLUEcloud suite.
Notes:

- It is still in early development.
- Will integrate with BLUEcloud Mobile 2 app, and build off of that work.
- Centralized search for all our resources, print or electronic.
- Looks and feels like a Wordpress or Drupal website.
- Many customer enhancements such as putting email communications into user account.
- Component library to add enhancements to the product. This could be presented in an AppStore like interface, with modules that can be added to the product, which would save on consulting time so it's not being used to implement the same enhancements over and over at different SirsiDynix customer sites.
- They will be redoing the search facets in the left pane (as currently seen in Enterprise). Users will be able to rearrange facets.
- Search within a search, ie "Search Within These Results" option.

- Boolean searching needs to be added still (AND, OR, NOT, AND NOT logical expressions).
- They claim this product will better handle non-traditional items that don't really fit the MARC record structure.
- Improved connectors to popular e-resources content (OverDrive, etc.).

**Summation**

SirsiDynix has two ILS products, Symphony (our product) and Horizon. SirsiDynix is continuing to try to bring development of those two products together with the BLUEcloud suite of products. It's expensive to develop both Symphony and Horizon independently. It is also difficult to get customer buy-in on a new product (BLUEcloud) that has a new interface. However, customers seem mostly happy with the products currently. BLUEcloud Analytics is a product that big libraries use to wrangle massive amounts of data. Smaller libraries are not well-represented at COSUGI. I am hoping that BLUEcloud Analytics proves useful to libraries in our cooperative. SirsiDynix has continued hiring the best librarians from their customers to help develop their products.

Thank you for the opportunity to attend COSUGI 2024. Jeremy and I got to meet many interesting library workers from all over the US and Canada. I was happy that we had good travel weather.

Bruce MacDonald
Head of Technology / Assistant Director
Peter White Public Library

**COSUGI 2024 - Provo, Utah** **Jeremy's Report**
COSUGI = **C**ustomers **o**f **S**irsiDynix **U**sers' **G**roup, **i**nc.

**730 Days and Counting…New System Admins Unite!**
This was a sequel to last year's presentation titled, "How to Survive Your First 365 Days as a System Administrator" and was led by the same person, a Technical Services Librarian at a university who is a veteran ILS system administrator. Much live-polling was conducted in the room of approximately 60-70 people. Around 10 were in the same situation I was in a year prior: in their first chaotic year in the job. About the same number were 5–10-year veterans. It was quite a comforting experience to be amongst others of my true peers—the live polling onscreen revealing familiar words in real time: "stress", "confusion", "overwhelming", "confident", etc. The presenter reminded everyone of the Dunning-Krueger Effect (when you know enough, and have just enough confidence, to be dangerous, haha). Several of the most experienced in the room offered good advice to us such as to get organized, to identify and use the resources available, and to try and develop a growth mindset. Give yourself time to learn and adapt, to take courses, etc.

**Enterprise Lightning Round: Ideas for Enterprise Improvements**
Led by a librarian from Louisiana, we were shown some things their library had implemented, which were similar to what we have adding in Enterprise, such as eResources in the catalog. Only this was different. They had added links to digital resources for things such as sewing patterns from the vendor Creativebug, an arts & crafts resource. They have set up book carousels as Rooms content the same way we have it set up in our OPACs. They created a separate Accelerated Reader page in their catalog like we have as well.

**Time for an Enterprise Color Update**
This was one of the rare sessions where my knowledge was far beyond what the presenter and those in attendance knew in relation to Enterprise. The presenter showed how her library (a single OPAC page, not dozens like we have) needed a color scheme update to match their new look. Feedback from users included this (felt very familiar to me), "The catalog needs to look jazzier, it feels really old looking." Their library had to pay SirsiDynix to make updates to the colors for them, since no one at their library had quite enough experience with .css code needed to make the adjustments. (Note: the learning curve with this for me was enormous.) They also demonstrated a new Enterprise layout called "Bento Box," which is slightly different from the "three-column" layout we are using at UPRLC. I enjoy looking at other libraries' OPACs to see how they are designed. I like the links to Adult Fic, Adult NonFiction, etc. being buttons, rather than just text, on the left column here https://westm.ent.sirsi.net/client/en_US/default. The most important thing I learned from this presentation was about accessible colors on web pages. Webaim.org is the site that was shown, and I have been using it recently to adjust the text and background colors on our OPACs so that they fall in the accessible range.

**Web Services Sharing Session**
This session was far beyond my comprehension. A way to interact with database records using HTTPS requests and responses…built on the REST API standard. This was lost on me, so I took the opportunity to walk across the hall and visit the **Ask SirsiDynix** room. Dressed in their blue shirts, the room was filled with support staff, with whom I was able to work with individually on some of our support

tickets. My knowledge was improved a bit on a few things from these interactions. Some things were left in limbo still, such as them wanting to charge us extra to be able to make the 400 fields ("Alternate Name") searchable in the catalog.

**SirsiDynix Discovery Landscape**
This was a panel discussion about the new CloudSource and SirsiDynix resource discovery architecture. The Product Managers of a few different SirsiDynix products discussed how work on the new platform helps libraries identify, manage, and make content available to library users. Enterprise, Cloudsource, the upcoming BLUECloud Discovery (eventual replacement for Enterprise), BLUECloud Mobile 2, all have to manage searching in slightly different ways using the same databases. The purpose was to show that all of the managers of these products routinely consult and share ideas with one another.

**BLUECloud Basics**
Lisa Witteman discussed getting started with BLUECloud products, especially BC Circ and BC Cataloging. Some of this was helpful for me in understanding the setup on my end for staff logins and so forth using BLUECloud Central (a site I am somewhat familiar with already).

**What's New – SirsiDynix Support Center and Security**

SirsiDynix head of Support, Reed Farnsworth, presented about the support portal (of which I am deeply indebted on an almost-daily basis). A new version of SD Support Center went online in the past year. We were advised to bookmark the support center on our mobile devices (done!). System Statuses page is helpful to monitor our Atlanta host for Saas and BLUECloud. They have streamlined search results for known incidents and maintenance. I learned that I needed to subscribe to status updates for our Saas hosted server status (done! I had gotten used to checking this site daily.) How to report on the page that our site is affected during an "incident". Much of this information was very pertinent, given that the week prior to the conference we had experienced the disastrous Merit outage affecting many libraries in our state. How to manage User Roles and Points of Contact in our account settings.

**Summary**
I had previously attended the COSUGI Conference in 2018 and I feel they have not done much to further the development of their BLUECloud Circ and Cataloging products. I hope SirsiDynix are one day able to apportion more development into these products so that our libraries will be able to utilize them. SymphonyWeb has been a nice product to have, as well as MobileStaff. I continue to utilize support as much as possible. Chatting with support techs almost daily. It was wonderful to be able to work with some of the same support techs in person in Provo. At mealtimes I was able to confer with other participants from various parts of the country (not any international participants like the last time I attended in person, though). I spoke with attendees from different parts of our state who had also endured the previous week's Merit outage. We discussed the setup of our respective Enterprise pages and the particulars of .css code parameters to customize the look and functionality, as well as how we have utilized Syndetics Unbound. I found that I have much to learn in my job including BLUECloud Analytics, which we have begun learning. It was nice to chat with vendors about products that we may or may not be able to use involving the management of large collections. Rumor was, this would be the last in-person COSUGI conference.