

IUG (Virtual 2021)

Sections: General, VEGA, Forums, Sessions, Tech

Training Videos, help information have been 'unlocked' no login necessary to access (if login necessary there is a 'lock'

icon adjacent to the topic ): <https://innovative.libguides.com/polarishome>

Polaris roadmap unlocked: <https://portal.productboard.com/iii/6-innovative-product-status-board-new/tabs/23-polaris>

General

Opening Sessions:

Yuriv Kursch – Gen Mgr III, Matti Shem (English 2nd language/difficult to understand)

Committed to III customers will invest on III products (as well as ProQuest). Proquest leading provider of software as solution. Focus on creating value. Leading aggregator of multi-type content solutions.

Accelerating demands - Market demand for ebooks, remote access, migration to cloud/SaaS platforms

Uncertainty for funding sources – budget uncertainty, investigating new models, improve efficiency.

Adapting to rapid change – support staff and users remotely, shifting patterns of demand, resuming plans for future

COVID research database free ??

Support, equity, inclusion, diversity

ProQuest – Open Layer – streamlining content (research)

RapidILL Rapido– library resource sharing

Rialto – acq workflow

Vega

Yuriv Kursch – 1st IUG joined Feb 2020

III provided, new learning and training center, III webinars, open documentation project

Changed investment strategy when COVID hit. Became more transparent – roadmap on website

Lowest # of open tickets by 70%, built success team mgrs., 21 product releases

Redesigning LEAP make it more efficient operation – made it useable on any device; innovative mobile developed; summon discovery (academic)

Vega – centralize and unified marketing and communication, integrated and open, automation, data connected, analytics across experience

Vega Discover (Dec 2020) – other pieces still being developed

Tom Jacobson

Service with no lines-

III mobile – user can phone and check out (including desensitize RFID)

LEAP and Sierra Web allow use of tablets

VEGA – works next to ILS (Discover, interact, promote, program, analyze)

Polaris meeting-

1600 total with 800 new attendees

87 III staff

41 states

13 countries

2019 – 719 members

2020 – 621 members

2021 - 642 members

IUG balance (-42,000 due to lower membership and cancelled conference)

Will be sending survey out for determining what conference will be next year (in person, virtual, mix)

Innovative Vision – Creating Superior Library Experiences

Toni Minick – Product Mgmt – VP intro

Jodan Fieds – Sr team Lead Product Mgmt– Vega Discovery

Development Partner Libraries Maisam Nouh – Ferguson Library (IT Supervisor) live on VEGA 3 weeks ago.

Documentation provided to patrons by III. Love rolled up search results with one button to lace hold.

Brielle Maynor MidPointe Library System (Pub Svc Director)

Nathan James Central Arkansas Library System (Ex Dir Tech and Collection Innovation) – reveals related resources that weren't available to patrons prior without Vega (linked data). Increase in traffic from Google. Just starting to integrate Syndetics info (series info in particular).

How do you provide positive experience digitally. Discovery-led Experiences – removing barriers. 5 keys to success: Centralized/data connected/omni-channel/automated and intelligent/integrated and open

People expecting big tech experience on your website. Vega platform. Vega engagement suite : three modules (Interact, Promote, and Program) are highlighted as the Vega Engagement Suite. The suite allows library staff to easily communicate and manage the full range of materials, programs, and services available to their community and

personalized for their patrons. The suite will include individualized communication channels such as SMS, voice (Alexa), chat, chatbots, social media and messaging apps as well as broad communications such as newsletters, campaigns, and event management tools.

Connect – layer that integrates ILS with Vega

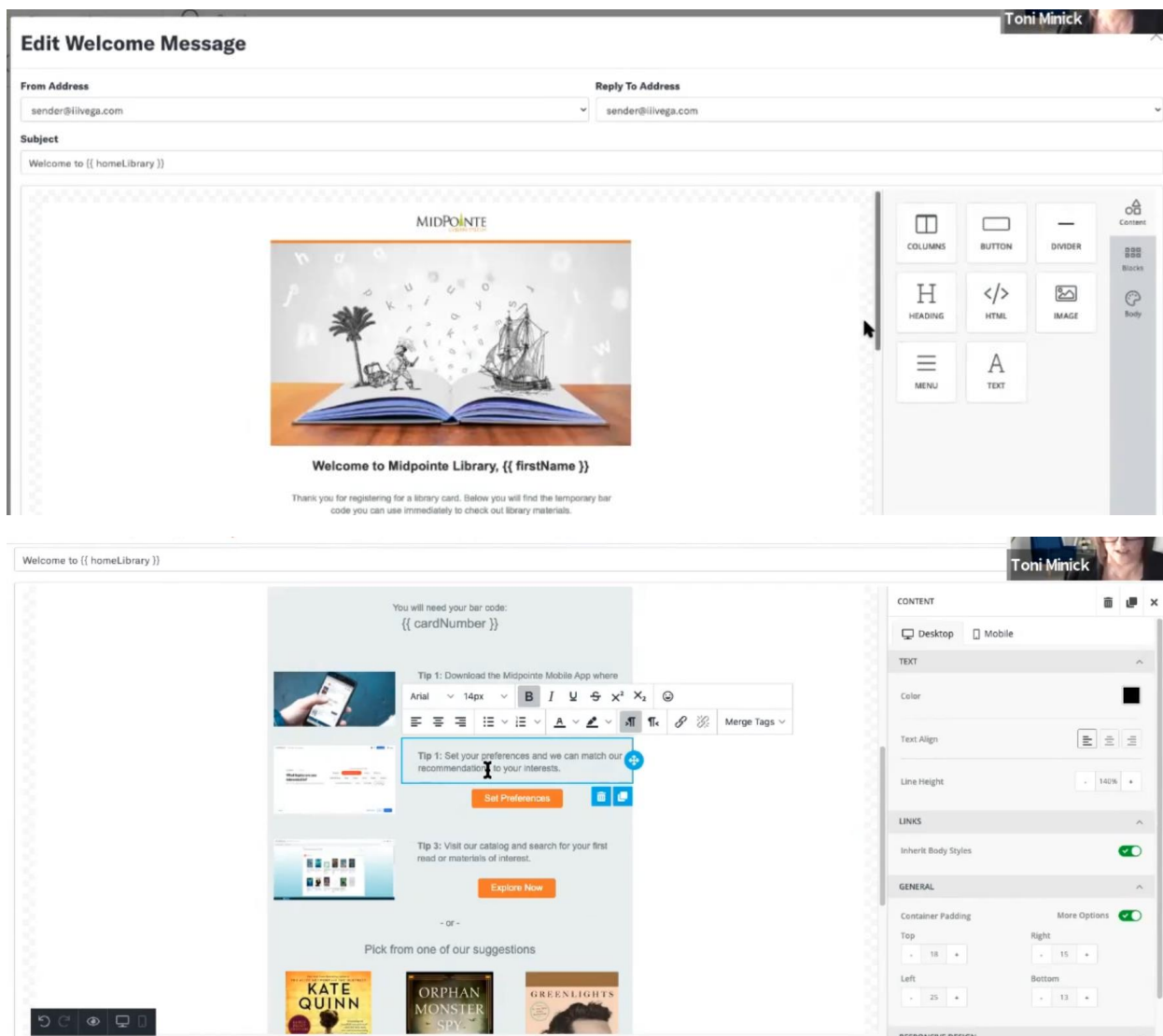
Discover (PAC) available now – coming soon: Interact (alexa app and notifications, automated chat if too complex sends to librarian), promote (donate option), program (view programs available,), analyze

Difficult to integrate all the content to one location – Syndetics unbound included in Discover VEGA including metadata that's incorporated into context engine. If purchase interact and/or the other modules get Syndetics images. Available for Sierra now July for Polaris.

As of July – 'Connect' incl for hosted customers (email designer, automated email, 5 email notice types, automated journeys (registration, renewal, anniversary), exception automation)

Vega universal messaging – one service delivers and receives msgs, add/remove channels – personalization, transactional, sequences, design, exceptions (beta demo below)

Sample journey – email registration drag and drop to edit



From staff perspective

Apps Innovative Interfa... Browse projects ... Microsoft Office H... Internal Open Tabs - Temp ERM CIL Polaris Virtua and Vital Sierra Resource Sharing Vega Ed Learning Lib Indust In

Patrons Sequences Search...

Toni Minick
vega.innovative+68@gmail.com Main Branch

Patron Information			
First Name	Toni	Mobile	720-471-6698
Last Name	Minick	Phone	
Nickname		Birthday	August 17, 1972
Home Library	Main Branch	Address	2396 John Smith Rd
Card Number	2117282	City	Fayetteville
Expiration Date	June 22, 2021	State & Zip	NC 28306
Membership Start	March 22, 2021	Country	USA

Activity

- Acted on: Welcome Mar 22, 2021
- Temporary barcode issued 2117282 Mar 22, 2021
- Agreed to circulation policies Mar 22, 2021
- Agreed to privacy and contact storage Mar 22, 2021

Welcome Email

Sent	Delivered	Opened	Acted on
Mar 22, 2021	Mar 22, 2021	Mar 22, 2021	Mar 22, 2021

Early access for select customers next week

VEGA will be available to all customers regardless of whether hosted or not.

Live question and answer sessions

Executive Meet & Greet

Yariv Kursh General Manager	Hilary Newman SVP Library Services	Toni Minick VP Product Management
Tuesday, March 23 – 9:30 am ET	Tuesday, March 23 – 6:00 pm ET	Tuesday, March 23 – 2:00 pm ET
Wednesday, March 24 – 1:00 pm ET	Thursday, March 24 – 2:00 pm ET	Wednesday, March 24 – 9:30 am ET

zoom

Polaris – What's next

Carrie Pearson – Director New logo sales

Samantha Quell sr team lead, Prod Mgmt – Polaris product mgr

‘Experience Matters’ for patrons and staff: personalized and enriched experiences, streamlined and interconnected workflows anywhere/anytime access, modern stack and APIs, patron/data privacy

Leap - A Reimagined Web-Based Experience



TYPE	DATE	BARCODE	TITLE	REASON	ORGANIZATION	NOTE	BILLED	AMOUNT	BALANCE
Charge	5/8/2020	30999999038000	Virtualback: how to come together, unleash our power and change the game	Processing Charge	Red Rock Public Library	Billed	Yes	\$5.00	\$5.00
Charge	5/8/2020	30999999038000	Virtualback: how to come together, unleash our power and change the game	Replacement Cost	Red Rock Public Library	Billed	Yes	\$9.99	\$9.99
Charge	5/8/2020	30999999037011	The bookkeeper's apprentice, or On the seagull's of the quest	Processing Charge	Red Rock Public Library	Billed	Yes	\$5.00	\$5.00
Charge	5/8/2020	30999999037011	The bookkeeper's apprentice, or On the seagull's of the quest	Replacement Cost	Red Rock Public Library	Billed	Yes	\$17.00	\$17.00
Charge	5/8/2020	3099999904703094	The book with no pictures	Processing Charge	Red Rock Public Library	Billed	Yes	\$5.00	\$5.00

#IUG2021



70% of Polaris users using LEAP.

VEGA – add to ILS

Innovative Library Experience (Lx) – Polaris & Vega



#IUG2021



2021 What's next

7 June



Extending Leap – Polaris 7.0 (June 2021)



MARC Edit



MARC Import



Issues & Parts

Hot keys (Tab, space bar to click, E to edit, I to insert), is connected to auto authority control (defined in SA)

The screenshot displays the Leap Bibliographic Record interface. At the top, there's a navigation bar with 'leap' and a search bar. Below this, the 'Bibliographic Record' section is visible, showing a book cover for 'New fears: new horror stories by masters of the genre'. The record details include a control number '1563313' and an owner 'QA-DEWEY 7.0 (sys)'. The record status is 'Final'. Below the record details, there's a list of MARC tags and fields, including 001, 005, 010, 011, 012, 013, 014, 015, 016, 017, 018, 019, 020, 021, 022, 023, 024, 025, 026, 027, 028, 029, 030, 031, 032, 033, 034, 035, 036, 037, 038, 039, 040, 041, 042, 043, 044, 045, 046, 047, 048, 049, 050, 051, 052, 053, 054, 055, 056, 057, 058, 059, 060, 061, 062, 063, 064, 065, 066, 067, 068, 069, 070, 071, 072, 073, 074, 075, 076, 077, 078, 079, 080, 081, 082, 083, 084, 085, 086, 087, 088, 089, 090, 091, 092, 093, 094, 095, 096, 097, 098, 099, 100, 101, 102, 103, 104, 105, 106, 107, 108, 109, 110, 111, 112, 113, 114, 115, 116, 117, 118, 119, 120, 121, 122, 123, 124, 125, 126, 127, 128, 129, 130, 131, 132, 133, 134, 135, 136, 137, 138, 139, 140, 141, 142, 143, 144, 145, 146, 147, 148, 149, 150, 151, 152, 153, 154, 155, 156, 157, 158, 159, 160, 161, 162, 163, 164, 165, 166, 167, 168, 169, 170, 171, 172, 173, 174, 175, 176, 177, 178, 179, 180, 181, 182, 183, 184, 185, 186, 187, 188, 189, 190, 191, 192, 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993, 994, 995, 996, 997, 998, 999, 1000.

SAVE ACTION



Control number:

1563313

Owner:

QA-DEWEY 7.0 (sys)

Record status:

Final

☒ Display in PAC☐ Do not overlay☐ Host

[Preview](#)
[Items](#)
[MARC](#)
[Headings](#)
[Statistics](#)
[Record Sets](#)
[Resources](#)
[Outreach Patrons](#)

 EDIT TAG

➤ INSERT ➤

 DELETE TAG

↑ MOVE TAG UP

↓ MOVE TAG DOWN

```

001 cam a22 i 4500
001 1563313
005 20210322091752.0
006 a| | | | | | | | | | | |
007 ta
007 z|
008 18017252017 enk 000 1 eng d
010 ta 2017289418
020 ta1785655523 (paperback)
020 ta9781785655524 (paperback)
035 ta20314416
035 ta(OCoLC)ocn967369644
040 taVXDtbhengterdaftVXDxt8DXdtd8KLTdDCCYLCfDd0
042 ta1785655523

```

008--BOOKS (LDR/06 value a with LDR/07 values a, c, d, m and LDR/06 value t)

Entry date
(00-05)

180127

Nature of contents (24-27)

Type of date
(06)

s - Single known date/probability

Date 1
(07-10)

2017

Date 2
(11-14)Place of pub
(15-17)

enk - England

Illustrations
(18-21)

- No illustrations

Audience
(22)

- Unknown or not specified v

Nature of contents (24-27)

- No specified nature of content
- 2 - Offprints
- 5 - Calendars
- 6 - Comics/graphic novels

Government
pub (28)

Conference
pub (29)

Festschrift
(30)

Index (31)

Literary form
(33)

Biography
(34)

OK

CANCEL

MARC Import Setup

IMPORT

CLOSE

Profile Setup

Bibliographic Records

Item Records

Authority Records

Record Sets

Bibliographic Record Set

Final

☒ Save to new record set
 ☐ Save to existing record set

Name

FIND

Owner

Record Set Options

☐ Append
 ☐ Replace

Provisional

☐ Save to new record set
 ☒ Save to existing record set

Name

FIND

Owner

Record Set Options

☒ Append
 ☐ Replace

Deleted

☐ Save to new record set
 ☐ Save to existing record set

Name

FIND

Owner

Record Set Options

☐ Append
 ☐ Replace

Authority Record Set

Final

☐ Save to new record set
 ☒ Save to existing record set

Provisional

☐ Save to new record set
 ☐ Save to existing record set

←

→

qa-polaris.polarislibrary.com/leapwebapp/staff/default#catalogingprocessing/marcimport

Apps

Confluence

Airlanders

Peanuts

Apollo

PM Status - Polaris

IdeaLab

Support

ADP

ADP

Leap

PO Resources

Demo Sites

UX 2021 Virtual Co...

Service Desk - Servi...

leap

Scan or search

FIND

New

Librarians

Help

CHECK IN

NEW PATRON

CATALOGING PROCESSING

REFRESH

CLOSE

Bibliographic Bulk Change

MARC Import

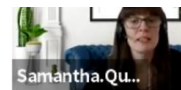
Filter

FILE	ORGANIZATION	USER	TYPE	STATUS	RECORDS READ	RECORDS CREATED	POSTED
<input type="checkbox"/> eContent automatic import 3/22/2021 1:22:28 PM for vendor account: OverDrive - Clark County	QA-DEWEY 7.0	PolarisExec	Bibliographic	Pending	4	0	3/22/2021 1:22:28 PM
<input type="checkbox"/> eContent automatic import 3/21/2021 4:17:36 PM for vendor account: OverDrive - GMLCS - Hooksett	QA-DEWEY 7.0	PolarisExec	Bibliographic	Completed	49	399	3/21/2021 4:17:36 PM
<input type="checkbox"/> eContent automatic import 3/21/2021 2:59:23 PM for vendor account: OverDrive LEAD	QA-DEWEY 7.0	PolarisExec	Bibliographic	Completed	1	1	3/21/2021 2:59:23 PM
<input type="checkbox"/> eContent automatic import 3/21/2021 2:36:18 PM for vendor account: OverDrive QA1	QA-DEWEY 7.0	PolarisExec	Bibliographic	Completed	2	2	3/21/2021 2:36:18 PM
<input type="checkbox"/> eContent automatic import 3/21/2021 2:14:10 PM for vendor account: OverDrive - GMLCS - Kelley	QA-DEWEY 7.0	PolarisExec	Bibliographic	Completed	52	409	3/21/2021 2:14:10 PM
<input type="checkbox"/> eContent automatic import 3/21/2021 12:55:51 PM for vendor account: OverDrive - Clark County	QA-DEWEY 7.0	PolarisExec	Bibliographic	Completed	62	101	3/21/2021 12:55:51 PM
<input type="checkbox"/> eContent automatic import 3/20/2021 10:13:16 AM for vendor account: OverDrive - GMLCS - Hooksett	QA-DEWEY 7.0	PolarisExec	Bibliographic	Completed	49	446	3/20/2021 10:13:16 AM
<input type="checkbox"/> eContent automatic import 3/20/2021 8:55:54 AM for vendor account: OverDrive - GMLCS - Hooksett	QA-DEWEY 7.0	PolarisExec	Bibliographic	Completed	1	1	3/20/2021 8:55:54 AM

Improved Experiences - Acq API working with B&T TS 360 click on submit in cart – auto generates PO in Polaris without intervention – will expand to other vendors after functional. Bulk Reset due date from record set; PAPI enhancements – allow/cancel ILL req, detail system block info, user defined field data being exposed to use for outside vendors using API; Address update without staff verification (opt in) PAC and mobile PAC will be different so patrons can't add strange zips to postal code PAPI will be different so vendors can confirm zip



Improved Experiences – Polaris 7.0 (June 2021)



Acquisitions API



Bulk Reset Due Date



PAPI Enhancements



Address Update w/o
Staff Verification



7.1 (Q4 2021)

LEAP Workflow based high level– some features there others not initially – SA dates closed, admin to update settings to multiple org at a time – Acq and SA mainly but will have some Cat and Serials

Improved exp – cancel held requests, PAPI enhancements for vendors – restrict endpoints by access ID (patron reg create but not patron search), maybe alert banner for PAC (emergency closure separate from regular PAC), bulk change held through date



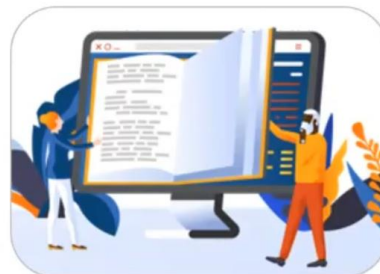
Improved Experiences – Polaris 7.1 (Q4 2021)



Cancel Held Requests



PAPI Enhancements



ExpressCheck Enhancements





Extending Leap – Polaris 7.1 (Q4 2021)



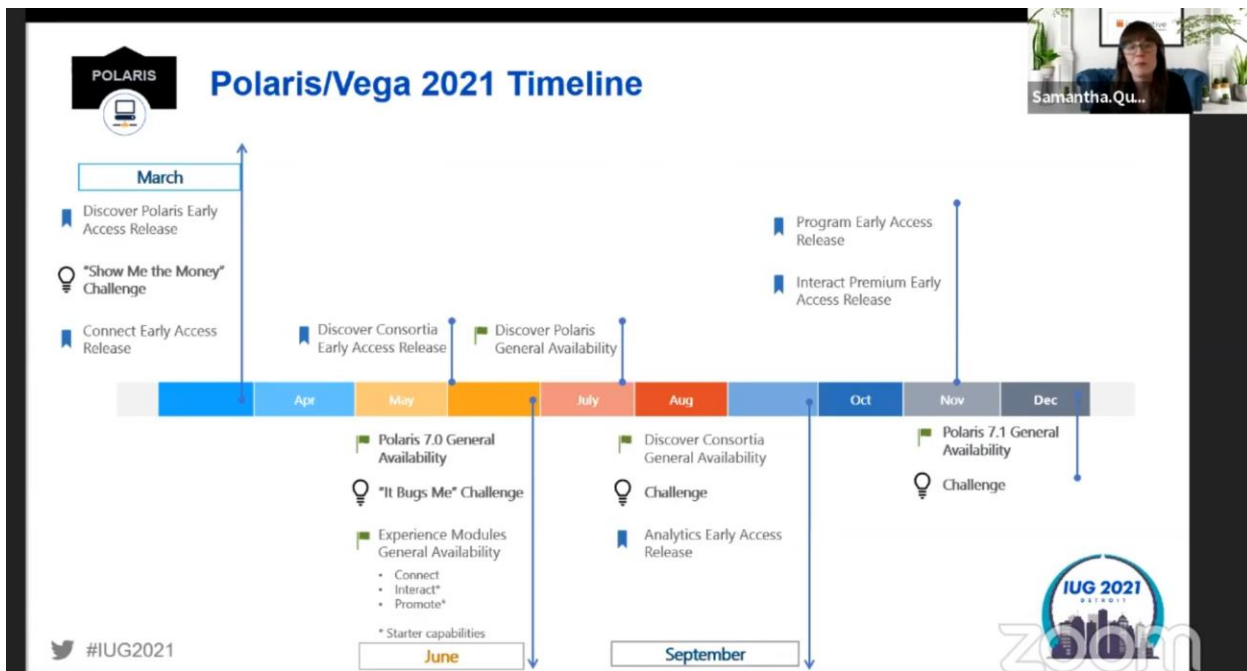
Purchase Orders & Invoices



Funds



System Administration



Show me the money challenge – support preferred ISBN/UPC (eliminate red excl point add something to 970?) and bulk change POLI seg fields – fund code and selection specifically

Coming challenge mid April– Bugs me small ideas that make big difference in workflow like display another column in find tool and action button to another screen (other ways to flag items as missing in picklist views), how to suppress active holds message (x holds in queue do you want to continue currently tied to displaying number of holds in queue currently)

Resources-

Polaris

Find the latest information on Polaris, including videos, training, and more.

[Go to Support Home](#)
[Go to Polaris Training and Learning](#)

New Leap Solution

New to Leap? Check out the **Leap Resource Guide** solution for training and where to start.

Training and Learning Center

Explore training and learning guides by product

Polaris Vital SkyRiver

Support: Ticketing, Solutions and Announcements

View your tickets and related solutions in the Customer Support knowledgebase

Webinars

Watch recordings of recent event webinars including company updates

Product Roadmap

View the real-time status of features and product enhancements

Contact Customer Support

Contact information for Innovative Customer Support, Sales, Professional Services, and Finance/Billing

Resource – Public Product Roadmaps

Innovative Product Status Board - New

SIERRA **POLARIS** VEGA MOBILE WORKLISTS INN-REACH DECISION CENTER MYLIBRARY!

IN PROGRESS: Polaris 7.0 (Q2 2021)

Contribution to Multiple INN-Reach Systems

PAPI Endpoint Enhancements

Manually Create Issues in Leap

Bib Bulk Change - Additional Fixed Field...

MARC Cataloging in Leap

MARC Record Import in Leap

MARC Cataloging in Leap

● SAMANTHA GUELLA Posted on Aug 2020

Description:
Addition of a MARC edit feature for bibliographic records in Leap.

Value:
Allows cataloging staff to manage bibliographic records anytime, anywhere.

How important is this to you?

Additional Resources



- Sessions:
 - Polaris Deep Dive – Wednesday March 24 (Virtual)
 - Vega Discover Happy Hour - Tuesday March 23 at 6:10 PM
 - Vega: Discovery and Beyond – Thursday March 25 (Virtual, Q&A 11 AM Eastern)
- Questions?
 - Email: Samantha.quell@iii.com
 - Q&A – Wednesday March 24 at 4 PM Eastern (Polaris Deep Dive)

Working on spine label printing LEAP, LEAP selection lists not yet, some are coming to client as well but mostly PAPI related

Customer Experience – New and Ahead (Hilary Newman)

Senior Library Services Leadership



Hilary Newman
Sr. Vice President
Customer Support & Success



Bruce Randall
Director
Polaris & Virtua



Caroline Mason
Director
Client Services



Caitlin Spears
Director
Customer Success



Jennifer Pelton
Director
Support Strategy Integrations



Brad Rogers
Director
Implementation Services



Meet Your Support Manager



Gary Bell
East Team, Central & South America



Angela Clough
Central Team



Ed Escueta
West Team & Mexico



Jesse Jensen
Polaris



Ann Rakes
Level 3



Charo Diez
EMEA



Rochelle Wordsworth
APAC



Library Services

Customer Support

With staff and offices in a variety of regions, you'll experience a close, working relationships with our product experts in your region.

We provide every customer with system critical support 24 hours a day, seven days a week, 365 days a year.

Professional Services

Our team is knowledgeable in the features and functionality of the software and understand how to configure and manage it to meet the specific needs of your library and patrons.

We provide consulting, training, and other services that ensure your patrons and staff are getting the most from your ILS system.

Customer Success

This team is focused on customer advocacy. We ensure you see the value of our products, services, and interactions with our company.

We will work with you to create scaled solutions to address training, engagement, and product needs.

2020

Address immediate needs

- Support to abruptly close physical locations
- Assist library staff move to remote work
- Fill gap in training necessities
- Be available to assist with whatever's necessary

Support new priorities

- Planning for reopening physical locations (for some, close again!)
- Fines free, temporary or permanent, extending holds
- Curbside pick up
- Quarantine materials

Fulfill promises

- Clear navigation and easy access to online resources & documentation
- Create a library of free training content, videos, how to materials
- Communicate plans to address open issues in engineering
- Timely customer service: quality, clear, and frequent communication
- Ensure customers see value in our services, products, and interactions

Caitlin Spears (Customer Success)

Worldwide Customer Success Team



Caitlin Spears
Customer Success Director



Silvia Guvernau
EMEA



Jackie Lu
APAC



Julie Dore
Sierra & Millennium



Martha Rice Sanders
Sierra & Millennium



Connie Wilson
Polaris



Our Mission



Our team ensures customer achieve their desired outcomes and see the value of our products and services, and in their interactions with our company.

