

COSUGI 2025 Report – Jeremy Morelock

COSUGI = Customers of SirsiDynix Users Group

Milwaukee, WI, April 2025

Introduction from Company Leadership:

Bill Davidson addressed the conference and announced that he is no longer CEO of SirsiDynix after 15 years of leadership of the company and several changes in ownership.

Mike Nehren is now in charge, who was formerly Chief Financial Officer.

Harris Computer CEO Jean Soucy addressed us and stated that SirsiDynix “will be owned by Harris Computer in perpetuity”. The new ownership will benefit the company with “the financial and technological strengths of the new owners.” Continuing investments in BLUEcloud products are occurring, and Harris developers have already helped improve security for SirsiDynix products.

The new owners will leverage Harris software best practices and are implementing cost-effective cloud and A.I. developments. I asked if they anticipated any changes to Support, and I was told they would be testing some A.I. to aid in the assigning of support tickets.

At the conference I met more system admins from our state and region. Ellen and I have discussed the possibility of attempting to resurrect the SirsiDynix Michigan Users Group (MUG).

I came out of the conference feeling very confident that BLUEcloud Circ and Cat will be ready for use by our libraries this calendar year. I have the goal of utilizing BLUEcloud Analytics and Data Control much more going forward. I feel good about the networking that we did with other SirsiDynix users in our area.

SymphonyWeb and Data Control:

Shawn Andary presented to us about the upcoming additions to the next version of Symphony, 4.2.0, due in the fall 2025 (although I do not plan to upgrade again for a while).

Apple notarization for Mac support will be added.

New icons in SymphonyWeb, “modern” and “classic”.

The ability to require First Name, Last Name, Birthdate, etc. for patron registration.

The ability to select a “patron expiration date” beyond 2037.

“Non-transitability by Item Type (a Library of Things enhancement)”.

Improvements to Reports: multiple access to WorkFlows reports in a new Reports Permission Group Wizard. Granular control of what can be done with reports.

Java 11 support for WorkFlows and SymphonyWeb.

Consortia SIG meeting:

I attended this group which is set up for System Admins for consortia.

Topics such as “How I spent my consulting credits,” and “What are my top five most useful reports?”

There is a fall gathering in Ohio.

BC Analytics Grab Bag:

I learned how to organize BLUEcloud Analytics reports within the program prior to exporting. I normally do the organizing after exporting to Excel. A more basic presentation for a change of helpful hints.

(I’ll take all the help I can get with this application.)

BLUEcloud Circulation: Ready for Prime Time:

I learned a bit about new features already in place, and some which are upcoming with the current development. Book Drop Mode is one feature, as well as Holds Pull Lists, and customization of Transit slips, Special Due Date, Edit Due Date, Mark Item Used, Renew Seen or Unseen, Print or Email receipts, Silent printing, Delete Patron, and Copy Patron are currently available.

*Up next: customization of Circ receipts. Hopefully by the end of this year we will have Checkout and Bill History, the ability to change an Item ID, Mark Item Missing, Remember last User, Audio alerts, Renew Item without navigating to patron, Fine-free Check in, the ability to hide features of patron record in display, and Display Holds History.

1,095 Days and STILL going; Just enough knowledge to be dangerous!

This was an update to the previous two COSUGIs which had presentations on how to survive your first year and then how to survive your second year as a System Admin. The same presenter, Lynde Roberts, led this (she has been a System Admin just a few months longer than I have). Trello, the list-making and project scheduling application, was suggested as a helpful way to set monthly or annual task reminders. This helped me to work on enhancing what I'm already doing with Outlook Calendar. The importance of embracing a growth mindset to give yourself time to learn and adapt, take courses, attend conferences, consult with your Library Resource Manager, and read listservs was emphasized. (I have used every one of these resources since the conference, by the way.)

My favorite quote from the presentation:

"Systems administration is the rocket science of library science".

Using BLUEcloud Analytics Day-to-Day:

This was a presentation about how one large library handles their reports. Apparently, they have mostly switched over from Symphony to BLUEcloud Analytics to handle their reporting. They have users of different levels depending on whether they are allowed to create, edit, or just run reports. They are taking full advantage of the software in terms of the functionality of the dossiers with fancy graphs and so forth. It was astounding to see what they have figured out. They use these reports to organize the receiving and cataloging between their various branches. They also use this for daily De-New reports and many fiscal reports.

SirsiDynix Symphony Data Control's greatest hits:

Shawn presented about Data Control (she manages this product now as well as Symphony). I have begun using this as an alternative to the API that I have learned. Examples of tasks that work well for System Admins in Data Control include Identifying Inactive Patrons and flagging for removal, Adding User Categories and Notes, Identifying and Updating Missing User Categories, Identifying Bib Records that are Shadowed at the Title Level, Finding Titles with Incorrect Indicators, Identifying Brief Bibs Needing Upgrading, Exporting MARC Records for Lexile upgrades (quite a few Ellen tasks).

Conference experience report by Ellen Moore

COSUGI: Customers of SirsiDynix User Group, Inc

April 15-17, 2025, Milwaukee

Summary: My conference experience was excellent, exceeding expectations. I visited with several vendors (see list at end), sat in on about a dozen different presentations, talked with librarians from several different states with varying levels of experience, learned a few things, left feeling reassured about the company and the product and pretty excited about what's coming.

Biggest take-away: a desire to start using or at least familiarizing myself with the BlueCloud staff interface. I can use it now for some tasks. I love the way it looks (Dang, It's so pretty!); I like the fresh architectural design of it. I am tentatively hopeful that we will switch to this platform in the future, maybe as soon as within the next 18 months. This will allow us to upgrade with migration. Since the conference I've started to use it a bit. I can edit records, import records; can't fix authority yet. It's not yet ready to become primary staff interface.

Other good stuff:

Healthy climate of expertise sharing. I'd like to encourage others to attend this conference. I noticed more than once, the other people in the room were at times more experienced than the presenter and the presenter did not hesitate to defer to the person with more experience. The lack of defensiveness and ego just felt refreshing. I now understand why cataloging and systems library staff like this conference. None of the sessions were completely over my head. (Though session on marcredit came close.) It did feel like a welcoming environment for asking questions.

Presentation on library of things display in Enterprise. We can use the technique used by a librarian in Shreveport (https://srve.ent.sirsi.net/client/en_US/default?) to get custom images to display in the hitlist. Coming soon!

Presentation on using Item types and Facets to improve discovery. The example was for literacy tools like lexile, AR, dyslexia font, and Hi-Los special elements of a collection. (Same presenter, same link as above.)

Opportunity to connect, re-establish and reform Michigan User Group

Venders:

Ingram. I liked working with Ingram when I worked at PWPL, both as an assistant reference librarian, using their ipage for ordering and as head of cataloging, supervising receiving. Their invoicing system was clear and simple when we received materials. At the conference I learned about their partnership with Thrift Books and Better World Books as part of their inDemand lease program (<https://lp.ingramcontent.com/libraries/indemand>). The program helps meet holds demand on popular materials and then credits accounts via resale of items when demand goes down.

Envisionware. They demo'd a slick Wi-Fi printing payment system.
<https://www.envisionware.com/products/>

Lyngsoe Systems. Had an assortment of self-serve tools for check-out and holds distribution
<https://lyngsoesystems.com/library>

Tech Logic. Also had self-serve locker systems for holds pickups on display. <https://www.tech-logic.com/>