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Executive Overview

For twenty years, LOUIS: The Louisiana Library Network has been a collaboration among Louisiana’s academic libraries and the foundation on which Louisiana academic libraries build to support research, teaching and learning. The mission of LOUIS has never been more essential than now during this period of diminished funding for higher education.

LOUIS was established in 1992 to provide equal access to library services and information resources to all publically funded academic libraries; to maximize the purchasing power of the consortium; and to save money and share expertise in support of research, teaching and learning on each campus. LOUIS is governed by the LALINC Executive Board, which is made up of the Deans and Directors of the LOUIS member libraries.

LOUIS is still developing a new business model brought on by budgetary changes. A sustainable funding model is core to the continued existence of the consortium. This year membership fees increased to 73% of LOUIS's budget, with Board of Regents support at 27%.

LOUIS supports all libraries in the higher education systems: the University of Louisiana System; Louisiana Technical and Community College System; Southern University System; Louisiana State University System; Louisiana Academic Independent Colleges and University Network; and LUMCON. In addition, LOUIS works closely with the State Library of Louisiana, parish libraries, State Archives and museums, and private museums. LOUIS continually considers the needs of K-12 when negotiating for e-resources. A link to a full list of members is provided at the end of this summary.

LOUIS saves money for the taxpayers of Louisiana. In 2012 alone, LOUIS purchased over $24 million worth of services and resources on behalf of Louisiana’s academic libraries for $3.67 million, a savings of over $20 million. Since 1992, LOUIS has saved the state of Louisiana over $172 million.

A central support staff of seven (6.75 FTE), located in Information Technology Services at LSU, makes it all happen. LOUIS staff installs, upgrades, configures, consults, supports and negotiates prices for the services, technologies and resources approved by the LALINC Executive Board. With over 125 years combined experience, LOUIS staff has an unequaled level of institutional knowledge and expertise which equates to fast and efficient implementation of new solutions and problem solving. Members support paying more in membership fees due to the exemplary level of service provided. The staff’s dedication to consortium activities has been especially noteworthy during recent changes in funding. A link to a list of services and resources is provided at the end of this summary.

Member libraries rely on exemplary support by the LOUIS staff as their own staff dwindles. Following the retirement of 1.25 LOUIS staff and upcoming retirement eligibility of several more LOUIS staff, LOUIS hired a uniquely experienced analyst and expects to hire a second experienced analyst in FY 2012-13.
The following is a list of activities provided by LOUIS during the past year. LOUIS was successful in licensing and providing support for the following services and resources:

- SirsiDynix Symphony, the library staff client and the electronic catalog
- SirsiDynix Web2, the union catalog
- SirsiDynix e-Library, the user interface
- OCLC Atlas ILLiad, the inter-library loan system
- OCLC CONTENTdm, the digital library system
- LinkSource and A-to-Z, the URL resolver and title list for LOUIS resources
- EBSCO Discovery Service (EDS)
- Credo Literati, information literacy – a joint collaboration with the State Library of LA
- EZproxy authentication technology
- 69 Electronic Resources (academic journals, full-text and abstracting services, citation databases, etc.) for state
- 23 Electronic Resources (academic journals, full-text and abstracting services, citation databases, etc.) for “mini” groups
- WordPress webpage software
- FootPrint incident reporting and knowledge base software
- Actively communicated with sites using email, listservs, and social networking tools such as Twitter, Facebook, YouTube and the LOUIS website
- Managed 10 listservs

The major highlights from this past year include:

- Participated in SirsiDynix Strategic Partner Program
- LOUIS staff elected as Program Chair of COSUGI 2013
- LOUIS staff member of EBSCO Academic Advisory Board
- Consulting with Northshore Technical Community College to join LOUIS
- Consulting with Central Louisiana Technical Community College to join LOUIS
- Consulting with Northwest Technical Community College to join LOUIS
- Consulting with Centenary College to join LOUIS
- Hosting the 19th annual LOUIS Users Conference (LUC)
- Hosted 34th and 35th System Administrator Meeting
- Hosted North and South ILLiad Users Group Meeting
- Hosted the LOUIS Boot Camp for new System Administrators
- Successfully tested Disaster Recovery process
- Enhanced Big Brother server monitoring system
- Implemented a redesign of the LOUIS website
- Implemented a new Partners contact platform and migrated 400+ contacts
- Implemented a new Documentation platform and migrated 700+ documents
- Implemented and hosted North and South Symphony User Group Meetings
- Implemented upgrade to SirsiDynix Symphony system on Beta, Training and Production servers
- Implemented improved SirsiDynix upgrade scripts
- Implemented new and enhanced Symphony functionality
- Implemented enhanced MARC file processing with MARCIVE
- Implemented numerous custom processes and database cleanup projects
- Implemented EBSCO Discovery Service (EDS)
- Presented on LOUIS at 6 different occasions
- Invoiced and received payment or PO’s from all LOUIS members
- Hired a new seasoned analyst
- Circulated over 1.129 million items through Symphony WorkFlows
- Provided results for over 3.5 million searches in Symphony e-Library
- Maintained all administrative content (documentation, partners, databases, software, financial)
- Participated in all LALINC Executive Board meeting
- Participated in all LALINC committee meetings
- Participated in beta testing processes with SirsiDynix and CONTENTdm
- Partnered with UNIX server administrators in the areas of disk space management, security, backup and recovery, and operating system maintenance
- Partnered with LOUIS sites and EBSCO to continue to enhance the A-to-Z with MARC service integration into the catalog
- Partnered with LOUIS sites and EBSCO to integrate EDS into the catalog
- Facilitated 4 training sessions
- Attended 7 site visits
- Attended 11 training sessions
- Attended user conferences for SirsiDynix, ILLiad, CONTENTdm
- Attended four conferences: LLA, ALA, ICOLC, Charleston Conference
- Attended Lyrasis Consortium Summit
- Renewed 69 e-resources saving the state million by negotiating discounts
- Supported 23 mini-consortiums for electronic resources purchased on behalf of subsets of LOUIS member libraries saving millions by negotiating discounts
- Offered numerous trials of new e-resources
- Loaded, on average, 140,000 A-to-Z records each month for 18 sites
- Completed 109,789 interlibrary loan requests
- Customized ILLiad pages
- Served on various committees with library industry staff regionally, nationally, and internationally
- Added 11 new collections to the LOUISiana Digital Library
- Facilitated the addition of 23,345 new items to the LOUISiana Digital Library for a total of 213,959 items
- Received 1140 new incidents via FootPrint incident portal
- Closed 1137 incidents in FootPrints
- Targeted specific training to insure all resources and services are used and properly understood

LOUIS Webpage: www.LOUISLibraries.org
LOUIS Members: www.LOUISLibraries.org/wp/louis/louis-members
LOUIS Services: www.LOUISLibraries.org/wp/louis/services
A. Maintain, Support and Manage SirsiDynix Symphony System

SirsiDynix is the software company that develops and maintains the integrated library system (ILS) known as Symphony. It includes e-Library for public access, both WorkFloows and StaffWeb for back office staff functions, and Web2 which provides the virtual union catalog for all materials owned by the Libraries. All these components are used by LOUIS libraries and supported by the LOUIS staff.

In September 2011, LOUIS hired a new Analyst with ten years’ experience at SirsiDynix. As Senior Technical Adviser, he worked on advanced customer support issues and coordinated with SirsiDynix Product Managers and Software Engineers to improve the product. Since starting with LOUIS, he has taken on many tasks pertaining to Symphony and other projects as well. He started with LOUIS six months before the retirement of another staff member with over 17 years’ experience in LOUIS.

After evaluation of release notes for the latest version of Symphony (3.4.1), member libraries approved an upgrade. The upgrade was completed by LOUIS staff in early 2012, with assistance and advice from senior SirsiDynix support technicians. The training server was upgraded first in January, and sites were allowed to evaluate and test for six weeks. The production server was upgraded on February 29. The system was down beginning with the backups which started on schedule shortly after midnight. Because this upgrade was smaller than usual and we had new staff and some new techniques, downtime was shorter than usual and the system was in full operation before 2:00 p.m.

The new upgrade made available a useful new staff function called the Item Group Editor. After some initial struggles with server-side maintenance related to the Item Group Editor, LOUIS staff disabled the new feature and asked that sites open a support ticket to indicate their desire to use it. It is now enabled for nine of our thirty sites with no significant ongoing problems.

The LOUIS staff participated in two regional sharing sessions pertaining to Symphony. The southern region meeting was held at Nicholls State University and the northern region meeting was held at Northwestern State University. The LOUIS staff gathered preliminary questions beforehand. Both LOUIS staff and library staff asked and answered practical questions of day-to-day concerns.

Following the 3.4.1 upgrade, SirsiDynix released Service Pack 1 and Service Pack 2. They are small sets of fixes and enhancements, a mini-upgrade essentially. In prior years, SirsiDynix released "patch clusters” which were comprised of fixes only, no enhancements. The delivery mechanism for the new service packs, however, was not compatible with the LOUIS server configuration in which directories that contain certain sets of files are shared by all instances (each instance serves one college or university.) SirsiDynix has stated that they have fixed the problem in Service Pack 3, and LOUIS will evaluate it in the near future.

SirsiDynix has launched a number of Strategic Partnership Program initiatives (SPPs) in the last year. LOUIS staff and member libraries have joined many of them, helping to shape development of new and improved features. Some of the SPP topics include new cloud-based staff client and a new business intelligence product, the aforementioned service packs, and software changes pertaining to Resource Description and Access initiatives (RDA).

LOUIS also undertook major efforts to implement a new public search product called EBSCO Discovery Service, or EDS. LOUIS worked with EBSCO to set up web based profiles that enable libraries to configure displays and resources searched in EDS. LOUIS also customized the process
which sends monthly complete extracts and daily updates to the EDS ftp server, in order to keep records in EDS as up-to-date as possible.

LOUIS successfully completed our third disaster recovery test for Symphony in April, 2012. The LOUIS staff successfully cut over from their main production server to the "hot site" server at Louisiana Tech, and then back again, transferring data from hot site to production at the end of the test. All thirty LOUIS sites used the hot site server for their public and staff activities for three days. No data was lost in the swapping from server to server, and down time targets were met. LOUIS staff carefully followed the steps they documented in previous disaster recovery tests, and refined them as needed.

LOUIS staff and SirsiDynix sales representatives met with the library staff at Centenary College of Louisiana to discuss migration to the SirsiDynix Symphony system administered by LOUIS. Plans are underway for a go-live date in the second or third quarter of 2013.

LOUIS staff also worked with our principal e-book and e-journal provider, EBSCO Publishing, to incorporate new statistical fields in the records loaded in Symphony. In order to enable rapid searching of this new data, LOUIS customized the process to add it to the Symphony keyword indexes. This will allow for easier and quicker statistics gathering for e-books and e-journals purchased by LOUIS or by each institution, those that offer full-text online, and other criteria. Statistical information like this is often needed when libraries assess their purchases and complete accreditation reports.

At the request of the libraries, LOUIS staff completed a project to change the call number used in e-book records. This involved updates to numerous tables for approximately 150,000 records per site. The work was done on Training first, where each site was allowed to review results before scheduling work on Production. The new call numbers clarify the online availability of the materials for students and faculty searching eLibrary.

Also in the realm of eLibrary, LOUIS customized scripts which are used to track usage of government publications that are available on the web.

LOUIS staff created new custom reports to provide alerts for records with a "pending update" status that should not have that status, and to notify us of scheduled reports which are owned by staff that have left one of the LOUIS libraries.

In order to help libraries more effectively deal with accreditation reports and other information requests, the LOUIS membership has created the Statistics Working Group. Several LOUIS staff members have joined this committee, and plan to provide advice and tools useful to collecting statistical information from Symphony and the other applications and services we support.

LOUIS staff also updated older custom reports in order to provide better e-mail messages regarding loading of monthly and weekly files of bibliographic records for government documents.