What We Do

- Meet with library teams to make sure you are getting the most out of your software investment
- Serve as an advocate for our library partners, proposing scaled solutions to address training, engagement, relationship, and product needs



Jennifer Pelton – Support Website

[Support.iii.com](https://support.iii.com)

Support.iii.com - available without login to you and your library staff

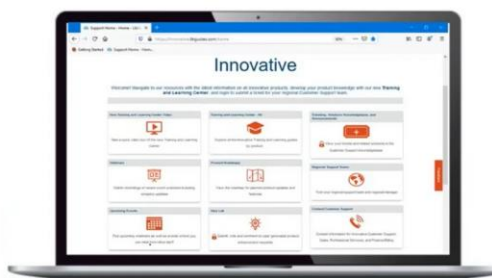
Training and Learning
Centers

Upcoming Events

Recorded Webinars

Product Roadmaps

Documentation Portal



What is the Training and Learning Center?

An open access repository of quality training materials organized in an easy-to-use and search format.

- Training resources in one place
- Organized to easily find resources
- No authentication required
- Accessible documents



🐦 #IUG2021

Bruce Randall (LEAP)



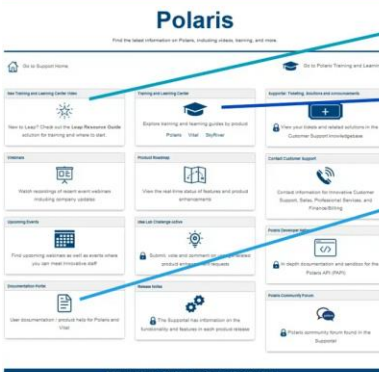
Take advantage of the most modern public library ILS and web client available!

Empower your library staff with the Polaris Leap web client, which delivers the full power of Polaris ILS public service workflows through a browser.

This means your staff can connect with patrons and complete tasks virtually anywhere – even outside the library walls.



Resources Available on Support.iii.com Polaris Home



- Leap Resource Guide solution in the Supportal
- Polaris Training and Learning Center has more than 20 resources including how to videos, guides and recorded webinars.
- User documentation - <https://documentation.iii.com/>
- For custom training, please contact your Account Manager



Monthly LEAP training 30-45 minutes for new users with Q/A

Brad Rogers where going 2021



One Family of Companies, One Customer Experience

- Aligning business processes, communications, tools, and vision
- Working across companies for:
 - Easier purchasing and contracting
 - Cross-company escalation of your issues
 - Cross-company assistance with product deliveries/implementations
 - Cross-company advocacy
 - Unified Support experience
 - The right products and services for every customer

Continuous Enhancement of Training Options



EXPAND
REMOTE LPT
OPTIONS



MORE
RECORDED
TRAINING



MORE TRAINING
OPTIONS

- Polaris
- Sierra
- Millennium
- INN-Reach
- Virtua
- Vega
- Mobile



#IUG2021

Remote training – no on-site may come back in limited capacity

Q&A customer Exp – will be looking at new ticketing system for escalation process that works better. Working with ProQuest

Only will fix items on current release – don't work backward. Customer Success will work with you if concerned about moving to next release.

Have certification class for Polaris and Sierra – certification requires attendance on certain workshops. Link to webpage at iii.com/training/ and 2 pdfs (cost involved - several days)

Is customer success paid or free – free

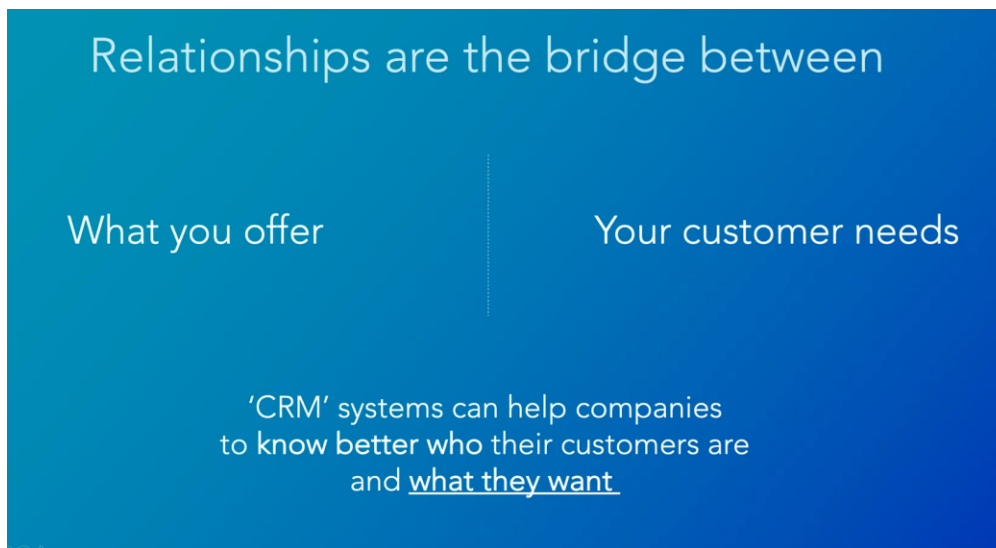
Training on INNReach being developed, updating and new content for Sierra/Polaris, offline circ LEAP and Sierra – booked out through June but starting to schedule out July on – Welcome to LEAP early April/May free open to everyone

VEGA (new discover and customer engagement product)

Patron Engagement - CRM



User experience – Starbucks – personal (name, apps personalized) – build emotional connection – build relationship with clients



Self-service Experience – get value quick, personalized, little effort and on our terms

Meld relationship and self service – product led where the user experience drives growth (amazon, uber, apple, etc) if don't meet those expectations patrons experience value gap – what they think they are going to get and reality doesn't meet expectations – patrons don't return

Companies Focused on desired outcome are successful (above) – up and going successfully within 30 minutes – use flywheel model – inner model is pattern (evaluator, beginner, regular, super user) outside is how they feel (activation, adoption, adore, advocate) Growth is driven by users becoming advocate

Flywheel



Physical library has to shift to digital (PAC). If PAC isn't as easy, convenient or personalized will go somewhere else. Libraries need to move to discovery led model to take patrons through flywheel.

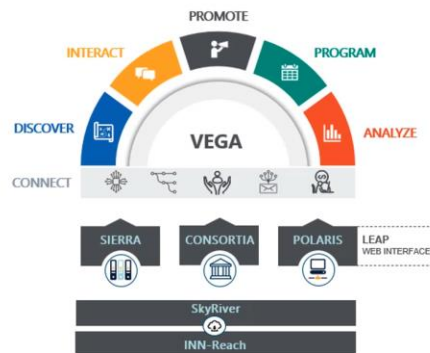
'CRM' and Engagement Management Solutions Can

1. Better anticipate needs and maintain great relationships
2. Better, speedier communications and service
3. Better segmentation and personalization
4. Better protection of data privacy
5. Better analytics



1. Everything related to managing patron in one place. Interaction history linked to more than just person record – holdings, programs, understanding historic engagement, prompt to communicate with those that haven't used in a while. Helps empower staff to create experiences
2. Use of preferred communication channels (Social Media, SMS) marketing automation can be scheduled in advance or triggered by patron actions, chat solutions with auto-responder, dynamic contact driven by preferences, one design not a lot of templates, ticketing, automate routing, auto-replies
3. Able to automatic segment patrons into groups base don captured data on preferences, create self service journeys, specific campaigns, personalize newsletters
4. Obtain and store patron permissions to store and use patron historical use, manage patron preferences for marketing, segment and useage data can be anomized
5. Capture and tie engagement data together with anomized patron data, track flywheel segments, track roadblocks and weak areas, id where trends are going

Vega: The Library Experience Platform



Extended Patron Record with Activity Stream

The screenshot shows the Midpointe interface for a patron named Jordan Fields. The interface includes a navigation bar with "Patrons", "Services", "Marketing", and "Sequences". The main content area is divided into two sections: "Current Activity" and "Patron Information".

NAME	ENROLLED START DATE	END DATE
The Best Life Diet Cookbook	January 6, 2020	February 6, 2020

Patron Information

Field Name	Value	Phone
First Name	Jordan	703-522-0000
Last Name	Fields	703-522-0000
Address	1000	August 9, 1975

Activity Stream

ACTIVITY	DATE
Signed up for program Reading Around the World	Jan 6, 2020
Made a donation	Jan 6, 2020
The Librarian Recommends Science Fiction Last Created	Jan 6, 2020
Chat request initiated	Jan 6, 2020
Book placed on hold	Jan 6, 2020
Book checked out Kindle eBook	Jan 6, 2020

Automated Journeys & Notices

The screenshots show the Midpointe interface for automated journeys and notices. The top screenshot displays the "Journeys" section, and the bottom screenshot displays the "Notices" section.

Journeys

STATUS	NAME	CHANNELS	LAST UPDATED	UPDATED BY
ON	New Patron Registration	EMAIL	December 16, 2020	Amey Dhanraj
ON	Patron Account Renewal	EMAIL	January 6, 2021	Amey Dhanraj
OFF	Patron Anniversary	EMAIL	December 16, 2020	Dan Roberts

Notices

STATUS	NAME	CHANNELS	LAST UPDATED	UPDATED BY
ON	Reminder Item Due	EMAIL	December 16, 2020	Amey Dhanraj
ON	Overdue	EMAIL	January 6, 2021	Amey Dhanraj
ON	Hold Ready	EMAIL	December 16, 2020	Dan Roberts
ON	Auto Renew	EMAIL	December 1, 2020	Mica Prochaska

[illegible]

MidPointe Library **WELCOME**

Hi Jordan! Welcome to MidPointe Library.

Thank you for registering for a library card. Below you will find your temporary bar code that you can use to borrow books and library materials, along with the password you entered when you registered.

You will need to visit the library in **Beaverton, OR 97005** to pick up your permanent library card. You will need to bring with you a bill or other piece of official mail to transfer your address. This mail must have your name and address that matches what you used to sign up.

[Create a New Account](#) [Bar Code: 3000000000000000](#)

Discover your next read


Use our discovery tool to quickly browse all we have to offer. Here are a few recommendations to get you started.

Never Too Disconnected

An entire library at your fingertip!

MIDPOINT MidPoint Library System

Search Encore Catalog Feedback



The best life diet cookbook : more than 175 delicious, family recipes

Greene, Bob (Bob W.)
2008

A cookbook from exercise and nutrition expert Bob Greene includes 175 brand new recipes and more two week meal plans can be implemented at any one of five calorie levels, and there are interchangeable options for

Book Available

Book available Call number 641.5635 GreelD 2009...Aurisdale Adult

Other locations: [Aurisdale](#) | [Baird](#) | [Five Points West](#) | [Pleasant Grove](#) | [Warner](#)

[Edition information >](#)

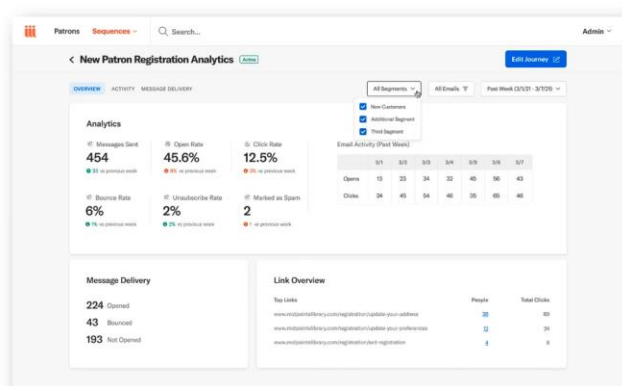
Related Resources

See all 315 related resources >

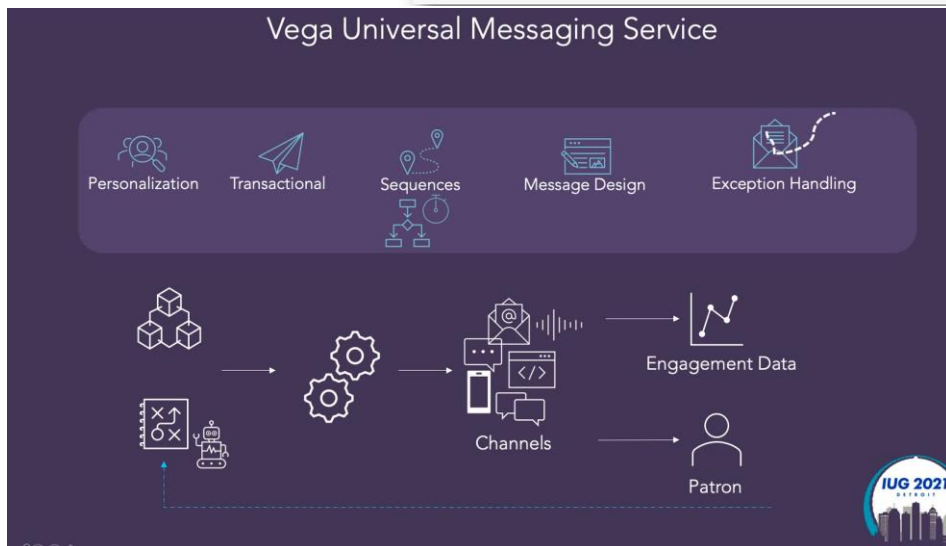
My Bookshelf [Bookmarks](#)

Guided learning, voice assistance (Alexa, Google home)

Metrics to Measure Outcomes



Vega Universal Messaging Service



VEGA discover happy hour



Vega Discover Demo

Presented by: **Michael Monroy**
Director, Global Sales Support

Tom Jacobson
VP, Executive Library Advocate & Strategist

March 23, 2021

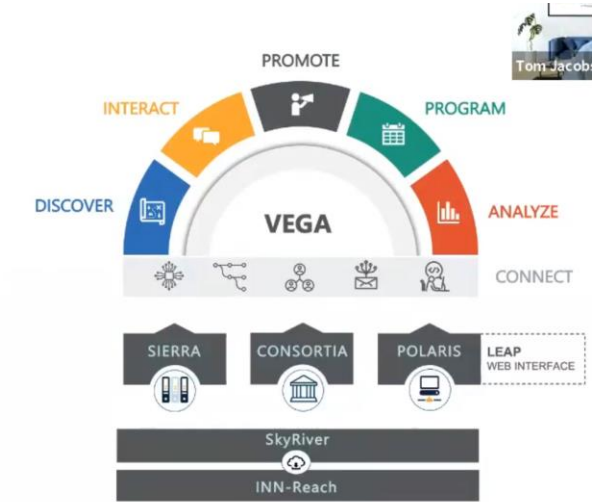
#IUG2021

#ExperienceMatters



Innovative Library Experience (Lx)

Deliver incredible experiences – easily and at scale



Platform to help manage user experience

Harry Potter and the sorcerer's stone
by Rowling, J. K.
1997-2018

Roll Ups Across Formats and Editions

Book
Available

eBook
checked Out

eAudiobook
checked Out

Book-On-CD
Available

Book available

Call number FIC RowJ., Avondale Juvenile

Other locations Avondale | Birmingham Public Library | Eastwood | Five Points West | Gardendale | Homewood | More locations

Edition information

Place Hold

Showcases offer access to related materials, people, topics

Topics

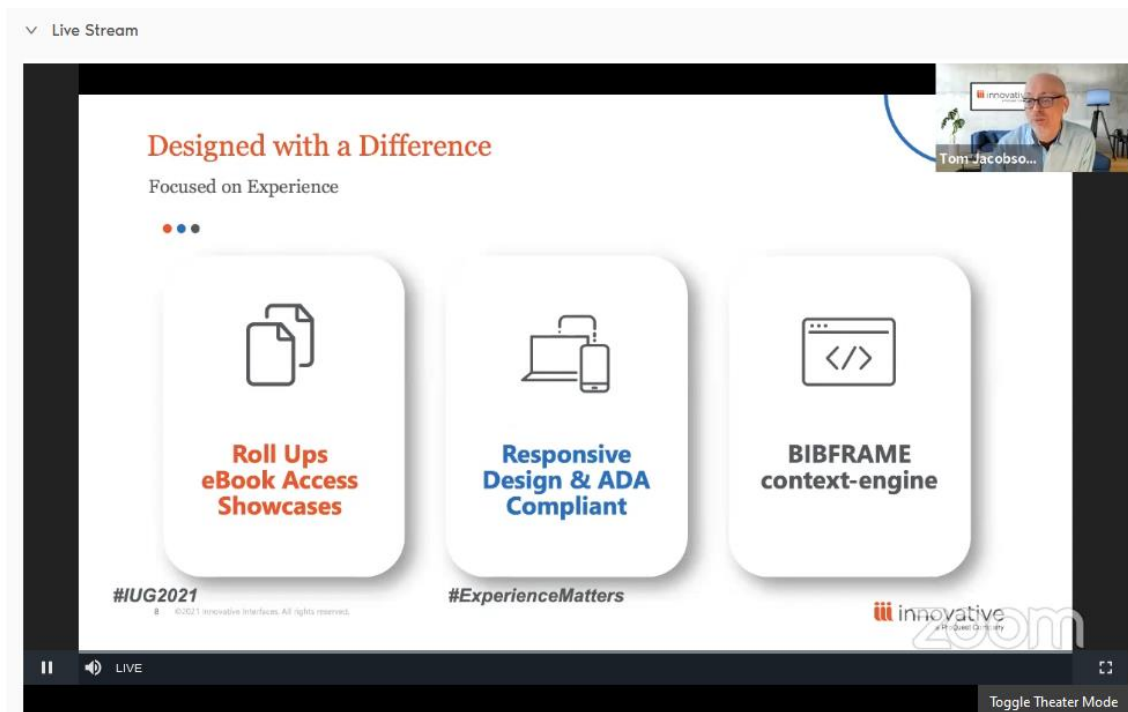
See all 4 topics

+191

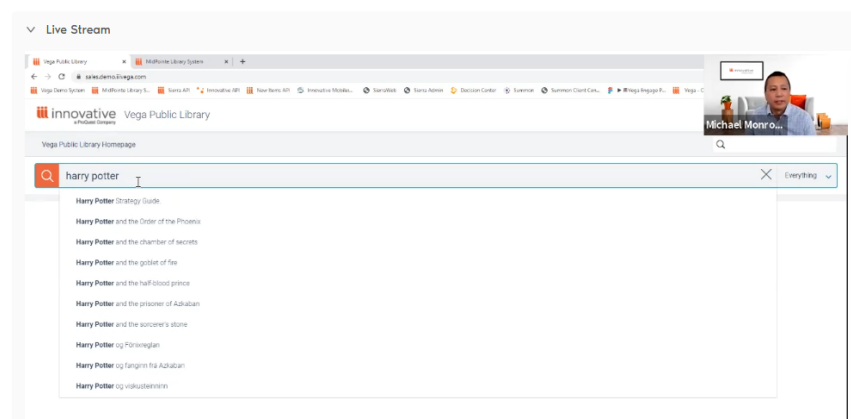
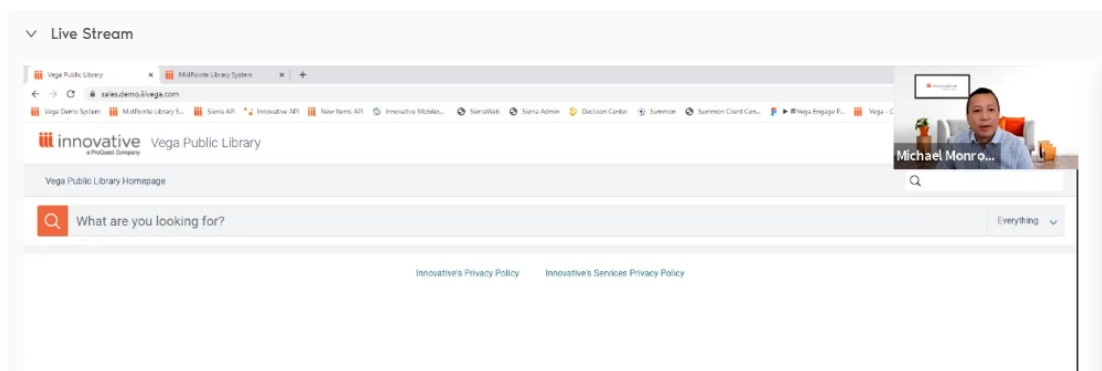
+121

Presidents' spouses--United States--Biography--Juvenile L...

African American women--Biography--Juvenile L...



Live demo (test and Mid Pointe library system) both Sierra libraries not out for Polaris until next month



harry potter | Vega Public Library | Innovative Library System

72 results found for harry potter

1-10 of 72 Results per page: 10

Find from Innovative Resource Sharing

Sorted by Relevancy

Book available Large Print Available Audiobook Available

Call number ROWLING, East Juv Fiction

Other locations East Library | Main Library | North Library | University Library Branch

Edition information

Place Hold

Harry Potter and the half-blood prince

Rowling, J. K.

2005-2006

Book available Large Print Available Audiobook Available

Call number ROWLING, East Juv Fiction

Other locations East Library | Main Library | North Library | University Library Branch

Edition information

Place Hold

Harry Potter and the goblet of fire

Rowling, J. K.

2000-2002



2005-2006

This novel takes up the story of Harry Potter's sixth year at Hogwarts School of Witchcraft and Wizardry as Voldemort's power and followers are increasing day by day, in the midst of the battle of good and evil.

Book available Large Print Available Audiobook Available

Book available Call number ROWLING, East Juv Fiction

Other locations East Library | Main Library | North Library | University Library Branch

Place Hold

Edition information

Publication Date	Edition	Details	Publisher	Physical Description	Availability
2006	—	!	London : Bloomsbury, 2006.	607 p. 20 cm.	Checked out Place Hold
2005	1st American ed.	!	New York : Arthur A. Levine Books, c2005.	x, 652 p. : 24 cm.	Available Place Hold

Jane austen search (view the person) – Syndetics unbound used to display basic info on Jane Austen. Will work with other vendors but Syndetics is partner. Syndetics included

Back

Austen, Jane, 1775-1817.

Jane Austen's life is striking for the contrast between the great works she wrote in secret and the outward appearance of being quite dull and ordinary. Austen was born in the small English town of Steventon in Hampshire, and educated at home by her clergyman father. She was deeply devoted to her family. For a short time, the Austens lived in the resort city of Bath, but when her father died, they returned to Steventon, where Austen lived until her death at the age of 41.

Austen was drawn to literature early, she began writing novels that satirized both the writers and the manners (...read more)

Resources See all 123 resources

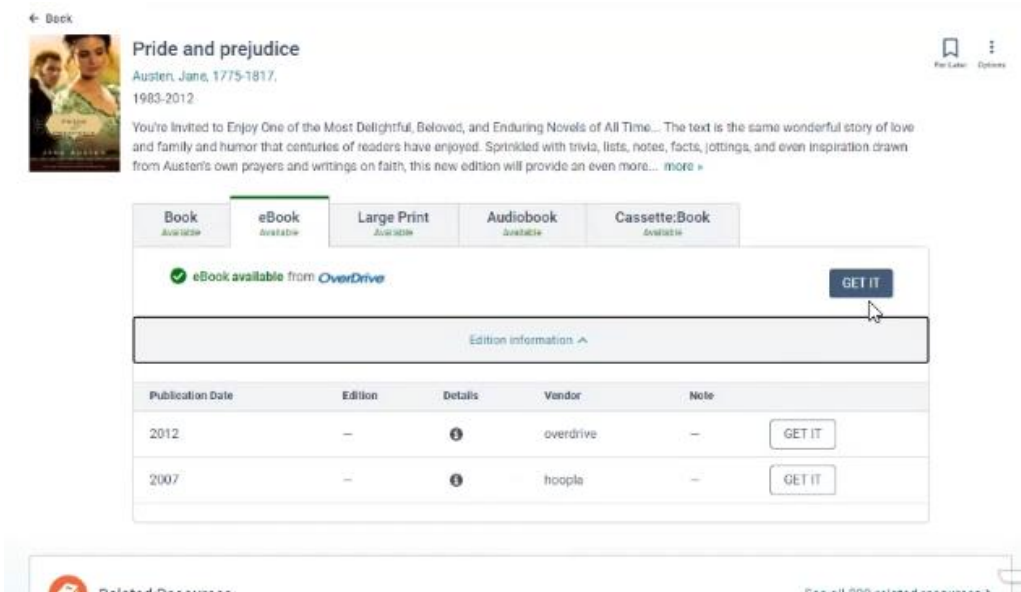
Jane Austen
Laoki, Margharita,
1915-
1975

A visit to Highbury :
another view of Emma
Austen-Leigh, Joan
1995

Northanger Abbey
Austen, Jane, 1775-
1817.
1968

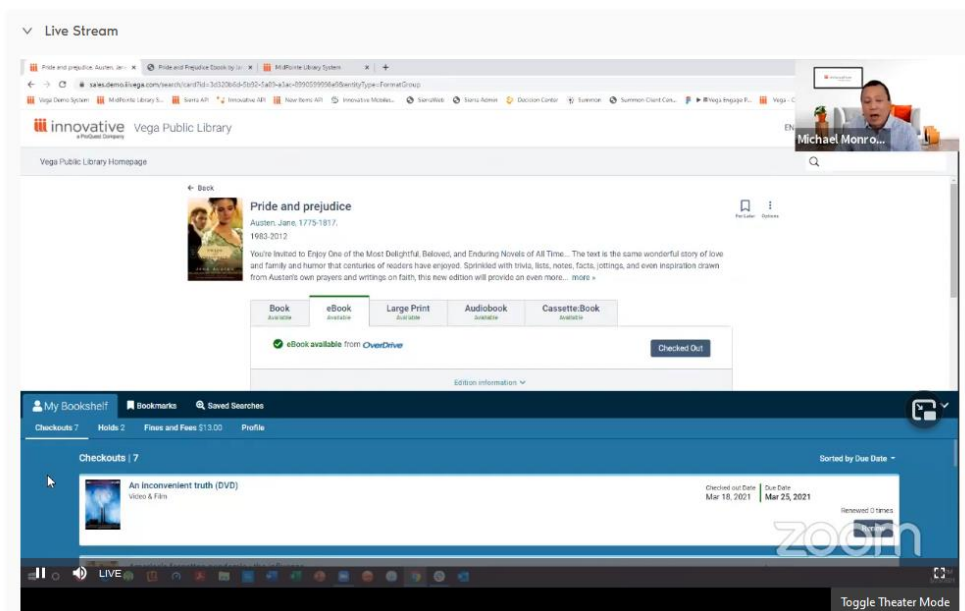
Ordinary, extraordinary Emma
Jane Austen : the story
of...
Hopkinson, Deborah
2018

