



Welcome!

Academic SIG

A COSUGI Special Interest Group





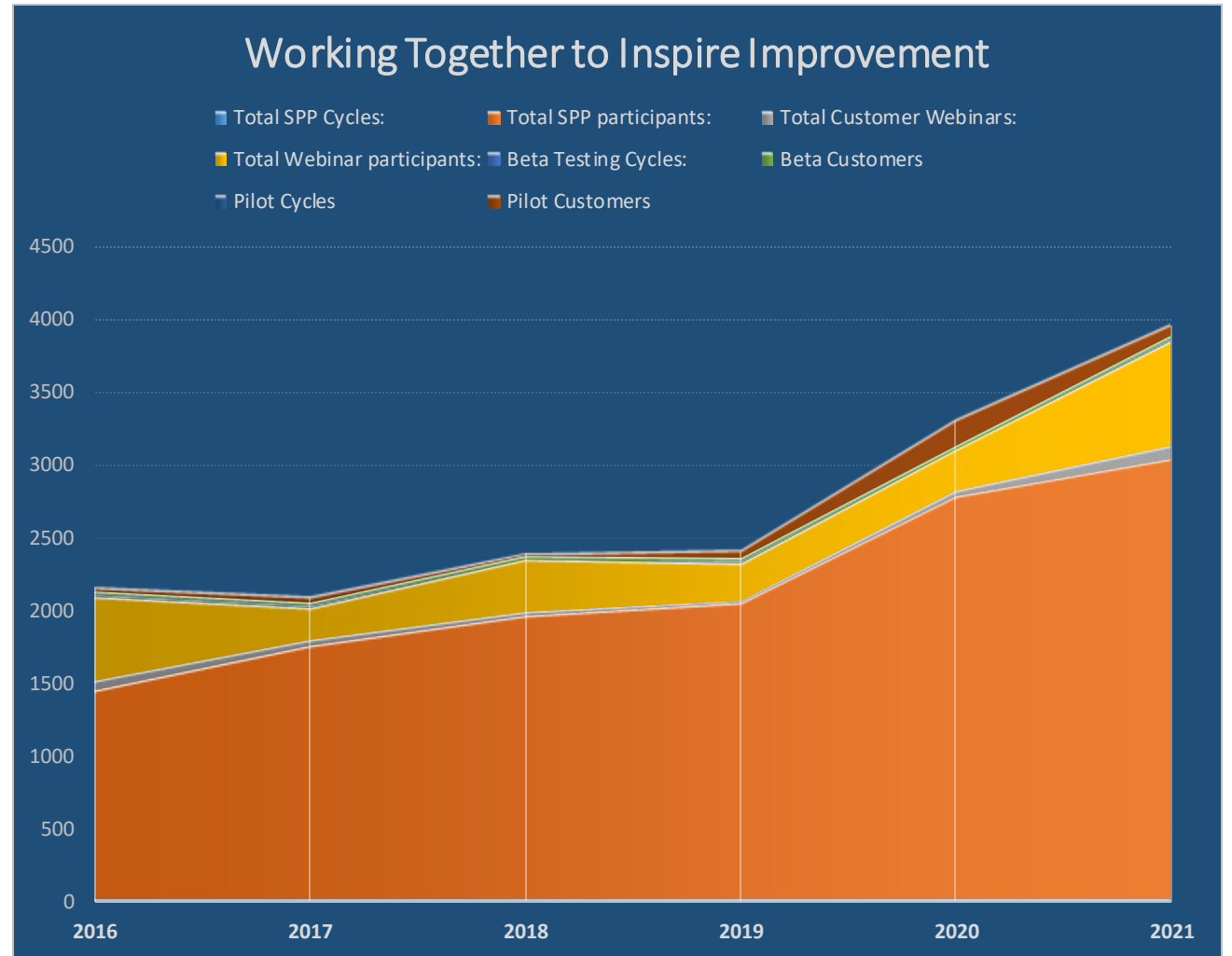
Product Roadmap

Berit Nelson | Chief Product Officer



Working Together

- Strategic Partnership, Pilot, Beta participation trends show growth
- Your engagement leads to new products
 - CloudSource
 - Data Control
 - Community Engagement Platform
- And improves existing products
 - BLUEcloud Circulation
 - Symphony
 - Horizon
- Look for this symbol in Release Notes and Roadmaps to see how you inspired us:





FILTERS (0) | No filter selections

2020 COSUGI Voting Results

Product or Platform	EF Number	Title	EF Item Status	JIRA	JIRA Status	Number of Customers	
BLUEcloud	77694	Sorting: Ignore "A" or "The"	JIRA	DSC-2500 - When sorting, results ignore "a," "an," and "the"	Open	120	
				DSC-4653 - When searching ignore "a", "an", and "the"	Closed	120	
	78226	Match at beginning or end in merge and replace	JIRA	BCCAT-1928 - Support Additional Merge and Replace Options to refine match criteria	Open	38	
	78234	Display of Item Shadow attribute	JIRA	BIP-2491 - Display of Item Shadow attribute	Closed	43	
	78251	Item record	JIRA	BCCAT-1929 - Allow staff to display Descriptions OR Codes for drop down list data that have both Codes and Descriptions	Open	44	
	78305	Customised Policy Lists in BLUEcloud client	JIRA	BCCAT-1927 - Support Symphony Customized Policy Lists in BLUEcloud Cataloging	Closed	51	
				BCCAT-2077 - Symphony - Customized Policy Lists / Display and Maintenance Policy Lists	Open	51	
	81659	Delete at copy level	JIRA	BCCAT-2073 - Item Delete - Horizon	Closed	42	
				BCCAT-2109 - Item Delete - Symphony	Closed	42	
	81668	Please Add Authority Control to BC Catalog and all PC Prod.	JIRA	BCCAT-2078 - Authority Control	Open	57	
	81672	Relinking Item & Copy Records	JIRA	BCCAT-2093 - Relinking item records from one bib record to another	Open	28	
	BLUEcloud Analytics	78234	Display of Item Shadow attribute	JIRA	BIP-2491 - Display of Item Shadow attribute	Closed	43
		81696	Include custom fields in BCA (e.g. user xinfo)	Open			40
85029		Access User SMS tab data	JIRA	BIP-3642 - Access User SMS Data within BLUEcloud Analytics	Open	52	

Customer Surveys

9

Likes:
horizon support is great

Needs:
When I look at BLUEcloud products they always seem to be 20% away from meeting my needs

8

Likes:
Quick response to any emails or phone calls. Great help when we moved to new servers. Assistance with adding new schools. The school WorkFlows contact person retired during COVID and your staff has been great in answering our questions.

Needs:
During the summer we will be changing how we run reports, how and why specific reports run a certain way, etc. I will be reaching out for some help and answers. I will defer this question until then.

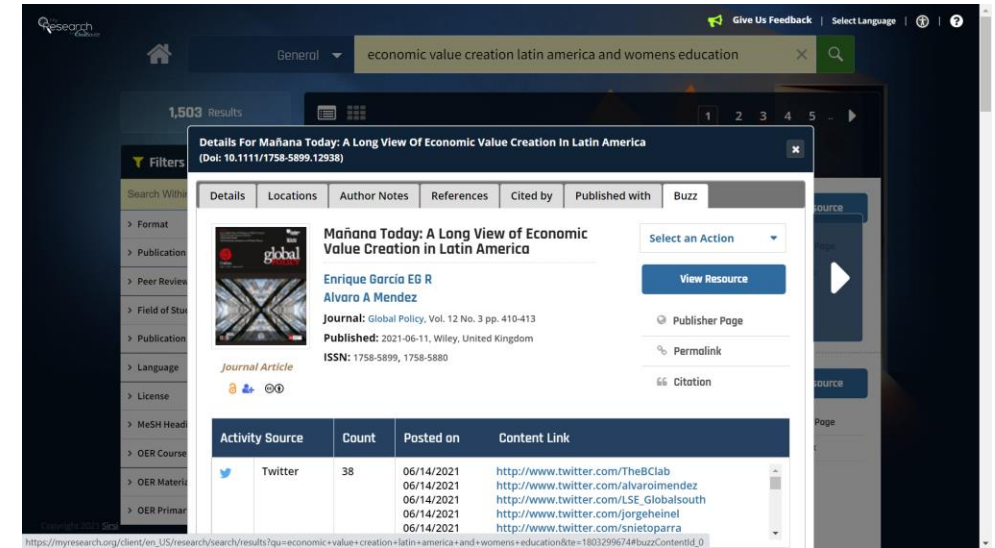
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Likes:
The staff are excellent from support to project managers to LRMs. Knowledgeable, professional, helpful--I've never had a bad interaction with any Sirsi employee.