LOUIS has long maintained a knowledge base of local documentation for Symphony and other products we support. After evaluating other options, LOUIS undertook a migration of that documentation from a Lotus Notes based system to the FootPrints Knowledge Base, a component of the support ticket tracking system long used by LOUIS. FootPrints is a Numera Software product. The initial motivation for looking for new knowledge base options was the planned end-of-life for Lotus Notes applications on the LSU campus in 2014.
In close cooperation with UNIX administrators in the LSU Information Technology Services (ITS) department, LOUIS began the procurement of new hard discs for our production, training, hot site and BETA Symphony servers. The new discs will simplify backups and provide ample storage for future growth. They will also allow the training, hot site and BETA servers to run on new hardware eventually, in order to move away from the VIOS virtual server environment which is little used within ITS, and therefore not easily supported.

LOUIS staff made various improvements to our automated backups, and working closely with LSU ITS staff changed the servers on which backups are stored to speed up the backup process and make it more reliable.

The AIX operating system on our Symphony servers was upgraded from version 5.3 to 6.1.

LOUIS hosted the 34th System Administrators Meeting, August 11, 2011 at the LOUIS Office at LSU. The meeting was attended by forty-five System Administrators.

LOUIS hosted the 35th System Administrators Meeting, January 12, 2012 at the Rapides Parish Learning Center in Alexandria. Fifty-nine System Administrators attended, representing thirty LOUIS sites.

LOUIS reimbursed travel costs for any System Administrator to attend each meeting if that system administrator traveled more than three hours each way.

Agendas from both meetings are in Appendix A.

A.1 Implementation of Symphony functions

The LOUIS staff supports the Symphony system for all member libraries. Towards that end, LOUIS continually:

- offers telephone and e-mail support to its members
- participates in various SirsiDynix Strategic Partnership Programs
- conducts regional Sharing Session pertaining to SirsiDynix symphony in which library ask questions and share answers on practical day-to-day concerns
- conducts on-site training for new staff in the libraries (System Administrator "Boot Camp" and "Selection Tool Training"). In 2011, LOUIS staff conducted both types of training at McNeese State University. See Appendix B for an outline
- discusses current projects, outstanding issues or concerns, and software development updates with SirsiDynix staff
- maintains and composes new documentation
- identify and facilitate training
- participates in SirsiDynix webinars and online training sessions to expand our knowledge of existing and newly developed software
- works with LSU ITS Unix server administrators in the areas of disk space management, performance, security, backup and recovery, Apache, Tomcat, and AIX (operating system) upgrades and maintenance
- encourages member libraries to actively participate in conferences, SPPs, enhancement forums, and e-mail lists
A.2 Create customized services for LOUIS libraries as needed

The LOUIS staff has an extremely deep level of knowledge related to the services supported. Consortium members benefit in many ways. One way is for LOUIS to do the customization of services and features needed by a member instead of having the vendor provide the customization. Having LOUIS implement these services and features saves consortium members thousands of dollars.

The custom services and features implemented include:

- Changed e-book and e-journals call numbers and MARC tags from SEE ELECTRONIC ADDRESS to "Available Online"
- Tested EDS authentication
- Daily automated export of Symphony bibliographic records and policies to Ebsco's EDS ftp server
- Alter indexing of the 856 tag to improve statistics gathering for e-books and e-journals
- Modified reports that gather statistics for newly ordered materials for LSU
- Improved e-mail alerts for loading of government documents
- New report to track and alert LOUIS staff of records with a "pending update" that should not have that status
- New report to alert the LOUIS staff of orphaned reports owned by library staff that have left the employ of the library
- Implemented Google Preview in eLibrary for SOWELA Community and Technical College
- Inserted a custom "item details" link in eLibrary for Delgado Community College

A.3 Keep LOUIS libraries informed of changes to the system & disseminate information

LOUIS uses individual emails, email groups, listservs, a web site (which is served up with WordPress software provided by LSU), Facebook and Twitter to communicate with the staff of the LOUIS member libraries. These media allow for constant and immediate contact between LOUIS staff and the staff of the member libraries.

Several changes to cataloging practices have come from an international committee called the Joint Steering Committee for Development of Resource Description and Access, and their recommendations are usually called simply RDA. To keep up with changes pertaining to RDA, LOUIS staff attended a full day instructional pre-conference session, spoke with development managers at SirsiDynix on their planned implementation and development efforts, helped and advised sites as they made Symphony policy changes pursuant to RDA, and wrote scripts that enabled the loading of RDA-compliant authority records.

Each of the various e-mail listservs concentrate on a different topic. They allow list members to ask questions and share solutions. A list of the listservs used by LOUIS is provided in Appendix C.

The web site (http://www.louislibraries.org) is used to host operational information and links, to explain the role and governance of LOUIS to the general public, to archive information and to share news and announcements. The LOUIS staff joined other units in LSU Information Technology Services (ITS) in migrating its web site to WordPress. LOUIS took advantage of the opportunity to revamp its web presence and make its web site resources easier to find.
Information posted to the LOUIS web site is often also posted to the LOUIS Facebook page to insure the information reaches as many people as possible. Access LOUIS on Facebook by logging into and searching for “LOUIS: The Louisiana Library Network” or directly at http://www.facebook.com/louislibraries.

Information posted on the LOUIS Facebook page is automatically “tweeted” by the LOUIS Twitter account. Follow LOUIS on Twitter here: http://www.twitter.com/louislibraries.

**Involvement with the SirsiDynix Symphony user community**

The SirsiDynix COSUGI 2012 Conference was held in Phoenix, Arizona, on May 2-5, 2012. Three LOUIS staff attended in order to explore, learn, share, and reconnect at pre-conference seminars and training, breakout sessions led by users as well as SirsiDynix staff, and vendor technology exhibitions. Louisiana was well represented at the conference. From the LOUIS staff, Cathy Sicard, Lisa Stigall and Mark Witteman attended, as well as several system administrators. Brian Sherman, LSU-S, served as Chair of the Customers of SirsiDynix Users Group, Inc. (COSUGI) Executive Committee. LOUIS staff member Mark Witteman was elected to serve as the COSUGI Conference Chair Elect for the 2013 conference.

LOUIS staff are active participants in several e-mail lists for SirsiDynix customers, especially but not exclusively those dedicated to system administration, library consortia, public catalog products, and the Symphony Application Programming Interface (API.)

**A.4 Maintain authentication software**

LOUIS protects users’ identity by encrypting user-sensitive transactions, like user account information submitted over the Internet. These transactions have been encrypted in e-Library since 2004. Encryption requires certificates that specify the trusted certificate granting authority, the web site for which the certificate was granted, and the expiration date of the certificate. LOUIS staff worked with LSU Information Technology Services (ITS) staff to renew our eLibrary web security certificates in June 2012.

LOUIS protects information resources by using authentication software called EZproxy. EZproxy brokers web requests between students and electronic resources. LOUIS members pay subscription fees to information providers and EZproxy is the means by which access to those for-fee resources is restricted to their students and faculty only, be they on campus or elsewhere. The authentication method LOUIS provides is encrypted. Nineteen LOUIS members use LOUIS hosted EZproxy software for authentication. The remaining LOUIS members locally support EZproxy or comparable software. In either case, the authentication software queries either the SirsiDynix Symphony patron file (hosted by LOUIS) or a file of users from an on-campus system.

At the request of a number of the vendors who sell electronic resources managed by LOUIS, we have helped libraries move away from default patron PINs like “CHANGEME” to unique PINs. Library patrons can have their PIN e-mailed to them when they fill out a form within eLibrary and can change their PIN in eLibrary also.
**B. Negotiate Statewide Licenses for Electronic Resources**

LOUIS now provides its members with sixty-nine electronic resource (academic journals, full-text and abstracting services, citation databases, etc.) from twelve vendors. With consortial purchasing, LOUIS negotiates discount for e-resources. LOUIS also negotiated deals for twenty-four “mini-consortia” contracts for various combinations of public and private academic libraries. LOUIS arranged for numerous trials of electronic resources through the year in order to make it easy for the members to make selection decisions.

LOUIS renewed sixty-nine electronic resources from the previous year and added seven new resources. A list of all the electronic resources can be viewed in Appendix D and here: 
http://sites01.lsu.edu/wp/louis/louis-electronic-resources-by-title/

LOUIS creates a “mini-consortium” for electronic resources when two or more libraries come together to purchase a specific product based on similar needs. LOUIS involvement is to negotiate the price and handles the billing. LOUIS pays the invoice and bills the participants. No mini-consortium is ever finalized without the expressed consent of the Dean or Director of the participating libraries. For each product, LOUIS negotiated with the vendor to provide the best savings possible to its members. The LOUIS staff negotiated seven new products, renewed seventeen existing products. The details about the twenty-four mini-consortia are provided in Appendix E and here: http://sites01.lsu.edu/wp/louis/louis-mini-consortia/

The seven new mini-consortia created are:
- Chronicle of Higher Education:
- WorldBook
- Sage Premier e-Journals
- HaPI – Health and Psychosocial Instruments
- RILM- abstracts of Music Literature
- Sanborn Maps
- Criminal Justice Abstracts

There was discussion among members for the following products, but these were eventually dropped because either the vendor had stipulations about minimum number of participants or the discounts provided were not enough and the subscription price was too high:
- Alexander Street Press: Classical Music in videos
- SportDiscus
- EasyBib via OCLC
- Sage Deep Backfiles
- HRAf – Human Relations Area Files from Yale

LOUIS offered trials during the year for the following electronic resources:
- Classical Music Video Collection by Alexander Street press
- eHRAF World cultures and Archaeology by Yale University
- National Geographic Archives by Gale Cengage
- IGI Global by IGI
- Mango Languages by Mango
- AAAS/Science by Science Online
C. Maintain, Support and Manage ILLiad

Seventeen LOUIS members use the ILLiad interlibrary loan software, hosted by Atlas Systems in Virginia. These sites completed 130,327 interlibrary loan requests between July 1, 2011 and June 30, 2012.

Atlas Systems released ILLiad version 8.1.3 in September 2011, client version 8.1.4.0 in September 2011 and finally the server version 8.1.4.0 in November 2011. ILLiad 8.1.4.1 includes many enhancements and improvements, such as new Word document templates using Excel data files, and sending and receiving documents in PDF format. Every form in the client was completely redesigned. The processes have not radically changed, but the new client has made tasks easier.

Over the past year Atlas has continued to offer support to LOUIS to customize the ILLiad patron pages for each LOUIS site at no cost to LOUIS.

The International ILLiad Users’ Conference was held in March 2012 followed by the North and South LOUIS ILLiad user meetings held in June. The International ILLiad Users Conference was held in Virginia Beach, Virginia on March 21-23, 2012. Over 300 people from across the nation attended including two from LOUIS and two from LSU. LOUIS paid for the two staff members from LSU to attend the conference.

The South LOUIS ILLiad user meeting was held on June 7, 2012 at LSU. Delgado Community College, University of New Orleans, Louisiana State University, Southeastern Louisiana University, Nicholls State University, McNeese State University, Louisiana State University at Alexandria and Louisiana State University Law School attended.

The North LOUIS ILLiad user Meeting was held on June 14, 2012 at Louisiana Tech. ILLiad users from University of Louisiana at Monroe, Northwestern State University, and Grambling State University attended. Even though they belong to the Southern Users group, Louisiana State University also attended to share the techniques they had perfected. (See Appendix F)
D. Maintain, Support and Manage Searching Capabilities

Discovery solutions allow a user to access a library’s entire collection through a Google-like search box. This type of access is possible with a federated search product, link resolver product, e-resource listing service and database subscriptions.

Starting in October 2010, LOUIS began an extended trial of a federated search product called EBSCO Discovery Service (EDS). EDS provides access to the library catalogs, databases, and the LOUISiana Digital Library through a single interface. EDS uses a knowledge base of pre-indexed records which allows the user to have faster response time for searches. All EBSCOhost databases including catalog records are stored in this knowledge base. Other non-EBSCO products are searched using EBSCOhost Integrated Search.

The LALINC Research and Development Committee evaluated EDS and recommended purchase for the 2012/2013 fiscal year. During implementation the service was customized to fit the needs of the libraries. This included customizing the record updating process to send catalog records and record updates.

LOUIS libraries also use EBSCO LinkSource to provide the consortium members with further access to full-text electronic resources. This service was renewed and will be available to our users through June 2013.