Pride and prejudice
Austen, Jane, 1775-
1817.
1983-2012

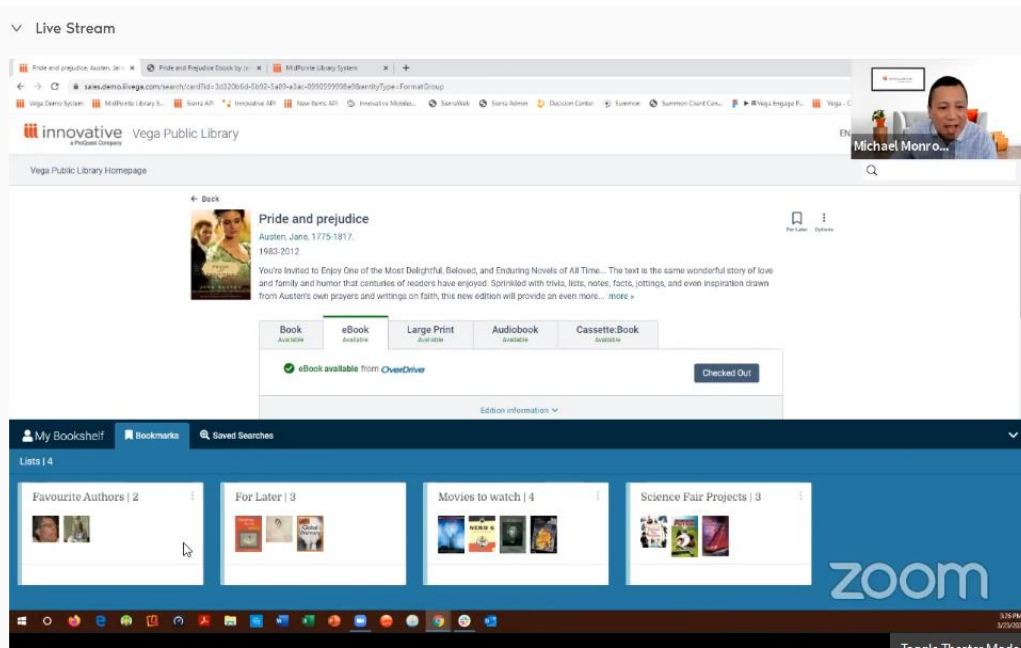


Hoopla have to sign in, go to hoopla interface and get it

Lower part of screen – click on my bookshelf – (see my account info)

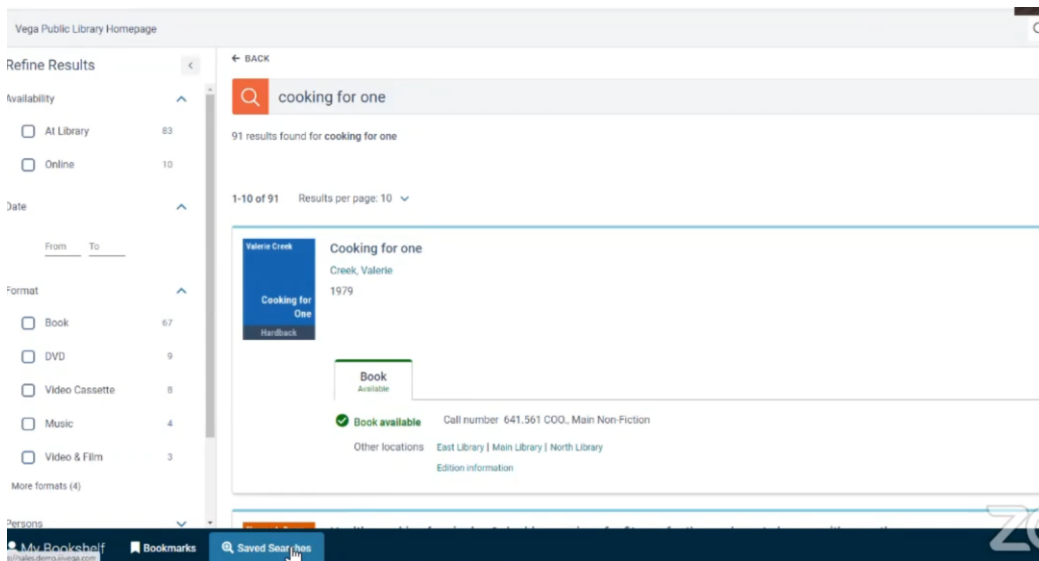


Bookmarks – if logged in as staff then curate lists using bookmarks (this is patron login)



When open a book title get related resources/book jackets; other titles by author

Saved search is live and can email to someone



Can view concept 'mystery and detective stories' open an item – showcases: best seller young adult NYT, related resources – NYT is API feed done by VEGA automatically (uses what you own compared to holdings)

Periodical

Vega Public Library Homepage

Refine Results

Availability

☐ At Library 27

Date

From To

Format

☐ Book 21

☐ Music 3

☐ Music:Printed 1

☐ Large Print 1

☐ DVD 1

More formats (1)

Persons

1-10 of 27 Results per page: 1

Road and

1947-

Periodicals

Periodicals

Latest

Library

Other

Which copy would you like to request?

Sorted by Newest first

Location	Call Number	Availability	
East Periodicals	Magazine Shelves v.73 no.1 Feb 2021	On Shelf	Place Hold
Main Periodicals	Magazine Shelves v.72 no.11 Dec 2020	On Shelf	Place Hold
Main Periodicals	Magazine Shelves v.72 no.10 Nov 2020	On Shelf	Place Hold
Main Periodicals	Magazine Shelves v.72 no.9 Oct 2020	On Shelf	Place Hold
Main Periodicals	Magazine Shelves v.72 no.8 Sep 2020	On Shelf	Place Hold
Main Periodicals	Magazine Shelves v.72 no.5 Jun 2020	On Shelf	Place Hold
Main Periodicals	Magazine Shelves v.72 no.4 May 2020	1 Hold	Place Hold
Main Periodicals	Magazine Shelves v.72 no.2 Mar 2020	1 Hold	Place Hold
Main Periodicals	Magazine Shelves v.72 no.1 Feb 2020	1 Hold	Place Hold

Q video gam I

View the concept **Video games**

Video games

Video games--Juvenile fiction

Video recordings for the hearing impaired

Video games--Fiction

Video games--Handbooks, manuals, etc.

Refine Results

- Availability
- ☒ Video Game 856
 - ☐ E Book 661
 - ☐ DVD/Blu-Ray 630
 - ☐ Book 565
 - ☐ E-Movie 448
- More formats (9)
- Persons
- Concepts
- Language
- Locations

← BACK

video game

856 results found for video game

1-10 of 856 Results per page: 10

Video Game X

Reset Filters



Jumanji the video game

2019

Video Game

Available

✓ Video Game available

Call number GAME 793.932 Jum., Middletown Play Station Video Game

Other locations Middletown | Trenton | West Chester

Video Game

Available



Video Game available

Call number GAME 793.932 Jum., Middletown Play Station Video Game

Other locations Middletown | Trenton | West Chester

Place Hold

Edition information ^

Publication Date	Edition	Details	Publisher	Physical Description	Availability	
2019	XBox One.		London: Outright Games, [2019]	1 computer disc : 4 3/4 in.	Checked out	Place Hold
2019	PlayStation 4.		London: Outright Games, [2019]	1 computer disc : 4 3/4 in.	Available	Place Hold

Can go out to INNReach site (SearchOhio)

Refine Results

- Availability
- ☐ Online 671
 - ☐ At Library 425
- Date
- From To
- Format
- ☐ E Book 492
 - ☐ Book 303
 - ☐ E-Audiobook 212
 - ☐ Music 64
 - ☐ E-Music 45
- More formats (8)

← BACK

lean in

909 results found for lean in

1-10 of 909 Results per page: 10



Learning for graduates

Sandberg, Sheryl.

2014

Book

Available

eBook

Check Availability

eAudiobook

Check Availability

Audiobook

Available

✓ Book available

Call number 658.4 San, Middletown Non-fiction

Other locations Middletown | West Chester

Edition information

Place Hold



Michael Monroe...

lean in

Everything

Save Search

Find from

SearchOhio

Sorted by Relevancy

Per User Settings

What's New in Vega?



Recently Released

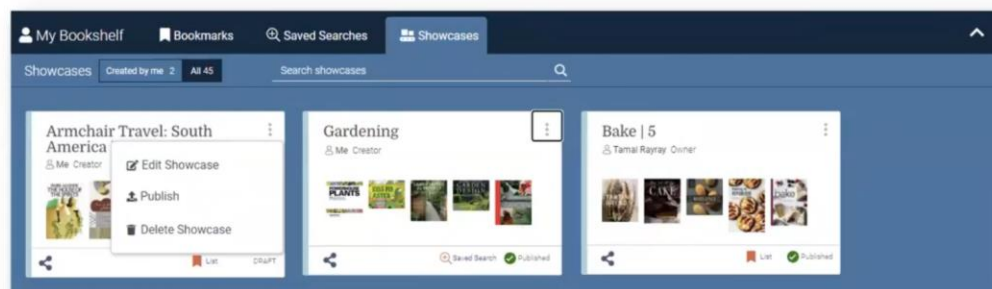
- Hoopla integration
- OverDrive Advantage integration
- Syndetics Unbound for author images and bios

Coming Soon

- Staff can create curated showcases from the bookshelf
- Polaris integration
- Consortia integration
- And more!

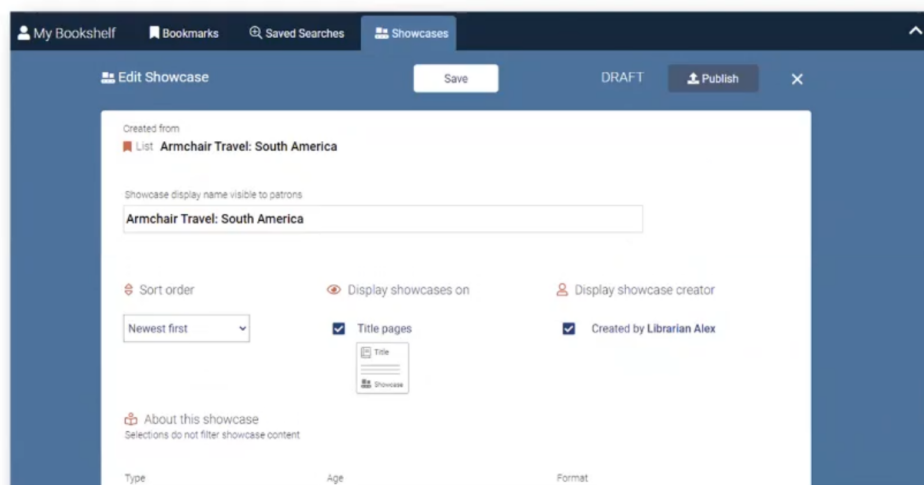
Consortia after Polaris – local branding for those sharing DB

Curated showcases from saved lists in the bookshelf

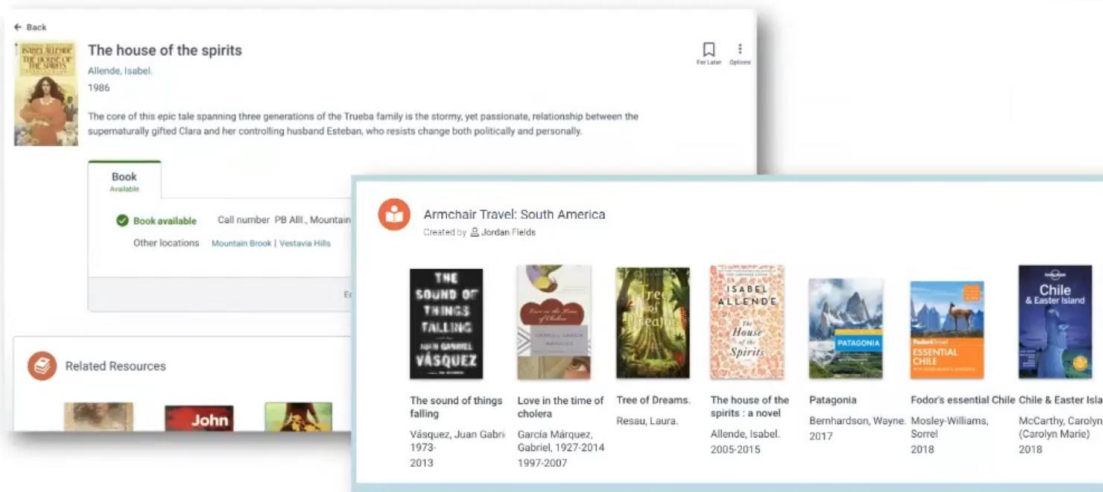


Take bookmarked list and publish it

Curated showcases from saved lists in the bookshelf

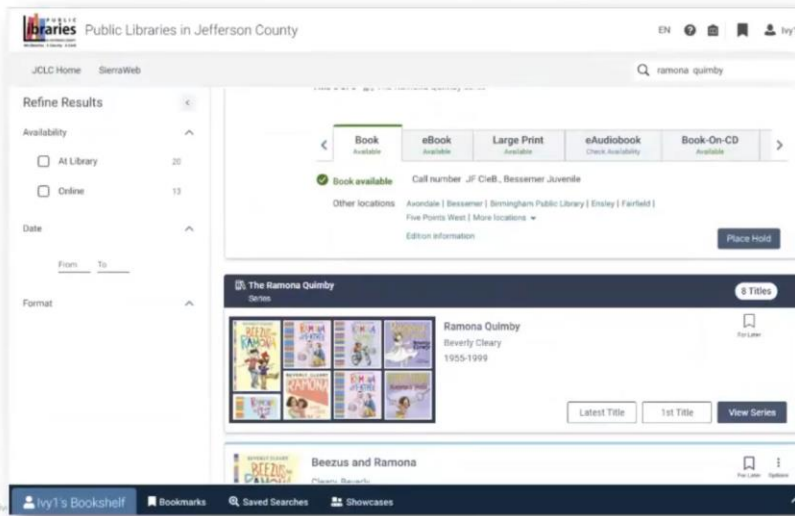


Curated showcases appear within Vega Discover

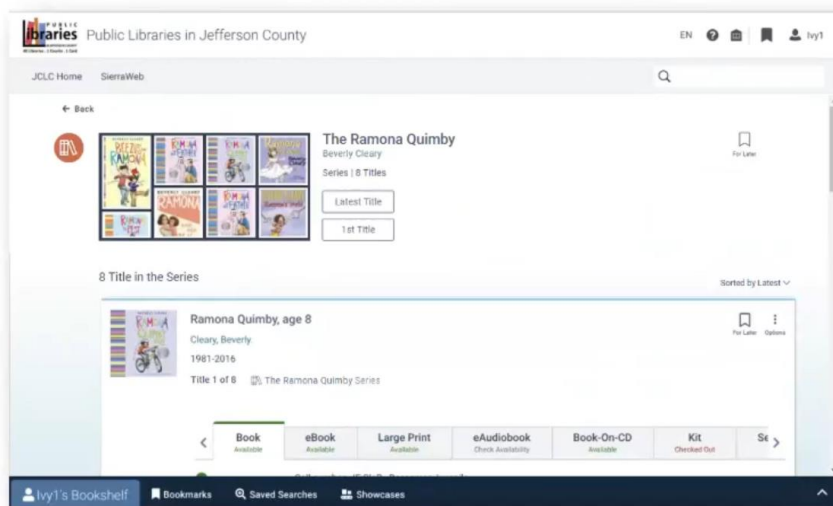


Coming soon- using data from Syndetics

Series in Vega Discover



Series in Vega Discover



Series will include those not owned



Starred 3 have VEGA discover on website – Ferguson it is the only option. Mid Pointe launching Monday (current in soft launch)



Thank you!

Michael Monroy – mmonroy@iii.com

Tom Jacobson – tomj@iii.com



Q&A

Linked data in records will have to re-catalog for bibframe? Understood that items are MARC based, load MARC, update and use MARC – it is converted to bibframe automatically. At some point there may be a bibframe editor.

Can library prioritize ebook vendor? Soon

If vendor not integrated into VEGA – they are working with vendors with API first so url would be used in Discover display another tab would open and send you to ebook vendor

Is OverDrive the default display? Does the displayed vendor change depending on either the import date of the vendor record, or the is there a different ranking? Admin setting in VEGA – right now Overdrive will be featured. Hopefully 'I want to feature something that is available' is coming soon

Are digital titles automatically discoverable and check-out-able even if a library doesn't have integrated content? url would appear and patron would check out from there

Do you still have to login to Overdrive or Hoopla separately to checkout/place hold on items? Not if have API and evendor integrated but must be logged in

How much of the menu option wording customizable? Like "Update profile" could we change it to "Update details"? DO have different language – can translate/change strings

Do other subscription databases come up as options in the catalog? If someone for example was searching for auto repair, would a library's auto repair database show as an option? IF there is a bib record. Still working on article integration. Will not be 'summon' – have to figure it out for public

Can pay fines and fees in VEGA

Does Syndetics unbound include cover art for music CD, video games, etc? Doesn't know.

Just starting integrating/linking library photos of items (LoT)

I can't quite see the top right of the VEGA screen - are there shortcuts to full pages of the footer options? (is there a full page for lists?) - I also don't see reading history. Is that in the account details? Reading history will come not yet. There is not a full page view of workbench at bottom. Use red flag at upper right to open workbench.

Is the API feed for NYT Best Sellers a separate purchase or subscription? Included

Vega



Experience Matters

User Experience

Customer Experience

Librarian Experience

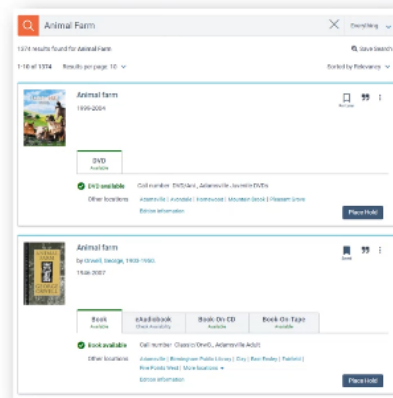
#UG2021



User Experience: "I need to read *Animal Farm* for school"

Does my library have the book?

YES!



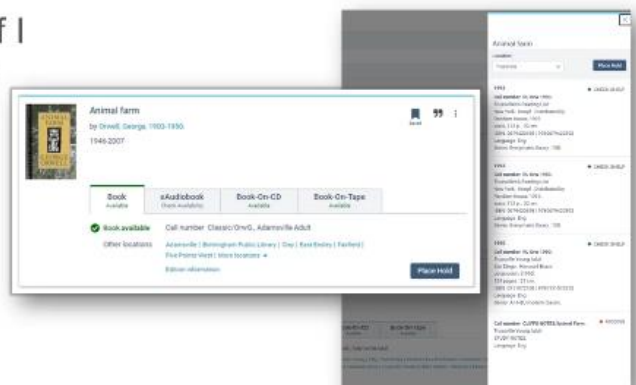
#UG2021

9

User Experience: "I need to read *Animal Farm* for school"

How do I get a copy if I want to pick it up at a library?

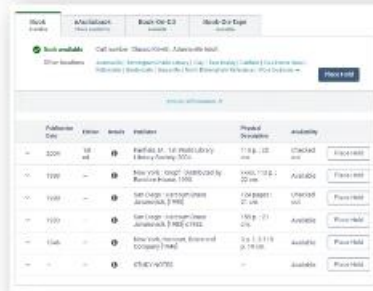
Click on my library to see availability.



User Experience: "I need to read Animal Farm for school"

How do I get a copy if I want to place a hold?

Vega has a single place hold button that guides the patron to place a hold on the fastest copy.



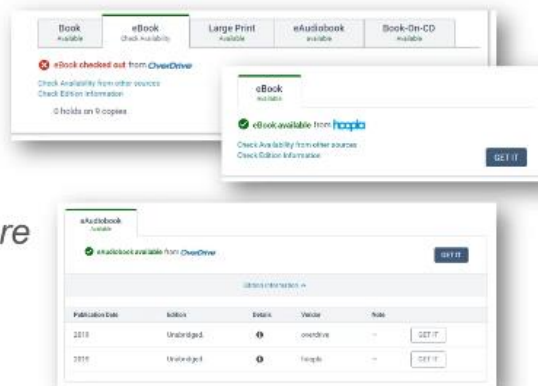
#IUG2021

12

User Experience: "I need to read Animal Farm for school"

How do I get a copy if I want an ebook?

All vendors and formats are available in the same search result.

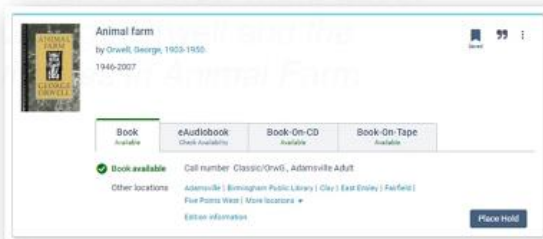


#IUG2021

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User Experience: "I need to read Animal Farm for school"

Driven by user needs and expectations.



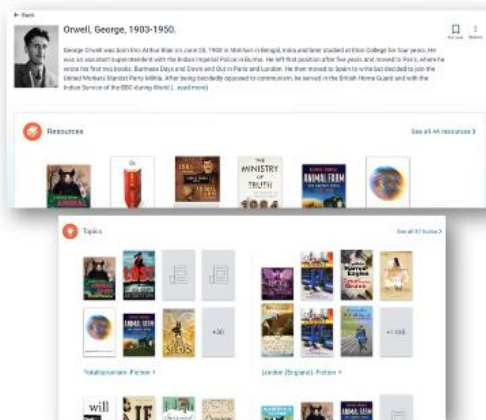
#IUG2021

14

User Experience: *More about George Orwell and Animal Farm*

The BIBFRAME linked data reveals additional connections between resources, contributors, and topics.

Data from Syndetics Unbound provides even more context.



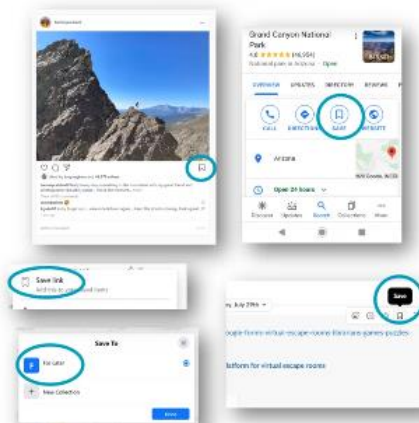
#IUG2021

17

User Experience: Liquid Expectations

The ability to save resources using a bookmark has recently become a common convention on the web.

This is one example of liquid expectations.



21

User Experience: The Vega Design Process

User experience designer does initial research and designs.

We design and test for one feature at a time, occasionally doing a broader study to ensure it all works together.

Designs are tested on real library users during usability studies.



#IUG2021

22

User Experience: The Vega Design Process

Based on the findings of the usability studies, we make changes to the user interface.

As a result, we have confidence that Vega Discover is easy to use and designed for what patrons expect.

#IUG2021

23



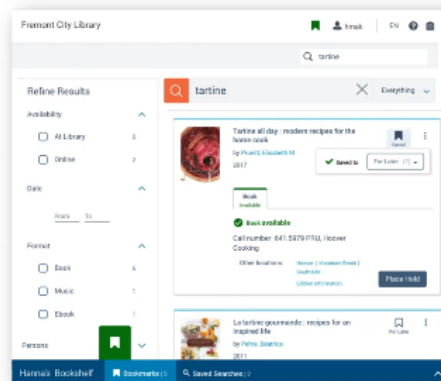
User Experience: Save for later

Lesson:

Beautiful or fun design is not necessarily usable design.

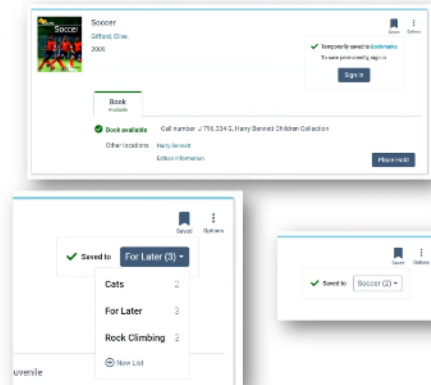
#IUG2021

24



User Experience: Save for later

We refined the process of saving items to lists, viewing lists, and editing lists until it was simple for all patrons, but still had advanced functionality for patrons with more advanced needs.

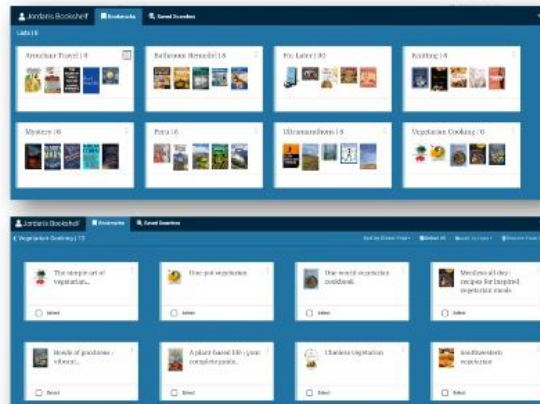


#IUG2021

25

User Experience: Save for later

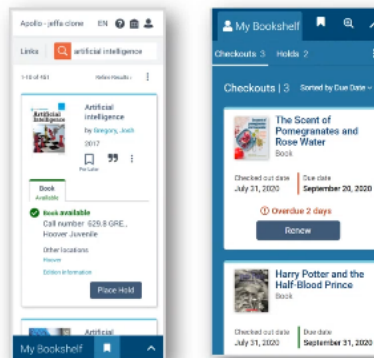
All lists are accessible from the patron's Bookshelf.



User Experience: Additional Design Principles

We typically design for mobile first.

Currently updating to meet WCAG 2.1 AA standard, after which we will be evaluated by a third party and issued a VPAT.



#11 IG2021

27

Beware of Feature Fatigue

"Before use, capability mattered more to the participants than usability, but after use, usability drove satisfaction rates. As a result, **satisfaction was higher with the simpler version of the product**, and in a complete reversal from the earlier studies, the high-feature model was now rejected by most participants."

From *Defeating Feature Fatigue*



Fighting Feature Fatigue

1. Usability testing and simple design
2. Layered advanced features mean that more advanced users, those that need fancy features, work *a little* more
3. Personalization



#IUG2021

Customer Experience

How many touchpoints does your library have?

