**Meeting in a nutshell:** The 2014 COSUGI Consortia SIG conference was held at the Marriott Courtyard at Thanksgiving Point in Lehi, UT on Sept 18-19.   We had a great turnout along with stimulating and informative discussions and presentations.   Most of the first day was spent sharing our “joys and concerns” related to consortia use of SirsiDynix products.   The notes taken during that discussion are included below.  We spent a couple of hours Thursday afternoon conducting a lively discussion on “e-content” and how we, as consortium administrators handle; title selection, quality of catalog records from various vendors, and usage policies.   Friday morning we met with SirsiDynix executives, including the CEO, Bill Davison, for their opportunity to respond to our “joys and concerns” and their presentations on the status of the company, product availability and development.   After lunch, we took a leisurely stroll to the SirsiDynix headquarters and after divided into groups, attended presentations and Q & A with product managers for BLUEcloud Analytics, Enterprise, Universal Admin and eResource Central followed by a tour of the SirsiDynix facilities.

**General Notes**

**~Client upgrades:**

* Cap number of workflows installs at each library
* Need to lock out previous versions after SP upgrades
* Ability to log the client version for sys admins
* Client key for BLUEcloud circ & MobileCirc to identify users

**~Release Notes, Upgrades Testing:**

* Bring back release notes for admins
* More detail in Release Notes
* Better documentation of bugs and patches
* Proactive notification of known issues
* Steps that need to be done post upgrade
* Dissemination of info about patches that can be installed
* Cycles too short to accommodate vigorous testing
* Incentives for Beta testing customers
* Better Beta testing/communication with 3rd party partners
* Package patches into SP to avoid upgrade and then the patches

**~SPP and Enhancements**

* New features: Where is the customer feedback coming from?
* SPP vs. enhancement forums vs contractual?
* How does it relate to development?
* Enhancement process is still not effective. Old enhancements. Archive?
* Review old enhancements and give feedback
* SirsiDynix possible have dedicated employee for enhancments?

**~Product Development**

* Over promise / under developed. We want under promise / over developed
* Example: email receipts don’t need to be printed.
* Product development/compatibility for new software: Red Hat, Windows, Drivers…etc
* SSL certificates should be provided and installed if required for SD and 3rd party products (e.g. MobileCirc).
* Security issues: OS patches..etc.

**~Pricing structures/schedules to help us make intelligent decisions; specifically BLUEcloud products**

**~Customer Support – Doing good with recognizing consortium customers**

**~BLUEcloud**

* eRC: a lot of patron complaints have been addressed. Fast development cycle has been a good thing for that.
* Back-end problems with Overdrive metadata
* We recognize that it’s bleeding edge; SirsiDynix is at the mercy of other vendors.
* Descriptions of format for users when downloading. Need Checkout button.

**~Enterprise**

* Can’t beta if locally hosted.
* SaaS sites occasionally experience slowness
* Responsive Web Design
* Config should have WYSIWYG
* Enterprise renewals doesn’t clear the check box
* RDA & MARC map not carrying over from ILS.
* Recentness of publication date should be factored in relevance: Status?
* Search suggestions built from multiple profiles (option)
	+ Number holds, checkouts…etc to adjust/determine relevancy of search results.

**~Integrate eRC into BookMyne** (might solve some of the problems)

**~Too many web based admins**

**~Security for MobileCirc:**

* Full access because we share logins
* Currently restrict to library owned devices
* Need way to have access to expire
* Problem with loading app to ensure running on authorized devices
* Need user profile for enabling access to MobileCirc
* Product that is opened to the world should be on a different port than the one used by the ILS. BookMyne vs MobileCirc for example.

**Prologue:** A few days after the meeting a discussion ensued on the Consortia email list about relevancy in Enterprise search results. After several emails on the topic, Berit summed them up for the SirsiDynix response:

**“***Hi, everyone.*

*As one of the follow up items from the recent Consortia SIG meeting in Lehi, UT, Carol Dawe from LINC in Illinois is compiling suggestions on where relevancy in Enterprise might be improved in order to produce better result sets for end users.   There has also been some feedback on additional improvements many would like to see in facets.  I wanted to summarize some of the points already submitted, see if we have consensus on these points, and also encourage you to note any other areas that might be explored.  And of course, if you have solved these issues at your site through clever manipulation of the MARC map or other settings, please share!*

*Note that the areas below focus on relevancy and other search tools related to bibliographic data.  There are certainly other, non-bibliographic factors that could be considered in determining relevancy.  Feel free to suggest those as well but I would ask that those be denoted in the communication as “non-bibliographic relevancy factors” for ease of review.*

***Possible Bibliographic Relevancy Improvements:***

*-        Increase the importance of publication date in the MARC record as an overall factor in determining relevancy.  NB:  there are some complications with this approach related to “fuzzy factor” settings; a challenge that we would love feedback on is how closely two or more records should match before a publication date would promote one record over another in hitlist display.*

*-        Consider allowing additional weighting by “subfield” concept, especially for title fields.  Today, Enterprise will favor a record with a single term title that matches the search string over records that have more than one term in the title.  Several sites have suggested that if that construct could be further refined to consider titles with single terms in the 245, subfield a, to be ‘equivalent’ to single term titles the result set order would be more helpful to the end user.  This would avoid situations such as the title Delicious: a Novel being ranked lower in relevancy than titles with only Delicious in the 245.*

*-        Review facet grouping for bibliographic facets and allow headings to merge into a single facet if the only difference among headings is a difference in ending punctuation.  Are there other, similar considerations that you would recommend we review?*

*Thanks!*

*-        Berit*