In addition, LOUIS also offers a service, EBSCO A-to-Z with MARC, where new data records for LOUIS resources are loaded into the library catalog on a monthly basis. Eighteen sites use this service. LOUIS works with EBSCO to customize the process and automatically receive a file which represents new, deleted or modified data records which relate to the specific holdings within the library. The file is manipulated and new files are created, tailored to each participating site. The new file is then automatically loaded into the online catalog. On average, there are 140,000 records in this file each month. Automatically updating these records saved the sites countless hours and keeps the online catalog as up-to-date as possible. Twelve sites receive their own data records each month. These files include the 140,000 records related to LOUIS resources as well as record for resources purchased by the site. LOUIS facilitates the process for these sites, handles the monthly file transfer and is available to help with any issues.
E. Maintain, Support and Manage LOUISiana Digital Library System

Since June 16, 2008, the Louisiana Digital Library (LDL) has been running on a server hosted by OCLC. This last fiscal year has seen a continued growth in the number of collections and items as well as challenges to upgrade from the current 5.4 version of the hosted software to the most recent 6.1.3 version. The new version is a re-design of the end-user interface incorporating many current features users expect in media presentation systems, like hooks into social media and end-user interactivity. It adds these features while preserving custom changes to the system, thus simplifying the upgrade process. However, one problem frustrates the completion of the migration: slow response time in the new 6.1.3 system. LOUIS staff are working with OCLC developers through conference calls to make changes to both the index.php page (by LOUIS staff) and the 6.x system (by OCLC staff) to improve response time.

The LOUIS staff have kept the LDL Committee apprised of the progress of the migration and the challenges with the single aim to establish a cutover date on which the hybrid 5.4/6.1.3 system can be converted entirely to the new 6.1.3 system interface.

One critical task in this migration is the switch of custom collection home pages from the 5.4 system to collection landing pages in 6.1.3 system. The Collection Administrators at each LDL subscriber site are responsible for accomplishing the migration of their site’s collection home page. Under the 5.4 system LOUIS staff implemented these custom collection home pages making low-level detailed code changes to several files per collection. The same changes and more can be accomplished by the Collection Administrators at each site, thereby removing LOUIS staff involvement and reducing costs to support the service.

In accordance with the LOUIS philosophy to share knowledge and effort among staff, Marcy Stevens has been receiving and conducting training. She conducted training at UNO on 16 April, 2012.

Collections added this FY (11 collections):

- The Star: Radiating the Light of Truth on Hansen’s Disease
- Lindy Boggs Collection
- Veterans of Southeast Louisiana
- Historic Louisiana Library Photographs
- LSU Health Sciences Center Shreveport Alumni Collection
- Ralston Crawford Photographs Collection
- Tulane Theses and Dissertations Collection
- Jambalaya - Tulane University Yearbooks
- StoryCorps
- Driftwood – Students newspapers at the University of New Orleans
- University of New Orleans Yearbook

The total number of items in the LDL is 213,959, up 23,345 since last FY (190,614).
F. Provide Reports

The Louisiana Library Network Commission met twice during fiscal year 2011-2012. The first meeting was July 19th and the second meeting was August 16th, 2011. The minutes from the August 16th meeting were drafted (Appendix G) and a running list of Action Items was kept (Appendix H). The Commission did not meet again afterwards but the Executive Director of LOUIS was in contact with several Regents staffers including the Commissioner, the Associate Commissioner for Finance and Administration and the Contract and Administrative Coordinator. Regents’ staff provided LOUIS with an end of the fiscal year grant of $250,000 which was used to push renewals on some subscriptions back two months until September 1, 2011. This change is part of a business strategy to help LOUIS members in new fiscal years as they await word on their own budgets. More subscriptions needs to be moved to September 1, and will be as future funding allows.

G. Serve as an Information Resource

Publish LOUIS Newsletter and maintain the LOUIS website

LOUIS publishes an annual newsletter. A call went out to consortium members for newsletter contributions. LOUIS received an overwhelming response and the August 2011 newsletter was a thorough compilation of consortium activities from the previous year. This newsletter is accessible from the LOUIS website.

Provide ongoing training for LOUIS libraries

LOUIS staff attended six conferences and twelve webinars (Appendix I) to stay abreast of emerging technologies and to remain current with the enhancements of systems maintained by LOUIS. The LOUIS staff presented five sessions, listed in Appendix J. Three training sessions were conducted by the LOUIS staff (Appendix K) along with eight site visits (Appendix L). The LOUIS Users Conference (LUC) was held at Patrick Taylor Hall of LSU (Appendix M). The LOUIS ILLiad Users meetings were held at Louisiana Tech and LSU (Appendix F).

Serve as a Resource for Louisiana Libraries and Library Associations

In order to better serve Louisiana libraries, LOUIS has nurtured relationships with the Louisiana Library Association (LLA), the Academic College and Research Library Louisiana Chapter (ACRL-LA) and the State Library of Louisiana, and through the State Library all parish libraries, and has attempted to reach out to the K-12 community. These relationships insure that LOUIS stays abreast of technology and industry trends, and that all libraries in Louisiana work together.

LOUIS continued to license Survey Monkey, an online survey tool. This year member libraries used it to conduct new surveys listed in Appendix N.

The LOUIS staff and consortium members contributed two articles related to LOUIS activities to Louisiana Libraries. Documentation for the articles is included in Appendix O.
LOUIS staff members serve on various committees. Lisa Stigall was reappointed to the EBSCO Academic Advisory Council Committee to represent higher education requirements and needs. Sara Zimmerman serves as a Peer Mentor for the Louisiana Chapter-Association of College and Research Libraries. John Guillory continues as a member of the Delgado Community College City Park Library Advisory Board to provide advice and recommendations concerning the creation and development of the new City Park Library. Zehra Zamin continues as a member of The Metadata Working Group of OCLC for CONTENTdm. LOUIS staff is on WebJunction, a resource sharing and delivery portal for OCLC Interlibrary Loan institutions and they also continue to serve as Ex-Officio members of all LALINC and LOUIS committees.

LOUIS Consortium members serve on many committees and influence the library industry regionally, nationally and internationally. These contributions not only influence the direction of the industry, but also highlight the expertise in the state.

Create, maintain and manage listservs for LOUIS and the Louisiana Board of Regents

The ten listservs managed by LOUIS are included in Appendix P.

Serve as a Resource for LOUIS and LALINC Committees

LOUIS staff continues to work with the following committees as they investigate various industry trends and products that benefit member libraries:

- LALINC Executive Board
- LALINC Information Literacy Committee
- LALINC Research and Development Committee
- LALINC Collections and E-Resources Committee
- LLN Issues Committee
- LOUIS Digital Library Committee

The charges for each committee, as well as the reports from each committee, are available on the LOUIS website.

Based on feedback from the Symphony North/South meetings, LOUIS instituted a new working group for collecting and managing statistics that are needed across membership for accreditation or other reporting purposes. This committee has volunteers that will work to develop criteria and best practices to answer the most common needs. The committee will begin work in 4th quarter 2012.

Keep abreast of Automation, Trends, Applications, Training and Tools

The LOUIS staff attends local, statewide and national conferences, users groups, meetings and webinars in order to learn and share with LOUIS sites and other library professionals. In addition, LOUIS staff took advantage of many training opportunities and both conferences and training sessions are listed in Appendix I.
The LOUIS staff takes the information gained through the training sessions and conferences and shares it with library staff members in a variety of ways. LOUIS creates and conducts training sessions, writes and maintains documentation, and uses social networking tools.

Live training sessions are held for one site or groups of library staff members around the state. During June 2012, there were two LOUIS Symphony Sharing sessions that allowed LOUIS staff members to share what they learned at the May 2012 SirsiDynix User’s Conference (COSUGI). These sessions were held at Nicholls State University and Northwestern State University and covered Acquisitions, Cataloging, Serials, Circulation and other related topics. In addition, there was a group training session at the LOUIS System Administrators Meeting in August 2011 and individual training system administrator sessions were held at McNeese State University in February 2012 and Louisiana State University in June 2012.

Another method of sharing information is through social networking tools. LOUIS has Twitter, YouTube and Facebook accounts and uses these to distribute information to a broader range of users.

The LOUIS Staff also keeps abreast of changes to standards and practices. LOUIS has been closely following the discussion about the new standard for resource description and access. This new standard is called RDA: Resource Description and Access and replaces AACR2. LOUIS will continue to assist sites in the implementation of RDA over the next few years.

Cooperate with Libraries beyond Louisiana

LOUIS staff continue to share and consult with individuals, institutions, consortia and other groups around the world on various aspects of the services and software supported by them. The following are a few examples of LOUIS cooperation with other libraries:

International requests:
Antony Gordon, System Administrator, Sound British Library, London, UK
LOUIS staff shared two methods for extracting deleted records.

Brad Martin, Applications Administrator, Gold Cost City Council, Australia
LOUIS staff shared details about how to find which User Access policies have access to a particular wizard.

Anthony Hornby, Director, Charles Darwin University, Australia
LOIS staff sent code for 3 custom reports that load YBP records.

National requests:
Lee Cornelison, Library Database Administrator, MIT Lincoln Laboratory
LOUIS staff shared information for removing inactive userids.

Karishma Furtado, Research Associate, Strategic Research
LOUIS staff participated in a research interview on behalf of the University of Florida on consolidating library services in a state wide consortium.

Mary Anne Zmaczynski, Instruction & Reference Librarian, DeVry University, Chicago, IL
LOUIS staff shared the details about LOUIS implementation of SIRSI Symphony. 
Geoffrey Skinner, Cataloger, Sonoma County Library, Santa Rosa, CA
LOUIS staff shared their scripts for the LOUIS custom User Interface to CONTENTdm v. 6.x.

Jim LeFager, Web Applications Librarian, DePaul University, Chicago, IL
LOUIS staff shared their scripts for the LOUIS custom User Interface to CONTENTdm v. 6.x.

Peter MacDonald, Library Information Systems Specialist, Hamilton College, Clinton, NY
LOUIS staff shared their scripts for the LOUIS custom User Interface to CONTENTdm v. 6.x.

Jerry Perry, Mission, Strategy, and Structure Work Group for Executive Director of The Colorado Alliance of Research Libraries, the Alliance Member Council
LOUIS staff participated in an interview to discuss the mission, organization, strategic plan and budget structure of the LOUIS consortium.

FCLA - Florida Center for Library Automation
LOUIS staff participated in a conference call to discuss LOUIS consortium setup, since FCLA and CCLA are being asked to combine into a single consortium.

CLIC - Colorado Library Consortium
LOUIS staff shared details of LOUIS consortium - its organization, governance, management.

Sarah Moore, Research Manager of the Advisory Board Company, Washington, D.C.
LOUIS staff shared details about LOUIS consortium - its organization, governance, management and technological infrastructure.

Ann Stocks, Technical Support, East Carolina University, Greenville, NC
LOUIS staff shared information to resolve the problem of Webserver halting without reason.

Russell Rokicki, Digital & Bibliographic Services Librarian with the Third Circuit Libraries, Philadelphia, PA
LOUIS staff shared a custom report extract Acquisition and Catalog data into tab-delimited File.

Lyn MacCorkle, Digital Repository Librarian, University of Miami Libraries, Florida
LOUIS staff shared script for creating dynamic indexes in CONTENTdm.

Jean Banks, Technical Support, INFOhio, Ohio
LOUIS staff shared details for suppressing Authority notes in e-Library.

Bill McClendon, Consultant, Philadelphia Free Library, PA
LOUIS staff identified a means of finding and printing data from a field within library patron address #1.

Dachun Bao, National Defence University, Washington, DC
LOUIS staff shared information on how to use SelCatalog to get list of catalog keys by searching 856 tag.

SIRSIDynix API Repository Facelift
LOUIS staff gave permission to use their scripts written and loaded to the API Repository.

SIRSIDynix - New Developer Community Site
LOUIS staff shared two scripts to Touch Item Keys for aduitemtext processing in Unix and Windows.

Scott Thomas, Lackawanna County Library System
LOUIS staff shared information for extracting patron address data from SirsiDynix Symphony server in Excel-compatible format.

Bill McClendon, Consultant, District of Columbia Public Library, Washington, DC
LOUIS staff shared the syntax for URLs used to search eLibrary (public catalog).

Paul Clark, Systems Librarian, Clay County Public Library, Florida
LOUIS staff shared details on how to move a library from one library policy to another.

Paul Clark, Systems Librarian, Clay County Public Library, Florida
LOUIS staff provided advice on how to delete items associated with long-term unpaid bills.