Website	Physical buildings
Printed marketing	Library app
Paid marketing	Email
Text/SMS	Chat and chatbot
Digital assistant	Outreach



#IUG2021

How do you know you're providing a consistent, excellent customer experience?

Customer Experience: Onboarding

MIDPOINT [Catalog](#) [eResources](#) [Services](#) [Programs](#) [About the Library](#) [Contact Us](#) [Donate](#) [Log In](#)

[Account Details](#) [Contact Details](#)

Great! You're within our service area. Let's set up your account.

We will never spam you, we use this for alerts such as due dates, program updates, and to keep you connected.

First Name

Sterling

Last Name

Archer

Nickname (Optional)

Duchess

Birthday

MM/DD/YYYY

Password

This password will be used with your library card number to sign in. Must be 4 characters or more.

☐ I agree to the [Privacy Policy](#)

☐ I understand the [Borrowing Guidelines](#)

Cancel

Continue

Customer Experience: Onboarding

MIDPOINTE MidPointe Library System

About Donate Log In

Interests — Preferences

Choose as many as you'd like

Biography Business & Economics Cooking Gardening

Health & Fitness Music Mystery Politics Religion Romance

Science Fiction & Fantasy Sports Technology True Crime

Cancel Skip this step Back Continue

Customer Experience: Onboarding

MIDPOINTE MidPointe Library System

Search Encore Catalog Feedback

The best life diet cookbook : more than 175 delicious, convenient, family recipes

Greene, Bob (Bob W)

2008

A cookbook from exercise and nutrition expert Bob Greene includes 175 brand new recipes and more than two hundred meal plans that can be implemented at any one of five calorie levels, and there are interchangeable options for...

Book available

Call number 641.5635 Gre8B 2009, Aurora Adult

Other locations: Aurora | Bellerose | Five Points West | Pleasant Grove | Wapiti

Related Resources

See all 315 related resources >

My Bookshelf Bookmarks

#IUG2021

IUG 2021

Customer Experience: Personalization

MIDPOINTE

Breaking news! Six more weeks of Winter!

Book Now

Registration

Join us for a 6 week trip around the world

1. Weekly selection of books, videos and music

2. Recipes and craft ideas

3. Guest speakers via webinar

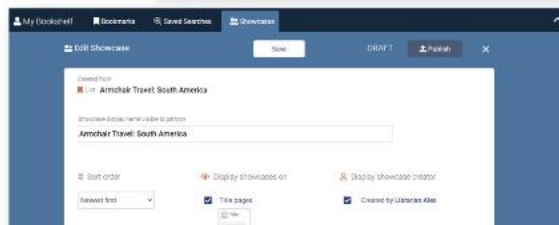
Book Your Trip Today

Customer Experience: Accessibility



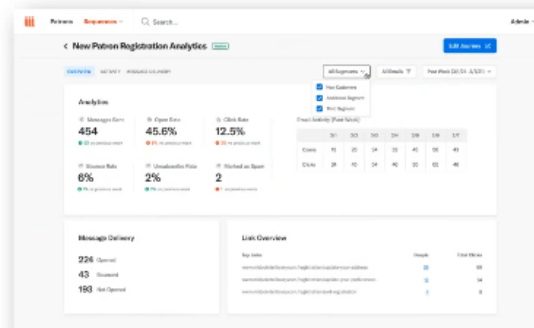
Librarian Experience

Do you have the tools you need to get your work done quickly and efficiently?



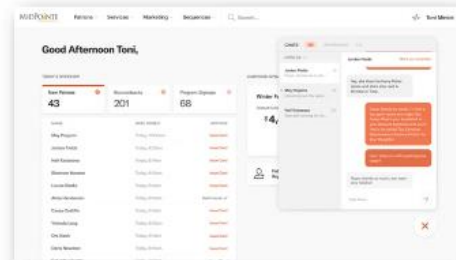
Librarian Experience

Do you have the tools you need to understand how your patrons are interacting with the library across channels?



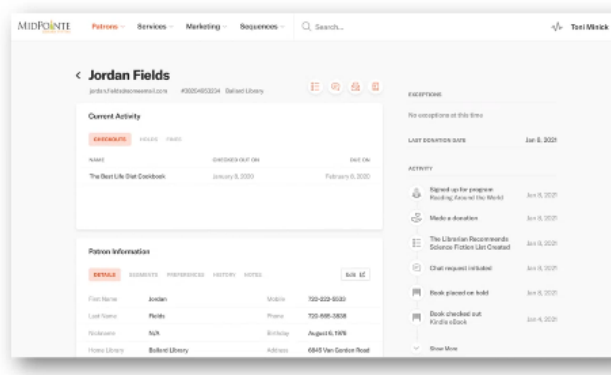
Librarian Experience

Do you have the tools you need to support the customer experience your patrons deserve?



Librarian Experience

We're applying our user experience standards and process to creating staff tools with the goal of enabling and understanding the best possible customer experience.



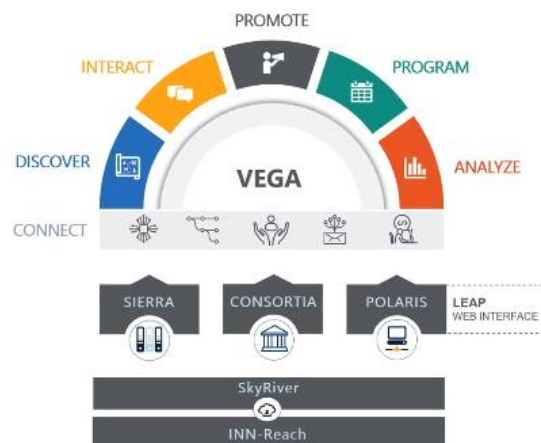
#IUG2021

Innovative Library Experience (Lx)

Deliver incredible experiences — easily and at scale

Discover is available today and additional modules and packages will be available starting in July 2021

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Q/A Vega replacing Encore

How do we expose enhanced content such as Syndetics Unbound and NoveList Select? – VEGA staff interface add 3rd party access - no novelist integration currently

I think the idea of rollups is a good one, but I have noticed that Vega appears to struggle differentiating between different items with the same title in some cases, in particular movies (e.g. original movies and their remakes/reboots/other adaptations of the same title are included together). Is there any way for Vega to better distinguish between these items with the same titles that are in fact different? Still trying to work on this going to improve algorithm will also have manual way to group and ungroup

Can we customize color of title link to match the color of other links such as Edition Information? More color customization coming in late 2020

It looked like the holds were on item level (button next to each copy) or did I misunderstand? Are title level holds supported? What about volume holds? In rollup – chooses bib to put hold item – VEGA chooses bib and VEGA chooses item. Volume holds are supported

How are consortial needs being considered in the design? (e.g. the single hold button and consortial holds filling priorities.) Just designing specific requirements now – ILS rules are going to win but VEGA needs to communicate how that happens to patron

Do you expect Reading History to be added soon? 2021 also want to have patron add items even if library doesn't own. When econtent checked out through VEGA they want to include those. Reading history just opt in

When will ISBN searching be available in Vega? Soon – used by vendors and staff

In the Animal Farm example, one of the rolled-up items was the Cliff Notes, not the actual novel. How would library staff correct errors in the rollup matching like this example? Cliff notes shouldn't be in there but depends on cataloging practices – need to change algorithm – it is an error

In your example of Animal Farm, the dvd didn't show up in the roll up with the other items. Why did it show as a separate item? DVD's do not roll up with books. Don't mix languages either. Don't roll up music at this time. Workin on how to let people know that title is available in DVD or Spanish.

For the Hoopla integration... we have many branches with their own Hoopla accounts, and some without. Can Hoopla only display as an option if the patron is signed in to their account in Vega so that it knows which branch they are from, and therefore whether or not to display Hoopla as a possibility in the search results? Can't today but working on it for consortia.

Do catalogers have the ability to control which bibs roll up using BibFrame editor or otherwise yet? Is it on the roadmap if not. Not now no bibframe editor focused on patrons currently and that is library function. You can change tabs based on material types

We are quite concerned that our authorities are not perfect - does bib frame normalize them? Or do you have more information on how authorities are translated to bibframe? Not using authorities – LOC authorities are seeded into VEGA try and match yours on those and if can't come up with match VEGA comes up with it's own. No public docs now on how this works – have to contact site mgr

In a consortium/system set up, how do things like adding showcases and managing the chat work? Is it based on and managed from a home library level, or managed from the system level? Also, what happens (and what does the patron see) when there are no staff members available to answer the chat once it gets to that stage? Still figuring out – this is engagement piece.

From a staff perspective, how do patron interests (from onboarding) translate to marketing? Is it reliant on flyers or emails that staff creates, or can Vega automatically select some resources for users (i.e. new mysteries or new biographies lists) and send marketing? Idea is that during onboarding patron can select preferences. Currently relying on BISAC as bookstores do.. Patrons opt in so customize marketing to send to them.

What functions will Vega still need to lean on WebPAC for? All ILS functions – some functions will be better managed but still need ILS. Anything in classic PAC no patron facing functionality would need it

How can I learn more how linking records for different editions and formats work in Vega. Example: will we need to outsource editing of all our records? What bibliographical/title record will show in the catalogue for merged formats? Many times the quality of electronic resources is poor. Goal is for records not to be modified by staff – adjusting algorithm by vendors

I looked at Vega on the "live" sites. Wondering which systems Ferguson, Midpointe, and Jeff Co are using? Sierra or Polaris? Currently all Sierra, early access for Polaris end of this month but works same way just different back end

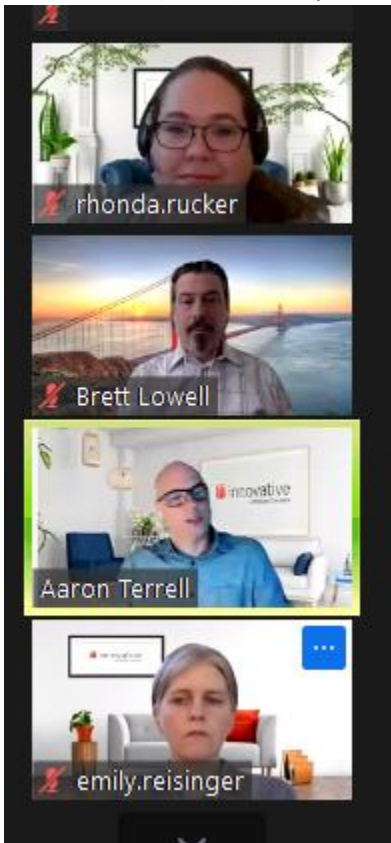
If a library is currently utilizing a different discovery layer, can they still purchase Vega's other modules like Connect? Or is Discover required first to build on any of the other modules? Can get pieces on own

Can a patrons place holds on ALL the items in their list or bookshelf at one time? Complicated by rollups – did some UX with model that allows holds placement that uses patron preference but will be awhile

Forums

Documentation forum (forums are Zoom based) – Allison Pruntel moderator (tech problems III has presentation)
Aaron Terrell aaron.terrell@iii.com

Brett Lowell (Sierra), Emily Reisinger (Polaris/vega), John Cook (Vega), Rhonda Rucker (Polaris) documentation team.

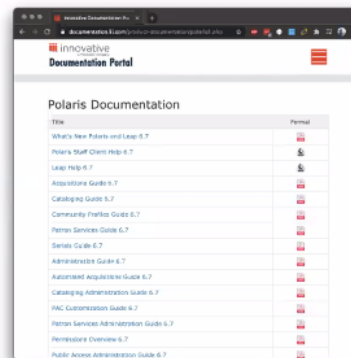


Older products get less priority..... Skyriver and INNReach being 2

Polaris <https://documentation.iii.com/product-documentation/polaris2.php>

2020 accomplishments

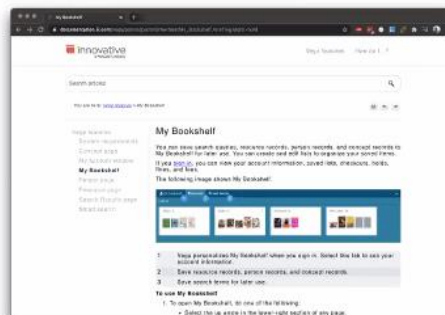
- **Moving toward publicly accessible content at documentation.iii.com**
 - Sierra WebHelp
 - Polaris
- **Polaris documentation updates**
 - Now additionally published in PDF format
 - Staff Client help is now available in user-friendly HTML format at documentation.iii.com and from within the Staff Client
- Joint effort in getting content available for the new support.iii.com



#IUG2021

Upcoming team priorities

- **Continuing the move toward publicly accessible content at documentation.iii.com**
 - Considering Encore, Vega, and potentially more (*any requests?*)
- **Improved insights into documentation utilization** – what resources are being read, what are not, and what can we do to help improve your experience
- Continue addressing edit requests
- Keep up with a busy release schedule! (*including Vega's frequent updates*)



#IUG2021



Submitting feedback to the Documentation team

We appreciate your feedback!

Report problems or submit feedback by clicking the **Send documentation feedback to Innovative** link that appears at the bottom of each page in web-based help projects.



Version 5.2.2

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[Send documentation feedback to Innovative](#)

Sierra customers can also select **Documentation > Feedback** in CSDirect.

Or, email your feedback to doccust@iii.com.

 #IUG2021



VEGA+MARC+bibframe

https://documentation.iii.com/vega/admin/admin/MARctoBibFrame_Book.htm

VEGA help only through application is accessible but need links:

Vega library administration help: <https://documentation.iii.com/vega/admin/Default.htm>

Vega patron help: <https://documentation.iii.com/vega/patron/Default.htm>

Sessions:

Polaris Deep Dive (Polaris and LEAP since last IUG/2020)

Agenda

- What's new since IUG 2020
 - Development
 - Documentation
 - Idea Lab challenges
- Resources
- Q&A

Development

- Three Polaris releases
 - Polaris 6.5 – March 2020
 - Polaris 6.6 – August 2020
 - Polaris 6.7 – December 2020
- Development initiatives
 - Improved patron experience
 - Internationalization
 - Leap parity projects
 - MARC updates and problem reports

Improved Patron Exp

Name on Identification / Patron Preferred Name



Form fields and options:

- Last Name *
- First Name *
- Middle Name
- Title *
- Suffix
- Date of Registration
- Expiration Date *
- Birth Date
- Statistical Class
- Gender
- ☐ Name on Identification
- ☐ Use Name on Identification for Print and Telephone Notices

Options:

- ☐ ID Number
- ☐ Privileges / Restrictions
- ☐ Value Restrictions
- ☐ Children/Adult Only (DOB, YYY)
- ☐ Not Currently in Use
- ☐ Name on Identification (First and Last)
 - ☐ Staff Client
 - ☐ PAC
 - ☒ Call Us
- ☐ Use Phone
- ☐ Use E-mail Address



Client option applies client and LEAP

Cancel Shipped Holds

Hold options (QA-Athena 6.5 sys)

Requests | Charges | Preferred | Pickup | Staff client & PAC | Terms | RTF | Queue

☐ Trap at check-out

☒ Display patron phone number when trapped

☒ Alert in bulk check-in if the item will fill holds

☒ Alert in bulk check-in if the item is held

☒ Change due date based on ratio:

Of 7 Requests

To 1 Items

Loan period 10 days

☒ Permit patron notes from PAC

☒ Permit suspended requests from PAC (systems only)

☐ Permit cancellation on Shipped status (systems only)

If no items are attached:

☒ Alert in Staff Client

☒ Block in PAC

If patron is blocked:

☒ Block in Staff Client

☒ Block in PAC

☐ Enable request status "Out"

☐ PAC display patron contact info (PowerPAC only)

☐ PAC block for patron verification

OK Cancel Apply Help

#IUG2021



Opt in – sys level only

If cancel will use cancel hold txn and new modify item state option (transfer to in transit) when item arrives at destination branch will go to next patron or owning branch

Patron's Preferred Pickup Location (PAC/PAPI)

Preferences:

Language preference
English

Phone number for TXT messages
Phone 1

Carrier
AT&T

E-receipts:
Email

Send e-mail notices in:

☐ Basic, plain text

☒ Full, HTML format

Send e-mail reminder notices:

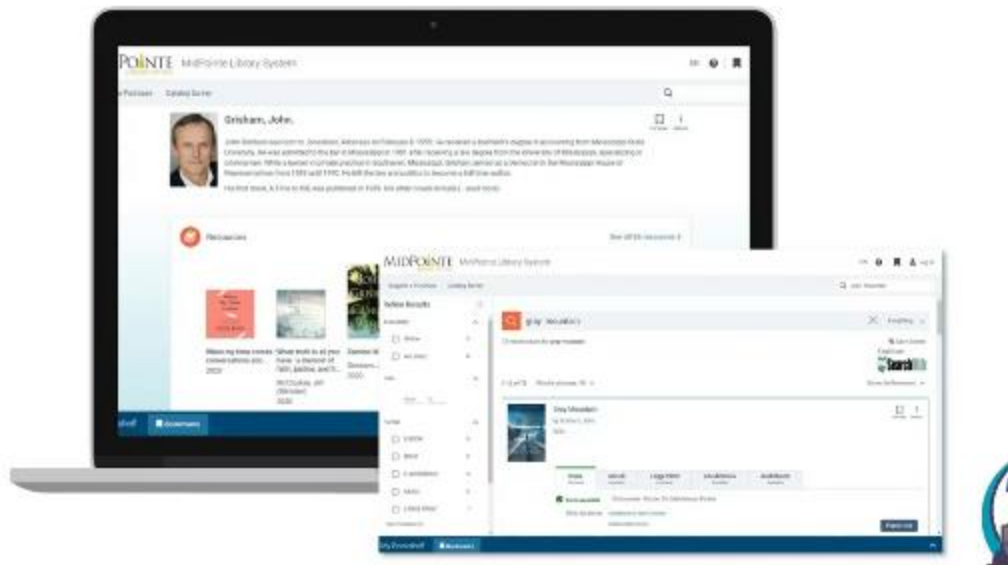
☒ Almost overdue/auto-renew reminder notices

☒ Patron record expiration reminder notices

Preferred pickup location
Otter test (Hilltop)

Exposes preferred pickup point in my account – honors SA settings re: what is available for pickup in PAC (patron reg branch)

Polaris / Vega Integration Gates



Lots of new PAPI endpoints and prep for streaming

Need to be on 6.7 for VEGA

Outreach Services Manager



Outreach Services Manager

Branch
 QUIET TEST BRANCH (QTB)

Status
 Active

Next Service Date
 From (MM/YYYY) To (MM/YYYY)

Delivery Routes

Delivery Modes

<input type="checkbox"/>	BARCODE	NAME	ROUTE	MODE	STREET	LAST SERVICE DATE
<input type="checkbox"/>	10000003700	Quell, Sebastian J			100 Commerce Blvd	2/3/2021

<input type="checkbox"/>	AUTHOR	TITLE	MATERIAL TYPE	COLLECTION	CALL NUMBER	STATUS	BARCODE	SHELF LOCATION
--------------------------	--------	-------	---------------	------------	-------------	--------	---------	----------------

Create Multiple Holds from Patron Record Set

Patron Record Set

Name:

Note:

Owner:

Record Status:

Record Count:

Actions: **SAVE** **ACTIONS** **CLOSE**

Actions dropdown: **Create Item Record Set**, **Create Multiple Holds**, **Delete**, **Undelete**

Barcode:

City:

State:

Postal Code:

Library:

BARCODE	NAME	STREET	CITY	STATE	POSTAL CODE	LIBRARY
quelltestpatron	Quell Test, Samantha	106 Main St	Dublin	Test	002 HE37	Quell Test Branch
PACREG383005	Quell, Roz					Quell Test Branch

Create Multiple Holds from Patron Record Set

Create Multiple Holds

Title:

Activation:

Expiration:

Pickup:

Buttons: **CONTINUE** **CANCEL**

Uses preferred location or reg branch (if no preferred)

Blocks will display – if ILL Bib or Bib deleted, patron in collections, hold limits – held item pop up suppressed

Create Multiple Holds from Patron Record Set

Holds Queue

Buttons: **PLACE HOLD** **SAVE** **REFRESH** **RESULTS** **CLOSE**

Title:

By King, Stephen, 1947.

Control number: 098628

Queue: (8) All Hold Requests (8)

POSITION	PATRON NAME	PATRON BRANCH	STATUS	PICKUP BRANCH	VOLUME	ISSUE	REQUEST DATE	EXPIRATION DATE
1 of 8	Quell, Roz	Quell Test Branch	Pending	Quell Test Branch			2/9/2021	8/8/2021
2 of 8	Quell, Tester	Quell Test Branch	Active	Quell Test Branch			2/9/2021	8/8/2021
3 of 8	Quell, Samantha	Amsterdam Free Library	Pending	Amsterdam Free Library			2/9/2021	8/8/2021
4 of 8	Quell, Sebastian J	Quell Test Branch	Active	Other test (H&E)			2/9/2021	8/8/2021

#UG2021

Holds queue is randomized so it isn't as appear in patron set used

Bibliographic Bulk Change

Bibliographic Record Set ⓘ

SAVE ACTIONS+ REFRESH CLOSE

Name: Dogs Owner: samantha.quei Set ID: Count: 10

Note: Record Status: Final

Scan or enter barcode FIND TOOL ACTIONS+ Filter Records

TITLE	AUTHOR	FORMAT	LINKED ITEMS	HOLDS	PUB DATE	CALL NO.	CONTROL NUMBER	STATUS
Barry, the bravest Saint Bernard	Hall, Lynn	Book	18	0	1992	JE 636.7 Hal	244344	Final



#IUG2021

Bibliographic Bulk Change

Non-MARC Data Fields Leader 008 Tag

Operation: Insert new subfield(s) into an existing tag

Tag Number: 100 Indicator One: * Indicator Two: *

Subfields: \$

ADD TO CHANGE QUEUE

Change Queue:

- [Subfield Insert] Tag 050 (*) \$a TestCallNumber
- [Tag Delete - all] Tag 050 (*)
- Correct non-filing indicator values (initial articles 'a', 'an' or 'the')

Non-MARC Data Fields Leader 008 Tag

Operation: Delete an existing tag (all instances)

Tag Number: 100 Indicator One: * Indicator Two: *

ADD TO CHANGE QUEUE

Change Queue:

- [Subfield Insert] Tag 050 (*) \$a TestCallNumber
- [Tag Delete - all] Tag 050 (*)
- Correct non-filing indicator values (initial articles 'a', 'an' or 'the')



#IUG2021

Fields are dynamic – only need to see fields used for that operation

Same operations as staff client

Bibliographic Bulk Change

Bibliographic Record Bulk Change

Dogs samantha.quei

UPDATE BIBS CANCEL

Non-MARC Data Fields Leader 008 Tag

Type of Material: Books

06 Type of date

15-17 Place of publication

18-21 Illustrations

22 Audience

23 Form of item



Select which type will modify and then will go through which fields available

Bibliographic Bulk Change

Bibliographic Record Bulk Change

Dogs
samantha.guy@

☒ Non-MARC ☐ Data Fields ☐ Leader ☒ 008 Tag

Type of Material
Books

06 Type of date
15-17 Place of publication
18-21 Illustrations
22 Audience

(No change) Change to (No change) X



#11/12/2024

Click on audience (all those option clickable)

Bibliographic Bulk Change

Bibliographic Record Bulk Change

Dogs
samantha.guy@

☒ Non-MARC ☐ Data Fields ☐ Leader ☒ 008 Tag

Type of Material
Books

06 Type of date
15-17 Place of publication
18-21 Illustrations
22 Audience

(No change) Change to (No change) X

(No change)
Unknown or not specified
a - Preschool
b - Primary
c - Pre-adolescent
d - Adolescent
e - Adult
f - Specialized
g - General
j - Juvenile
k - Not assigned to code



X closes or clears out options

Bibliographic Bulk Change

Books

06 Type of date
15-17 Place of publication
18-21 Illustrations
22 Audience

(No change) Change to (No change) X

(No change)
Unknown or not specified
a - Preschool
b - Primary
c - Pre-adolescent
d - Adolescent
e - Adult
f - Specialized
g - General
j - Juvenile
k - Not assigned to code

Bibliographic Record Bulk Change

Non-MARC Data Fields Leader 006 Tag 007 Tag (1) 007 Tag (2) 008 Tag

☒ Books From (22) - Unknown or not spe To (22) d - Adolescent
Replace the entire 008 tag

☐ Computer files From To
Replace the entire 008 tag

☐ Cartographic materials From To
Replace the entire 008 tag

☐ Maps From To
Replace the entire 008 tag

☐ Mixed materials From To
Replace the entire 008 tag

☐ Music From To
Replace the entire 008 tag

☐ Visual materials From To
Replace the entire 008 tag

OK Cancel Help

Same bulk change request (3 changes) LEAP on left and client on right

Bibliographic Bulk Change

Type of Material: **Music**

- 06 Type of date
- 15-17 Place of publication
- 18-19 Form of composition
- 20 Format of music
- 21 Music parts
- 22 Audience
- 23 Form of item
- 24-29 Accompanying matter
- 30-31 Library text
- 32 Transposition
- 35-37 Language
- 38 Modified record
- 39 Cataloging source

Type of Material: **Maps**

- 06 Type of date
- 15-17 Place of publication
- 18-21 Relief
- 22-23 Projection
- 25 Type of cartographic material
- 26 Government publication
- 29 Form of item
- 31 Index
- 35-34 Special format characteristics
- 35-37 Language
- 38 Modified record
- 39 Cataloging source

Type of Material: **Computer Files**

- 06 Type of date
- 15-17 Place of publication
- 22 Audience
- 23 Form of item
- 35 Type of computer file
- 38 Government publication
- 35-37 Language
- 38 Modified record
- 39 Cataloging source



#IUG2021

Options avail in bulk change for 008 adjusts based on TOM (007 and 006 coming)

Bibliographic Bulk Change

RECORD SET NAME	RECORD SET OWNER	TOTAL RECORDS	STATUS	POSTED	STARTED	ENDED
Quick Test Set	corcoran.gail	4	Completed	12/15/2015 3:54:20 PM	12/16/2015 5:35:05 PM	12/16/2015 3:54:01 PM
Pops	corcoran.gail	14	Completed	12/12/2015 6:40:23 AM	6/10/2016 3:41:01 AM	6/10/2016 8:41:01 AM
Scan Test	corcoran.gail	8	Completed	12/4/2015 3:31:42 PM	10/4/2016 3:35:01 PM	10/4/2016 3:35:06 PM

Copy Cataloging

Find Tool - Bibliographic Record (Remote Databases)

- Bibliographic Record (Remote Databases)
- Authority Record
- Bibliographic Record
- Patron Request
- ILL Request
- Item Record
- Patron
- Record Set
- Templates

Find Tool - Bibliographic Record (Remote Databases)

Bibliographic Record (Remote) Basic Search Author Keyword (All)

Search:

Database	Title	Author	Format	Publ.	Call Number	Control
Library of Co.	Handbook on...	selected data...	Book	2017	013/ 813/ 568	1986/1
Library of Co.	New from...	new from...	Book	2017	000/ 007/ 58	203144
Library of Co.	Black box	Malemman, Jack	Book	2014	013/ 5	183064
Library of Co.	Black road wheel	Malemman, Jack	Book	2017	013/ 5	201535
Library of Co.	Golden...	Malemman, Jack	Ebook	2021	013/ 5	218086
Library of Co.	Golden...	Malemman, Jack	Book	2021	013/ 5	218086
Library of Co.	Inspector...	Malemman, Jack	Book	2019	013/ 5	207286
Library of Co.	Male...	Malemman, Jack	Ebook	2033	013/ 5	213468
Library of Co.	Male...	Malemman, Jack	Book	2033	013/ 5	213468
Library of Co.	Pearl	Malemman, Jack	Book	2021	013/ 5	218091

SEARCH STATUS:



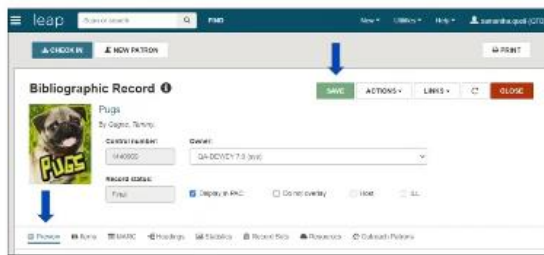
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First time accessed no databases (user defaults in client and LEAP different) after you select first time they will come up

Click on db see this (one of them)

Just MARC view displays with cover image – results action (z39.50) within first 20 min goes back to search but z39.50 will timeout and have to re-run. Save refreshed screen in full bib workform

Accessibility and Firefox Support



VPAT can be shared for accessibility – contact site mgr

Changed contrast, added grey and darkened grey and green

Documentation

- Updated Polaris user guides
- All Polaris documentation in the web! (documentation.iii.com)



Updated to most updated version and moved to innovative documentation portal – no login required for LEAP or staff client docs

IdeaLab

Idea Lab Challenges



Crisis Management



"I want to do it myself!"