Needs:
Please improve Enterprise so that it groups formats together better than FRBRish and has good relevancy ranking.

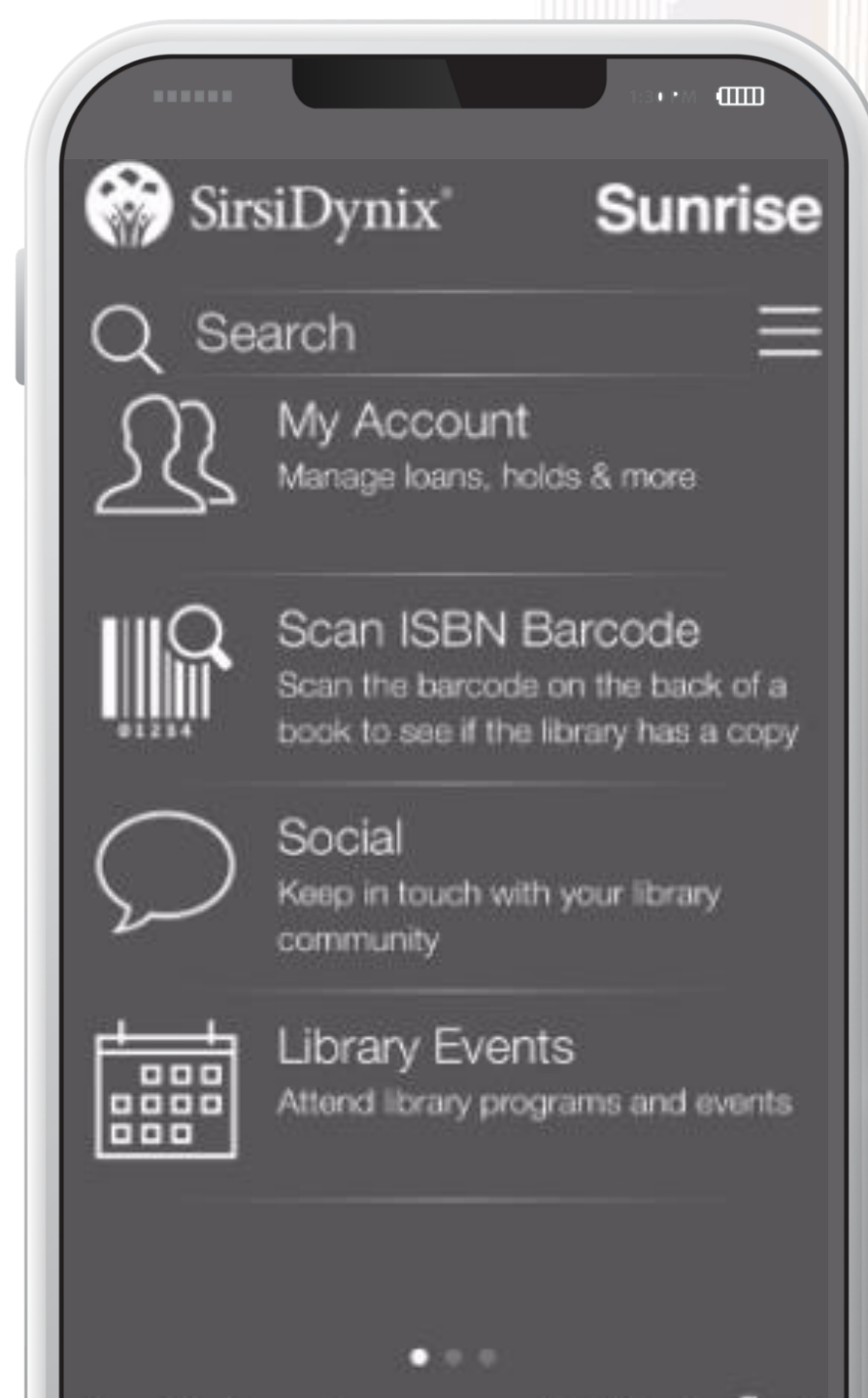
Tomorrow is Electronic

- A new, cost-effective way to provide world class resources
- Builds on our commitment to simplified discovery for all library resources
- Full text with no authentication
- CloudSource+ offers true no dead ends by integrating your commercial resources as well
- Updated search relevancy and search options meet needs from casual searcher to researcher with deadlines
- Use BLUEcloud Course Lists to highlight curricula-required content



CloudSource OA

Discovery & Mobile Access



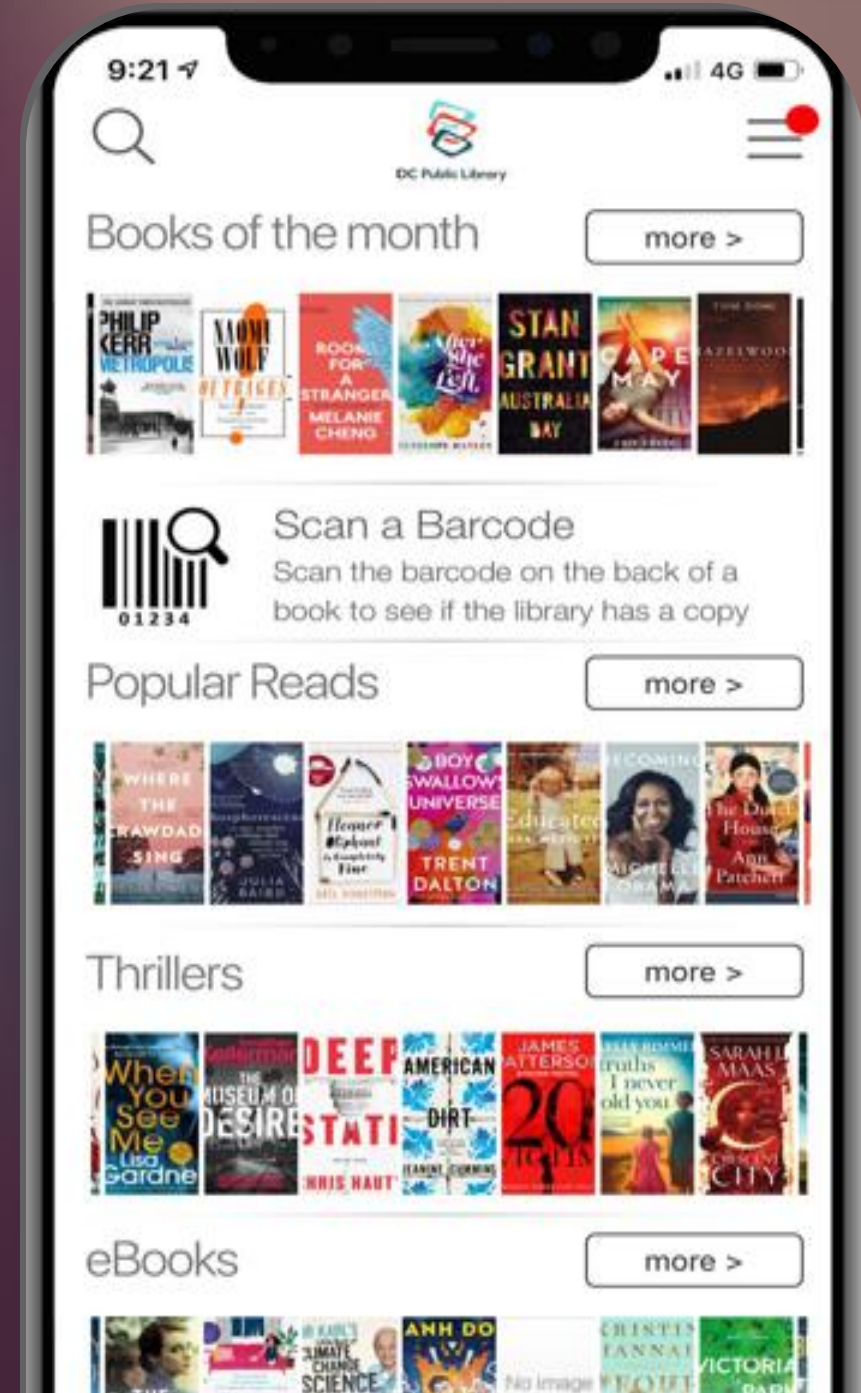
Together We Are Mobile

BLUEcloudMOBILE

- 400% growth in devices
- 460% growth in apps launched
- App home refresh and other new features coming soon!