Paul Clark, Systems Librarian, Clay County Public Library, Florida
LOUIS staff shared details for removing inactive userids.

Paul Clark, Systems Librarian, Clay County Public Library, Florida
LOUIS staff shared information on extracting primary address for patrons from SD Symphony server using seluser.
Appendices

Appendix A: System Administrator Meeting Agendas
Appendix B: System Admin Boot Camp Agenda
Appendix C: Listservs Used by LOUIS
Appendix D: LOUIS Electronic Resources
Appendix E: LOUIS Mini-Consortia
Appendix F: LOUIS ILLiad Users Meeting Agendas
Appendix G: LLN Commission Meeting Minutes
Appendix H: LLN Commission Action Items
Appendix I: Training & Conferences Attended by LOUIS Staff
Appendix J: LOUIS Presentations
Appendix K: Training Conducted by LOUIS Staff
Appendix L: Site Visits Made by LOUIS Staff
Appendix M: LOUIS Users Conference (LUC 2011)
Appendix N: Surveys by LOUIS members
Appendix O: LOUIS Article Citations
Appendix P: Listservs Managed by LOUIS
Appendix A
System Administrator Meeting Agendas

August 11, 2011
LSU Frey Computing Services Center

Attendees

UL System
- La Tech – Daniel Bates, Will Lancaster
- Nicholls – Jeremy Landry
- Northwestern – Gail Kwak
- SLU – Jean Badeau
- ULL – Duane Huval
- ULM – Don Smith, Chuck Hughes
- McNeese – Mary Jane Bloomquist, Jerome Marcantel, Michael Sartori
- Grambling – Cecilia Iwala
- UNO – Lora Amsberryaugier, James Hodges

LSU System
- LSU-A - Bonnie Hines, Rachel Hunter
- LSU - Natalie Palermo, Dana Taylor
- LSU Law - Kevin Baggett, Susan Morrison
- LSU CES – Versa Stickle
- LSUE – Arlene Dupre
- LSUS - Jim Evans

SU System
- Southern Baton Rouge – Dawn Kight, Louis Metevia
- Southern New Orleans – Rosalind Chester, Laurie Gaillard
- Southern Law – Angela Gaines
- Southern Shreveport – Rose Powell

LCTC System
- Baton Rouge Community College – Amy Reese
- Bossier Parish Community College – Adam Viator
- Delgado Community College – Shanna Clevenger, Kevin Hebert
- Delta Community College – Hugh Carter, Marty McKaskle
- L.E. Fletcher Community College – Cindi Blaschke, Jodi Duet
- Nunez Community College - Richard DeFoe
- River Parishes Community College – Wendy Johnson, Victor Sanchez
- South Louisiana Community College – Carl Close
- SOWELA Community College – Darren MacLennan

LAICU System
- Our Lady of the Lake - Lucas Huntington, Maggie McCann

Other
- LUMCON - John Conover

SirsiDynix
- Lisa Witteman
Appendix A – continued

LOUIS
- Sara Zimmerman, Cathy Sicard, Bron Laird, Marcy Stevens, John Guillory, ZeeZee Zamin, Lisa Stigall, Mark Witteman

- Welcome and Introduce New System Administrators - Marcy
- LOUIS Update – Sara
  - HCR 129 and 150
  - LLN Commission
  - LALINC Executive Committee

- PR for LOUIS – Marcy
  - LOUIS Logo
  - Social Networking – Twitter, FaceBook, YouTube
  - Tshirts, mousepads, buttons from Ebsco
  - Executive Overviews
  - LOUIS webpage redesign including Partners and Documentation

- Symphony
  - SirsiDynix Update – Lisa Witteman
  - Bootcamp Refresher – Cathy
  - Other training needs – mini sessions before each SA meeting - Cathy
  - Site Visits - Cathy
  - Reports
    - Rebuild Text – should you run it more often? NSULA runs it once a week.
  - Acquisitions
  - Serials
  - Cataloging
    - AL22 – 856 tag increase? Google indexing? Cathy and Natalie
    - Reordering tags - Lisa
  - eLibrary
    - Permalink options in system.env – Lisa
    - Forgot My PIN - Marcy
  - Circulation
    - New Security Policy on moving away from shared PINS - Lisa
  - Misc Discussion
    - Symphony Usage Statistics - Bron
    - Symphony and Windows 7 - Bron
    - Disaster Recovery Test – discuss dates – Marcy
    - Beta Server Update - Cathy

- Listservs – what’s available - Marcy

- Electronic Resources -
  - LALINC Electronic Resources & Collection Development Committee update: OED, etc…-Sara
  - LNAU and Newspapers –Cathy
  - Pay to Play - Zee

- EDS Update – Lisa
  - Research and Development Committee will be reviewing for recommendation to purchase
  - Customizations
  - Full loads vs adds, updates, deletes (ECAT, shadowed, discarded, etc.)
  - Authentication
- EBSCOhost administrator accounts
- Feedback will be requested/required

- **ILLiad Update** – Bron/Zee
- **LOUISiana Digital Library Update** – Zee/Marcy
- **Usage Statistics** – John
- **EZproxy** - Lisa
  - Running EZproxy for just a few databases and not all
  - PINS – upper/lower case
- **LUC 2011** – Marcy
  - Change in times and number of concurrent sessions
  - Commissioner Jim Purcell will be the Keynote Speaker
- **Miscellaneous** - Marcy
  - System Administrator List of Responsibilities – revisions needed?
- **Next System Administrators meeting date?**
- **Adjourn**
Appendix A - continued

January 12, 2012
Rapides Parish Learning Center - Alexandria

Attendees

UL System
- Grambling – not attending
- La Tech - Daniel Bates, Will Lancaster
- McNeese - Michael Sartori, Jerome Marcantel
- Nicholls - Jeremy Landry
- Northwestern - Gail Kwak
- SLU – not attending
- ULL – Barbara Flynn, Duane Huval
- ULM - Chuck Hughes
- UNO - Lora Amsberryaugier

LSU System
- LSU – not attending
- LSU CES – not attending
- LSU Law - Natalie Palermo
- LSUA - Bonnie Hines
- LSUE – not attending
- LSUS - Brian Sherman, Jim Evans

SU System
- Southern Baton Rouge - Dawn Kight Ventress, Louis Metevia
- Southern Law - Angela Scott Gaines
- Southern New Orleans – not attending
- Southern Shreveport - Rose Powell, Raegan Stearns

LCTC System
- Baton Rouge Community College - Amy Reese, Lauren Wade
- Bossier Parish Community College - Adam Viator
- Delgado Community College - Shanna Clevenger, Kevin Hebert
- Delta Community College - Hugh Carter, Marty McKaskle
- L.E. Fletcher Community College - Cindi Blaschke, Jodi Duet
- Nunez Community College – not attending
- River Parishes Community College - Wendy Johnson, Victor Sanchez
- South Louisiana Community College - Carl Close
- SOWELA Community College - Darren MacLennan

LAICU System
- Our Lady of the Lake – not attending

Other
- LUMCON - John Conover

SirsiDynix
- Lisa Witteman
Appendix A - continued

LOUIS
- Sara Zimmerman, Cathy Sicard, Bron Laird, Marcy Stevens, John Guilly
- ZeeZee Zamin, Lisa Stigall, Mark Witteman

❖ Welcome and Introduce New System Administrators - Lisa
❖ LOUIS Update – Sara
  o LLN Commission - Sara
  o LALINC Executive Committee - Sara

❖ PR for LOUIS – Marcy
  o Social Networking – Twitter, FaceBook, YouTube - Marcy
  o T-shirts, mousepads, buttons from Ebsco - Marcy
  o LOUIS webpage redesign including Partners and Documentation - Sara

❖ Symphony
  o SirsiDynix Update – Lisa Witteman
  o Site Visits – Cathy
  o Upgrade to 3.4.1. – Mark
  o Reports
    - Rebuild Text – should you run it more often? – Mark
    - Finished Reports – What to keep and for how long? - Mark
  o Acquisitions
  o Serials
  o Cataloging
    - Global Edit Report and Advanced Keyword Searching – 0# use – Mark/John
    - Gov. Doc. Load schedule change – Zee
    - ECAT Library – can be used for other records – Zee
  o eLibrary
    - eLibrary Configuration Admin – Options when Saving - Marcy
  o Circulation
    - New Security Policy on moving away from shared PINS - Lisa
    - SS # in User Database – Lisa
    - Overdue Report vs. Bill Report – Lisa
    - Inventory Item Wizard - Mark
  o Misc Discussion
    - Disaster Recovery Test – discuss dates – Marcy
    - Sort Limit – John
    - Web2 End of Life at Symphony 3.4.1. - Lisa
    - Workflows/StaffWeb compatibility with tables – John
    - Policy Names & Descriptions – rules for adding and deleting & issues with spaces – Marcy
    - Statistics for Accreditation – How/Best Practices Group Discussion – Lisa
    - Scanner – Recommendations for Inventory Scanner - Lisa

❖ Listservs – Marcy
  o LSA-L List restrictions – Marcy
  o What’s available - Marcy

❖ Electronic Resources -
  o LALINC Electronic Resources & Collection Development Committee update - Sara
  o Changing license renewal dates – Zee
  o Single Sign-On options – Cathy
Appendix A - continued

- Creating Holding Code policies for ebooks. One? One per vendor? Can they be globally changed with a report? – Zee

- **EDS Update** – Lisa
  - Customizations
  - Full loads vs adds, updates, deletes (ECAT, shadowed, discarded, etc.)
  - EBSCOhost administrator accounts

- **ILLiad Update** – Bron/Zee/Marcy
  - Server upgrade – Bron
  - Migration to new web pages – Zee
  - Sirsi add-on - Marcy

- **LOUISiana Digital Library Update** – Zee/John
  - Usage Statistics - John

- **EZproxy** – Lisa
  - Statistics - Lisa

- **LUC 2011** – Marcy
  - Recap - Marcy

- **Miscellaneous** - Lisa

- **Next System Administrators meeting date?**

Adjourn
Appendix B
System Admin Boot Camp Agenda for McNeese
February 6-7, 2012

SirsiDynix Symphony
- SirsiDynix Symphony Upgrades
  o When?
  o Checklists: What to check after a Symphony upgrade?
- UNIX Basics
  o Who? Only SA’s can do this
  o Why? To transfer files to and from the server
  o How?
    ▪ ssh client
    ▪ User id/pin: for example, Sowela: lasc
    ▪ Must have your ip address in hosts.allow file on server
  o Where?
    ▪ your .xferhome/Xfer directory
  o What?
  o User (patron) files: manually, programmatically (ascii format)
  o Access logs
  o WorkFlows clients
  o Be aware: 60 days house cleaning

WorkFlows Cataloging Module
- Authority (LOUIS Documentation – Authorities):
  o Marcive Authority Processing - Overview and Options
  o How to Process Large Authority Projects
  o How to add new RDA formats
- Cataloging
  o Policies related to Indexing: Browse, Keyword, Cat Format, Entry ID
    ▪ Indexes - Keyword, Browse, KDYN, KUNI
    ▪ Symphony Indexes (LOUIS Doc- Unicorn Indexes)
    ▪ Policies related to Loads: Bib Map, Item Type, Item Cat1 & 2, Review Status
- Loads: Authority, PromptCat, Gov Docs, Netlibrary, etc. LOUIS Documentation - Cataloging:
  o Unicorn: Bib recs - How to Load a Bib file
  o Unicorn Netlibrary 1: Overview
  o Unicorn Netlibrary 2: MarcEdit
- SmartPort ( LOUS Documentation – Cataloging):
  o Unicorn Setting up OCLC Z39.50 in Workflows
  o Unicorn SmartPort Getting multiple records

WorkFlows Serials Module
- Config toolbar - Serials Control policies, Patterns (LOUIS Documentation – Serials):
  o Unicorn Serials How to display only Call No. stem for titles
  o Unicorn Serials Error Msg: Invalid captions & pattern tag
  o Suggestion for identifying titles to be discarded upon receipt
Appendix B – continued

**WorkFlows Config Toolbar**
- **Circulation**, Acquisitions, Cataloging, Serials - these all use policies that are defined in this toolbar.
- Global
  - User Search Fields
- Module
  - Report - emailing of Circulation notices configuration
- OPAC
  - The “Brain” where some iLink settings are controlled
- Creating a staff user id
  - You will use different pieces of the Config Toolbar. “Unicorn - Creating a Workflows Staff User ID” LOUIS Doc.

