



CODI 2007 Conference Update November 6-9, 2007

Pat Boze, Lincoln Trail Libraries System

This year's CODI Conference was more successful than expected. Although numbers were down, over 600 still attended. Sessions were lively and spirited. I focused on presentations about different PAC products that individual Horizon libraries have implemented as well as company presentations about Symphony and Horizon 7.4.

The software name changes (and ensuing changes to new names) are confusing, but it's evident that Horizon as a product will soon be in maintenance mode. There will only be one more major release (Horizon 7.4). Length of time for how long it will be supported ranges from 6-9 years, depending on who is talking. Libraries on Horizon are being encouraged (through price incentives) to move from Horizon to Unicorn (a Sirsi product) and then upgrade to Symphony when it becomes available. Symphony is supposedly a blended product, combining the best of both Unicorn and what would have been Horizon 8.0. However, Symphony is still in beta testing so any library migrating now must migrate to Unicorn first.

Announcements made by the new SirsiDynix CEO, Gary Rautenstrauch, included a re-commitment to customers and the importance of those relationships as well as delivering what is promised. The upcoming year will see a release of Symphony 3.2, more options for Software as a Service (offsite server hosting for a fee), release of a web-based client for schools, and addition of an add-on faceted search product through a partnership with Brainware. Also announced were 3 price packages for migrating to Symphony, with each price level featuring different levels of migration support. Each of the three packages include free Symphony software licenses equivalent to current Horizon licenses. If no RFP is used for the process, a 20% discount is allowed. Also, if a library signs on for a 3 year maintenance contract, an additional 20% discount is realized.

One of the more interesting meetings was a discussion on open source software, moderated by Martin Taylor of Vista Equity Partners, previously with Microsoft. He asked how libraries are currently using open source software, why, and which products. As part of the discussion, several members of the audience expressed their dismay with the shelving of Horizon 8.0 (which used some open source

components) claiming that this action has been a regressive step back to a proprietary-based system, Unicorn. Libraries are using all kinds of open source software because ILS vendors can't keep up with rapid change. Also, library software needs fall outside of the library automation system, such as with library event management and other local needs. Taylor countered that all software users need to understand that open source can be developed quickly but usually only a few developers are doing all the work in the community. Cost needs to be considered – free software doesn't mean that the development costs for a local need makes it free.

PAC Presentations highlighted several products that different Horizon libraries are using to replace their Horizon PAC. Endeca has been implemented at McMaster University Library, Aquabrowser is being used at Ouachita Parish Public Library, Fac-Back-OPAC (open source) at Paul Smith's College, the Smithsonian Institution is using Lucene/SOLR open source products to create a federated, faceted search product that searches across multiple databases.

This year's conference was the last official CODI Conference. In 2009, there will be a joint SirsiDynix Horizon/Unicorn/Symphony user's conference held in Detroit.

Donna Schaal, Lincoln Trail Libraries System

After an airport delay, I arrived at CODI on Wednesday morning, Nov. 7th. The general session was in full swing. Sessions I attended:

SirsiDynix Symphony Circulation Overview – This session was an overview of circulation in Symphony. Lots and lots of features were discussed most of which is currently available in the Horizon software we now use. One item stood out in my mind as really useful – a patron can establish a Patron Credit Account. This allows the user to deposit a monetary amount into their library account. The system then takes payment from that account as defined by the Credit Rule Policy. There were other new features as well, I must admit that fatigue took its toll during this session and my notes are sketchy at best.

SirsiDynix Symphony Cataloging/Authority Control Overview – This session was an overview of cataloging in Symphony. Cataloging in Symphony is based on 3-tiers. The level of bibliographic data, call level and then item level. As with most automation systems, the cataloging section is based on the idea that libraries will catalog in the ILS product. However, at LTLS and other systems in Illinois, we catalog using OCLC and then import into our database. There were a couple of features that stood out to me – as a non-cataloger:

- When adding original records, there are “helpers” along the way explaining valid choices for indicators, fields and subfields. All using the MARC 21 standard.
- When looking for records to import, you can start with your local database and then using Z39.50 can search other databases (example: OCLC WorldCat) to locate available record matches.

SirsiDynix Symphony Acquisitions Overview – This session was an overview of acquisitions in Symphony. I was very impressed with the interface of the Acquisitions module in Symphony. It was very streamlined process. The one overwhelming features for us is that everyone’s records are separate! No more listing purchase orders from other libraries. You see only what your library has ordered.

Horizon 7.4 Enhancements – This session highlighted enhancements in Horizon 7.4 (we are currently on 7.3). I went to this session to see what they had added that might make this worth are while to upgrade. One of the main reasons why LTLS never went to this version was the instability of the LINCPac for the patrons. This has now been taken care of. With that main hurdle out of the way, here are a few “yeahs” that the next release does better than what we currently have.

- 7.4 will work with our current web product. No more questions of instability.
- 7.4 is certified to work with Vista.
- When a patron has an expiration coming up before the due date of an item they want to check out, checkout will now truncate that date to the expiration date. No more manually adjusting item due dates.
- More information can be included on the print receipts. Plus, the patron’s barcode can now be masked on the print receipt.
- Transit to and from a library will be logged with every checkin. Information is stored until the item reaches its destination library but it will continue to keep a history. Right now we have issues with the information being removed.
- If you restrict your borrower search to just your location there is no indication of the restriction when you perform the search, 7.4 now shows you that there is a restriction in the search.
- On a child’s account, it will be possible to redirect the notices to a guardian.
- On the Request Pull List, LTLS could add more than just the status of “on the shelf or ‘i’ to the pull list – “li” which is the “local on the shelf” could be added as well.
- More flexibility on which libraries receive the request first. This would give us more control of who fills the hold first.
- Items can be aged to the status of “lost” based on days – no longer dependent on the Notice Cycle.

Also, there was mention of an upgrade for WebReporter :

- 180 modifications to metadata.
- New dashboard reports for directors.
- Codes that are both in upper and lower case – statistics will be combined.

Vendor Supplied Records: Know When to Hold 'em, Know When to Fold 'em, Know When to Walk Away, Know When to Run – This very entertaining presentation was a discussion of electronic records and their quality.

KeyNote Speaker – Roy Tennant – Listening to Roy Tennant speak in person was both entertaining and enlightening. In library school, Roy's articles were mandatory reading for a variety of topics so for me it was very cool to listen to his opinions rather than read about them. Roy was very witty but expressed our industries frustration at the lack of response from ILS' vendors.

CODI Annual Meeting – The CODI board is working towards a merger with the Sirsi Users Group (UUGI). This was the last annual meeting of CODI. CODI members are invited to the Spring 2008 UUGI meeting in Detroit. In 2009, there will be a joint users meeting in Dallas, Texas.

SirsiDynix Symphony Serials Overview – This session was an overview of Symphony Serials. The look and feel as with acquisitions is much smoother than the current version of Horizon. Adding publication patterns is easier. Adding magazines that have no distinctive pattern is easier. The whole process seemed to be streamlined and easier to manage.

iGoogle Gadgetry: Add Your Library's Presence and Branding to iGoogle – Very cool workshop talking about gadgets and how you can make one for yourself.