SMS MESSAGING

- 32% growth year over year
- More of you use it, and you use it to send more notifications



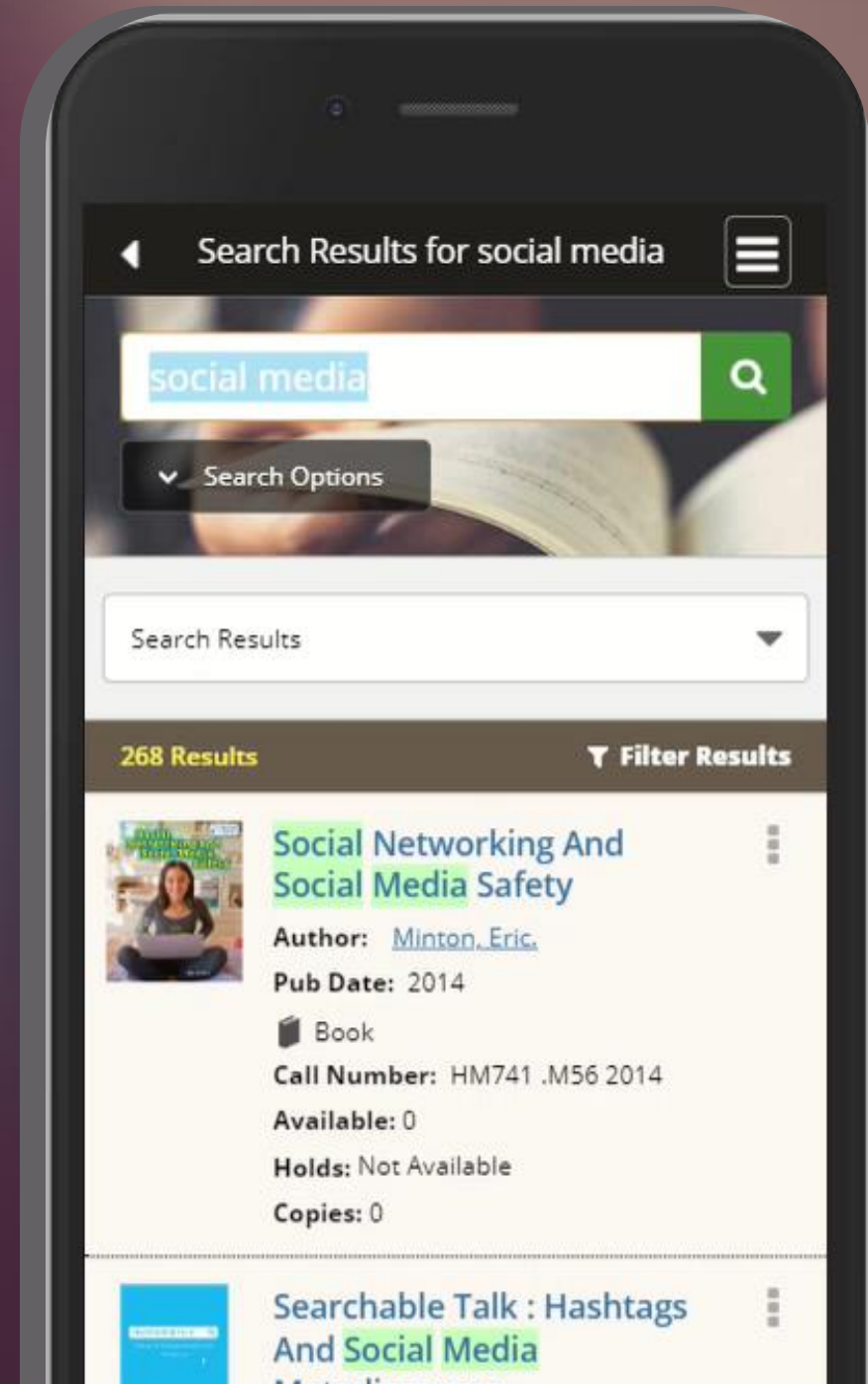
Together, We Are Mobile

Latest 5.1.0:

- Stop Words, Thesaurus, Parent/Child filters and facets
- Accessibility "Lite"
- Overdrive Magazines eRC Connector Support
- Comics Plus Connector Support
- Updated Admin UI

Coming soon 5.2.1 and 5.2.2

- Security improvements (5.2.1)
- Discovery File Manager (5.2.2)
-  SirsiDynix®
- New "sort field" (5.2.2)



We Will Discover More Together

- Using the solid foundation of Cloudfunder OA search, we will build a new discovery
- Multi-tenant
- Responsive
- More out of the box config options
- Component-based
- API for customization





Recently released: *Item Management*

The screenshot displays the BLUEcloud Circulation web application interface. At the top, a blue navigation bar contains the following menu items: Staff, Admin, Connections, Developers, Circulation, and a user profile for SYM_TEAMX_MASTER [RIPON] root. The Circulation menu is expanded, showing a sub-menu with eResource Central, Cataloging, Acquisitions, Circulation (highlighted), and Lists. A secondary menu is open under Circulation, listing Item Management (highlighted), Search, BCSP REST Client, Check Item Status, Holds Pull List (highlighted), Holds Shelf, Mark Items Used, and Receive Transit. The main content area features a large background image of a wooden pier over the ocean with the text "Welcome to BLUEcloud Circulation". Below this is a search bar with the text "Patron Search" and "Scan or search for patrons", a dropdown for "Berlin Libraries", and a dropdown for "Name". At the bottom, there are two buttons: "Patron Registration" and "Check In".

BLUEcloud Circulation

Product Roadmap Q3 2021-April 2022

- **Holds**

- ~~View details~~
- ~~Edit~~
- ~~Delete~~
- ~~Pull list~~
- ~~Holds Shelf~~
- ~~Permissions~~

- **Items**

- ~~In-house~~
- ~~Check Status~~
- ~~Receive Transits~~
- ~~Permissions~~

- **Patrons**

- **Copy**
- ~~Delete~~
- ~~Add SMS contact info~~
- ~~Add/update PIN (Sym)~~
- ~~Create a bill~~
- **Permissions**