**WorkFlows Circulation Module**
- Circulation - help in LOUIS Docs and Workflows helps. Look for FAQs
- Investigating why items are not checking out correctly.
- Circulation
  - Policies that control checkout, check-in and billing.
- Access Control
  - User Access - Used when investigating checkout problems and creating new staff users.
  - Station - where some of your PC’s are defined. Useful for PC’s at circulation. Named stations can appear on reports.
- User Configuration
  - User Profile - Used when investigating checkout problems and creating new staff users.
  - Address Format - All sites use the same field names. Sites have the option of which fields to include. “User Address Entries (i.e. fields)” (LOUIS Doc).
  - Creating a user file of students and or faculty/staff. (“Unicorn - How to Load User Files to the Unicorn Test and Production Servers” (LOUIS Doc).
  - The file has to be sent in a defined format. “Chapter 7 - User Record Formats” (LOUIS Doc)
- Reserves
  - Reserve Desk policy - contains Reserve Desk hours.

**WorkFlows Reports Module**
- General info
  - LOUIS sites should not schedule WorkFlows reports between 11:30pm - 3:00am. Server backups and WorkFlows maintenance reports run during this time.
  - Reports - Unicorn (LOUIS Documentation)
- Custom Reports
  - Reports - Unicorn - Unicorn Custom Reports Written by LOUIS (LOUIS Documentation)
  - Requesting custom reports (Footprint) - Unicorn - Problem, questions and custom report requests
- Wizards
  - Report Session
  - Schedule New Reports
  - Scheduled Reports
  - Finished Reports
Appendix B – continued

- **Tips**
  - How to provide access to a report, but not a report group
  - Finished reports - Maintenance - Purge Finished Reports - sites determine this
  - Finished reports - check for errors

**WorkFlows Acquisition Module**

- Acquisitions (LOUIS Documentation)
- Acquisitions - Acquisitions Implementation Questionnaire (LOUIS Documentation) must know what information you want to get out of acquisitions, may be more than you need
  - Config/Policies - Acquisition Configuration

**Wrap-up, Take-Aways, Questions**
# Appendix C
Listservs Used by LOUIS

<table>
<thead>
<tr>
<th>Listserv</th>
<th>Users/Groups</th>
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</thead>
<tbody>
<tr>
<td>ACQUISITIONS</td>
<td>SirsiDynix’s Acquisition Module</td>
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<tr>
<td>API</td>
<td>SirsiDynix’s API Tools</td>
</tr>
<tr>
<td>BOOKING</td>
<td>SirsiDynix’s Booking Module</td>
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<td>BayouDocs-L</td>
<td>Louisiana Government Documents Librarians</td>
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<td>CATALOGING</td>
<td>SirsiDynix’s Cataloging Module</td>
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<td>CIRCULATION</td>
<td>SirsiDynix’s Circulation Module</td>
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<td>CONSORTIA</td>
<td>Consortia using SirsiDynix’s Symphony</td>
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<td>COSUGI-L</td>
<td>SirsiDynix users group</td>
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<td>CONTENTdm-L</td>
<td>OCLC’s CONTENTdm digital library listserv</td>
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<td>DC-GENERAL</td>
<td>Dublin Core Metadata Elements for Digital Objects</td>
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<td>Digital-Preservation</td>
<td>Digital Preservation Announcement and Information List</td>
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<td>DIGLIB</td>
<td>Digital Libraries Research List</td>
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<td>DIGISTATES</td>
<td>Statewide Digitization Project Discussion Group</td>
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<td>EZPROXY-L</td>
<td>Users of EZproxy Software</td>
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<td>LARGESCALE</td>
<td>SirsiDynix’s Symphony</td>
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<td>IMAGELIB</td>
<td>Digital Imaging Discussion and Information List</td>
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<td>LaNet-L</td>
<td>Users of the LaNet Network</td>
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<td>LALDF-L</td>
<td>Louisiana Library Directors List</td>
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<td>Louisiana Community and Technical Colleges</td>
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<td>LLA_Gen_MEM</td>
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<td>LOUISDL-L</td>
<td>Users of Louisiana Digital Library</td>
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<td>LOUILL-L</td>
<td>Users of LOUIS ILLiad users</td>
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<td>LSULIB-L</td>
<td>LSU Libraries</td>
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<td>MARCIVE-L</td>
<td>MARCIVE Users</td>
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<td>OPAC</td>
<td>SirsiDynix’s e-Library</td>
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<td>PERL4LIB-L</td>
<td>PERL Programmers in Library Environments</td>
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<tr>
<td>RIGHTS-L</td>
<td>Copyright Information List</td>
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<td>SERIALS CONTROL</td>
<td>Users of SirsiDynix’s Serials Module</td>
</tr>
<tr>
<td>SYSTEM-ADMIN</td>
<td>Administrative Users of SirsiDynix’s Symphony</td>
</tr>
</tbody>
</table>
Appendix D
LOUIS Electronic Resources

Academic Search™ Complete (EBSCOhost®) (More Info)
African American Newspapers, 1827-1998
Alt HealthWatch™ (EBSCOhost®) (More Info)
AGRICOLA (EBSCOhost®) (More Info)
America’s Historical Newspapers- Louisiana State Package
Arts & Sciences I Collection (JSTOR®) (More Info)
Arts & Sciences III Collection (JSTOR®) (More Info)
Arts & Sciences IV Collection (JSTOR®) (More Info)
Arts & Sciences V Collection (JSTOR®) (More Info)
Arts & Sciences VII (JSTOR®) (More Info)
Art Index Retrospective 1929-1984 (H.W. Wilson) (More Info)
Biography Resource Center (Thomson Gale™) (More Info)
Biological Abstracts® 1969 – Present (EBSCOhost®) (More Info)
Book Collection: Nonfiction™ (EBSCOhost®) (More Info)
Business Source® Complete (EBSCOhost®) (More Info)
CINAHL® Plus with Full Text (EBSCOhost®) (More Info)
Computer Science Index™ (CSI) (EBSCOhost®) (More Info)
Computer Source™ (EBSCOhost®) (More Info)
CQ Researcher (More Info)
Dissertations & Theses A&I (ProQuest) (More Info)
EBSCOhost ECONOMIA Y NEGOCIOS (EBSCOhost®) (More Info)
Environmental Issues & Policy Index™ (EIP) (EBSCOhost®) (More Info)
ERIC® (EBSCOhost®) (More Info)
Fuente Academica™ (EBSCOhost®) (More Info)
Funk & Wagnalls New World Encyclopedia (EBSCOhost®) (More Info)
Gale Virtual Reference Center Library (GVRL Titles)
GeoRef (EBSCOhost®) (More Info)
GreenFILE™ (EBSCOhost®) (More Info)
Health Source®: Nursing/Academic Edition (EBSCOhost®) (More Info)
History Reference Center® (EBSCOhost®) (More Info)
Hospitality & Tourism Index™ (HTI) (EBSCOhost®) (More Info)
Information Science & Technology Abstracts™ (ISTA) (EBSCOhost®) (More Info)
Internet & Personal Computing Abstracts™ (IPCA) (EBSCOhost®) (More Info)
LearningExpress (LearningExpress, LLC)
Legal Collection™ (EBSCOhost®) (More Info)
LexisNexis Academic (More Info)
Lexi-PALS Drug Guide
Library, Information Science & Technology Abstracts™ with Full Text (LISTA) (EBSCOhost®) (More Info)
Literary Reference Center (EBSCOhost®) (More Info)
Literature Resource Center (Thomson Gale™) (More Info)
Literati by Credo (more info)
MAS Ultra™ – School Edition (EBSCOhost®) (More Info)
Appendix D – continued

MedicLatina™ (EBSCOhost®) (More Info)
MEDLINE® (EBSCOhost®) (More Info)
Mental Measurements Yearbook™ (MMY) (EBSCOhost®) (More Info)
Military & Government Collection (EBSCOhost®) (More Info)
MLA Directory of Periodicals (EBSCOhost®) (More Info)
MLA International Bibliography (EBSCOhost®) (More Info)
Newspaper Source™ (EBSCOhost®) (More Info)
Primary Search® (EBSCOhost®) (More Info)
Professional Development Collection™ (EBSCOhost®) (More Info)
ProQuest Nursing & Allied Health Source™ (ProQuest) (More Info)
Psychology & Behavioral Sciences Collection™ (EBSCOhost®) (More Info)
PsycINFO® (EBSCOhost®) (More Info)
Regional Business News™ (EBSCOhost®) (More Info)
Religion & Philosophy Collection™ (EBSCOhost®) (More Info)
Science & Technology Collection™ (EBSCOhost®) (More Info)
Scribner Writers Series (Thomson Gale™) (More Info)
SocINDEX™ with Full Text (EBSCOhost®) (More Info)
Teacher Reference Center (EBSCOhost®) (More Info)
The Serials Directory™ (EBSCOhost®) (More Info)
Twayne Author Series (Thomson Gale™) (More Info)
Vente et Gestion® (EBSCOhost®) (More Info)
World History Collection™ (EBSCOhost®) (More Info)
WorldCat (OCLC FirstSearch) (More Info)
Appendix E
LOUIS Mini-Consortia

Annual Reviews
Chronicle of Higher Education
Biological Abstract Backfiles (EBSCOhost)
Communication and Mass Media Direct (EBSCOhost)
Compendex (EI Village 2)
Criminal Justice Abs (EBSCOhost)
Criminal Justice Full Text (EBSCOhost)
IEL (IEEE)
JSTOR Biological Sciences
LibGuides (Springshare)
National Criminal Justice Reference Service Abs (EBSCOhost)
NetLibrary 9
Nursing Education Videos (Alexander Street Press)
Nursing Reference Center (EBSCOhost)
Oxford Reference Online
Philosophers Index
PsycArticles (EBSCOhost)
RILM- Abs of Music Literature (EBSCOhost)
Sage e-Journals
Sanborn® Maps of Louisiana(ProQuest)
Scifinder Scholar (Chemical Abstracts Service)
Social Work Abstracts (EBSCO)
Web of Knowledge (ISI Web of Science)
Worldbook
Appendix F
LOUIS ILLiad Users Meeting Agendas

June 7, 2012 and June 14, 2012

1. Lending AV materials
2. Student Worker Pointers
3. Document Delivery
4. International ILL
5. "Get It Now" User Experience
6. OCLC Update
7. Atlas Update
8. Discussion Topics:
   • How do libraries handle outstanding invoices beyond 6 months? Do they block the institution or any other penalties enforced?
   • How are other libraries handling lost item in mail? How long do you trace the item before the lender is billed?
   • Is there a way to bypass or remove a lender from the Direct Request lending string in ILLiad?
   • General discussion about Odyssey for borrowing requests
   • Customizing ILLiad interface
   • Improving communication with multiple departments in library and with patrons
   • Helpful ways to deal with declining staff
   • Social networking.
   • New ways to deliver articles/book chapters in Lending
   • Direct request processing
   • Training sessions as collaborative effort with Reference
   • Custom holdings
Present were Karen Denby (Chair), Barbara Goodson and Todd Barre’ from the Board of Regents, Jennifer Cargill, from LSU, Sara Zimmerman and Cathy Sicard from LOUIS, Eric Johnson from SLU, and Dr. Ken Rea, from La Tech.

1. Karen Denby called the meeting to order at 10:00am.

2. The LLN Commission Operating Policies/Guidelines were reviewed and approved with the suggestion of one change from “may be renewable” to “is renewable”. Karen will seek final approval from the Commissioner and get his approval for Barbara to be Chair.

3. There was a review of when the LLN Commission meetings should be held. It was decided that the specified times listed in the LLN Commission Operating Policies/Guidelines would remain as is with two meetings per year: a fall meeting and a spring meeting, and additional meetings will be scheduled as needed.

4. Todd Barre’ explained that the LOUIS project will be added to the list that will be presented in the Board of Regents budget which will be presented to the Legislature in November. The goal is to get permanent funding for LOUIS beginning in 2012/13. Barbara Goodson specified that they are requesting an additional $2M to add to the Regents base of $500,000 in 2011/12. So the total requested allocation would be $2.5M. The additional $2M will be outside the Higher Education budget and dedicated to LOUIS.