Comeback Challenge



"Show Me the Money"



Idea Lab Challenge Winners

- Ability to bulk reset due dates from an item record set
- Ability to add date ranges to the Dates Closed policy table
- Ability for patrons to cancel requests in a held status
- PAC emergency closure banner
- Ability to bulk reset held till dates

Resources

- What's New documentation and webinars
 - Support.iii.com
 - <https://vimeopro.com/innovativeiii/webinars>
- Polaris/Leap documentation and user guides
 - Support.iii.com
 - Documentation.iii.com (6.7 and higher)
- Polaris/Leap roadmap
 - Support.iii.com
 - <https://portal.productboard.com/iii/6-innovative-product-status-board-new/tabs/23-polaris>



Hot, hot hotspots



Hot, Hot, Hotspots!

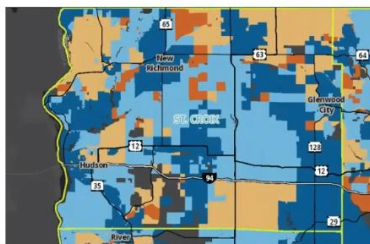
Barbara Krueger, Deer Park (WI) Public Library
Kathy Setter, IFLS Library System, WI

11 public libraries – 10 counties, 53 libraries, 89,000 pop – 1 million circs dropped to half in COVID



Underserved is most of st croix county

Wisconsin Broadband Map



Wireline Download Speed
Advertised Speeds

- 25 + Mbps (Megabits per second)
- 10 - 24.99 Mbps
- 3 - 9.99 Mbps
- Less than 3 Mbps

WISCONSIN BROADBAND UNDERSERVED AREAS



NEW! - Underserved Areas
Fiscal Year 2020

NEW! - Underserved Areas (Broadband
Expansion Grant Eligible Guideline Areas
- FY 2020)
Fiscal Year 2020

#IUG2021



-
- Each library receives funding from the county based on their circulation to patrons who live outside of a municipality with a library.
 - How were the Wi-Fi hotspots were funded prior to this program?
 - Friends of the Library
 - Library Foundation
 - Library operational budget
 - St. Croix County Library Planning Committee – What can the county do for libraries?
 - Suggestion was made to fund Wi-Fi hotspots for each of the eleven libraries – decided on two for two years through T-mobile.
 - County board member took the proposal to the County Administration committee to use 2018 contingency funds for the for this pilot program at a total cost \$15,840. – Approved October 15, 2018
 - County Board approved funding for 2021 when previous funding expired



4/11/2021

-
- Selecting a provider
 - Why re-invent the wheel - T-Mobile
 - Fair price - \$29.40/month
 - Unlimited data with no throttling
 - Good coverage in majority of area
 - Communicating project to Library Directors
 - Funding by the county – procedure to request the funds
 - T-Mobile Government account contact
 - Links to shared materials

Att and Verizon had to be used in a few libraries because of service issues with T mobile. Hotspots shipped directly to libraries

-
- Shared via Google Drive
 - Hotspot policies
 - Checkout forms
 - Spreadsheet for managing the devices, including passwords
 - Hotspot case options
 - Shared via Canva
 - Marketing materials
 - Coordination of an informational newspaper article about the project
 - Seven area newspapers
 - Written by IFLS PR and Communications Coordinator

- Library responsibilities
 - Contact the T-Mobile account manager or other provider
 - Hotspots shipped directly to the owning library
 - Customize shared documents for their library
 - Have Library Board of Trustees approve Wi-Fi Hotspot Circulation Policy
 - Contact ILS administrator
 - Create Location Code
 - Setup Loan Rule
 - Ordering cases for the hotspots
 - Activation of the hotspot by owning library
 - Create bibliographic record for the hotspot(s)

Marketing materials



Playaway view case

Issues:

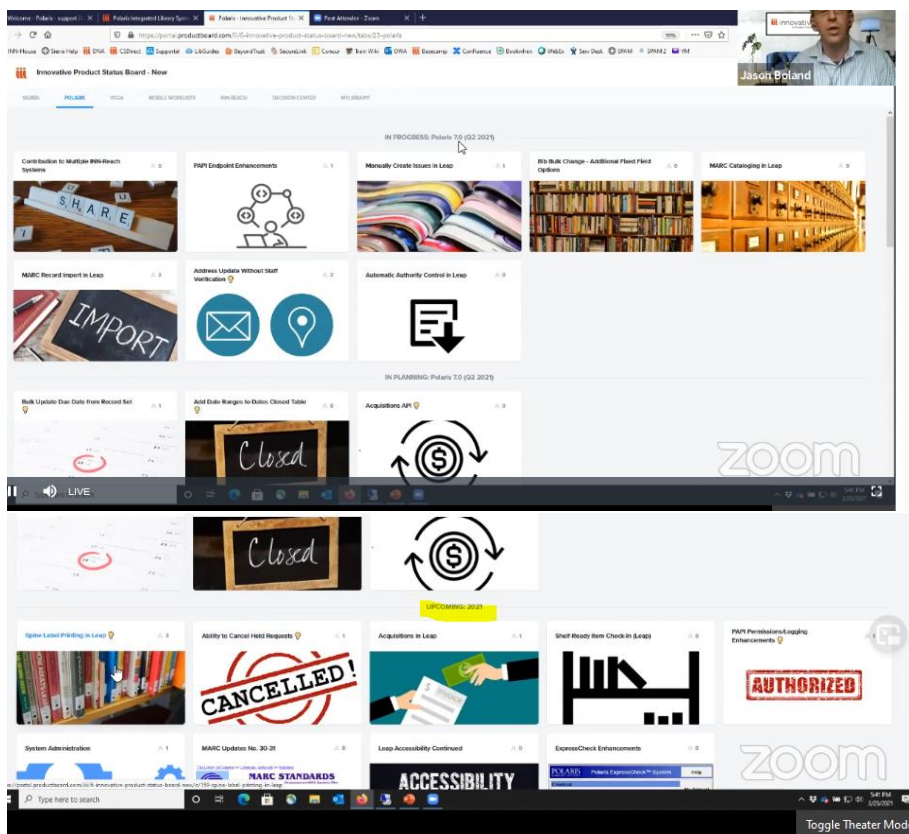
- Equipment
 - Inserting the correct SIM card
 - Defective SIM cards
 - No cellular service in library area
- Lack of a checklist of the steps that each library needed to complete
- Confusion regarding type of account
 - Government program so a different web portal than the general retail site
 - Need to register the user name and password
- Everyone not as enthusiastic about another technology item to manage
- Monitoring due date to suspend service when not returned

Rules

- Tried to be as uniform as possible
- 2 week checkout
 - 2 libraries chose 1 week
- No renewals
- Holds allowed
- Owning Library pickup
- Fines \$5/day
 - 1 chose no fine
 - 2 chose \$1/day

LEAP – 2021

Q/A support iii.com/polaris/polaris training – no login required



The notices tab in Leap is specific to the Reporting Services user. So you won't see your coworkers notices unless you are using a shared account to access reports.

In the check out screen, do you now have to click on the submit button instead of just hitting enter like in the client?
Correct

- Help/keyboard Complete checkout is a 'Ctrl+shift+.' (ctrl/shift/period)

Would it be possible to have multiple Find windows open at once? Sometimes I am working on one patron's question while they're off browsing, and another patron comes up. Or I might be working on a Record Set when a patron comes

up. I would also like to be able to resize the Find window to take up the whole screen, as patron and item records do, so that more columns and data are visible at once. -> not now put in idealab – open a new tab

Tech

LEAP offline-

Video


Monday, March 29, 2021, 1:00 pm - 2:00 pm ET

Agenda

- What is LEAP Offline?
- Installing LEAP Offline
 - System Administration Permissions
 - User-level installation
- Using LEAP Offline
 - LEAP Offline vs. Offline client
 - Staff Workflow
 - Automated Offline SQL Job
- Tips & Troubleshooting
 - Questions to ask
 - Common Issues

#IUG2021

IUG 2021



What is LEAP Offline?

- LEAP Offline is an **HTML 5** browser-based web application, capable of running in an environment without network access. It installs itself within the user's browser.
- Transactions are stored locally within the browser's database and eventually sent to the server to process. LEAP Offline relies on the **LeapWebApp**, **Polaris.ApplicationServices** and the **Automated Offline SQL job**.

Browser Compatibility

Compatible browsers:

- Windows Chrome v74.0.3729.157+
- Windows Edge v44.17763.1.0+
- Windows Firefox v66.0.5+
- OS X Safari v12+
- OS X Chrome v74+
- iOS Safari 11.3+ (eg: iPad 5th+, iPad Air+)

Incompatible browsers:

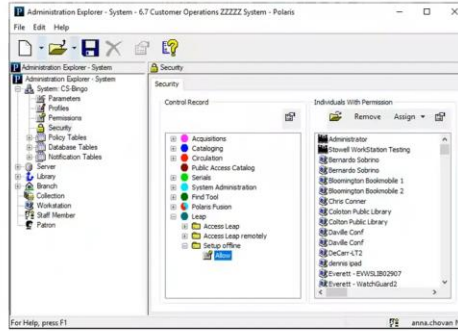
- Windows Internet Explorer (all)
- iOS Safari 1.0-11.2

System Administration Permissions

- A system administration permission controls which users can complete the Leap Offline installation.

System > Security > Leap > Setup Offline > Allow

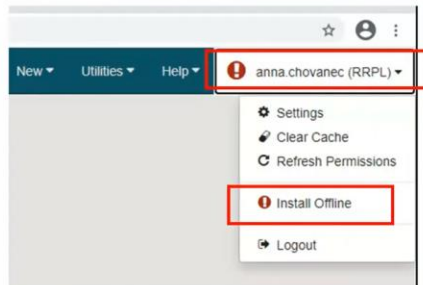
- This permission is not assigned at upgrade.
- Workstation access is permitted by default.
- The permission is not overridable.



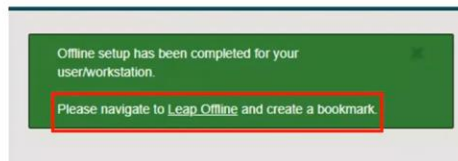
User-level Installation

- Installation is completed within the user's browser after logging into a normal LEAP session. If LEAP Offline has not been previously installed, you will see an installation Warning icon.

***NOTE: LEAP Offline will be installed once per Windows user/workstation/browser.**



- Create a bookmark for LEAP Offline for use in the event of a loss of network connectivity.



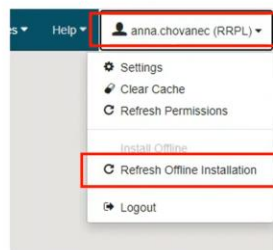
url is case sensitive for bookmark

Refresh Installation

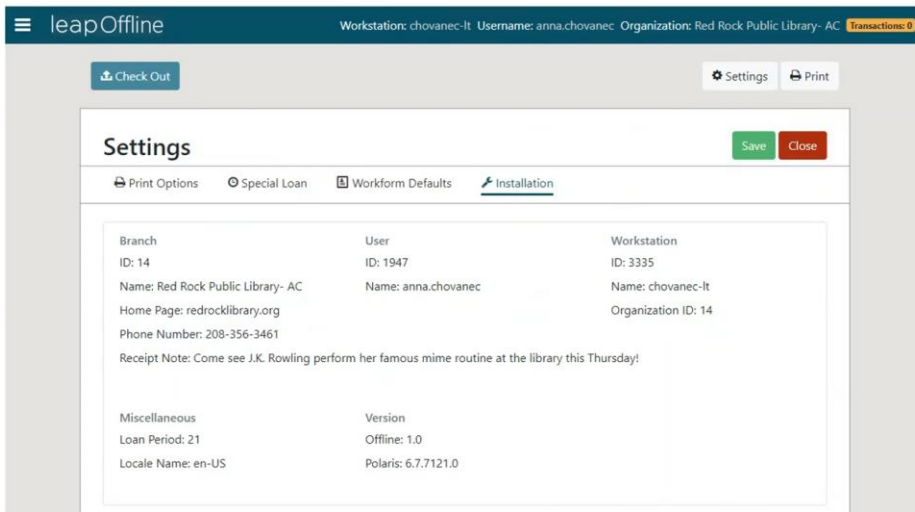
- You have the option to update your Leap Offline installation with any changes made to system administration without manually clearing your cache and re-installing the application.

- Refreshing the installation updates the following values:

- User ID
- User Name
- Workstation ID
- Workstation Branch ID
- Workstation Name
- Branch ID
- Standard Loan Period
- Branch Name
- Branch Phone
- Branch Home Page
- Branch Receipt Note
- Locale Name



In settings-

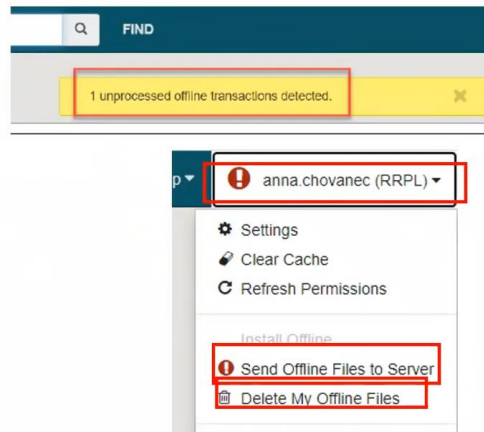


“Traditional” Offline client vs. LEAP Offline

Offline client	LEAP Offline
<ul style="list-style-type: none"> Check in, Update inventory date, Check out, Patron registration (new and update) Generates .TRN files on the user's workstation Automated Offline SQL job optional <ul style="list-style-type: none"> User can upload files directly through Bookmobile 	<ul style="list-style-type: none"> Check out only Generates data that imitates .TRN files within the user's browser cache Automated Offline SQL job required <ul style="list-style-type: none"> As there are no files, user cannot upload manually

Staff Workflow

1. Navigate to leapoffline site via browser bookmark
2. Perform checkout transactions **[DO NOT clear browser cache]**
3. Login to live LeapWebApp site **[Yellow toast indicating unprocessed offline transactions]**
4. Send offline files to server or delete them if unwanted



Send Offline Files to Server

- When the user sends offline "files" (transactions) to the server, the browser data gets loaded into two SQL Tables in the Results database:

- LEAPOfflineTransactionSets**

- Contains one entry per .trn filename

- LEAPOfflineTransactionData**

- Contains one entry per line within the .trn "file"

SQLQuery1.sql - cs-a-janis (polaris (66))

```

select *
from results..leapOfflineTransactionSets (nolock)

select *
from results..leapOfflineTransactionData (nolock)
    
```

Results	Messages	LeapOfflineTransactionSetID	Name	UploadDate	Processed	ProcessedDate
1		1	PTF_2019072515083964_PINSLEY.LT.TRN	2019-07-25 15:00:010	1	2019-08-14 09:57:53.930
2		2	PTF_2019072515164688_PINSLEY.LT.TRN	2019-07-25 15:17:26.777	1	2019-08-14 09:57:53.937
3		3	PTF_2019072515214111_PINSLEY.LT.TRN	2019-07-25 15:22:26.737	1	2019-08-14 09:57:53.940
4		4	PTF_2019081409524632_CO-YODA.TRN	2019-08-14 09:55:02.183	1	2019-08-14 09:57:53.943
5		5	PTF_2020061611402812_CHOIVANE.LT.TRN	2020-06-05 11:29:01.863	1	2020-08-05 11:32:19.023

LeapOfflineTransactionDataID	LeapOfflineTransactionSetID	Sequence	Data
1	1	0	115.08.39July 25 201903192610476.3.2292.0
2	1	1	215.11.01pinley32280031521701028
3	2	0	115.16.46July 25 201903192610476.3.2292.0
4	2	1	215.16.54pinley32280031521701028
5	3	0	115.21.41July 25 201903192610476.3.2292.0
6	3	1	215.21.43pinley32280031521701028
7	4	0	109.52.46August 14 2019091616.3.2292.0
8	4	1	209.56.08pinney1010505061429121
9	5	0	111.40.28June 16 202014194733296.5.4104.0
10	5	1	211.42.081701ans175145695611231021

Automated Offline SQL Job

- Once the data has been loaded into the LEAPOffline tables, the Automated Offline SQL job must run for those transactions to be marked as 'processed' and recorded in the live Polaris database.

- The Automated Offline job must be enabled (disabled by default) in SSMS and either scheduled or run manually.

- When the Automated Offline job runs, and there are LEAP offline files to be processed, the job will generate a .DON file** from the data in the LEAPOffline SQL tables, and store it right on the server:

C\$\\ProgramData\\Polaris\\[version]\\OfflineTransaction

Agent Job Activity

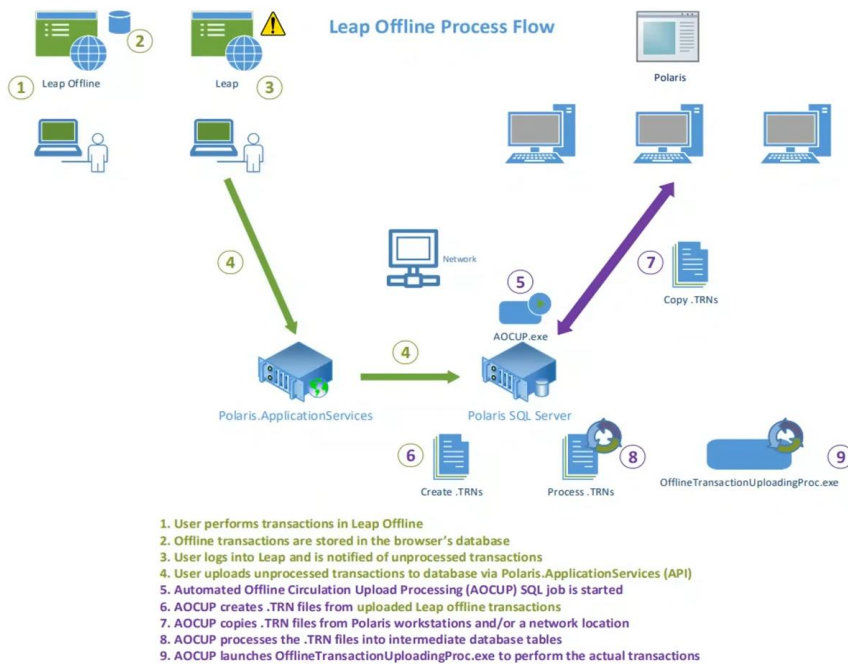
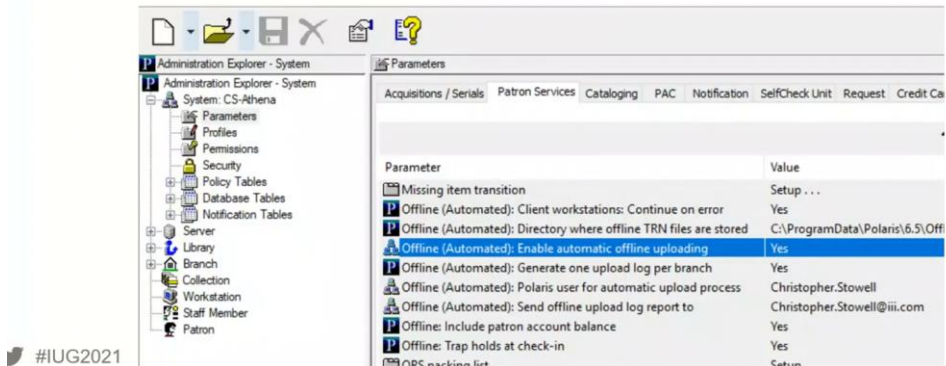
Name	Enabled	Status	Last Run	Last Run	Next Run
3M Novellet Select Export	no	Idle	Unkno...	never	3/1/20...
Acquisitions Overnight Cancellation	yes	Idle	Succo...	2/26/2021 5:10:00 AM	2/27/2...
Automated Offline	yes	Idle	Unkno...	never	not sch...
Book Sense Import	yes	Idle	Succo...	2/26/2021 6:11:00 AM	2/27/2...
Build Up Compressed Holdings Statement	yes	Idle	Succo...	2/25/2021 11:00:00	2/26/2...
Cash Drawer Daily Debit Rows	yes	Idle	Succo...	2/26/2021 1:00:00 AM	2/27/2...
Cataloging Background Tasks	yes	Idle	Succo...	2/26/2021 4:06:00 PM	2/26/2...
Cataloging Import Job 1	yes	Idle	Succo...	2/26/2021 4:06:00 PM	2/26/2...
Cataloging Import Job 2	yes	Idle	Succo...	2/26/2021 4:07:00 PM	2/26/2...

****NOTE: This is the only part in the LEAP Offline process where a true file is generated.**



Enable Automated Offline

- Automatic offline uploading must be enabled in System Administration under System>Parameters>Patron Services, and a user must be entered for the automatic upload process.
- In addition, the job must be configured in SQL, which may require assistance from Polaris Support.



Browser data sits on server until job is run

Questions to Ask Before Staff Rollout:

- Do circulation staff use shared Windows profiles or shared Polaris accounts?
- What is library policy regarding browser user profiles? (e.g. Are staff encouraged to use Chrome user profiles at circ workstations? Are browser user profiles used consistently?)
- How many different workstations do individual circ staff use on a regular/daily basis? Will specific workstations be designated for specific users for LEAP Offline?
- How important is it for offline transactions to be traced back to specific users? Will a "LeapOffline" Polaris user be added to simplify installation and processing of offline files?
- How frequently will the Automated Offline job be run? Will it be scheduled or manual?
- What kind of training will be needed?
 - Which staff will be expected to install LEAP Offline?
 - Will staff need to "Refresh offline installation" at the beginning of each shift?



Also are the browsers 'cleared' using deep freeze or something like that

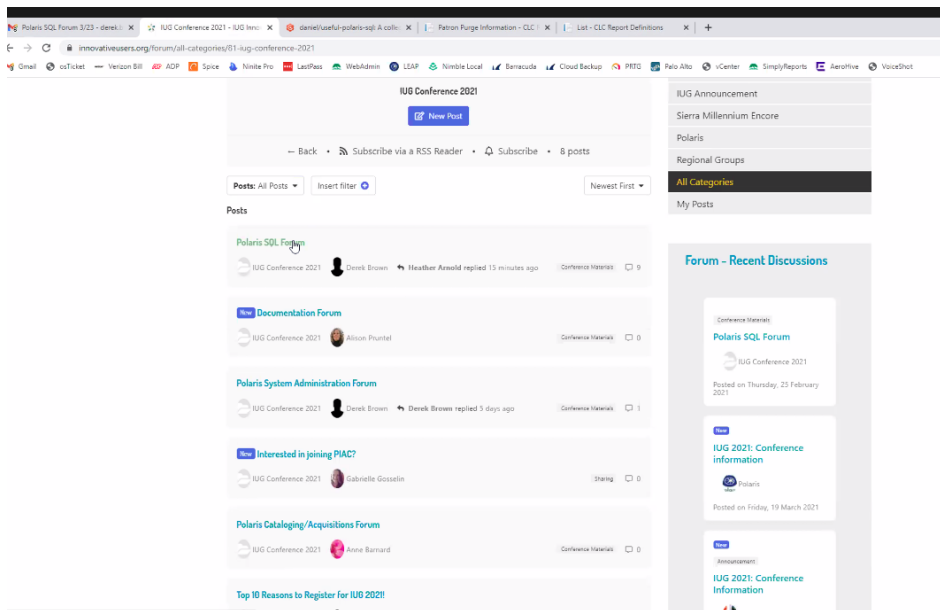
Trouble Locating the Offline Site?

- LEAP Offline will not work in "incognito" mode
- Deleting or clearing the browser's web cache/history/cookies/storage will essentially uninstall LEAP Offline.
 - If you need to start over and reinstall LEAP Offline completely, try F12> Application> Storage> IndexedDB - delete LeapOfflineApp
- URLs are case-sensitive. The Leap Offline web application name **must** be lowercase and exact:
 - You must visit the Leap Offline site using the exact URL it was installed with, eg: <https://young-lt.polarislibrary.com/leapoffline/#/checkout>

Trouble with Missing Transactions?