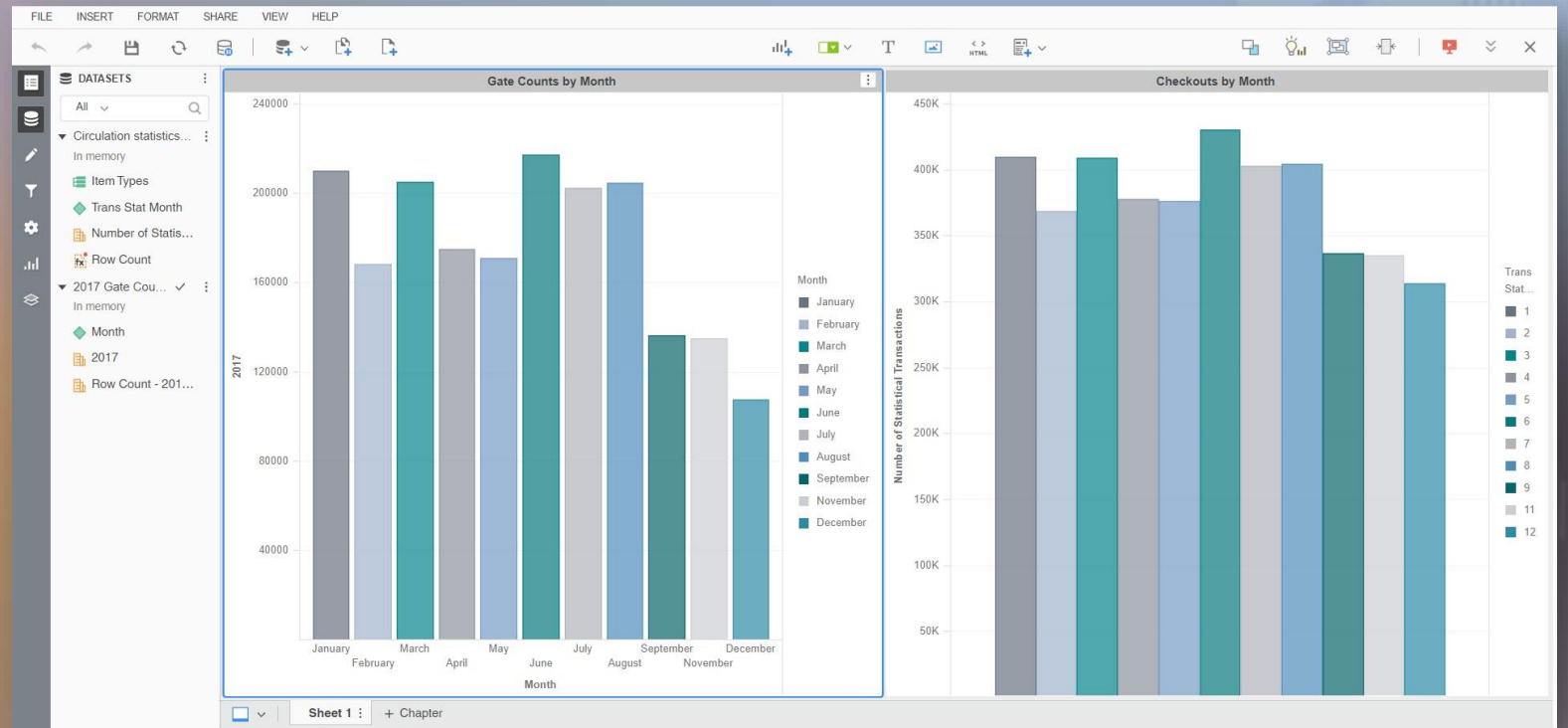
- **Due Dates**

- ~~Edit due date (*IP)~~
- ~~Special due dates~~
- ~~Permissions~~

*We will also be adding actions to the Holds Pull List and the Holds Shelf in the near term



Analytics

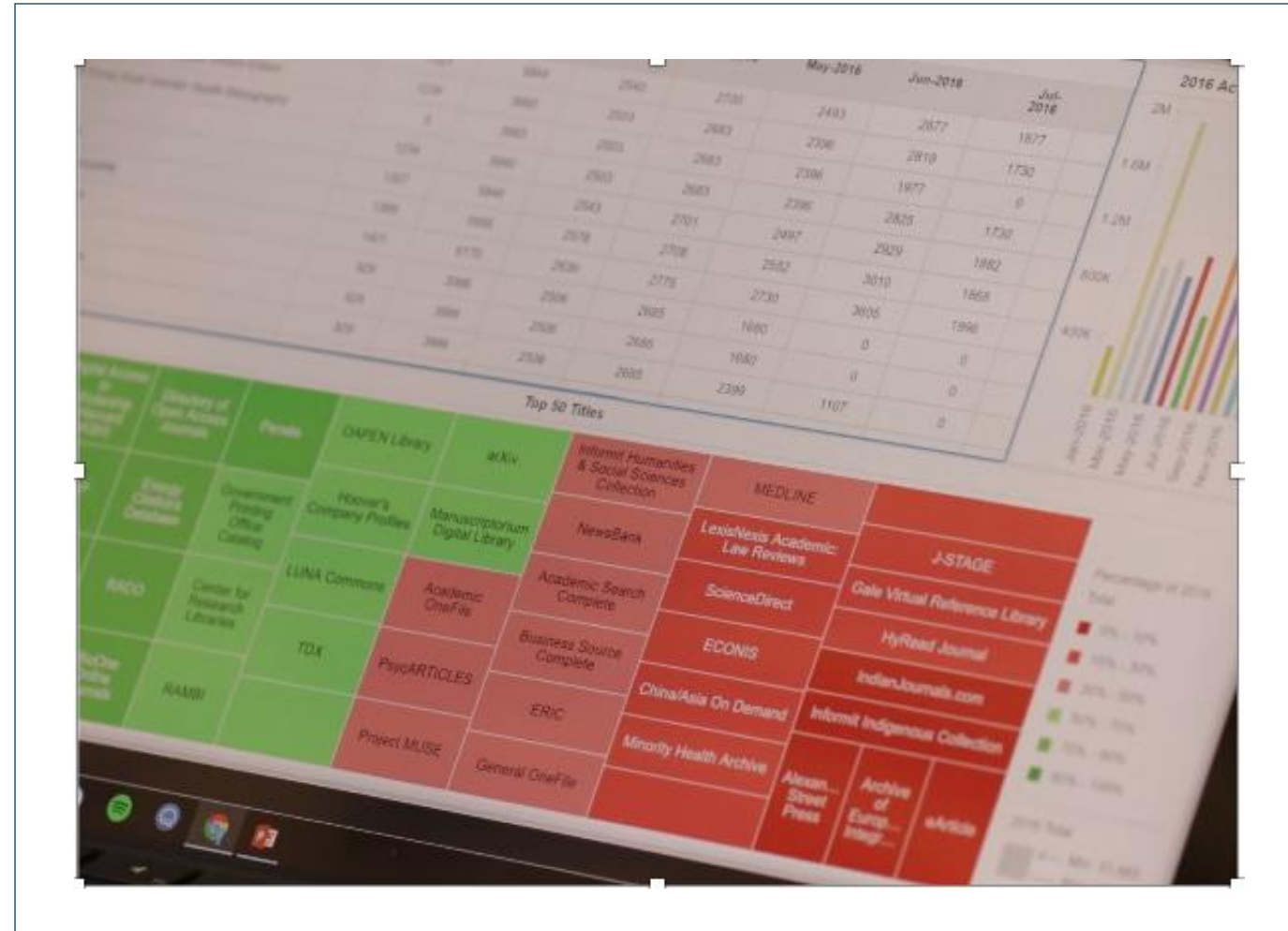


*BLUEcloud Analytics: Introducing
Our New Director:*
Hilary Prisbylla



BLUEcloud Analytics: The Data You Need to Plan For Tomorrow

- Check out the growing set of standard reports in the Support Center
- Commit to explore dossiers in 2022
- Microstrategy platform upgrade will offer new visualizations



Goals for 2022-2023

- Technical updates:
 - MicroStrategy 2021
 - Universal Harvest
 - Updated Architecture for transforms
- Ongoing pilots, Resumption of pilots:
 - Horizon and Symphony ODBC
 - Push API (need a MicroStrategy bug API)
 - Private Intelligence Server, Platform Analytic
- Focus on content:
 - Grids to Dossiers
 - More reports: Collection Analysis, State Reports, Accreditation reports, etc.

