

Consortia SIG Comments and Discussion with SirsiDynix

Friday, November 8th, 2013 (compiled by Karla Smith and Shawn Andary)

SirsiDynix Staff attending the 2013 Fall SIG Consortia Meeting: Berit Nelson, Sheridan Richey, John Perry, Ray Biscaro, and Lisa Witteman.

Red = SD Response

Blue = Post Meeting Notes/Comments

Orange = Not asked at fall meeting

Upgrades, Support

Pretty well with upgrades with exceptions:

- Enterprise upgrades—particularly with profiles and other settings; no heads up in documentation—should be more about copying over before do it, and so forth.
 - o **Berit Nelson responded that Client Care tracks SD customizations, but from the sounds of it, local customizations have been lost and/or broken by many customers after upgrading Enterprise. Berit followed up after the meeting and solicited volunteers to talk to Product Development and Engineering about their customizations in the hopes of improving the upgrade process for Enterprise.**
 - o Too many builds of Enterprise; each has the potential to break something (charge history is example)
- Client Upgrades -Could we get an advanced copy of JWF client: would it be possible to get the client first so that stamp.dat file would be available—need ways to make stamp.dat file delivered to match. Consider an option to download JWF in advance from Support Center
- Staggered workstations for upgrade—do critical workstations: library + # at that library that could upgrade today (ask about msi push method)
 - o **Sheridan Richey responded that the msi push method should allow for more control over the upgrade process for clients, and of course, the upgrade process will not be an issue with the BlueCloud Suite of products.**
- New Features. Think through big picture: patron categories 1-5 can elect to hide ones you don't want to see, but **with the new item categories that is not an option**. Additionally, there is frustration, that the item categories do not show up in eLibrary or in the advanced search of Enterprise
 - o **Note – support has been added for new item categories in SP4.**
- SPPs:

- Really love them, but sometimes feel that decisions are foregone conclusions; would like to feel that they have more input. Example: Point of Sale: say a great wireframe in July that showed everything you would want, but when requested screen shots, did not match. So the pieces that were in the wireframe were not necessarily there.
- SPP meeting might be cancelled but when rescheduled, there would be something new that had not had the expected input. Sometimes things slide or there is interaction that is productive followed by gaps in interaction that may result in developments that did not have the expected input. Might help to have more nudges via basecamp—e.g., engineer or PM might send a “what do you think”
- Patches - Please make scripts or patches available for time sensitive updates e.g., OCLC number—if it is critical offer some other options. Do not tie to a larger upgrade or service pack. (Richard Shurman)
- Known Issues
 - Proactive notification of known issues that might affect sites if upgrading. But how to avoid telling sites things they don't want to know? **Idea: know platform well enough that we gather information that is customer database. Put in customer dbase and then have an interactive upgrade path. What about more specificity on the known issues to allow the platform tracking.**
 - Also would like some ability to see issues that might come to be known issues. Would like more details on known issues—more information should be searchable so that they are more likely to be able to find the known issue. (Michael Stallings)
 - **Note from CC website. “Beginning 3 MAY 2014, you may notice some changes in how your Support cases are processed. Among the changes are a new set of case statuses and other features to improve transparency and control for customers as we work together toward timely and effective case resolutions.”**
- **Future Development & Enhancements**
 - Concerns about allocation of resources: concerns about dual development against both ILS's
 - **Sheridan : SirsiDynix plans to continue product development for BC Suite for both Horizon and Symphony simultaneously.**

- Roadmap and timelines in roadmap are not met (this can also be a good thing; but when substantially different than what is expected originally then a problem for them in terms of communication with member libraries)
 - **There will be new BC products ready at COSUGI.**
- Enterprise: concerns about commercial third party (clarified that no longer have a commercial third party dbase vendor).
- Steve Gaines: would like to have checkouts going into the ILS
 - **Berit : eRC will allow stats to be collected, but there isn't a plan for the actual transactions to be replicated in Symphony or Horizon at this time.**
- Lexile and reading level information range searching.
- Find it Fast : popular for some sites; noted that had been included in some of the published 2014 roadmap items.
- Hosting questions re: BC PAC (asking about whether BC Pac has to be SD hosted as opposed to locally installed)
 - **Sheridan: first release of BC Pac will be hosted by SirsiDynix and available to customers that are both SaaS and locally hosted Horizon/Symphony sites. There is a plan to allow for sites to locally host the BC Pac, but that will be further down the line.**
- Question: sometime far in the future: do we envision that over years we will move to whole new DB architecture.
 - **Sheridan : The product development plan is to continue to build upon the existing foundation of Horizon and Symphony.**
- Reports in Symphony running reports : what options might be to lock down reports to prevent end users with high level of access to reports from getting details from sites that they do not have access.
 - **[Shawn: This continues to come up year after year. Should we try as a group to find some wording for an enhancement request? It seems that there would be some possible options in WF to lock in certain agency specific selections for member libraries. I'm not as certain about how this would work in BC Analytics thought, but maybe is something to discuss at COSUGI.]**
- Development: driven by new contracts, enhancement processes/SIGs, Support issues and so forth? Still some perception that more development is going above the line than