5. Todd also reviewed a potentially new funding structure that would distribute membership based on a formula method they already have in place with higher education institutions. When compared to the LOUIS funding structure, which is based on the BOR published FTEs, along with which members use which products and services, it was determined that the current LOUIS funding structure will serve the members more equitably and remain in place.

6. Sara Zimmerman announced that the LALINC deans and directors are sending thank-you letters to elected officials. Barbara suggested that they also send them to the BOR board members. This will be done as well.

7. Barbara explained that she is currently working on the Board of Regents formal response to HCR 129. She requested help from LOUIS and LALINC regarding the history. Sara said she could send her some history documents that might be helpful. Jennifer Cargill and Dr. Ken Rea offered to help as well.

8. There was a discussion regarding the history of LOUIS. Jennifer explained that a task force on libraries was formed in 1990. She explained that the library community established the concept of cooperating and collaborating since at that time academic libraries had little, to no budget, and very few were automated. They begin developing a strategy to prove the concept. This was
Appendix G - continued

done with 2 different 8g grants. She explained that the Board of Regents got behind the concept
and with their efforts the result in 1995 was a permanent funding allocation from the state. Sara
and Dr. Rea also included some of their recollections of the history.

9. Sara mentioned that she is working with the International Coalition of Library Consortia
(ICOLC) on a survey comparing consortia aspects such as funding, staff, products and services.

10. Sara discussed some of the public relation initiatives that the LOUIS staff is working on with
EBSCO publishing. EBSCO has designed mouse pads and t-shirts to distribute to academic
institutions throughout the state. These items are funded by EBSCO.

11. With the recent shift in how the LLN Commission supports LOUIS, i.e. more emphasis on the
funding structure, a suggestion was made to change the chair of the LLN Commission to a
finance position within the BOR. Todd suggested making the chair the Commission of Higher
Education, or his designee. Everyone agreed.

12. Todd asked if Technical Colleges were part of LOUIS. Sara explained the history, in that they
used to be included, but they did not use the resources. So the access was turned off. If they
would like to join LOUIS, Sara explained that they would first need a librarian who can best
determine the resources needed to support their curriculum, as well as their SACS accreditation.
Then they would join LALINC and LOUIS would begin negotiating on their behalf. Dr. Rea
expressed concern that they do not currently take advantage of this opportunity to support their
curriculum. Sara mentioned that she has spoken to Monty Sullivan on numerous occasions
explaining that LOUIS is available to them. Cathy Sicard mentioned that a meeting was held in
2010 between LOUIS and the community colleges to develop a proposal regarding how LOUIS
and the community colleges could help technical colleges, and a proposal was sent to LCTSC.

13. Sara stated that the LALINC Research and Development Committee will be reviewing a
potentially new product for the consortium, EBSCO Discovery Services. She gave a brief
explanation of the product.

14. Sara announced that 21 members have paid their 2011/12 membership fees, and 24 have not. The
site that needed an extension sent a letter from their Chancellor.

15. Sara reviewed the 2012/13 budget which included a 5% increase, as well as a potential new
product, EBSCO EDS. Barbara had a suggested change which will be made by Sara and
resubmitted to the BOR.

16. Sara requested that the BOR send us the 2011/12 contract. Barbara will check on this.

17. Barbara suggested that LOUIS attend the Board of Regents December 4th joint meeting with
BESE. Sara made the suggestion that a LALINC director from each system would speak on
behalf of the consortium. This is also when the response to HCR 129 would be presented to the
Board members. Barbara would like BESE to also address HCR 150.

18. Dr. Rea expressed concern the K-12 also did not cooperate and collaborate to purchase electronic
resources for their faculty and students. Sara described some of the past efforts of LOUIS and the
Appendix G - continued

State Library to collaborate with the Department of Education, but unfortunately without a commitment from the Department of Education, nothing can be done.

19. The action items from the July 19th meeting were reviewed and updated.

20. Barbara and Todd stated that their webpage still needed to be updated, but at the current time there is no plan since they currently do not have a webmaster.

21. Cathy invited Karen, Barbara, and Todd to the LOUIS Users Conference (LUC) to be held October 13-14. Sara will send them the conference details.

22. Having no other business the meeting adjourned at 11:30am.

Respectfully submitted,

Cathy Sicard on behalf of Sara Zimmerman
Appendix H
LLN Commission Action Items

Present were Karen Denby (Chair), Barbara Goodson and Todd Barre’ from the Board of Regents, Jennifer Cargill, from LSU, Sara Zimmerman and Cathy Sicard from LOUIS, Charles Triche from ULL, Eric Johnson from SLU, and Ken Rea, from La Tech.

<table>
<thead>
<tr>
<th>Action Items</th>
<th>Who?</th>
<th>Status/Notes?</th>
<th>When?</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Tuesday, July 19, 2011 ● 1:30 p.m. ● Claiborne Building</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>LOUIS will add Barbara Goodson and Todd Barre to LLN Commission.</td>
<td>Cathy, Sara</td>
<td>complete</td>
<td>July 20, 2011</td>
</tr>
<tr>
<td>LLN Commission decided to meet as often as necessary to accomplish goals. Start with monthly.</td>
<td>Karen</td>
<td></td>
<td>August 16, 2011</td>
</tr>
<tr>
<td>LALINC will review the LLN Commission operating polices, and present recommendations to the LLN Commission.</td>
<td>LALINC Exec Cmte</td>
<td>complete</td>
<td>August 16, 2011</td>
</tr>
<tr>
<td>The BOR will invite LOUIS &amp; LALINC to a Board of Regents meeting in order to give a LOUIS Executive Overview to the board members.</td>
<td>Karen, Todd, Barbara</td>
<td>Date set 12/4/11</td>
<td>December 4, 2011</td>
</tr>
<tr>
<td>LALINC will work with Regents towards a positive message to state elected officials as we work towards sustainable funding.</td>
<td>LALINC EC/ LOUIS / Regents</td>
<td></td>
<td></td>
</tr>
<tr>
<td>The $500K from the legislature is one-time money. The BOR will make it a priority to find a way to translate this to permanent funding in an amount higher than $500K. This will be included in the action item for the BOR to include LOUIS in their requests to the legislature in November.</td>
<td>Karen, Todd, Barbara</td>
<td>Todd/Barbara working on this.</td>
<td>November 2011</td>
</tr>
<tr>
<td>LOUIS/LALINC will provide Regents with a 12-13 budget</td>
<td>LALINC EC/LOUIS</td>
<td>complete– Sara sent to Barbara</td>
<td>August 17, 2011</td>
</tr>
<tr>
<td>Send Dr. Rea spreadsheets of saving calculations</td>
<td>Sara</td>
<td>complete</td>
<td></td>
</tr>
<tr>
<td>The BOR will include LOUIS as a project for “new and expanded items” in requests they submit to the legislature in November 2011. Need to decide on the amount to request.</td>
<td>Karen, Todd, Barbara</td>
<td>In progress: refer to item above</td>
<td>November 2011</td>
</tr>
<tr>
<td>In response to the HCR 129 and sustainable funding, the BOR will come up with scenarios for funding LOUIS, possibly using a new funding methodology. One of these will include “pulling off the top” and using the established funding formulas they use for higher education to determine the equitable cost per system. These scenarios would be presented to the LLN Commission for discussion.</td>
<td>Karen, Todd, Barbara</td>
<td>Todd presented to group on 8/16/11. Appears LOUIS membership fee funding model will be used.</td>
<td>8/16/11</td>
</tr>
<tr>
<td>The BOR will meet with their finance contacts at the Systems office to educate them on LOUIS, and</td>
<td>Karen, Todd,</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
keep them in the discussions regarding recommendation for a new funding methodology. | Barbara |
---|---|
The BOR will be more proactive in promoting LOUIS via their webpage. LOUIS suggested they make use of other means of promoting in an effort to shine a more positive light on what’s being done in Louisiana regarding higher education, and also to highlight the efficiencies, collaborative efforts, and cooperation within LOUIS. LOUIS would like the BOR to elaborate on how this will be done. | Karen, Todd, Barbara |
LALINC will send thank-you letters to the BOR and the Legislature. | LALINC / Sara | complete | August 15, 2011 |
The BOR will invite LOUIS & LALINC to their joint BOR/BESE meeting in response to HCR 150. | Karen, Todd, Barbara | Date set | December 4, 2011 |
The BOR will respond to HCR 129. | Karen, Todd, Barbara | | January 2012 |
The BOR mentioned that they would keep LOUIS on their radar for future end of the year funds. | Karen, Todd, Barbara | ongoing |

**Tuesday, August 16, 2011 ● 10:00 p.m. ● Claiborne Building**

Approved new version LLN Commission operating policies and Commissioner’s designee for Chair. (Barbara is willing if approved.) | Karen | Karen will get final approval from Commissioner. |
Send thank-you letters to BOR board members | LALINC | Complete | Sept 8, 2011 |
Send LLN/LALINC/LOUIS history to Barbara for HCR 129 response. | Cathy | Complete | August 17, 2011 |
Modify format of 2011/12 budget per BOR suggestions. | Sara | Complete | 8/17/2011 |
Send LUC details to Barbara for BOR. | Sara | Complete | 8/17/2011 |
Resolve invoice issue. | Sara/Karen | Complete | 8/17/2011 |
# Appendix I

## Training & Conferences Attended by LOUIS Staff

<table>
<thead>
<tr>
<th>Title</th>
<th>Date</th>
<th>Who Attended</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Training</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EBSCO Discovery Service Overview (webinar)</td>
<td>September 20, 2011</td>
<td>Lisa Stigall, Zehra Zamin, Mark Witteman</td>
</tr>
<tr>
<td>EBSCO Discovery Service: Basic Admin (webinar)</td>
<td>September 22, 2011</td>
<td>Lisa Stigall, Zehra Zamin</td>
</tr>
<tr>
<td>EBSCO Discovery Service: Searching (webinar)</td>
<td>December 8, 2011</td>
<td>Mark Witteman</td>
</tr>
<tr>
<td>ABC's of developing an Institutional Repository program on campus - BEPress (webinar)</td>
<td>December 9, 2011</td>
<td>Zehra Zamin</td>
</tr>
<tr>
<td>Implementation &amp; Development of Digital Repository - BEPress (webinar)</td>
<td>February 8, 2012</td>
<td>Zehra Zamin</td>
</tr>
<tr>
<td>CONTENTdm Basic Skills #1 - OCLC (webinar)</td>
<td>April 2, 2012</td>
<td>Marcy Stevens, Zehra Zamin</td>
</tr>
<tr>
<td>CONTENTdm Basic Skills #2 - OCLC (webinar)</td>
<td>April 4, 2012</td>
<td>Marcy Stevens, Zehra Zamin</td>
</tr>
<tr>
<td>CONTENTdm Basic Skills #3 - OCLC (webinar)</td>
<td>April 9, 2012</td>
<td>Marcy Stevens, Zehra Zamin</td>
</tr>
<tr>
<td>SIRSIDynix Cataloging Web Client SPP (webinar)</td>
<td>May 18, 2012</td>
<td>Mark Witteman, Zehra Zamin</td>
</tr>
<tr>
<td>SIRSIDynix RDA SPP (webinar)</td>
<td>June 11, 2012</td>
<td>Zehra Zamin</td>
</tr>
<tr>
<td><strong>Conferences</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lyrasis Consortia Summit</td>
<td>November 14-16, 2011</td>
<td>Sara Zimmerman, Cathy Sicard</td>
</tr>
<tr>
<td>LLA 2012</td>
<td>March 22-23, 2012</td>
<td>Sara Zimmerman, Cathy Sicard</td>
</tr>
<tr>
<td>SirsiDynix SuperConference 2012</td>
<td>May 2-5, 2012</td>
<td>Cathy Sicard, Lisa Stigall, Mark Witteman</td>
</tr>
<tr>
<td>ICOLC 2012</td>
<td>April 22-25, 2012</td>
<td>Sara Zimmerman, Cathy Sicard</td>
</tr>
</tbody>
</table>
## Appendix J
### LOUIS Presentations