CONTENTS

- 1 Chapter
- 1 Page

Item Counts

- Collection Analysis

DATASETS

All

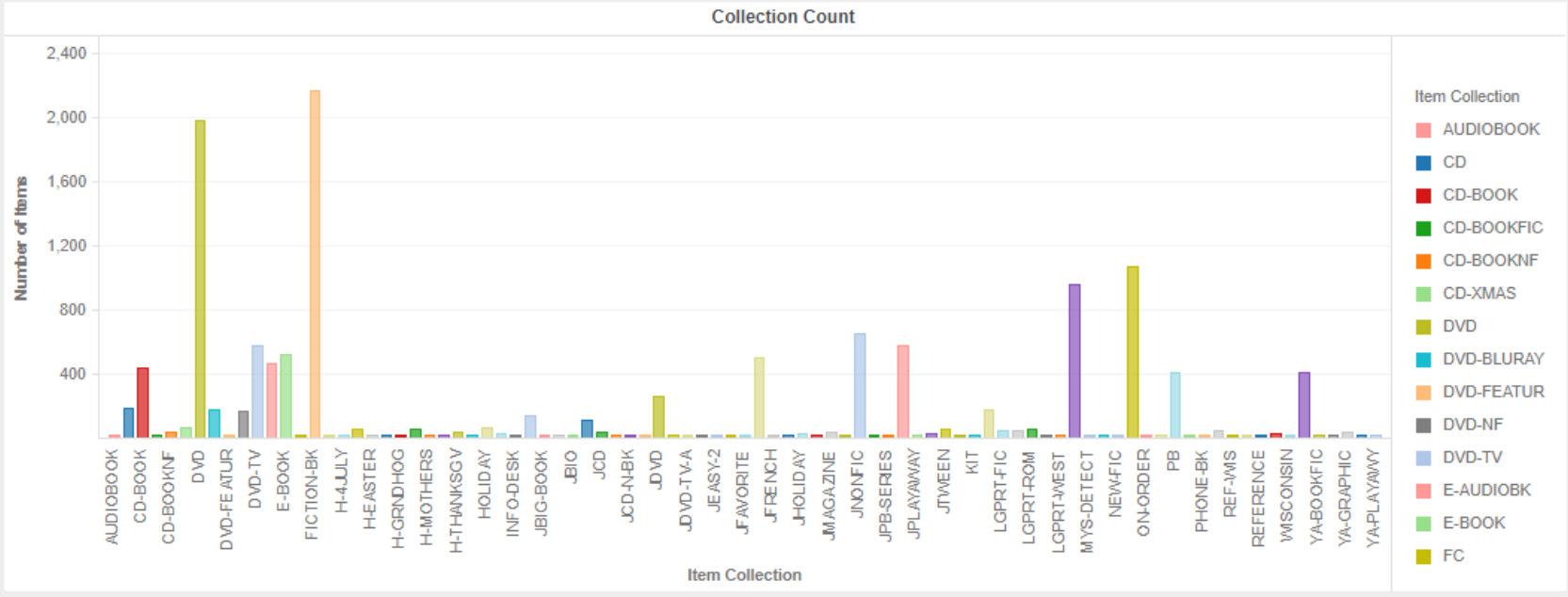
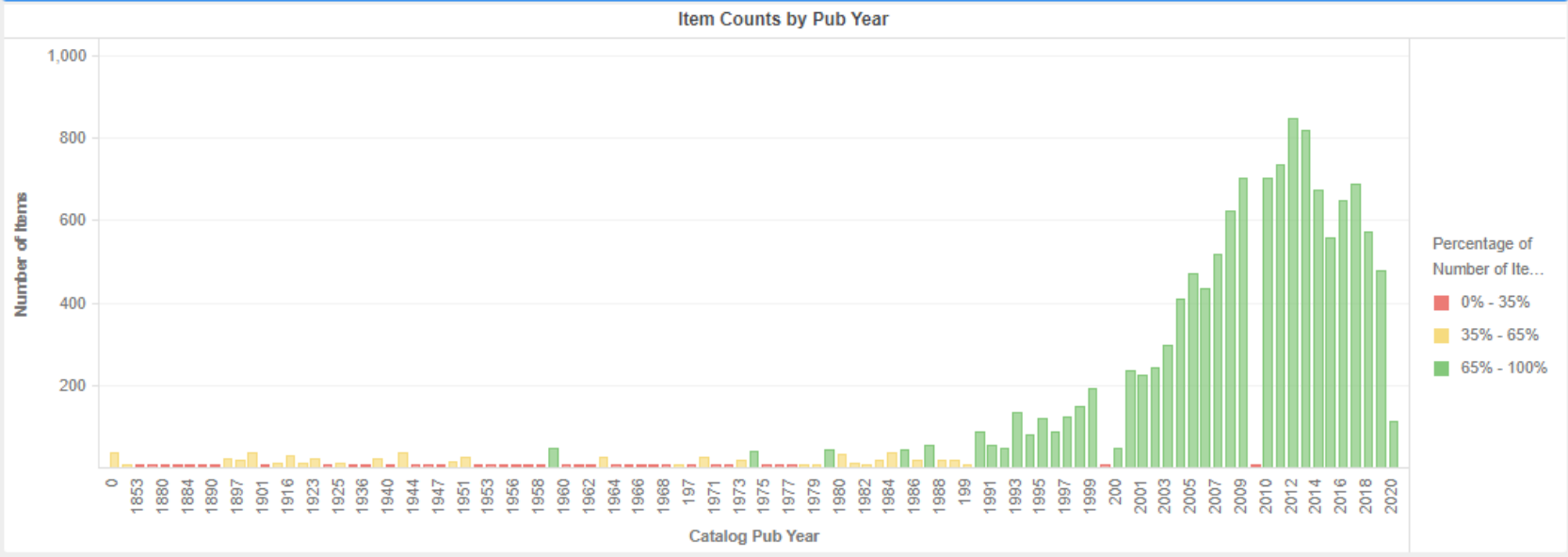
Collection Cou...

In memory

- Author
- Catalog Pu...
- Catalog Title
- Item Barcode
- Item Collect...
- Item Create...
- Item Library...
- Item Lifetim...
- Item Lifetim...
- Item Pieces
- Item Price
- Item Status
- Number of I...

Select your Library

Coloma



GALLERY

Built-in

- Grid
- Table
- Line
- Bar
- Area
- Scatter
- Pie
- Donut
- World Map
- Location
- Network
- Bar Chart
- Box Plot
- Bar Chart

Custom

- Data
- Close
- Chart

Other Customer & Marketplace Inspired Roadmap Items

Multi-factor authentication: Enterprise/Portfolio Admin, Version 5.2.1

- Single Sign On updates, including MFA under review for BC Central (SSO in pilot now), SymphonyWeb

Zip code/City, State selections (Symphony & future BLUEcloud)

Differentiation of Circulation Quick & Full Registration (BLUEcloud)

Improved Citation Options (Enterprise, BC Course Lists, CloudSource)

TLS 1.3 support for SIP2: Horizon 7.6, Symphony 4.0

Transfer Holds; Improved RFID support in SymWeb (Symphony 4.1)

Library Communications Framework (Symphony & Horizon, 2023)



Partnerships

Web Services and APIs Mean We Can Build and Expand Connections Together

95

Partners help expand your systems

20

Since last year

How we connect:

- SIP/NCIP (12)
- Web Services/APIs (22)
- eRC (17)
- Data Reports (5)
- Services/Content (33)
- Suppliers (6)



Web Services and APIs Mean We Can Build and Expand Connections Together

Coming Soon:
Library Communications Framework

Our connector certification programs and consulting catalog offer secure and effective solutions!



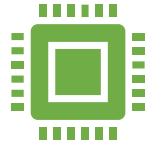
Partnership & Integration Trends

- e-Content: CloudSource, eRC, BC Course Lists
- Statistics: Above the Treeline, Library IQ
- Web Services: Discovery, Authentication, Local Development
- Updates for Web-based products: RFID suppliers
- Efficiency for physical collection management: Lyngsoe IMMS, ReShare ILL

Successful Partnerships Require



Communication between partners



Test environments: eRC, Web Services, Related Services



Staff time (everyone's)



SirsiDynix:

Maintains testbeds for partners

Dev/Ops approach: we may offer implementation services, consulting, extracts, etc

New development (Web Services, Universal Harvest, ILS, etc.)

