

**MUG Spring Meeting at Baker College, Flint
May 15, 2009
MUG Meeting Minutes**

Welcome and Introductions

Stephanie Williams welcomed everyone to the MUG Spring Meeting. She then thanked Mark Evans and Baker College for hosting the meeting.

SirsiDynix Updates – Kate Howe and Roslyn Dean

- Next year the users group meeting will be in Orlando, Florida Wednesday-Friday.
- SirsiDynix financial base is solid. The company is fully funded.
- 2008 – hired over 111 new employees. Implemented more than 300 Symphony solutions. 527 customers use Symphony.
- Just published product roadmaps for both Horizon and Symphony products.
- Client Care – Study of 465 customers, 95% strongly agreed or agreed that service is excellent.
- 11.2 years if the average tenure of operations (implementation, data services). 42% have a background in library science.
- 11,000 solutions on the Knowledge base.
- 95% accuracy in data in migration.
- 540 SAS customers in North America, Europe and Australia.
- McKinsey Enterprise survey – 850 customers; SAS is most important thing affecting their businesses.
- SAS is good for disaster recovery.
- SirsiDynix has a calculator to figure out the costs of SAS.
- 25,250 people took training last year – web-based self-paced training (for new employees or as a refresher); instructor led WebEx sessions; hands-on lab (can see what customer is doing); on-site training.
- Training subscription – put money into package and take training as needed.
- Self-service web portal – being tweaked; more search options.

Product Roadmap – on ClientCare Portal

- 3.3 v Symphony (available in July) – includes item group editor
- Since June 2007 SD has produced all major product line releases on time. Fewer bugs.
- 2009 Release Schedule – Q3 2010
- Release Notes in progress under Documentation – can see what is coming before release is available.
- Symphony 3.3 – VIP (vendor interface port); has more Horizon and Dynix features than any other release; can separate patron name into 3 fields plus

bonus nickname field (preferred name); Staff web available for all clients – little to no training, web-based, limited functionality.

- Enterprise 3.0 (faceted searching) – availability information on search results; Reviews and ratings with ChiliFresh in beta testing.
- E-Library – OPAC for Symphony – cascading style sheets
- Web Services & API – SIP, NCIP, Symphony, Symphony web services, platform web services
- URSA and Reciprocal Borrowing – URSA 4 in general release last year
- Prototype mobile applications
- Horizon – no plans to drop support for Horizon; 7.x for 4-6 years; new releases planned; new product options
- Horizon 7.5 & HIP 3.20 – July 2009 – Sybase ASE 15; HIP infrastructure upgrade; delivery of new SIP responder (can skip 7.4)
- Medley Products – Enterprise, School Rooms, Pocket Circ, Bowker enriched content, Web reporter, TeleMessaging 3, Envisionware, Self checks, Automated checkin and materials handling, RFID solutions.
- Pocket Circ – replaces Telxon and Percon
- Enriched Content – “Deluxe” package available from Bowker (Syndetic solutions)
- TeleMessaging 3 – TeleCirc II – Edify now end of life
- WebReporter – 1.5 requires 7.4.1 or later

Pocket Circ - Symphony

- Inventory
- off-line transactions, on-line transactions (can use wireless connections)
- no more PC Reliance, can create user records while off-line
- can be used for Outreach (offline toolbar in Symphony)
- runs on Windows CE devices, requires the use of Active Sync

Symphony

- Tool bars are very customizable
- can create shortcuts
- function key mapping
- can print patron info – you can select what prints
- can have separate sound for each exception - have to acknowledge the message
- if client is upgraded you could lose customizations - when you call client care with a problem you need to refer to the original name of the button, etc.
- patron record – comments field is 9,999 characters, lines wrap
- hold slips – comments print
- Spine labels- much easier to setup label template, can reuse label sheets, can edit label before printing, can change label template
- Global Call # modification – batch modify call numbers
- 600 report templates (DayEnd processes are reports)

- Acquisitions – Workslip – print one for each copy; VIP – use same way as in Horizon; Voucher – called “saved funds summary” in Symphony – goes to excel where you have to clean it up
- Serials – easier in Symphony than in Horizon – frequency better; code in frequency field in bib and it pulls pub pattern

Enterprise

- Cromaine first HIP library with Enterprise
- Can blacklist words that shouldn't be in search suggestion list
- Will have item availability – how many copies available (not all copies) on first screen
- ChiliFresh reviews are an option (through ChiliFresh)
- Library Favorites – recommended websites
- V.3 – weighing relevance of results (books, websites, A-V)(websites – facet)
- Can put Federated search into Enterprise (if you use 3rd party such as Serials Solutions or Muse)
- iPhone app – searching, My Account, recommendations (by the end of the year)

MUG Business Meeting

Motion to approve minutes of last meeting made by Angela Klocek. Seconded by Renay Elve. Approved.

Treasurer's Report

BEGINNING BALANCE	
March 1, 2008	\$2,292.60
Income	
Meeting Registrations (Spr 2008)	255.00
Interest	<u>3.10</u>
TOTAL FUNDS AVAILABLE	\$2,550.70
Expenses	0.00
TOTAL EXPENSES	0.00
ENDING BALANCE	
April 30, 2009	\$2,550.70

Motion by Judy Wager, seconded by Angela Klocek to approve the treasurer's report. Approved.

Discussion of Minutes

In the past the unapproved minutes have been mailed to members before the next meeting. Suggestion was made to email the unapproved minutes after the meeting, and to then post them on the MUG website (clearly marked as unapproved). Those attending the meeting felt this would be acceptable.

Election of Officers

A call was made for volunteers to run for MUG office. The following members volunteered: Treasurer – Jessica Sanchez, Secretary – Anne Barnard, Member-At-Large – Sandra Besselsen, VP/President Elect – Virginia Meeks, and President – Steve Bowers. Steve will also ask on MUG-I if anyone else is interested in running for office. A ballot will be going out soon to elect officers.

Panel Discussion by Anne Neville – TLN (on Symphony 3.2.1) and Randy Call – DPL (Symphony 3.2.1 – heavy users of Acquisitions module)

TLN (The Library Network)

- TLN was previously on GEAC and DRA. In 2004 they migrated to Unicorn. They didn't notice much difference between Unicorn and Symphony.
- Symphony is very consortia friendly, especially circulation.

DPL (Detroit Public Library)

- DPL – Bought Sure Start and extra training.
- They deleted many customer records before the migration.
- They don't have a juvenile profile which is now a problem.
- Acquisitions – moved historical records – They had an accounting policy that everything needed to be kept for 7 years. SD recommends taking open orders only. Their old acquisitions system could create lines for multiple copies ordered; the migration created one line for each copy. They couldn't open orders in Unicorn – it took 18 months to fix this, one order at a time. The purchase order records went in with the date loaded, not the date created.
- The move from Unicorn to Symphony was bug free. They were the 36th library to move to Symphony from Unicorn.

- Symphony software assumes only one report runs at a time (including maintenance reports).
- Interactive authority control.
- The acquisitions module is very flexible but EDI doesn't work with all vendors and it's a lot of work to setup with vendors.

Breakout group discussion - a few group discussions were held.

Meeting adjourned at 3:00 p.m.

Submitted by Anne Barnard
May 22, 2009

UNAPPROVED