- Check the offline user set in SA under System> Parameters> Patron Services> "Offline (automated): Polaris user for automatic upload process"
 - This MUST be a user in the Administrator group – best if it's PolarisExec (shouldn't be PolarisSuperUser)
- Check SQL tables to make sure the data has been sent to/received by the server
 - Is the data there? Is it marked "processed"? Etc.
- Check the log file on the production server for any errors
(\\[servername]\C\$\ProgramData\Polaris\[version]\Logs\Offline)

SQL Forum



Organize by solutions – Joe Fee/Derek Brown

Are aggregate fields stored anywhere or Azure Data Studio with git integration

Trn mapper provided by III (Jesse taking that back to III)

Does anyone have something written in SQL already that calculates average loan lengths (how long a patron kept an item)? I was reading through the Polaris SQL forum today and saw in Idea Lab that Polaris added Loan Length to the transaction database in 6.1 – Mike has something in SQL forum with SQL

Has anyone tried doing a process of using SQL to find outdated subject headings (eg. "Indians of North America")
Extracting the records and then updating the headings via MarcEdit or such? Changing record in table can be risky – MARC records won't update – MARC are like in 500 different locations – updating needs to be done manually in MARC records

Heather Arnold – posting to SQL forum – find tool to create record set and then bulk update to those records manually

Last activity date – if patron hasn't done anything need to also use registration date because appears as null for LAD – updates if SIP authenticating.

https://documentation.iii.com/polaris/PolarisPDFGuides/PolarisImportingStudentRecordsGuide_6.7.pdf

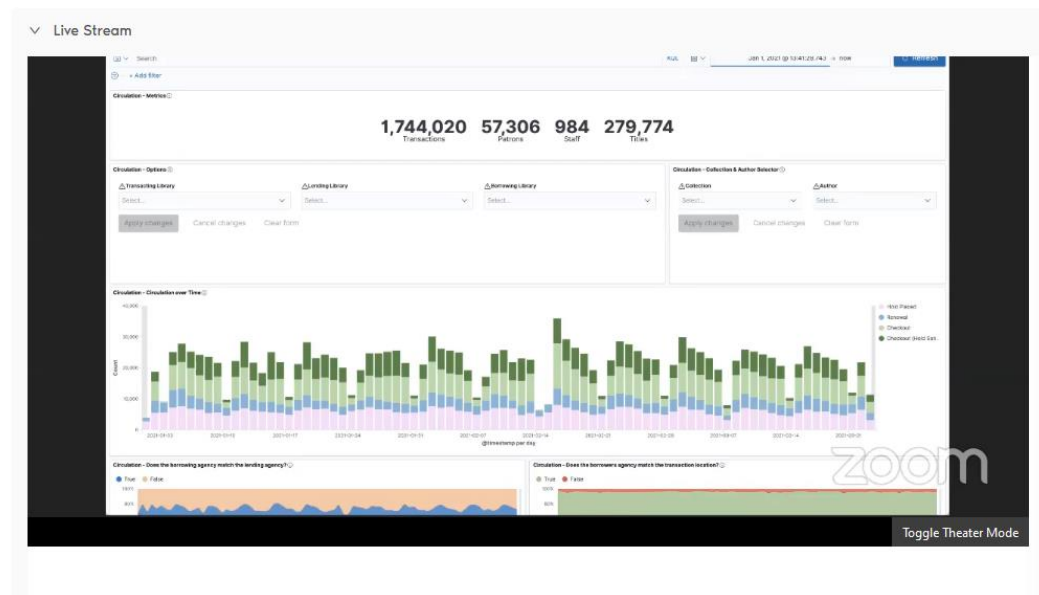
Data and Analytics Portal



Q/A have you thought about having a 'push' model to notify people about new reports? Now we will but nothing now

SSRS history gets deleted fairly quickly – they built a process that built up history on what reports being used

Kibana demo (3 parts) – elastic search , logfile and kibana



Presentation Contents

- What is SILS?
- Developing Data Services
- It's Too Complicated!
- We Can Make It Better
- Assessment and Future Plans
- Questions?

What is SILS?



SILS is: Saskatchewan Information and Library Services

- A consortium of all the public libraries in Saskatchewan
 - Formed in 2009
 - 11 libraries (3 city libraries, 7 regional libraries, 1 northern library system)
 - Over 300 branches



What is SILS?

The SILS Office is...

- A team of 6 staff created by the consortium to provide technology support for the member libraries
 - Overseen by the board of library directors
 - An executive director, 2 sys. admins., an infrastructure analyst, a web developer, and an executive assistant
 - Shared ILS, website development and hosting, mobile apps, notification services, email support, OverDrive, staff intranet, and... *data reporting*
 - Library staff submit issues/requests through a ticketing system

Ticketing system – freshworks

Developing Data Services

- Through consultation the consortium developed standardized, scheduled reporting
 - Prev. each library produced own reports, making comparison difficult
 - A committee was struck to lead the discussion and come to consensus on what data definitions to use and what to report on
 - Monthly & annual scheduled reports were developed, and exports saved to a Google Drive (our **Statistics Repository**)
 - SimplyReports used for ad hoc needs
- **Google Analytics** was adopted for website usage stats



Developing Data Services

- Post-migration to Polaris in 2015 we had:
 - Polaris out-of-the-box reports - through the desktop client and directly through **SSRS** (SQL Server Reporting Studio)
 - **SimplyReports**
- Didn't cover all needs, but SSRS and the Report Builder app. allowed us to customize
 - Copied and tailored Polaris reports and created some from scratch
 - Ensure comparability with data from previous ILS (Sierra), but also developing improved reports in Polaris/SSRS



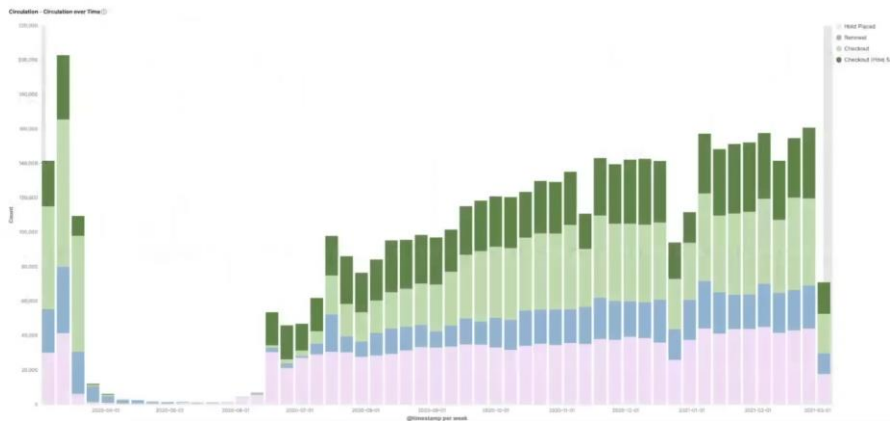
Developing Data Services

- Kibana is a data visualization tool that allowed us to build accessible and visually appealing dashboards
- Allows imports directly from Polaris (through SQL and SimplyReports)
 - Data indexed using Elasticsearch (an open-source app.)
- Transactional data allows a view of trends over time, and much of the data is up-to-the-minute
- SSRS reports can have performance issues, Kibana is smoother
- Great for assessment and advocacy



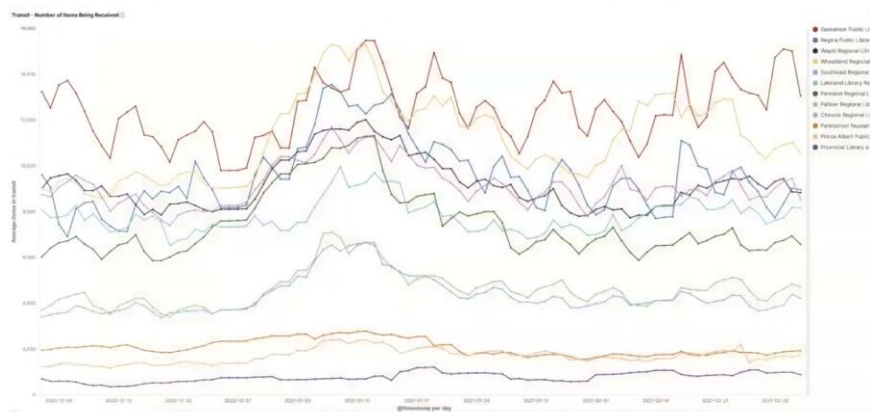
Developing Data Services

This visualization shows circulation over the pandemic, broken down by transaction type.



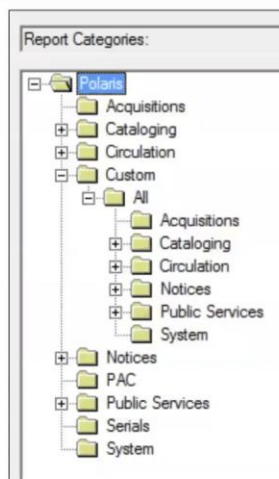
Developing Data Services

This visualization shows items in transit by receiving library.



It's Too Complicated!

- Reporting developed as needed
 - Several reports duplicated data topics
 - Unclear which tool was best for certain data
- We received many questions about which reports to use and where to find them



It's Too Complicated!

- We now had 500+ reports in SSRS
- The SSRS/client folder structure for custom reports repeated the OOTB structure - two versions of each folder
- Resource-intensive reports run at the wrong time could cause system slow-downs for the entire province! They had to be moved.
- Specialized folders broke the directory structure and made reports harder to find



SILS - Do not run between 12pm and 5pm

[Home](#) > SILS - Do not run between 12pm and 5pm



It's Too Complicated!

SSRS reports were not as helpful as they could be:

- Many did not have descriptions or definitions, e.g. type of branch being filtered on (transaction, patron, assigned branch)
- Library filters not configured well for consortium

Agency	Wapiti Regional Library	Branches	Wapiti - PAC, Wapiti - Online
Item Status	Hold in-Transit, In-Transit	Date Selector	Last Month
Item Status Change Date between	2021-01-01	and:	2021-02-01

Item Status List Report

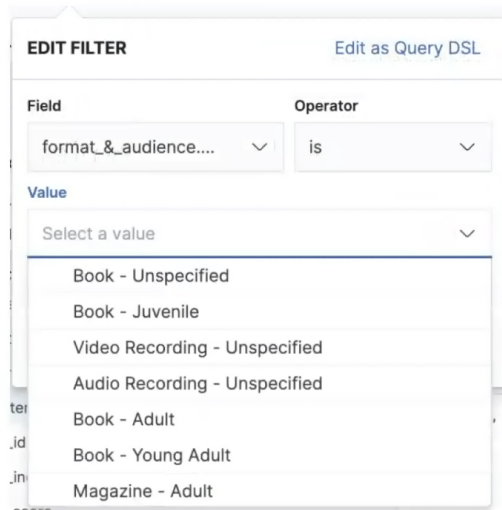
2021-01-01 12:00:00 AM - 2021-02-01 12:00:00 AM

Wapiti - Alvena Public Library

Material Type	Barcode	Item Status	Item Status Date	Record Status	Browse Title	Browse Author	P	Y
Book	33292013336742	In-Transit	2021-01-30 10:51:38 AM	Final	1899-1999 Zakreski, Peter.. celebrating 100 years	Zakreski, Peter.. author.		

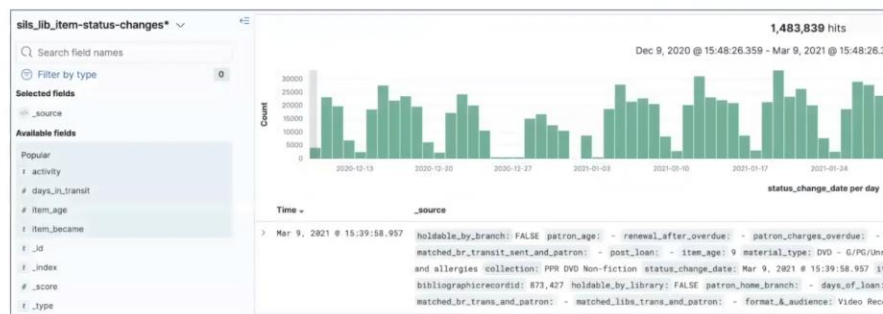
It's Too Complicated!

Filtering in Kibana dashboards is not always intuitive.



It's Too Complicated!

The learning curve for working with raw data in Kibana can be steep.



Putting the pieces together

- 2 system administrators - more capacity for improvements
- Began cleaning-up SSRS/Polaris client reports:
 - Clearer descriptions & improved filters
 - Contextual info in report exports, like begin and end dates
 - Assessed areas of report coverage, merging similar reports and filling gaps
 - Looked at usage data and developed priorities
 - Improved performance of resource-intensive reports

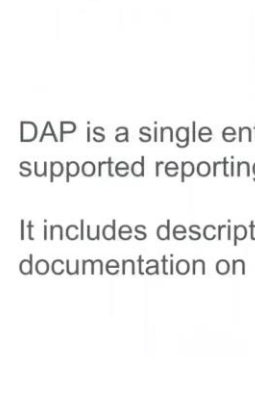
Putting the pieces together

A “refurbished” SSRS report:

- Filters improved
- Metadata about applied filters and description added
- Still a challenge to understand the report content without running it

Putting the pieces together

Through this work, **DAP** (the Data & Analytics Portal) was developed!



DAP is a single entry point for all SILS supported reporting tools and resources.

It includes descriptions of each tool and documentation on how to use it.

Data & Analytics Portal

SSRS (SQL Server Reporting Service) >

Microsoft SQL Server Reporting Services (SSRS) is a web interface that provides a variety of pre-built reports.

<https://help.saskilibraries.ca/a/solutions/articles/12000057424>

SimplyReports (Polaris) >

SimplyReports is a reporting tool created by Polaris for ad hoc reporting needs.

<https://help.saskilibraries.ca/support/solutions/articles/12000003147-simply-reports-training-materials>

Kibana >

Kibana is a powerful data visualization and dashboarding tool.

Putting the pieces together

DAP’s SSRS search page with tag filters applied:

Data & Analytics Portal

< Landing

SSRS

8 of 108 shown

Search

Tags

- ☒ acquisitions
- ☐ agenda
- ☐ bibliography
- ☐ branch
- ☐ cataloging
- ☐ checkouts
- ☐ circulation
- ☐ collection
- ☐ commercial
- ☐ financial
- ☐ housing
- ☐ fund
- ☐ holds
- ☐ interagency

Branch Fund Hierarchy Report

Fund: **Acquisitions** Branch

Provides an overview of a selected fund and its subfunds, by branch. Details including allocated, encumbered, spent and free amounts.

Open Preview Subscribe

Closed Fiscal Years - Fund Hierarchy Report

Fund: **Acquisitions** Branch

Provides an overview of a selected closed fiscal year, summarized overall and by fund. Details including allocated, encumbered, spent and free amounts.

Open Preview Subscribe

Putting the pieces together

The file used to add reports to DAP includes (for each report):

- Subject tags, interpreted from abbreviations in the SSRS description
- Name
- Description
- URL for the SSRS report
- URL for the subscription page

DownloadReplaceMoveDelete

Changed by SILS\va.jtenter on 10/1/2019 10:23 AM
Created by SILS\va.dstorie on 5/9/2016 6:24 PM
82 KB

Properties

Name

Agency Holds Alert - Ratio of Holds to Items Owned

Description

Displays titles with a minimum ratio of holds made by agency patrons to items owned within an agency. The agency, collections and ratio are chosen by the user. HO,AG,DO

Putting the pieces together

DAP’s SSRS page showing a preview screenshot:

SSRS

4 of 108 shown

Search

Branch Fund Hierarchy Report

FundAcquisitionsBranch

Agency: Lakeland Library RegionBranch: Lakeland - Headquarters

Date Selector: Last MonthBegin Date: 7/1/2019

End Date: 8/1/2019Fiscal Year: Lakeland 2019 (Open) (Hq) (1/1/2019 - 12/31/2019)

View Report

Expenditures by Supplier

Fiscal Year: Lakeland 2019 (Open) (Hq) (1/1/2019 - 12/31/2019)

Period Start Date: 7/1/2019 12:00:00 AM

Period End Date: 8/1/2019 12:00:00 AM

Execution Date: 8/8/2019 2:08:18 PM

Shows purchases made by a branch during a specified fiscal year, individualized by supplier. Amounts are categorized by fund and material type.

amazon

Fund Name	Material Type	Purchased	YTD Charges/Units	Amount paid
LHQ Adult Fiction: ble	Book	2	2	\$32.15
Adult Audio books: Bca	Spoken Word CD	1	0	\$30.83
Barkland Books: ble	Book	1	0	\$17.25
LHQ Adult NF: ble	Book	10	6	\$108.11

Report Preview

Expenditures by Supplier

Close

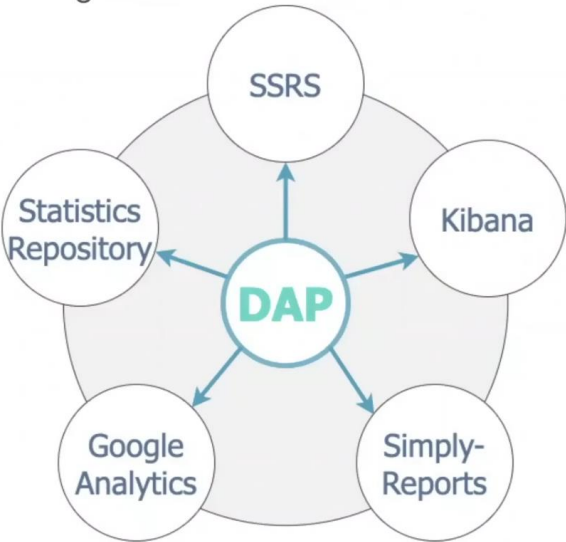
Supplier

Amazon.com

OpenPreviewSubscribe

Putting the pieces together

Reporting options are organized and accessible!



Putting the pieces together

Additional Reporting Developments

- Report Lab:
 - A mailing list of reporting stakeholders from across the library systems
- Documentation:
 - Rewritten and made available in multiple locations
- Kibana:
 - Updated to cloud-based version
 - Recreation of dashboards/development of new dashboards

Assessment and Future Plans

It's not perfect...

- Having multiple reporting sources isn't as tidy as having only one; DAP provides a unified entry point for reports, but it is a compromise
- Upkeep of SSRS report metadata (tags, screenshots) takes time/attention
- Adoption of DAP by established/existing staff members:
 - While new people who are shown DAP are making use of it, existing staff often have URLs bookmarked or other paths to reports memorized
 - The pandemic also sidetracked efforts to direct staff to DAP - everyone's attention has been elsewhere for a while



Assessment and Future Plans

It's not perfect.....but it's a big improvement

- A centralized access point for multiple resources provides context and organization to a previously disordered environment
- We find it helps us get to the right SSRS report!
- Improved documentation helps with onboarding new staff members, and refreshing skills for existing staff
- The cleaner, clearer reports are more helpful for interpreting and sharing data

Assessment and Future Plans

It's not perfect.....yet!

- More communications and training!
- Kibana restructuring gives us an opportunity to re-think what data we want to share in dashboards, and how we want to present it
- Embed Kibana visualizations into websites (DAP, our intranet site, library web-pages) and link directly to specific Kibana dashboards from DAP
- Integrate external resources, such as Statistics Canada and other demographic data, into reporting
- Further improve and curate the SSRS reports shared in DAP

Contacts & Links

Eleanor Crumblehulme: ecrumblehulme@sasklibraries.ca

Jason Tenter: jtenter@sasklibraries.ca

SILS: <https://www.sasklibraries.ca/>

Elastic Search: <https://www.elastic.co/>

SUSHI Made Easy





SUSHI Made Easy

Using the COUNTER 5 Report Tool for Harvesting Usage Statistics

Scott Carlton
Library Associate for Electronic Resources
Thomas J. Watson Library
The Metropolitan Museum of Art
scott.carlton@metmuseum.org / scott.a.carlton@gmail.com

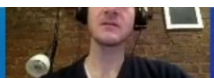
Agenda

- Background
 - COUNTER 5
 - SUSHI API protocols
- COUNTER 5 Report Tool
 - Installation
 - General Functionality
 - Demo
 - Vendor Management
 - Fetch Reports
 - Fetch Special Reports
 - Search
 - Cost Input
 - Visualizations
- Conclusion



Source: Sushi Count, <http://www.sushicount.com/>

Introduction - What is COUNTER 5?

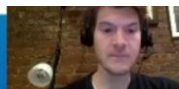


“COUNTER provides the Code of Practice that enables publishers and vendors to report usage of their electronic resources in a consistent way. This enables libraries to compare data received from different publishers and vendors.” (Project COUNTER, n.d.)

Project COUNTER homepage: <https://www.projectcounter.org/>

Gal Report

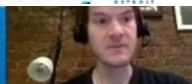
Introduction - What is COUNTER 5 (continued)



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Report Name	Platform Master Report													
2	Report ID	98													
3	Release	5													
4	Institution	Metropolitan Museum of Art Watson Library													
5	Institution ID	Galenew72306													
6	Metric Type														
7	Report Filters														
8	Report Attributes														
9	Exceptions														
10	Reporting Period	Begin Date=2020-01-01; End Date=2020-12-31													
11	Created	2021-02-01T15:53:28Z													
12	Created By	Gale													
13															
14	Platform	Metric Type	Reporting Period	Jan-20	Feb-20	Mar-20	Apr-20	May-20	Jun-20	Jul-20	Aug-20	Sep-20	Oct-20	Nov-20	Dec-20
15	Gale	Searches_#Platform	568	115	98	56	28	52	79	82	27	42	20	32	21
16	Gale	Total_Item_Requests	515	156	14	15	17	10	5	44	5	14	17	8	10
17	Gale	Unique_Item_Requests	309	156	14	15	17	10	5	43	5	14	12	8	10
18	Gale	Unique_Item_Requests	231	107	14	13	13	6	3	34	5	14	11	5	6
19	Gale	Unique_Item_Requests	227	107	14	13	13	6	3	33	5	14	8	5	6
20	Gale	Unique_Item_Requests	222	95	13	10	13	6	3	11	3	9	8	5	6
21	Gale	Unique_Item_Requests	120	35	13	10	13	6	3	10	3	9	7	5	6
22	Gale	Unique_Item_Requests	94	4	1	14	1	0	5	0	0	5	0	4	0
23	Gale	Unique_Item_Requests	94	4	1	14	1	0	5	0	0	5	0	4	0
24	Gale	Unique_Item_Requests	26	3	1	11	1	0	4	0	0	3	0	3	0
25	Gale	Unique_Item_Requests	26	3	1	11	1	0	4	0	0	3	0	3	0
26	Gale	Unique_Item_Requests	1525	206	107	172	46	99	115	211	83	62	9	70	945
27	Gale	Unique_Item_Requests	1312	206	107	172	46	99	115	115	67	28	5	12	340
28	Gale	Unique_Item_Requests	1334	149	86	149	35	83	101	130	80	55	8	64	214
29	Gale	Unique_Item_Requests	1342	149	86	149	35	83	101	104	64	25	4	11	291



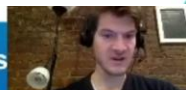
Introduction - What is SUSHI?



- SUSHI automates library's retrieval of COUNTER statistics from vendors via an API protocol.
 - The user (librarian) runs client software to harvest reports from the vendor's SUSHI-compliant server.
- The API returns COUNTER reports in JSON
- The vendor requires the user to have credentials to identify their account when they request statistics.
 - Customer ID
 - Requester ID
 - API Key



Introduction - What is SUSHI? (cont) - URL Requests



A SUSHI URL request specifies, in order, a base URL identifying the vendor's server, the particular report requested, authentication credentials, and date range, followed by any other report specifications.

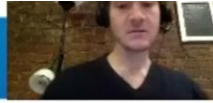
https://sushi.vendorname.com/reports/tr_j1?customer_id=12345&requestor_id=678989&api_key=7f89dhj489f0dajk348&begin_date=2020-01&end_date=2020-07

https://sushi.vendorname.com/reports/tr?customer_id=12345&requestor_id=678989&api_key=7f89dhj489f0dajk348&begin_date=2020-01&end_date=2020-07&data_type=Book&attributes_to_show=Data_Type|Access_Method|YOP|Access_Type|Section_Type

https://www.jstor.org/sushi/reports/dr?customer_id=metmuseum.org&requestor_id=&api_key=&begin_date=2020-01&end_date=2020-09



The COUNTER 5 Report Tool Overview



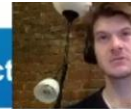
The COUNTER 5 Report Tool is a SUSHI client software developed by Melissa Belvadi and her team at UPEI. It is a data harvester, report manager, and data analysis application.

Available freely on Github:

<https://github.com/CS-4820-Library-Project/COUNTER-5-Report-Tool>

Also has table of vendors and if SUSHI compliant

The COUNTER 5 Report Tool Overview (cont) - Functionality



- Functionality
 - Vendor management -- stores SUSHI credentials for each vendor
 - Report harvesting
 - Fetches all COUNTER 5 reports that are supported by vendors
 - Creates a searchable database of calendar year reports
 - Fetches reports with user-specified characteristics and date ranges
 - Reports generated elsewhere can be imported into the client
 - Converts some COUNTER 4 metrics to COUNTER 5 standards
 - Generated basic data visualizations
 - Tracks e-resource costs and incorporates them into data visualizations

#111102021 SUSHI Made Easy / Carlton / Slide 9



Customizing LEAP – Chicago Public, Paul Keith

Paul Keith
pkeith@chipublib.org

Agenda

- About CPL
- Reasons to customize/Reasons not to
- HTML and CSS
- Selectors and Declarations to Know
- Practicalities
- Examples



Hide fields in Patron Reg

Default

Addresses

Address Type

Home

Postal Code *

Zip+4:

City *

Street Address *

State *

Street Address Line 2

DELETE

Street Address Line 3

ADDRESS

Address Check Date (Not used by CPL.)

3/7/2120

Term (Not used by CPL.)

99

Years

Custom

Addresses

Address Type

Home

Postal Code *

Zip+4:

City *

Street Address *

State *

Street Address Line 2

DELETE

ADDRESS

Notification settings

Default

Notification Settings

Notices Address

Home

eReceipt Option

(None)

Notification Option

Email Address

Additional TXT Notice

Text Messaging Phone

(None)

Wireless Carrier

(None)

Custom

Notification Settings

eReceipt Option

(None)

Notification Option

Email Address

Phone notification is only available for local area codes:
217, 224, 309, 312, 334, 464, 618, 630, 708, 773, 779,
815, 847 and 872.