Communication Support (Slack)

Actual Support (close partners)

Partnership Inspired Development 2021-2023

Library Communications Framework (potential SIP2 replacement)

Improvements to web services to better reflect availability and holdability

BC Search improvements: sorting, index keys for FRBR constructs, get certain facets

Symphony/IMMS): more item categories, alternate structure for “pickup” and “sorting” locations that doesn’t require full library creation

BC Course List Integration with Digital Content Store

TLS 1.3 for SIP2

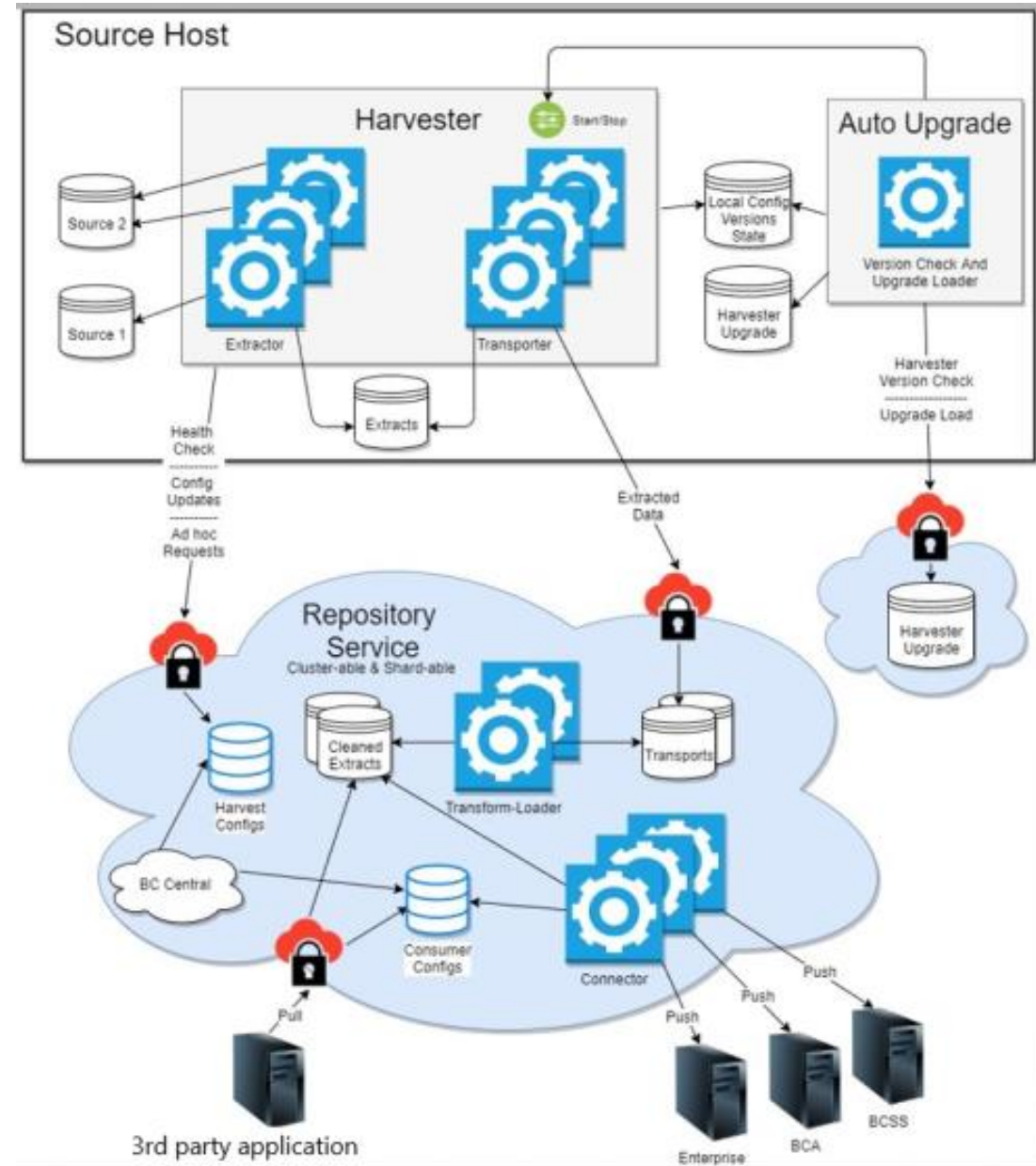
Consulting third party discovery delta report

Some features of Universal Harvest



Universal Harvest

- One agent, all SD products
- Multi-tenant
- More data (authority, etc.)
- Dynamic updating
- Third party integrations



Partnerships in Security for Today and Tomorrow

- SirsiDynix devotes well over \$1 million annually in security-oriented software, related staffing, training and standards such as ISO 27001
- Impact on all of us together will only increase: Log4J review and remediation took approximately 1 week of development time department wide. Similar time for SaaS and IT staff.
- SaaS is a great way to mitigate your risk
- Expect portion of roadmap devoted to security and privacy to continue growing

Security Oriented Updates

Horizon:

- 7.6 Client to server ODBC and encryption
- 7.6 Support for TLS 1.3 for SIP2
- 7.5.5 Password rules

Symphony:

- 3.7.1 SymWeb Access Control
- 3.7.1 Password rules
- 3.7.1 & 4.0 Data Control access
- 4.0 TLS 1.3 for SIP2
- 4.0 Timeout for unsuccessful login attempts

Web Services:

- Allow/Deny access to end points

New Products:

- Library Communications Framework



Number of allowed attempts before lockout: 5

Amount of time the account is locked: 5 Days Hours Minutes

Amount of time until failed attempts are forgotten: 5 Days Hours Minutes

Use this policy for invalid users:

Error

Your ID or PIN is incorrect. Number of attempts before account lockout: 4

OK

Identify User

User ID: MATTHEWP

Basic Info Privilege Demographics Addresses Extended Info

Privilege expires: NEVER

PIN: 1234 Override:

User's PIN is active

PIN creation date: 2/14/2022 PIN expiration date: 5/15/2022

Status: OK

Claims returned: 0 Override:

Web auth id: Override:

User is locked out!