<table>
<thead>
<tr>
<th>Title</th>
<th>Date</th>
<th>Who Presented</th>
</tr>
</thead>
<tbody>
<tr>
<td>LOUIS’ Strategy to Migrate from CONTENTdm 5.4 to 6.0 - ALA 2011</td>
<td>June 26, 2011</td>
<td>John Guillory</td>
</tr>
<tr>
<td>McNeese System Administrator Boot Camp</td>
<td>February 6-7, 2012</td>
<td>Lisa Stigall, Mark Witteman, Zehra Zamin</td>
</tr>
<tr>
<td>SLIS class LIS7005--Alternative Careers in LIS</td>
<td>April 16, 2012</td>
<td>John Guillory</td>
</tr>
<tr>
<td>SLIS class LIS7004 – Mgmt for LIS Professionals</td>
<td>April 17, 2012</td>
<td>Sara Zimmerman</td>
</tr>
<tr>
<td>LSU System Administrator Boot Camp</td>
<td>June 28, 2012</td>
<td>Cathy Sicard, Lisa Stigall, Mark Witteman, Zehra Zamin</td>
</tr>
</tbody>
</table>
# Appendix K
## Training Conducted By LOUIS Staff

<table>
<thead>
<tr>
<th>Title</th>
<th>Date</th>
<th>Location</th>
<th>Number of Sites or Attendees Per Site</th>
</tr>
</thead>
<tbody>
<tr>
<td>Symphony Reports Training</td>
<td>January 6, 2012</td>
<td>BRCC</td>
<td>10: BRCC staff</td>
</tr>
<tr>
<td>Systems Administrator Training &amp; Seltool training</td>
<td>February 6-7, 2012</td>
<td>McNeese State Univ</td>
<td>2: McNeese staff</td>
</tr>
<tr>
<td>CONTENTdm End User Training</td>
<td>April 16, 2012</td>
<td>UNO</td>
<td>14: UNO staff</td>
</tr>
</tbody>
</table>
### Appendix L
Site Visits Made by LOUIS Staff

<table>
<thead>
<tr>
<th>Site Visited</th>
<th>Date</th>
<th>LOUIS Staff</th>
</tr>
</thead>
<tbody>
<tr>
<td>Implement Ezproxy at RPCC</td>
<td>January 5, 2012</td>
<td>John Guillory, Marcy Stevens, Lisa Stigall</td>
</tr>
<tr>
<td>Seltools overview + Sys Admin overview</td>
<td>Feb 6-7, 2012</td>
<td>Lisa Stigall, Mark Witteman, Zehra Zamin</td>
</tr>
<tr>
<td>Acquisitions session</td>
<td>March 30, 2012</td>
<td>Lisa Witteman, Zehra Zamin</td>
</tr>
<tr>
<td>CONTENTdm end user overview</td>
<td>April 16, 2012</td>
<td>Marcy Stevens, Zehra Zamin</td>
</tr>
<tr>
<td>Centenary College</td>
<td>May 30, 2012</td>
<td>Cathy Sicard, Lisa Stigall, Mark Witteman, Sara Zimmerman</td>
</tr>
<tr>
<td>Southern University at Shreveport</td>
<td>June 7, 2012</td>
<td>Mark Witteman</td>
</tr>
<tr>
<td>Bossier Parish Community College</td>
<td>June 7, 2012</td>
<td>Mark Witteman</td>
</tr>
<tr>
<td>Louisiana State University in Shreveport</td>
<td>June 8, 2012</td>
<td>Mark Witteman</td>
</tr>
</tbody>
</table>
Thursday, October 13
8:00 am – 9:00 am
REGISTRATION & BREAKFAST

Thursday, October 13
9:00 am
OPENING REMARKS
Room 1109
Presenter: Dr. Jim Purcell, The Commissioner of Higher Education

Thursday, October 13
10:10 am – 11:10 am
SESSION 1
Room 1110
Generating Public Support with the Web
Presenter: Karen Niemla (ULM)
Description: This presentation will explain online branding techniques, and how they can be used in action to reach your users. In response to crisis, a new website was needed for explaining LOUIS to the general public and generating their support. SAVELOUIS.ORG was made for this purpose, and specific design decisions were made with this type of audience in mind. It is a website on its own, but it has other parts in "Web 2.0" tools which carry out certain functions and there are ways to make these different accounts appear to be part of a coherent whole.

Redefining the Library’s Role through an Institutional Repository
Presenter: Sharon Mader & Jeanne Pavy (UNO)
Description: In Spring 2011 the UNO Library implemented ScholarWorks@UNO, an open access repository of the research, scholarship, and creative work of the university. Our presentation will focus on the various factors to consider in creating an institutional repository, including preliminary tasks like defining the purpose of the repository, identifying funding, choosing a platform, and engaging campus stakeholders, as well as elements of the actual implementation process such as design, allocation of staff, policy development, outreach, and evaluation of services. We will share examples from our own experience and from other library implementations, and relate the range of potential benefits, to both the library and the university, of this dynamic new resource.

State Library: New Services and Resources
Presenter: Diane Brown (State Library)
Description: This session will cover the new services and resources available from the State Library of Louisiana provided through the Louisiana Libraries: Connecting People to their Potential, a Broadband Technology Opportunity Program (BTOP) grant from the Department of Commerce. New services and resources include: Homework Louisiana, Louisiana Jobs and Careers Center, new databases, laptops to check out from public libraries and more.

Room 1114
EBSCO Discovery Service and NetLibrary
**was a live demo**
Presenter: Kathy Kiely (EBSCO)
Description: How does a Discovery System allows students to discover everything the library owns and more. Also we will spend time learning about Ebooks on EBSCOhost formally known as NetLibrary.
### Thursday, October 13
#### 11:20am – 12:20pm

<table>
<thead>
<tr>
<th>Session</th>
<th>Room 1110</th>
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</thead>
<tbody>
<tr>
<td><strong>Marketing Your Library for a Song: How 2 Academic Librarians Used Their Interests in Music to Reach out to Students</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Description:</strong> This presentation is the culmination of four years of our using interests in various aspects of music to engage students at various levels, and in all disciplines, at Nicholls State University. We will chronicle our evolution from hosting a Beat Poetry Reading and Performance Happening (known on our campus as Beats and Bongos), which attracted 17 participants in 2007, to our becoming involved with more than a half-dozen music-based events, including hosting a live/online radio show (The Holy Librarians’ Archive of Weird, Rare, and Interesting Music, which has won two university media awards); creating a Facebook page (The Holy Librarians, which has 3000+ friends); hosting dance demonstrations (German, Punjabi, and Nepalese folk dance, and American tap) in the library; presenting informative sessions on Bhangra-Beat music and dance competitions; hosting our faculty book club reading (Daniel J. Levitin’s This is Your Brain on Music); teaching a for-credit, senior level film music course; and beginning the process of creating a Music and Arts Resources Center, which will house world and historical instruments. In the four years we have been hosting such events, we have engaged over a thousand Nicholls’ students and faculty members directly and virtually, as well as geographically diverse people who had never heard of Nicholls or Ellender Library beforehand.</td>
<td></td>
</tr>
<tr>
<td><strong>Presenter:</strong> Tony Fonseca &amp; Melissa Ursula Dawn Goldsmith (Nicholls)</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Session</th>
<th>Room 1111</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Web Accessibility at Louisiana Academic Libraries</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Description:</strong> This presentation will cover the fundamentals of web accessibility, including why it is important, and share some simple best practices. The presenter will show data about the accessibility of Louisiana’s academic library web sites, and compare it to a sampling of North American library web sites. The data reflect only 4-year academic libraries, but the issues and best practices are useful for all libraries.</td>
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<tr>
<td><strong>Presenter:</strong> David Comeaux (Tulane)</td>
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<table>
<thead>
<tr>
<th>Session</th>
<th>Room 1112</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>What Cataloging Managers Need to Know to Prepare for Transition</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Description:</strong> Prior to the 2011 American Library Association (ALA) Annual Conference held in New Orleans in June, the three U.S. National Libraries, (Library of Congress (LC), the National Agricultural Library (NAL), and the National Library of Medicine (NLM) announced their decision to adopt the new cataloging code, Resource Description and Access (RDA) with a recommended implementation date not to proceed January 2013. This session is designed to provide cataloging managers with strategies and tips on how to introduce and prepare their libraries and staff for the transition to the new code.</td>
<td></td>
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<tr>
<td><strong>Presenter:</strong> Linda Smith Griffin (LSU)</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Session</th>
<th>Room 1114</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Discussion/Demo of Recent Enhancements to EBSCO’s A-to-Z/EBSCONet</strong></td>
<td></td>
</tr>
<tr>
<td><strong>“was a live demo”</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Presenter:</strong> David Dubard (EBSCO)</td>
<td></td>
</tr>
<tr>
<td><strong>Description:</strong> Presentation will cover enhancements to A-to-Z, ERM Essentials and SmartLinking.</td>
<td></td>
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</table>

### Thursday, October 13
#### 12:15 pm – 1:30 pm

<table>
<thead>
<tr>
<th>Session</th>
<th>LUNCH</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>Time</td>
<td>Session</td>
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<tr>
<td>Thursday, October 13 1:30 pm – 2:30 pm</td>
<td><strong>SESSION 3</strong></td>
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<tr>
<td>Thursday, October 13 2:40 pm – 3:40 pm</td>
<td><strong>SESSION 4</strong></td>
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</table>
Thursday, October 13  
3:50 pm – 4:50 pm  
SESSION 5  

<table>
<thead>
<tr>
<th>Room 1110</th>
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</table>
| **Keeping up with the Jones' and not getting caught on the wrong side of the digital divide: Ipads in the Library**  
**Presenter:** Lora Amsberryaugier (UNO)  
**Description:** Budget cuts have really put a damper on the Library keeping up with the expectations of students as users of technology. This last fiscal year the UNO Library was able to purchase iPad2s for the reference faculty and staff. This presentation will demonstrate what we have learned so far and what we plan to do with them this school year. |

<table>
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<tr>
<th>Room 1111</th>
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| **RDA Relationships and RDA Instructions for Serials: The RDA Road Less Traveled**  
**Presenter:** Joseph Nicholson (LSU)  
**Description:** Training materials on RDA thus far have tended to concentrate on relatively cosmetic changes to MARC records that RDA will require in the descriptive portion of the cataloging record (e.g., the elimination of most abbreviations and the addition of new MARC fields for content, carrier, and media type) while neglecting the equally important concept of RDA relationships. Training documentation has also focused primarily on the monograph rather than on non-book formats like serials. This presentation will attempt to shed light on these sometimes disregarded aspects of RDA. Drawing on the FRBR and FRAD models on which RDA is based; it will devote special attention to the important relationships between Group 1, Group 2, and Group 3 entities and their representation in MARC records, with a particular emphasis on core relationship elements in RDA. It will also highlight some of the more important RDA instructions for cataloging serials. The presentation will conclude with recommendations about steps libraries should take to prepare for the implementation of RDA. |

<table>
<thead>
<tr>
<th>Room 1112</th>
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| **LearningExpress Library: Basic Skills and Test Prep- A Four Year Partnership**  
**Presenter:** Tom Porter (LearningExpress)  
**Description:** A review of LearningExpress library and demonstrate the resource and how it is helping students throughout Louisiana and the United States. |

<table>
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<tr>
<th>Room 1114</th>
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| **WorldCat Now and the Future**  
**Presenter:** Tim Whisenant (OCLC)  
**Description:** Come learn what’s new with WorldCat and how it is being used to help create efficiencies for staff in cataloging, acquisitions, and circulation within WebScale Management Services. |
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<tr>
<th>Thursday, October 13</th>
<th>SESSION 6</th>
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<td>5:00 pm – 6:00 pm</td>
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### Heirs to the Throne: How to Effectively Transfer System Administrator Duties to your Successor

**Room 1110**

**Presenter:** Kevin Baggett (LSU-LAW) and Michael Satori (McNeese)

**Description:** After storing up a wealth of information after many years of working as a system administrator, how does one successfully train the next in line in a relatively short time? The speaker will discuss strategies for training the next system administrator that goes well beyond the LOUIS System Administrator Responsibilities document.