Default

Renew

Special Renew

Reset Due Date

	TYPE	DUE ON ▼	BARCODE
<input checked="" type="checkbox"/>	DVD	3/16/2021	R0999999999

Custom

Renew

Special Renew

Estimate Fines

	TYPE	DUE ON ▼	BARCODE
<input checked="" type="checkbox"/>	DVD	3/15/2021	R0999999999

800 staff use LEAP never a time before LEAP – initial migration was to LEAP not in client a lot so no ‘disconnect’

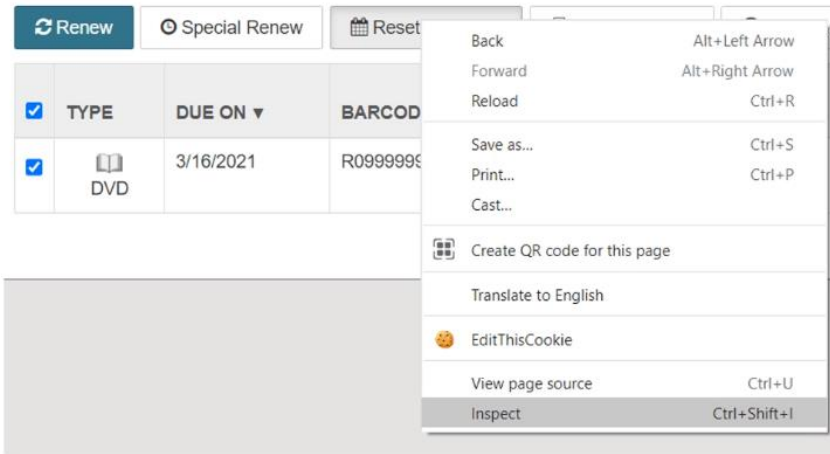
Reasons Not to Customize

- Can hide issues with records
- May hide other elements by accident
- Rules must be checked at each upgrade
- No one on staff knows HTML and CSS

HTML and CSS

- HTML says what something is
- CSS says how to display it (or not to display it)
- CSS rules are applied to HTML via selectors

Viewing the HTML



<button type="button" class="action btn
btn-default reset-due-date disabled-in-
readonly">

<i class="glyphicon glyphicon-
calendar"></i>

Reset Due Date

</button>

List element – group of functions – it is a button. Button belongs to a lot of categories/classes. List done by space between each one (there are 5): action, btn, btn default, reset due date, disabled

I is italic and

Text of button reset due date – snippet – to all btn-default elements apply these rules -

```
.btn-default {  
    color: #333;  
    background-color: #fff;  
    border-color: #ccc;  
}
```

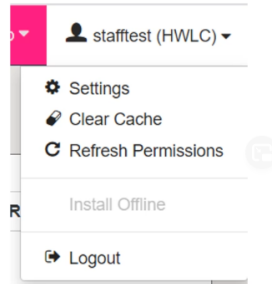
Selectors to know – ID – Unique name given to element or site – this is for menu offline install instead of graying it out they hide it – can refer to it using #menuofflineinstall (rules in curly braces)

Id

```
<li id="menuOfflineInstall" class=""  
role="menuitem">...</li>
```

```
#menuOfflineInstall { ... }
```

```
li#menuOfflineInstall { ... }
```



Class

```
<button type="button" class="action btn btn-  
default reset-due-date disabled-in-  
readonly">...</button>
```

Code to make change to reset-due-date button use the period in front or make change to buttons

```
.reset-due-date { ... }
```

```
button.reset-due-date { ... }
```

Refer to id names – 1st is list of item checkouts and 2nd is checkout to patron

Id begins with...

```
<div id="items-index-pid1261153">...</div>
```

```
<div id="checkout-index-  
pid1261153">...</div>
```

[id^=items-index] ...
div[id^=items-index] ...

Element inside Another

```
<div id="items-index-pid1261153">...  
  <button type="button" class="action btn btn-  
default reset-due-date disabled-in-  
readonly">...</button>  
...</div>
```

To modify-

[id^=items-index] .reset-due-date { ... }

Element Following Another

Suffix

Application Language

☐ Use Name on Identification for Print and Telephone Notices

Name on Identification (If different from name above)
Last Name

First Name

Middle Name

```
<div class="checkbox">  
  <label>  
    <input class="disabled-in-  
readonly" type="checkbox" name="UseLegalNameOnNotices" value="">  
    Use Name on Identification for  
    Print and Telephone Notices  
  </label>  
</div>
```



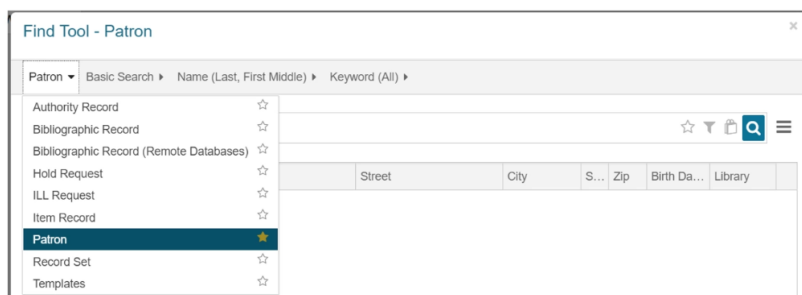
Checkbox following language

Element Following Another

```
<div class="patronGenderSection hide">...</div>
<div class="checkbox">
  <label><input ...>
  Use Name on Identification for Print ... Notices
</label>
</div>
```

```
div.patronGenderSection + div.checkbox { ... }
.patronGenderSection + .checkbox { ... }
```

Nth Element inside Another



li:nth-child(3)

Hide part of list – 3rd child (item in list is #3) that is the 3

```
<li class="erms-ft-database erms-dd" ...>
<button></button>
<ol class="erms-defaultable erms-popup-list">
<li>...Authority Record...</li>
<li>...Bibliographic Record...</li>
<li role="menuitem"><a class="erms-popup-list-
item">Bibliographic Record (Remote
Databases)</a>...</li>
```

```
li.erms-ft-database ol.erms-popup-list li:nth-child(3)
{ ... }
```

Declarations to know:

`display: none;`

```
#menuOfflineInstall { display: none; }
```

```
[id^=items-index] .reset-due-date {  
  display: none; }
```

Make sure your rule trumps III end it with 'important' – here it says don't display offline install button and don't display reset due date

!important

```
#menuOfflineInstall { display: none  
!important; }
```

```
[id^=items-index] .reset-due-date {  
  display: none !important; }
```

Also of interest...

- margins
- padding
- borders
- content



Notification Settings
eReceipt Option
(None) ▼
Notification Option
Email Address ▼
Phone notification is only available for local area codes: 217, 224, 309, 312, 331, 464, 618, 630, 708, 773, 779, 815, 847 and 872.

Content – adds content before/after element

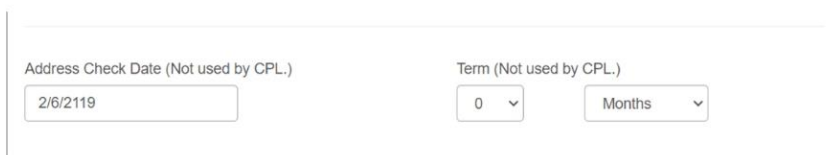
Practicalities

- /leapwebapp/circulation/css/polaris.css
- login.css
- Always add rules, never change existing rules
- Be as specific as possible when “writing” your selectors

Will get wiped out during upgrade

Examples – hide address check date

Address Check Date

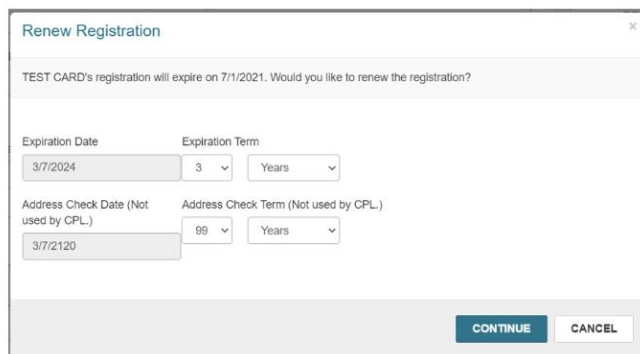


Address Check Date (Not used by CPL.)

2/6/2119

Term (Not used by CPL.)

0 Months



Renew Registration

TEST CARD's registration will expire on 7/1/2021. Would you like to renew the registration?

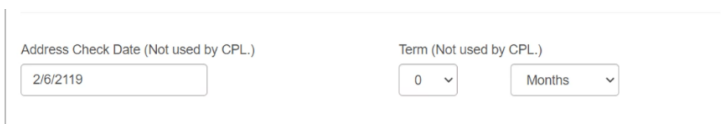
Expiration Date: 3/7/2024

Expiration Term: 3 Years

Address Check Date (Not used by CPL.): 3/7/2120

Address Check Term (Not used by CPL.): 99 Years

CONTINUE CANCEL



Address Check Date (Not used by CPL.)

2/6/2119

Term (Not used by CPL.)

0 Months

```
<div class="address-check-section  
row"></div>
```

```
.address-check-section { display: none; }
```

Extra line still appears so

Street Address Line 3

```
form.address { border-bottom: none
!important; padding-bottom: 0px !important;
margin-bottom: 0px !important;}
```

Renewal screen

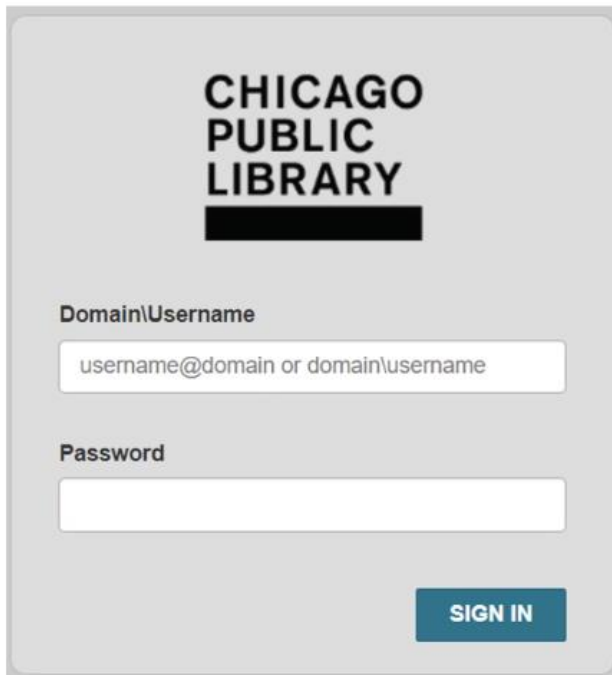
```
<div id="renew-patron-content" class="row dark-content">
  <div class="col-md-12">
    [Expiration date]
  </div>
  <div class="col-md-12">
    [Address check]
  </div>
</div>
```

```
#renew-patron-content div.col-md-12:nth-
child(2) { display: none; }
```

Looks like this now

Put logo on page

Leap Login

A login form for the Chicago Public Library's Leap system. At the top, the text "CHICAGO PUBLIC LIBRARY" is displayed in a bold, sans-serif font, with a thick black horizontal bar underneath. Below this, the label "Domain\Username" is positioned above a text input field containing the placeholder text "username@domain or domain\username". Further down, the label "Password" is above an empty password input field. At the bottom right of the form is a blue button with the white text "SIGN IN".

CHICAGO
PUBLIC
LIBRARY

Domain\Username

username@domain or domain\username

Password

SIGN IN

```
<div id="polaris-logo">
<h1>

</h1>
</div>
```

First hide Polaris logo

1. Hide the Polaris logo

```
h1 img {
  display: none;
}
```

Add background image

2. Add a background image to the H1

```
h1 {  
  height: 119px;  
  background-image: url(...);  
  background-repeat: no-repeat;  
  background-position: center;  
}
```

Put url in (...)

3. Decrease padding on bottom of div

```
#polaris-logo {  
  text-align: center;  
  display: block;  
  padding-bottom: 35px;  
}
```

3. Decrease padding on bottom of div

```
div#polaris-logo {  
  padding-bottom: 15px;  
}
```

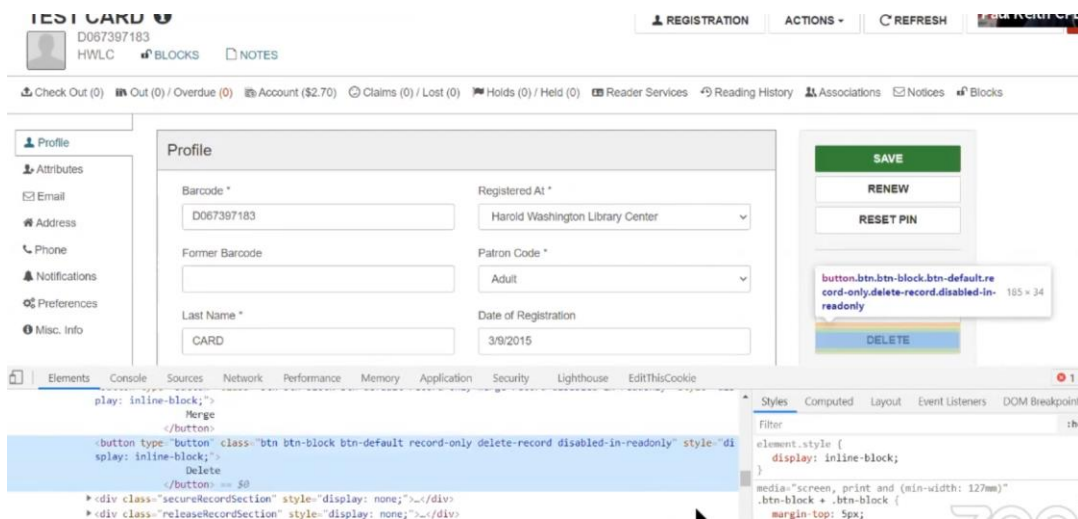
Q&A - Can edit text in WebAdmin for some fields. CSS can be used to hide some things. Changes are System-wide not branch specific – css doesn't use user name/branch ID

Every upgrade have to go in and test/training –. 2-3 hours to put in custom codes then have to test. Wiped out every upgrade. Menus require additional testing since they appear multiple places – find tool for example is cascading

Mostly streamlining patron reg and hiding buttons

Only him doing changes and little experience with html and css

Comments /* this is the information as to what is happening in css changes*/



^= above

Also have to comment out code if staff have problems to make sure it isn't the custom code

Where do you put css – C:\Program Files\Polaris\6.6\LeapWebApp.Core\wwwroot\circulation\css – 4 css files
login/Polaris/printing/pulse. Polaris is main one

W3schools.com – css selector reference

No regular expressions in css – require a field

They don't use Polaris PAC

After changes made – just need to reload and refresh

SA - Tips

To Do and What Not To Do

Help is Here for the Polaris System Administrator

Michelle Ralston

In This Presentation

- What should I be doing daily, monthly, yearly?
- Reviewing System Admin settings
- Maintaining a clean database
- Things to stay away from

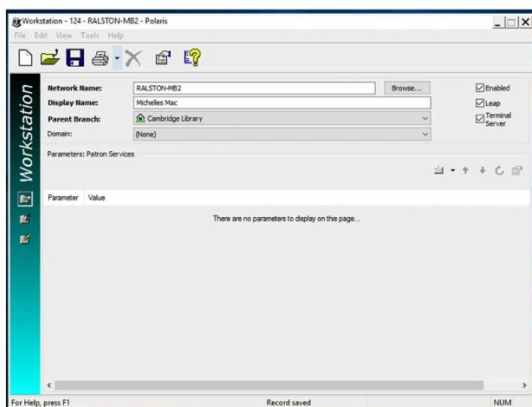
System Administration

- Workstations
- Staff members
- Permissions
- SQL Jobs
- Simply Reports
 - Use to help find/fix problems
 - Create for staff use

Annually review:

Workstations have to be registered

Workstations

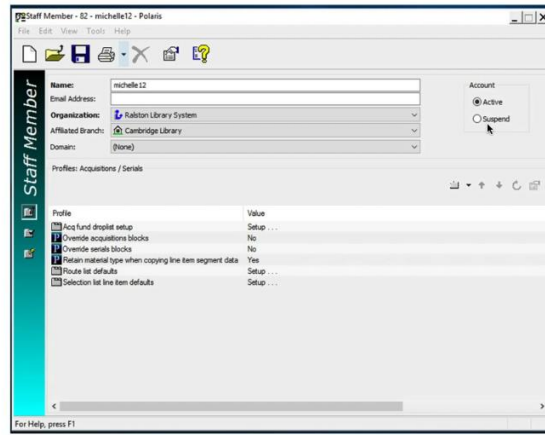


- Replacing workstations throughout the year
- Run any reports that are workstation based
- Make inactive or delete unused workstations



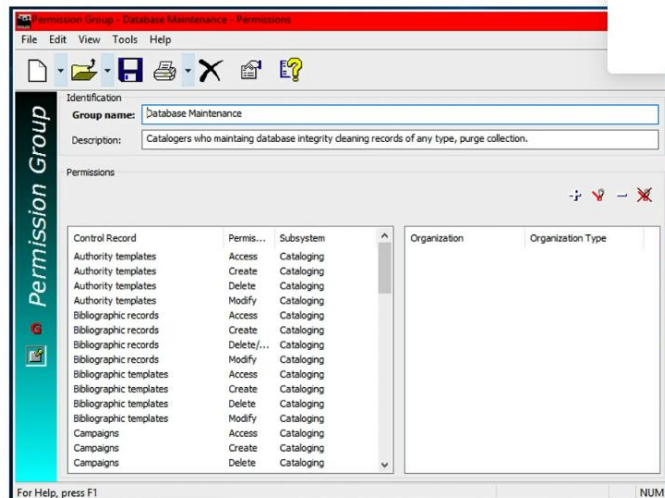
Staff Member Records

- Review staff changes throughout the year
- Run any reports that are staff member based
- Make suspend or delete staff records



Permissions

- Review Permissions
- Create new groups if needed

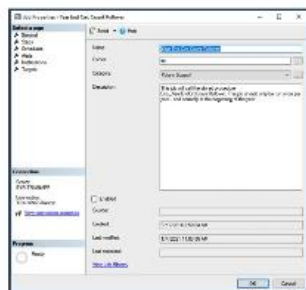


Iti
Pr
or
10

SQL Jobs

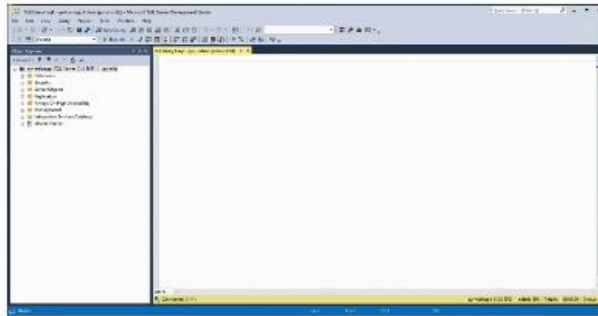


- Year End Circ Count Rollover



SQL – DO NOTs

- IF you have SQL access and use it to update/make changes, or delete.
 - DO NOT DELETE patron, items, or bibs... they touch too many other tables



Simply Reports



- What reports to you have scheduled and sent?
 - Are they giving you the results you want?
- Are there reports you need to create?
 - Yearly statistics?
 - Board/Gov. reports
- Delete any unneeded scheduled/saved/ad-hoc reports



Reviewing Parameter & Profile Settings

There are two types of settings - ones that open a dialog box and ones that do not.

Settings that open a dialog box have this icon to the left:

Settings that do not open a dialog box have different icons depending on where they are modified.

- modified at the system level, seen at all organizational levels
- modified at the library level, seen at the branch and library organizational levels
- modified at the branch level, seen at the branch organizational level
- not modified/still has the default value, seen at all organizational levels



When To Change Settings?

- Policy Changes
- New Workflows
- Something isn't working as expected

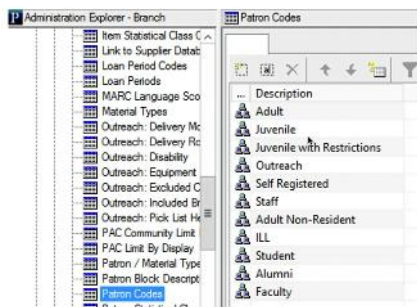
Check Known Issues

- Especially soon after an upgrade
- www.support.iii.com

Release Notes and Upgrades



Reviewing Policy/Database Tables

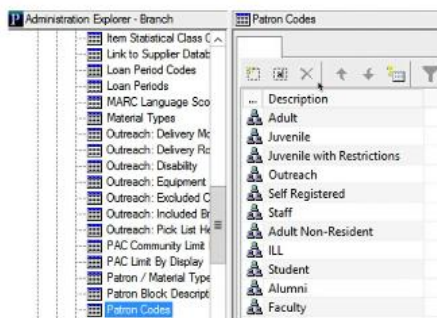


Policy Tables Reference

Policy Table Name	Description	Organization Levels
Addresses	Provides a standard set of addresses for use in all the organization records that include street addresses. See Setting Organization Addresses.	System, Library, Branch
Authority Overlay Reason	Specifies tags to retain when an existing authority record ID is overlaid with a new one.	System, Library, Branch
Authority Lowest Input (overlaid cataloging Source)	Lists the codes for cataloging sources the organization considers to be valid sources for authority records. If this table is empty, any imported authority record with any code in tag 040 for is considered to come from a preferred cataloging source ID.	System, Library, Branch
Bibliographic Tape to Scan/Overlay	Specifies tags to retain when an existing bibliographic record ID is overlaid with a new one. It is also used to specify tags to delete from incoming new bibliographic records whether or not the incoming records are duplicates of existing records.	System, Library, Branch



Policy/Database Tables - DO NOT DELETE



- Many of these tables do not allow you to delete, however, if they do, DO NOT delete any code that is still being used
 - Especially if using SQL



Maintaining a Clean Database

- Does your system contain codes or settings so old that no one remembers why?
- Have you added codes as needed, when needed?
- Do you have codes that are similar, or not used anymore?
- Do you have expired patron records hanging out?
- Are you having problems getting the metrics needed for reporting?
- Are items circulating as expected?

Technical Services

- SA Tasks
 - Fiscal Year Rollover
 - Cataloging Record Purge
- Codes/Templates Cataloging
- Codes/Templates Acquisitions/Serials
- Settings Cataloging
- Settings Acquisitions/Serials


Task - Fiscal Year Rollover

This utility provides the ability to easily transition from the current fiscal year to a new fiscal year

- It will automatically generate a new fiscal year structure based on the previous year
- It will close the current fiscal year for any orders placed after the utility is run
- It will update the fiscal year and funds associated with:
 - Pending Purchase Order Line Item Segments
 - Pending Purchase Order Header Charges
 - Open Selection List Line Item Segments
 - Purchase Order Templates
 - And More...



Task – Purge Cataloging Records

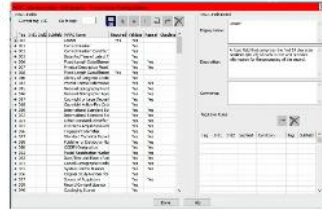
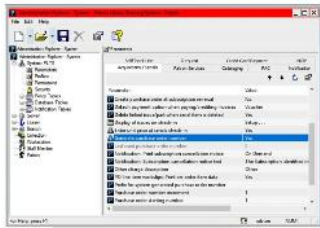


- This is used if you retain deleted authority/bib/item records
- Can schedule it to run after you run your reports
- Can choose a specific record set of deleted records.