Unlock user Override: *****

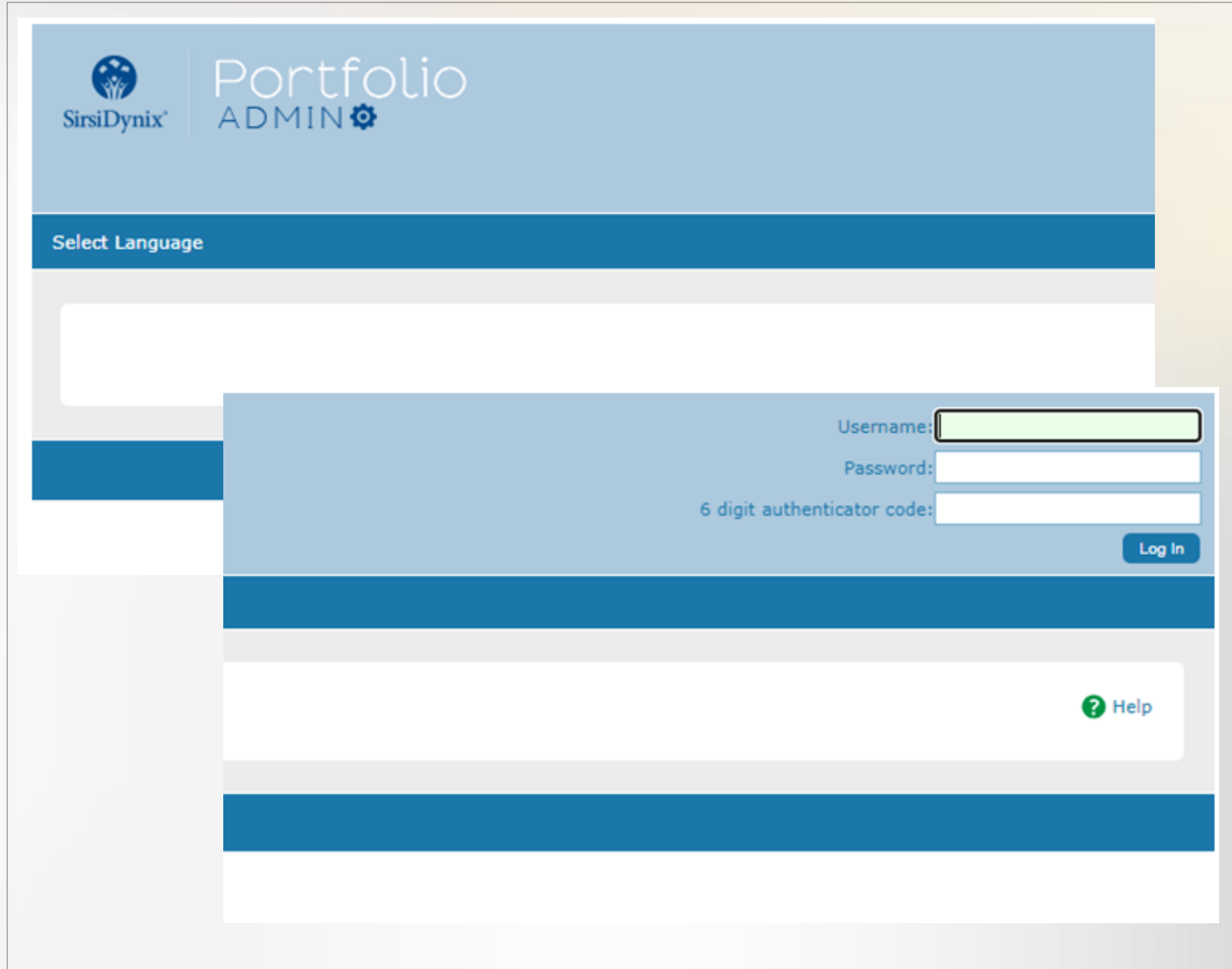
Security Oriented Updates

Enterprise/Portfolio:

- 5.2.1 Optional MFA for Admin Login
- Numerous other improvements

Single Sign On:

- Enterprise/Portfolio
- BC Central (Pilot)
- SymphonyWeb (Planned for 4.1)



The screenshot displays the 'Portfolio ADMIN' login interface. At the top left is the SirsiDynix logo. The main header area contains the text 'Portfolio ADMIN' with a gear icon. Below the header is a blue bar with the text 'Select Language'. The login form is centered and includes three input fields: 'Username:' (highlighted in light green), 'Password:', and '6 digit authenticator code:'. A blue 'Log In' button is positioned to the right of the authenticator code field. At the bottom right of the page, there is a green circular icon with a question mark and the text 'Help'.

A large crowd of stylized human figures in various colors (black, brown, grey) is shown against a dark background. One central figure is highlighted in light blue. The text "Serving Communities Together" is overlaid in white, italicized font.

Serving Communities Together

Software as a Service

Keeps your focus on the community

Reduces security planning overhead

Easier to keep current, getting the full value of your solution



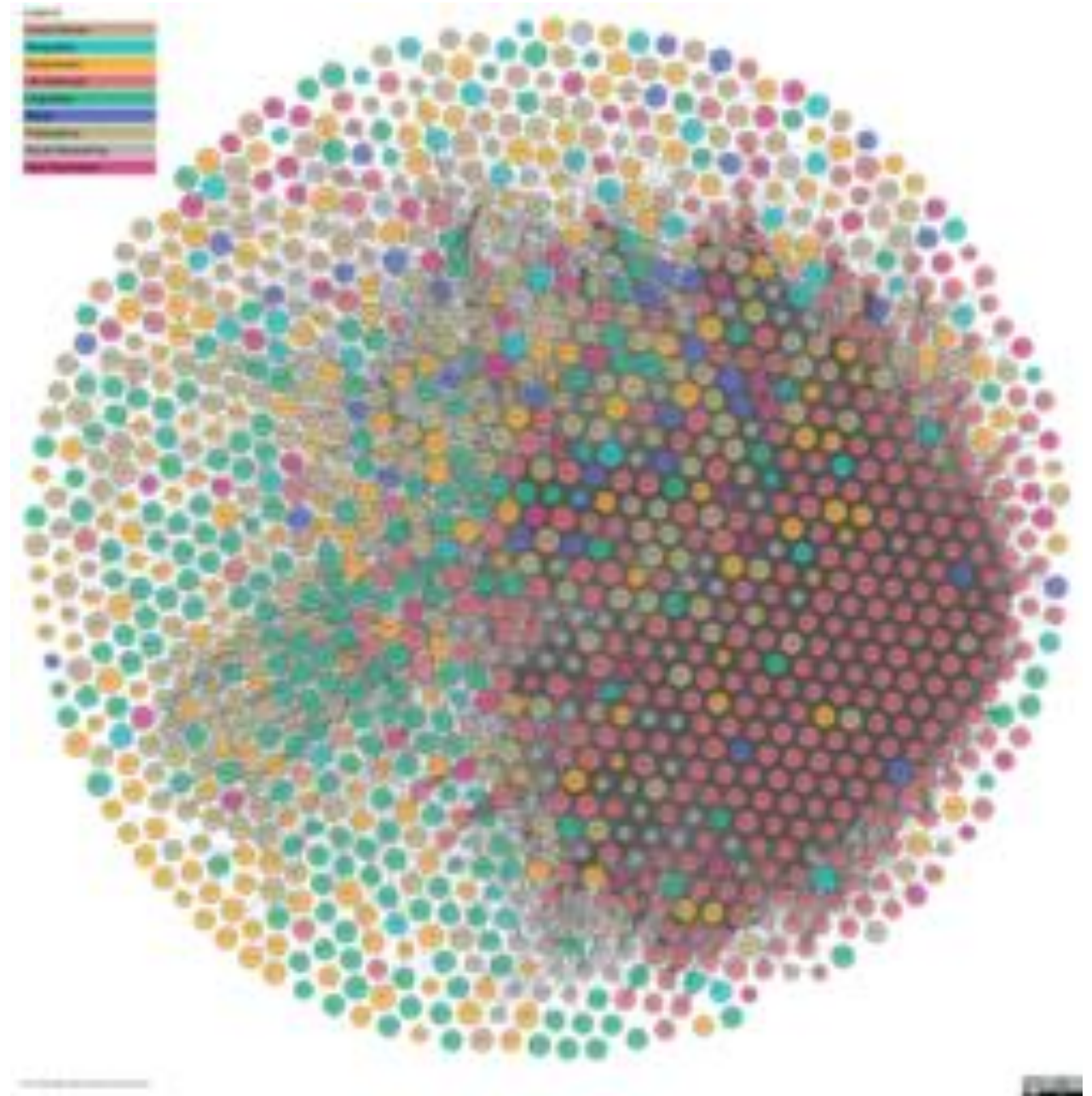
eResources Continue to Grow; Make The Most Out Of Your Physical Resources Too

- NCIP updates support ReShare open source ILL solution
- Upcoming Symphony interface with Lyngsoe IMMS puts automated material handling into overdrive while improving efficiency and collection equity