### SubjectsPlus

**Room 1111**

**Presenter:** Sigrid Kelsey & Robbie Gore (LSU)

**Description:** Sigrid and Robbie will share their experiences installing, configuring, and using SubjectsPlus (www.subjectsplus.com), an open source web management system, at LSU. SubjectsPlus, similar in idea to LibGuides, allows subject librarians to create quality online subject and class guides, with an easy-to-use drag-and-drop interface. It also has web site features such as a staff directory and resources listings. Sigrid and Robbie will demonstrate SubjectsPlus, discuss how to use it, and share their experiences with it at LSU Libraries.

### What's New with SciFinder

**Room 1112**

**Presenter:** Peter Blasi (Chemical Abstract Services (CAS))

**Description:** The training will consist of a short presentation on SciFinder content and the new features, followed by a live demo highlighting the new sorting and filter options, the Markush searching capabilities, and, most importantly, our new synthesis planner, SciPlanner.

### Symphony Update

**Room 1114**

**Presenter:** Lisa Witteman (SirsiDynix) and Bill Kessler (SirsiDynix)

**Description:** In this session, you will hear an update on what's new and coming soon in Symphony. Have you worked with the power tools and new report outputs? Take a look.
**Friday, October 14, 2011**

<table>
<thead>
<tr>
<th>Session</th>
<th>Time</th>
<th>Description</th>
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<tbody>
<tr>
<td>BREAKFAST</td>
<td>7:00 am – 8:00 am</td>
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<tr>
<td>SESSION 7</td>
<td>8:00 am – 9:00 am</td>
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**The Louisiana Legislative Briefing: 2011 Edition**

**Presenter:** Mike Matthews (Northwestern State)

**Description:** The presenter will update attendees on the results of this year’s legislative session including the passage of HCR 129 which “urges and requests” the Regents to fund LOUIS. He will summarize the impact of HB 1 (the state budget), and related legislation on academic, K-12, and public libraries, including the massive effects of scheduled tax repeals on the 2011-2012 fiscal year.

**LA LAMPP: Shining New Light on Preservation of Cultural Heritage Resources in Louisiana**

**Presenter:** Laura McLemore (LSU) & Tom Clareson (LYRASIS)

**Description:** In 2010, the Louisiana Archives and Manuscripts Association (LAMA), Le Comité des Archives, Louisiana Association of Museums (LAM), and LYRASIS (regional library services organization) collaborated to create the Louisiana Libraries, Archives, and Museums Preservation Project (LA LAMPP) to provide training and education in preservation planning, to survey cultural heritage institutions on the preservation status of their historical materials, and to develop a comprehensive plan for statewide preservation of cultural heritage resources. LA LAMPP received funding under the Institute of Museum and Library Services’ National Leadership Grant Program for a Statewide Connecting to Collections Planning Grant. The statewide survey was conducted between October 2010 and February 2011. In addition to focusing on traditional preservation practices and needs, the survey gathered information on digitization and digital preservation issues among Louisiana’s cultural heritage organizations. Laura McLemore, LSU-Shreveport, Project leader, and Tom Clareson, LYRASIS consultant on the grant, will present the findings of the Planning Grant (from survey results, workshop feedback, and Advisory Committee meeting discussions), and what the plans for the future would be under either an IMLS implementation grant or other types of funding.

**Introduction to the New ProQuest Platform**

**Presenter:** Edward Loera (ProQuest)

**Description:** This presentation is an overview of the new ProQuest platform. In this presentation I will demonstrate how users will be able to search, find, use and share their research. This presentation will cover: single search box, subject areas and product start pages, advanced search, search results – faceted search options, document preview and more, right tools at the right time – spell check, cite this, export and more, search and publication alerts - email and RSS, My Research, and tagging and shared lists

**Beyond the H-Index: The New Web of Knowledge Platform**

**Presenter:** Brian DeMarchi (Thomas Reuters)

**Description:** This presentation will discuss the new functionality of the Web of Knowledge including identifying funding sources, author disambiguation, and using bibliometrics for research evaluation.
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<tr>
<th>Date</th>
<th>Time</th>
<th>Session</th>
<th>Location</th>
<th>Presenter</th>
<th>Description</th>
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<tbody>
<tr>
<td>Friday</td>
<td>9:10 am – 10:10 pm</td>
<td>8</td>
<td>Room 1110</td>
<td>Community Partnerships and Academic Librarians: Taking our Knowledge Beyond the Campus</td>
<td>Southeastern librarians took their information literacy knowledge and instruction skills from the campus to the community. The librarians partnered with the Tangipahoa Voluntary Council on Aging (TVCOA) to promote health information literacy to senior citizens in southeastern Louisiana. Armed with an Express Consumer Health Outreach Award from the National Network Libraries of Medicine/South Central Region, librarians offered instruction in basic computer and Internet skills, use of MedlinePlus and NIHSeniorHealth databases, and evaluation of online information. The presentation will highlight how the library formed local partnerships to fulfill the University’s strategic priority to promote lifelong learning in the community. It will also discuss the adjustments made to tailor instruction for a unique group of learners.</td>
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<td>Presenter: Mary Lou Strong, Jean Badeau, &amp; Ladonna Guillot (Southeastern)</td>
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<td>Ruskin Didn’t Say It: Researching and Verifying Claims in Anonymous Chain E-Mails</td>
<td>Librarians -- and professionals in other fields -- have frequently complained that Internet websites are often the source of unreliable information. This unreliability has been the source for books, journal articles, conference presentations, and countless personal conversations. In contrast, anonymous chain e-mails receive less attention from librarians and other researchers. Many well-meaning people receive and forward anonymous chain e-mails containing questionable information and outright falsehoods. This forwarding simply reinforces misinformation in the public's mind. I offer two examples of pre-Internet quotation hoaxes that persist in the public's mind. Lastly, I illustrate several fact-checking sources to assist librarians in their reference work with these types of questions.</td>
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<td>Presenter: Stephen Pomes (U.S Department of Interior)</td>
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<td>CQ Press Electronic Resources Featuring CQ Researcher</td>
<td>The session will cover training and best utilization of the CQ Researcher and its components.</td>
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<td><strong>was live demo</strong></td>
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<td>Presenter: Mary Glazier (CQ Press)</td>
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<td>Credo Reference: Promoting Information Literacy and Research Effectiveness</td>
<td>Are you getting the most out of your e-resources? With low usage and shrinking budgets, libraries are challenged to justify resource investments now more than ever. At the same time, information users are ill prepared to navigate the amount and quality of content on the web. Attend this session to learn about Credo Reference and how our new platform, reference content, tools and services help users navigate information resources. This live demonstration will cover new features of Credo Reference and best practices for increasing usage and information literacy.</td>
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<td>Presenter: Jackie LaPlaca Ricords (Credo)</td>
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<tr>
<td>Friday, October 14</td>
<td>SESSION 9</td>
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<td>10:20 am – 11:20 pm</td>
<td>Room 1110</td>
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**Being Accountable for Assessment: Challenges in an Information Literacy Credit Course**

**Presenter:** Angela Dunnington, Penny Hecker, & Mary Lou Strong (Southeastern)

**Description:** Developing outcome-based library instruction is one of the challenges faced by academic librarians today. This session will provide an overview of how a team of librarians at Southeastern Louisiana University formed an Assessment Working Group to improve assessment of student learning outcomes in their information literacy credit course, Library Science (LS) 102: Introduction to Information Research. The presentation illustrates how the working group identified core competencies for the course, created a standardized departmental final exam, and continues to explore other assessment measures.

**Making the Students Work for Us: The Library as the Beneficiary Community Partner in Campus Service Learning Projects**

**Presenter:** Beth West (Southeastern)

**Description:** In the fall of 2010, Sims Library at SLU paired with three groups of students in a junior/senior level marketing class focusing on public relations. Each group was tasked with creating outreach and PR materials for various library services and was paired with a librarian “community partner” who worked closely with them. In addition to the project, students were required to work volunteer hours as part of their project. Sims Library does not have a librarian in charge of outreach; thus the project was a great way for us to “outsource” PR materials. The presentation will cover the successes and lessons learned in the project.

**To the Cloud! How to Compile and Analyze Reference Statistics Easily and for Free**

**Presenter:** Sonnet Ireland & Faith Simmons (UNO)

**Description:** Keeping all statistics in one spreadsheet can get messy and confusing—and it leaves us vulnerable to losing our statistics in the event of technical difficulties. To organize and preserve the statistics, we copy data from Google Documents on a weekly basis into stable spreadsheets organized by month. To prevent the loss of data, we use cloud computing, saving them in a shared folder in Dropbox. We keep the original data in separate tabs, allowing us to calculate weekly and monthly totals by type of interaction, time of day, and day of the week. Using free cloud computing applications allows us to keep more accurate reference statistics throughout the library and better serve our patrons.

**New Innovations from IEEE Xplore**

**Presenter:** Jalyn Kelley (IEEE)

**Description:** This live demonstration, presented by IEEE Client Services Manager Jalyn Kelley, will cover how to get the most out of your IEEE Xplore subscription, what’s new with IEEE, and upcoming enhancements to the database. IEEE Xplore is the premier database for research in electrical engineering, electronics, computer science and related disciplines.
<table>
<thead>
<tr>
<th>Friday, October 14</th>
<th>SESSION 10</th>
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<tr>
<td>11:30am – 12:30 pm</td>
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**LOUIS: The Louisiana Library Network**  
**Room 1110**

**Presenter:** Cathy Sicard (LOUIS)

**Description:** Join us as we revisit our journey from 1990, when only six Louisiana academic libraries were automated and only four had internet access, to the present where we partner with Academic Libraries, State and Private Libraries, Museums and Archives to provide a multitude of products and services to 47 consortia members.

**ACRL Business Meeting**  
**Room 1111**

**Presenter:** Mike Matthews (Northwestern State)

**Description:** OCLC and LYRASIS are collaborating to share more about the web scale working environment with libraries nationwide. Through a series of face to face and online conferences, the two organizations are sharing the value of cloud computing tools by demonstrating the ease of use, adaptability, scalability and overall cost benefit of working in this cutting edge way. Join us for a one-hour conversation on Web Scale! We will begin with a group discussion of how libraries are working smarter by implementing free cloud computing tools. This will be followed by a brief summary of how libraries are successfully transitioning to OCLC’s revolutionary new Web Scale Management Services. Our group discussion will conclude with of the long term impact of web scale services on libraries and their users.

**LexisNexis Academic: Conducting Legal and Business Research**  
**Room 1114**

**Presenter:** Lynn Smith (LexisNexis)

**Description:** This session will concentrate specifically on conducting legal and business research using LexisNexis Academic. For legal, the presentation will cover the different ways to find cases and statutes. It will also cover Shepard’s. Shepard’s is a key element of conducting legal research. For business, the presentation will cover Company Dossier and the numerous business resources on LexisNexis Academic. Company Dossier covers over 40 million companies.
Appendix N  
Surveys by LOUIS Members

<table>
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<th>Survey</th>
<th>Date</th>
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<tr>
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<tr>
<td>LRC Student Worker/Tutor Survey</td>
<td>November 28, 2011</td>
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Appendix O
LOUIS Article Citations

LOUIS Column. By: Lowe, Megan. Louisiana Libraries, Summer 2011, Vol. 74 Issue 1, p18-19, 2p

### Appendix P
Listservs Managed by LOUIS

<table>
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<tr>
<th>Listserv</th>
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<tbody>
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<td>LAEXEC-L</td>
<td>LALINC Executive Committee</td>
</tr>
<tr>
<td>LALDF-L</td>
<td>Louisiana Academic Library Directors Forum</td>
</tr>
<tr>
<td>LALINC-L</td>
<td>Louisiana Academic Librarians Discussion List</td>
</tr>
<tr>
<td>LER-L</td>
<td>LALINC Electronic Resources Listserv</td>
</tr>
<tr>
<td>LLN-L</td>
<td>Louisiana Library Network Discussion List</td>
</tr>
<tr>
<td>LLNCOM-L</td>
<td>Members of the LLN Commission</td>
</tr>
<tr>
<td>LOUILL-L</td>
<td>LOUIS ILLiad</td>
</tr>
<tr>
<td>LOUIS-L</td>
<td>All LOUIS Staff</td>
</tr>
<tr>
<td>LOUISDL</td>
<td>LOUISiana Digital Library</td>
</tr>
<tr>
<td>LSA-L</td>
<td>LOUIS System Administrators</td>
</tr>
</tbody>
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