Technical Services Settings to Review

- Profiles and Parameters Cataloging
 - MARC Validation Table
 - Subfield 9 Utility



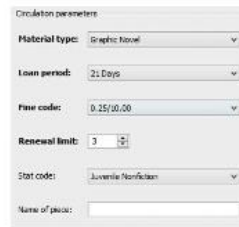
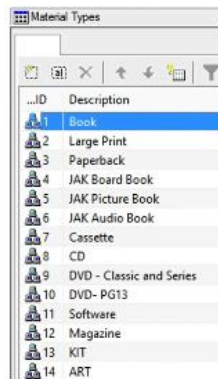
- Profiles and Parameters Acquisitions/Serials
 - Generate PO
 - EDI Invoice Defaults



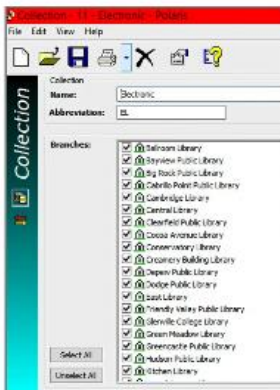
#IUG2021

Codes/Templates Cataloging – Material Types

- Policy Table – Material Types
- Standard way to identify physical items
- Created at the System Level
- Determines Loan Limits
- Determines Hold Limits



Codes/Templates Cataloging – Collections



- Are there collections you aren't using?
- New collections to add
- Hide collections from specific branches



Codes/Templates Cataloging – Item Stat Codes

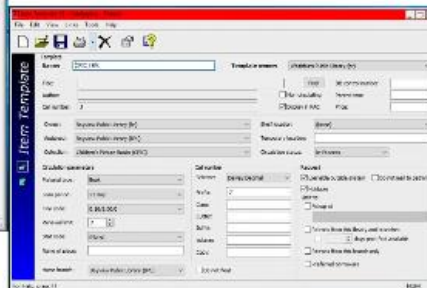
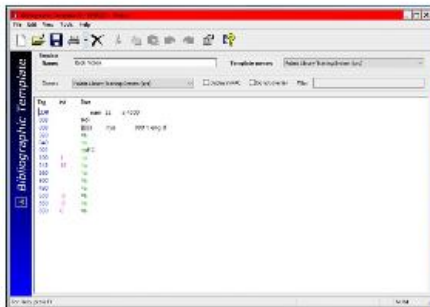
- A way to group items separately from collections
- Primarily used for reporting
- Unique to the individual branches
 - Created at the branch level only

Item Statistical Class Codes

ID	Organization	Description
1	Stowell	Fiction
2	Stowell	Gentle Reads
3	Stowell	Mystery
4	Stowell	Romance
5	Stowell	Science Fiction
6	Stowell	Thrillers
7	Stowell	Western
8	Stowell	Nonfiction
9	Stowell	Reference
10	Stowell	Genealogy
11	Stowell	Juvenile Fiction
12	Stowell	Juvenile Nonfiction
13	Stowell	Young Adult - Fiction
14	Stowell	Young Adult - Nonfiction

Codes/Templates Cataloging – Bib & Item Templates

- These templates help create bib and item records quickly and correctly



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Codes/Templates Cataloging – Import Profiles

- These are the rules for how records get into Polaris

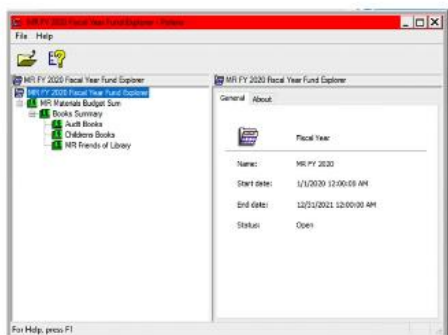
Import Profiles

Profile Name	Description	Creator
IX: Acquisitions Bib		relston
IX: Enriched IIS Orders		relston
MR ACQ Bib		relston
MR Bibs and Transfer Order Bib		relston
MR Bibs with Clans		relston
MR Full MARC records 2		relston
MR Full MARC records good		relston
MR Enriched IIS Orders		relston
Supplier Full MARC		relston

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Codes/Templates Acquisitions/Serials – Funds/Structure

- At FY Rollover/End of fiscal year, is a great time to check your fund structure
- Add new Funds
- Delete unneeded funds

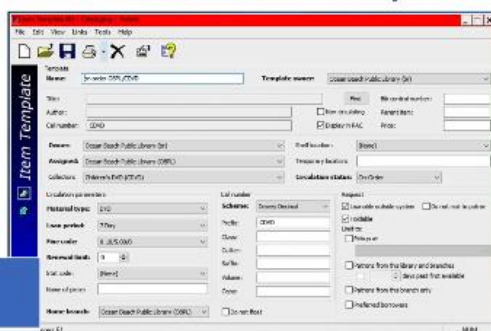


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Codes/Templates Acquisitions/Serials – On Order Bib/Item Templates

- Item records are generated when the PO is released
- The template name must begin with "on order" or "on-order"
- Create a template for every branch, collection, material type combination that is ordered

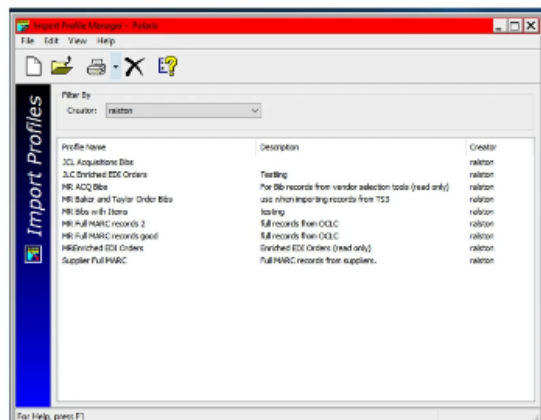


P.O. Line Item	On Order Item Templates
Destination	Assigned Branch
Material Type	Type of Material
Collection	Collection

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Codes/Templates Acquisitions/Serials – Import Profiles



- Differ from Cataloging imports
- Might have different profiles for different suppliers

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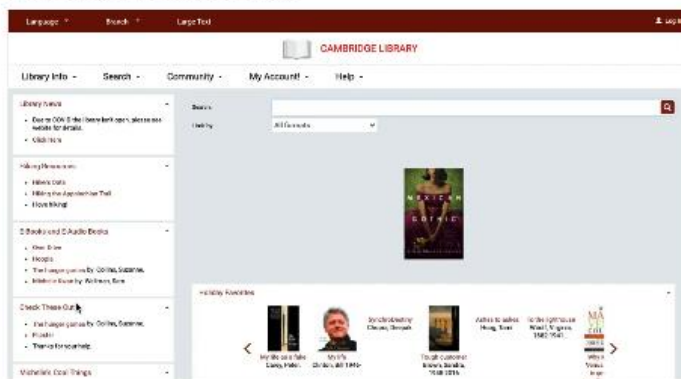


Patron/Circulation

- SA Tasks
 - PAC Review
- Settings Patrons
- Settings Circulation
- Codes Patrons
 - Patron Codes
 - Patron Stat Codes
- Codes/Templates Circulation
 - ILL item template

Task – PAC Review

- Have there been new features added (and you've upgraded) that could benefit your patrons?
- Check any Dashboard or Resource Links



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Task – Oversee Patron Record Clean Up

- Why is it good to clean up expired patrons?
 - Excessive and/or inaccurate data
 - Skewing reports based on percentage
 - The library has 100 patrons, but only 50 out of 100 use the library "regularly". In other words 50% of library patrons use the library regularly. However, 25 of the 100 have not used the library in over 7 years. Deleting the 25 patrons will lower the total patron count down to 75. While at the same time increasing the percentage of regularly library users. With 50 out of 75 patrons, or 66%, use the library regularly.
- Automate the process:
 - – Parameters > Patron Services > Patron Delete Options



Tasks – Postal Code Table

Postal Codes Table Filter

Row counts
Unfiltered: 30050
Filtered: 30057

Countries to include
☒ USA
☐ Canada

States / Provinces to include
IL
Address
AIC
AIC

Country
City
Postal Code

Postal Codes

City	State	Country	Country	Postal Code
MOUNT PROSPECT	IL	COOK	USA	60056
MT PROSPECT	IL	COOK	USA	60056

Apply Filter Cancel Help

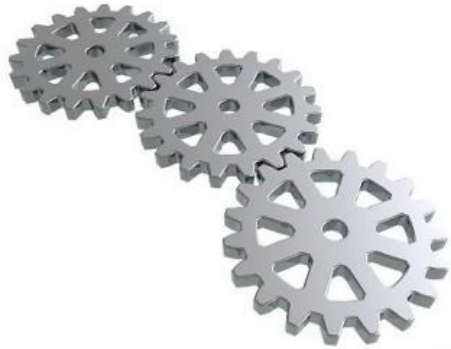
- Search and find if you have any postal code mistakes
- Allows you to easily replace the correct spelling in the incorrect records.



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Patron Services/Circulation Settings to Review

- Settings Patrons
 - Receipt Options
 - As needed if policy changes
- Settings Circulation
 - Holds Options
 - Floating Settings



Codes/Templates Patrons – Patron Codes

- This is the primary way to define patrons
 - Allows categorizing of patrons
 - Sets permissions of library use
 - Loan limits
 - Fine amounts



Codes/Templates Patrons – Patron Stat Codes

Organization	Description
Ocean Beach Public Library	Undergraduate
Ocean Beach Public Library	Graduate
Ocean Beach Public Library	Graduate assistant
Ocean Beach Public Library	Law
Ocean Beach Public Library	In county
Ocean Beach Public Library	Out of county
Ocean Beach Public Library	Other

- Another way to categorize
- Used for reports
 - Example : Patron circulation by statistical class
- Unique to the individual library branches
 - Branch level only
- Possible to require the field
 - Parameters > Patron Services > Patron Registration Options



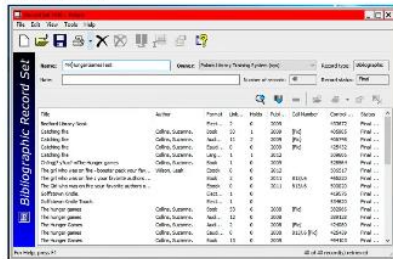
Codes/Templates Circulation – ILL Item Template

- Each branch/library must have an ILL template named 'ill item' and the template must be owned by the branch level




Record Sets - DO NOT

- Do not use punctuation in record set name
- Do not have over 50 characters
 - If using bulk change, you may receive an error



Bulk Deleting? DO NOT

- Do not bulk delete large amounts of records during normal business hours.
 - Over 100 records.
 - Best to do before open or after closing.
- 



As Needed Tasks

- Cataloging record purge
- Patron record purge
- Serials Pub Patterns

Monthly/Quarterly Tasks

- Review Permissions
- Review Templates
- New PAC Features Implemented

Once A Year Tasks

- Workstations
- Staff members
- SQL Jobs – Year End Circ Count Rollover
- Simply Reports
- Fiscal Year Rollover
- Codes Review
 - Postal Code Table
- PAC Review
- Patron Record Cleanup

Although she recommends removing workstations and staff members this is not a standard followed by most locations because that information is stored in various tables

Q&A

In 2017 (?), we did similar to Trevor and moved from assigning and copying permissions to users to starting over and assigning them all by groups. And getting rid of generic logins, except for some low-level permissions. I'm not sure if this is what you meant (it's not a full list of permissions), but here are some docs I use to explain the permission groups to library staff. https://wccls76-my.sharepoint.com/:w:/g/personal/amy_wccls_org/EYxMOxDgvgJEk7Ceu6T1pCkBORqIlhpKN39U3NWB0bgMvA?e=BGhbPk

Do not delete Anonymous OPAC

While Michelle says to remove staff and workstation it isn't a good practice as SQL stores all the info re: staff and workstation using assigned numerical info not attached to a name (if they are deleted)

SSL Certificate

What you need to know about SSL
certificates and your Innovative
systems

Melissa Black

Why Are SSL Certificates Needed

Help to protect identity and data

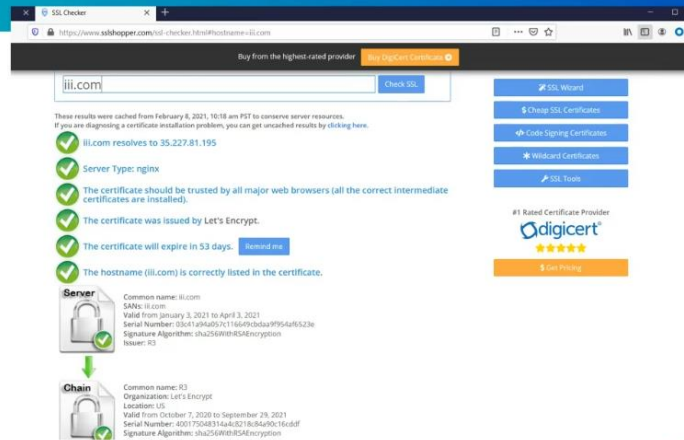
May be required by vendors

Improve search engine ranking

Alleviates consumer peace of mind

How to determine whether your certificate needs to be renewed

Visit sslshopper.com and enter your hostname



These results were cached from February 8, 2021, 10:18 am PST to conserve server resources. If you are diagnosing a certificate installation problem, you can get uncached results by clicking here.

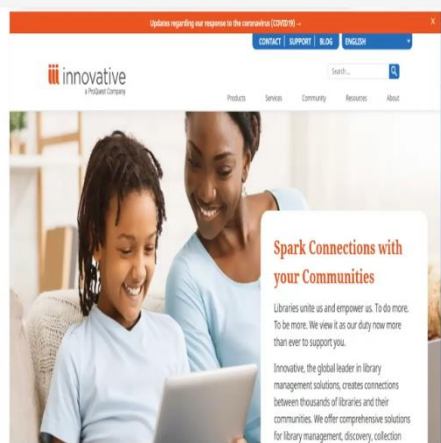
- ✓ jll.com resolves to 35.227.81.195
- ✓ Server Type: nginx
- ✓ The certificate should be trusted by all major web browsers (all the correct intermediate certificates are installed).
- ✓ The certificate was issued by Let's Encrypt.
- ✓ The certificate will expire in 53 days. [Renewal link](#)
- ✓ The hostname (jll.com) is correctly listed in the certificate.

Server

Common name: jll.com
 SANs: jll.com
 Valid from: January 3, 2021 to April 3, 2021
 Serial Number: 03c41494d91c116d9fcb4a995d4f6523e
 Signature Algorithm: sha256WithRSAEncryption
 Issuer: R3

Chain

Common name: R3
 Organization: Let's Encrypt
 Location: US
 Valid from: October 7, 2020 to September 29, 2021
 Serial Number: 400775048314a4d218c0a40c16c4d4f
 Signature Algorithm: sha256WithRSAEncryption



OR

- 1) go to your site in a browser
- 2) Click lock in the upper left-hand corner
- 3) More Info >view Certificate

Certificate

www.jll.com	R3	ISRG Root X1
Subject Name		
Common Name	www.jll.com	
Issuer Name		
Country	US	
Organization	Let's Encrypt	
Common Name	R3	
Validity		
Not Before	12/15/2020, 6:26:38 PM (Pacific Standard Time)	
Not After	3/15/2021, 7:26:38 PM (Pacific Standard Time)	
Subject Alt Names		
DNS Name	www.jll.com	
Display Name Info		

If needs renewal- get cert from vendor and contact JLL to apply it

Generate a CSR with server information

Submit to cert vendor

Get the certificates

Provide them to JLL for installation

Email troubleshooting

Introductory E-Mail Troubleshooting For Polaris ILS

Wayne DeCarr

- Knowing the basics of e-mail configuration allows you to quickly resolve mail issues or provide support with helpful troubleshooting details.
- By the end of this presentation, you will know where to check various e-mail logs, how to test e-mail and the basics of e-mail configuration on the Windows Server environment.

Agenda

- Configuration
 - SMTP Service
 - IIS 6.0
 - Polaris Client
- Logging
 - PolEmailManager
 - SMTP
 - InetPub
- Testing
 - Telnet
 - SMTP Tester
- Examples

May be hosted on separate server

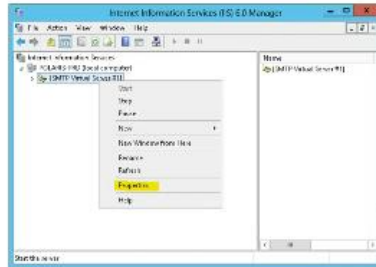
Configuration – SMTP Service

- SMTP Stands for Simple Mail Transfer Protocol
- To ensure e-mail is able to send, the SMTP service needs to be enabled on the server hosting the service.
 - Navigate to Services > Simple Mail Transfer Protocol (SMTP) and ensure the service is started and set to start automatically.
 - If set to manual, set to automatic

Simple Mail Transfer Protocol (SMTP)	Transports electronic mail across the net...	Started	Automatic	Local System
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Configuration – IIS 6.0

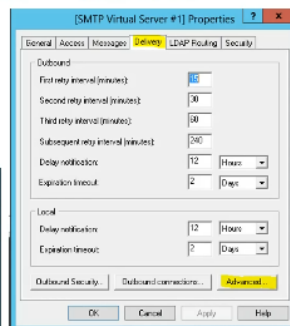
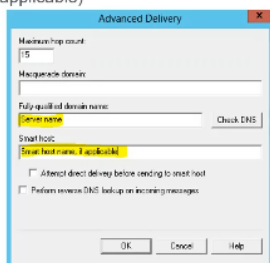
- Whether a server is sending mail directly or relaying to an external server, it will utilize IIS 6.0
 - Administrative Tools > Internet Information Services (IIS) 6.0 Manager
- Right-Click on SMTP Virtual Server #1 and select Properties



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Configuration – IIS 6.0

- Navigate to the Delivery Tab
 - Select Advanced
- Advanced Delivery
 - Add FQDN name of current server
 - Add SmartHost IP between brackets (if applicable)

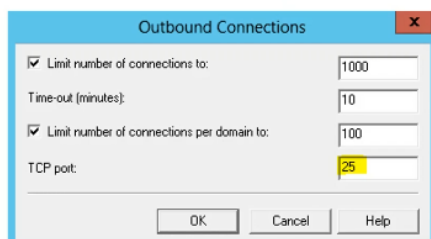


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If using office 365 this is where it is designated

Configuration – IIS 6.0

- Click Outbound Connections
 - TCP Port shows the port SMTP is utilizing, this is the port you would want to test via telnet

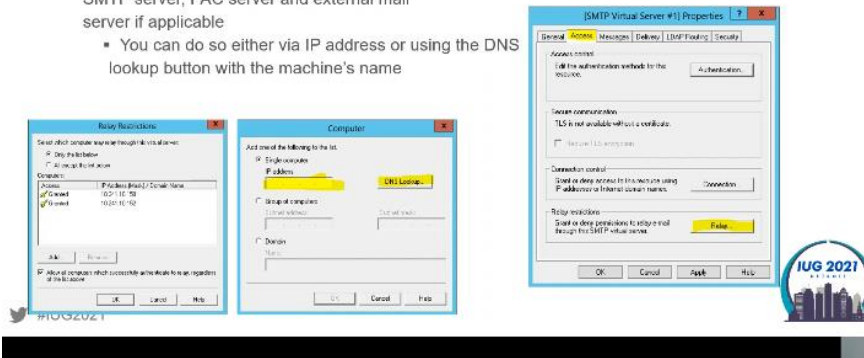


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May use port 465 – depends on external host

Configuration – IIS 6.0

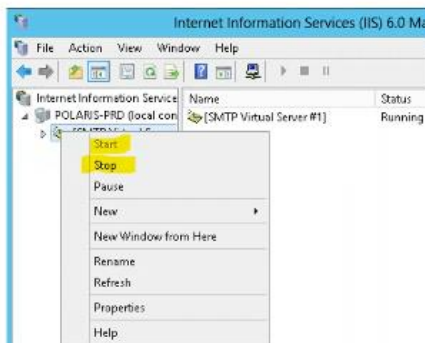
- Navigate to the Access tab and select Relay
- Click Add and add IP addresses for your SMTP server, PAC server and external mail server if applicable
 - You can do so either via IP address or using the DNS lookup button with the machine's name



May need to add PAC. Phone server or PROD

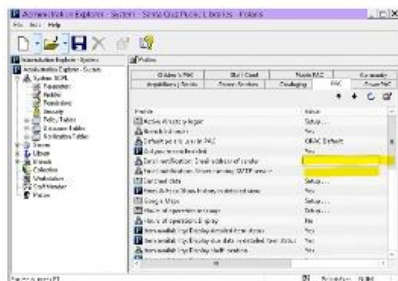
Configuration – IIS 6.0

- Stop and start SMTP to apply changes



Configuration – Polaris Client

- Log into Polaris and navigate to Administration > System > Profiles > PAC
 - Ensure the Email address of sender and Server running SMTP service are filled in
 - If SMTP service has an external server name, ensure you can telnet to it



Office 365 will not work because cannot authenticate

Advanced Configuration

- In the instance you're using a web based external SmarHost, e.g. Gmail or Office 365, additional configurations will be necessary.
- If you submit a ticket, a Support Engineer can assist you in configuration.

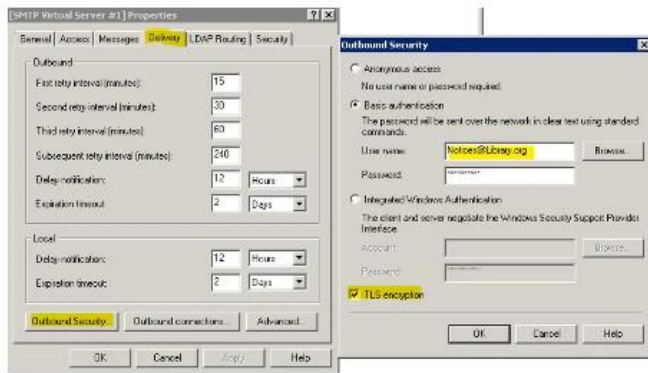
Advanced Configuration

- Some things you'll likely need to configure:
 - Gmail/Office365 typically utilize port 587 and not 25, this port is used for secure mail. You'll need to ensure 587 is open on your firewall (you can test via Telnet) and Outbound Connections is pointing to port 587
 - You'll need to create an account in Office365/Gmail that mirrors the sending account designated in SA.

Advanced Configuration

- The account you created in your web mail will then we added to Delivery > Outbound Security
 - Select Basic authentication
 - Add User name and password, then check the TLS encryption box and click OK

Advanced Configuration



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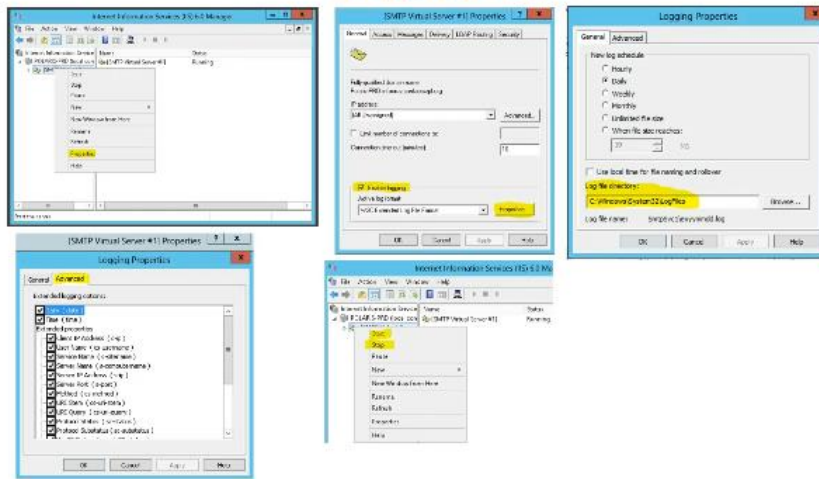
Logging - PolEmailManager

- The PolEmailManager logs are the output from the Notices Processing Job
 - Located at C:\ProgramData\Polaris\X.X\Logs\POLEMAILMANAGER
- This will whether mail is sending via SQL. It will also indicate whether SQL was able to communicate with the Reporting Server properly or the SMTP server properly
 - Note: even if logs do not indicate an error, mail may not be sending for a variety of other reasons.

Logging - SMTP

- The SMTP logs are the output from any E-mail being sent from the server, they will indicate whether mail is being successfully sent from the server and, if not, whether it is being blacklisted or otherwise unable to send.
 - C:\Windows\System32\LogFiles\SMTPSVC1 (this location can be changed)
 - Logging can be enabled by navigating to IIS 6.0 > SMTP Virtual Server > Enable Logging > Properties > Advanced (select all). This also where you find the location of the SMTP log files.
 - Right Click on Virtual Mail Server, stop and restart.

Logging - SMTP



Logging - Inetpub

- In Inetpub, you can see whether mail is leaving the outgoing queue or getting stuck and sent to the Badmail folder
 - C:\inetpub\mailroot
- By navigating to C:\inetpub\mailroot\Queue, you can see whether mail is entering/leaving the queue. If it isn't, mail may be sending directly to the exchange server
- By navigating to C:\inetpub\mailroot\Badmail, you'll see mail that failed to send altogether and is marked as bad (no longer being processed by the queue)
 - This is often useful for determining a timeline of when mail issues began occurring

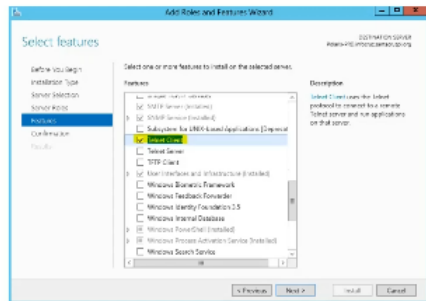


Testing - Telnet

- Using Telnet, you can determine if SMTP ports have been opened on the firewall.
 - SMTP Ports are usually 25 or 587
- To use Telnet, open a command prompt window and type telnet [mail server IP] 25 (or 587 if site is using it). If successful, this will open a subsequent command prompt window saying that it is listening on the selected port.
 - If it fails, you will receive: Connecting To [IP/server name]...Could not open connection to the host, on port 25: Connect failed

Testing - Telnet

- Telnet may need to be enabled on the machine you're using to test. To enable telnet, navigate to Control Panel > Programs and Features > Turn Windows Features on or off > Features > Telnet Client > Next > Install



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Testing – SMTP Tester

- The SMTP tester will give you a verbose error if mail is unable to send from the server.
- Contact your support representative and we can install the SMTP Tester if it's not installed.
- Launch SMTPTester.exe
 - Add the SMTP Server you're looking to test in the "SMTP Server" field, add the library's notification address as "From", your mail address at "To", Anything in the "Subject" line and a test message in the open field.
 - Click Send to test
 - If you do not receive the e-mail or receive an error message, SMTP is not working
 - If you receive the mail at your e-mail, SMTP is working



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Examples

- Bouncebacks (particularly in Hosted)
 - Sites need to ensure they have SMTP.iii.com in their SPF record
 - "v=spf1 ip4:x.x.x.x include:SMTP.iii.com -all"
- Password Expiration (for authenticating accounts)
 - Navigate to C:\Windows\System32\LogFile\SMTPSVC1
 - View a log in the affected date range, if a password has expired, the logs will indicate authentication failures
- Port Closures
 - Open Telnet via cmd line and attempt to telnet to the SMTP server on the port being used (as designated in IIS 6.0)
 - This could be 25, 465 or 587 (or something weird, in a very rare occasion)
- PolEmailManager is giving 'General Failure' errors
 - Typically, this would indicate the SMTP service isn't running on the server designated in SA
- Failure to Relay
 - In the SMTP logs, you may see errors like 'relay not allowed for <your SMTP server>', this typically means the relay field hasn't been filled with the appropriate IP information



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Weird Stuff!

- Wait, what port?
 - On a very rare occasion, a customer will decide to use a non-standard port. In one instance, they decided to use 26, whilst not knowing they were using a nonstandard port
- "Yeah, but it says SMTP"
 - A customer decided to try to use IIS 8.0 (e.g. IIS Proper, where websites reside)

SMTP Adjacent Stuff!

- There are a few issues that are SMTP Adjacent as well. Things that deal with E-Mail, but aren't caused by SMTP issues
 - In PolEmailManager, you may sometimes see 'permissions to MSSQLServer' errors where mail fails to send.
 - This is caused by inadequate permissions in SSRS, you'll need to add Browse Permissions to the account running SQL on the production server in SSRS
- Report Subscriptions may also fail to send for a few reasons (which would, on the surface appear to be e-mail based)
 - You'll want to first ensure you're able to create new subscriptions. Errors when attempting to do so indicate either the SMTP target is blank in Reporting Services Configuration Manager or missing permissions to the RSExec account



Sys Admin Forum

Who uses cookie acceptance – no-one yet (EU requirement)

Imbed images to show location in PAC/Where is it? Several years ago, Dennis Todd did an IUG presentation where he used item notes field to display and image / "map" using simple html.

we had a week-long emergency closure while staff were still working. We held on to email notices by converting the Branch to only print notices; letting them queue all week; and then when it came time to reopen curbside, Kelly Sobrino ran a script to update the notice method for all the queued notices for the branch to match the patron's preference. And then we set the branch notice method back to patron preference. It was a big help.

sql to find users with individually assigned permissions

```
select distinct pu2.Name
from Polaris.polaris.PermissionUsers pu
join polaris.polaris.PolarisUsers pu2
on pu2.PolarisUserID = pu.PolarisUserID
```

Here's our permission group breakdown that we use to help supervisor pick permissions for new users or to add.<https://wccls76->

my.sharepoint.com/:w:/g/personal/amy_wccs_org/EYxMOxDgvgJEk7Ceu6T1pCkBORqIlhpKN39U3NWB0bgMvA?e=SAIXgj

And more fun, here's a graphic example to explain to library staff how permission groups "stack" on each other.

<https://drive.google.com/file/d/1HtRQUD1N0RiRnKVwE8XqHRWgRNwFoWD1/view?usp=sharing>

We were trying to track down some import profile issues last year, and our solution ended up being to put in the template control number into the nonpublic note field of the import profile, and then look at the resulting item records. It may help you in the short term

You can add items from spreadsheet into item or patron record set now – build bib record set from item record set