Metadata Rules

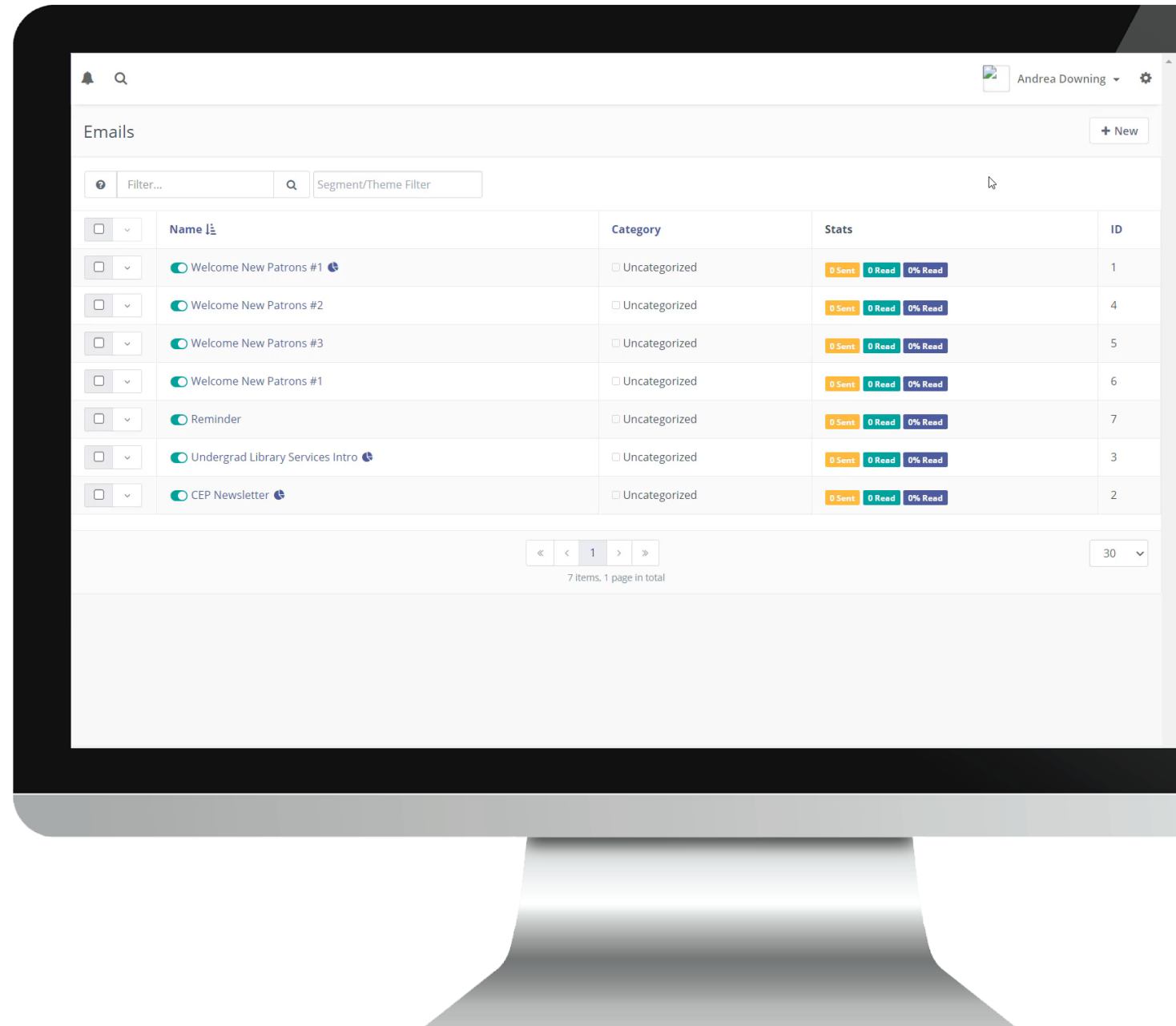
- Take advantage of authority updates to improve discovery
- Find out about new options that give you ways to modernize headings to meet community norms
- Use BC Visibility to bring external searchers to library collections



Keep your Community Engaged and Informed

Community Engagement Platform allows you:

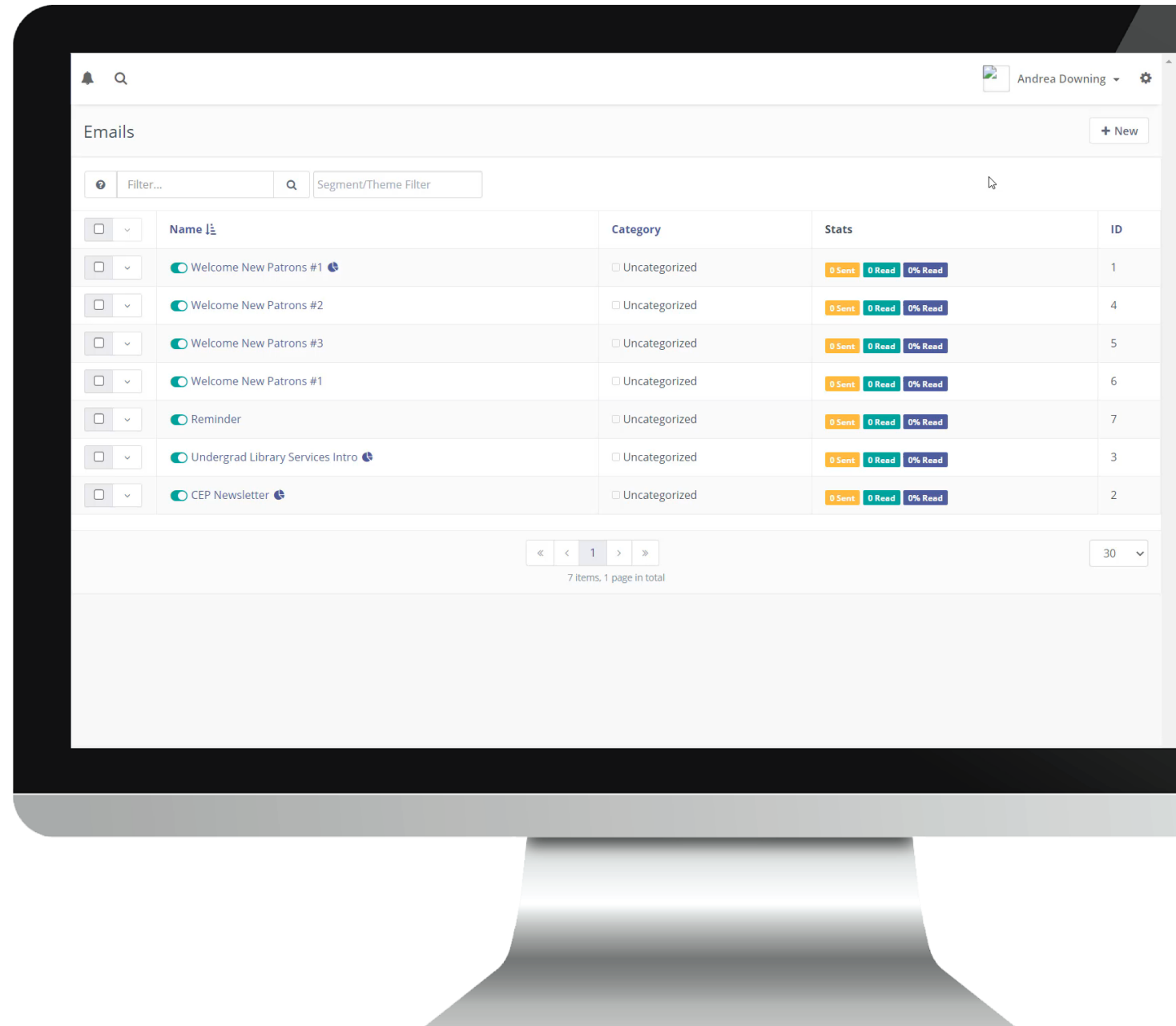
- To keep your community updated on library services and activities via professional communications
- Track stats and make decisions on results of communications
- Provide your calendars to the community



Keep your Community Engaged and Informed

Community Engagement Platform allows you:

- Reserve rooms and equipment for meetings and events
- Organize event landing pages, invitations and manage attendance



Thank you!

We Believe in the

POWER *of* LIBRARIES

We believe in the power of libraries. You transform, improve, and enrich our communities. We recognize the importance of libraries and want to help you thrive. It is our goal to support libraries as you evolve in an increasingly digital world.