below the line. Some conversation points: some of this related to MobileCirc –e.g. why is it coming out more quickly.

- **Sheridan: MobileCirc was developed more quickly due to the obsolescence of PocketCirc. Also, the functionality for MobileCirc is less robust than BC Circ. Product development spends a “ton” of time working on product development below the line.**
- Does SirsiDynix think of creating equivalents to useful functions in Symphony and Horizon as we make the transition to the BC Suite of products? Things that are available in e-Library or JWF into BC PAC, Enterprise, BC Cataloging, for Horizon and so forth.
- Concern about Enterprise using a 3rd party product to index.
 - **Sheridan : SirsiDynix is using an opensource Solar Lucene for the indexing.**
- Rumor floating around that SD is working on a link resolver.
 - **There was no link resolver on the road map at the time of the meeting.**
- Need to see some of the BLUEcloud stuff finished before COSUGI. Can we believe the timeline for BC products and eRc, etc.
- **Portfolio - not a way to limit by agency or profile. No location setting in metadata. This is a requirement for consortia and should be a required feature.**
- **Facebook App comment. Not many libraries using the Social Library option should be below the line and included with maintenance.**

Pricing:

- Quotes still aren't very detailed: things are not broken out in a way that makes clear what services are provided. More detail (e.g., SOW)
- Update invoices to remove older names (e.g., should not say Symphony if it is actually Unicorn)
- Refine invoice list into something – some lines show \$0.00; in other cases—Mentor cited—if they decide to drop something to reduce price, the price ends up not going down. What is happening.

- Discussed that LRM/billing coordinator can work out more customized indexes. Also make sure that any line that IS displaying makes clear what it is/what it is included.
- Quotes: more detailed SOWs to be very clear about what is being delivered.
- Sometimes initial quote seems too high; often SD discounts; it would be preferable to have more discussion about financial reality at the site prior to giving the initial quote. This leads to sites feeling like they are being taken advantage of when there is an extreme changes/reductions in price.
- **Berit sent out a message asking for input on how SD invoicing could be improved. Invoices have been updated. Hopefully they are clearer and more current. Berit will provide an update at the spring meeting.**

John Perry – Customer Support Update

- Support primary focus is prevention followed by timely resolution of issues
- Client Care has account narratives and notes on all customers.
- CC has badges to identify those that are API trained.
- **Chat support option to CC coming.**
- Customer support 3.0 looking for beta testers.
- Will try to add more detail to known issues.
- Enhancements deadline to be extended.

Berit Nelson – BlueCloud and Roadmap Update

- **Buy It Now** to soon have **more vendors** as an option in addition to Amazon. There will also be an option to represent local vendors.
- **ProPay** coming to Enterprise transaction fees are lower for nonprofits and libraries than PayPal. Nothing stays on the local system.
- **Fredericksville Library** is piloting a debit/library card combo.
- **Roadmap**
 - BC Cataloging expected in Q1
 - Bookmyne 4.0 in Q4 (**this has been released for Android, waiting on iOS**)

Sheridan Richey – BlueCloud Platform and Technical Update

- BC platform is SOA (service oriented architecture) in that there are loosely coupled services that can be scaled independently of each other.

- Multi-tenancy – a single instance of an app serves multiple organizations, and the ability to group customers together will save both money and resources.
- Fault Tolerance is built into BC platform and ensures no downtime in the event of system failure.
- Firehoop facilitates communication between Horizon and Symphony
 - Load balancer generates new instances of the service to accommodate increased load.
 - These instances go away when the demand decreases.
- **Enterprise** is currently single tenant (1 client to 1 instance ratio)
 - SD will be migrating all Enterprise customers to the architecture that supports multi-tenant
- BC Security – all BC traffic will be encrypted.
- Webservices Security – customers would need to encrypt their own Web Services traffic if locally hosted to achieve this.