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

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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/SaS 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

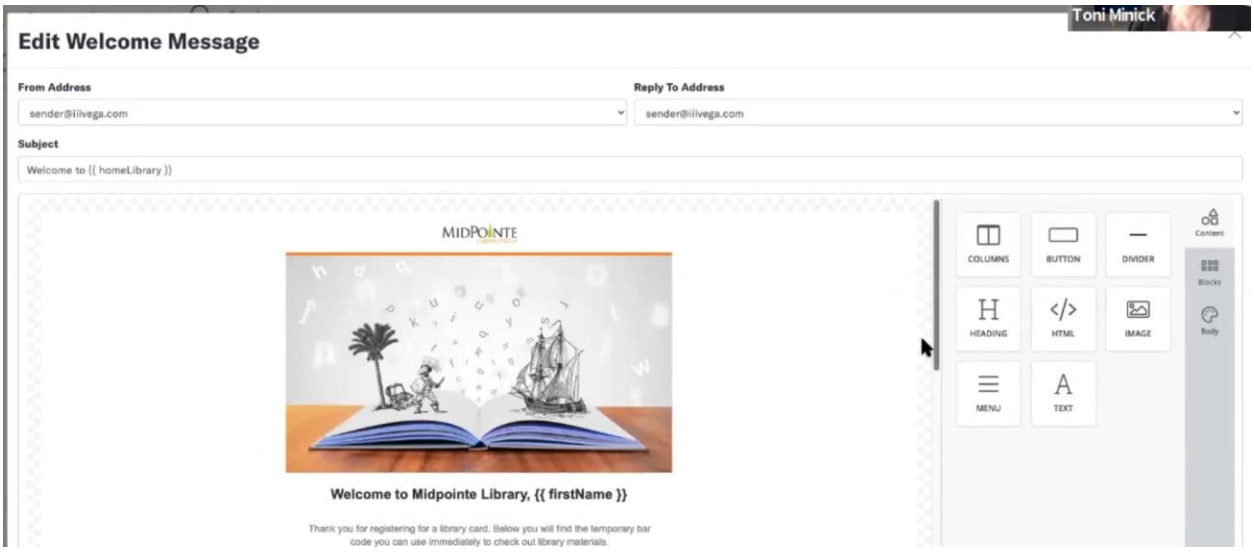
Discover (PAC) available now – coming soon: Interact (alexa app and notifications, automated chat if too complex sends to librarian), promote (donate option), program (view programs available,), analyze

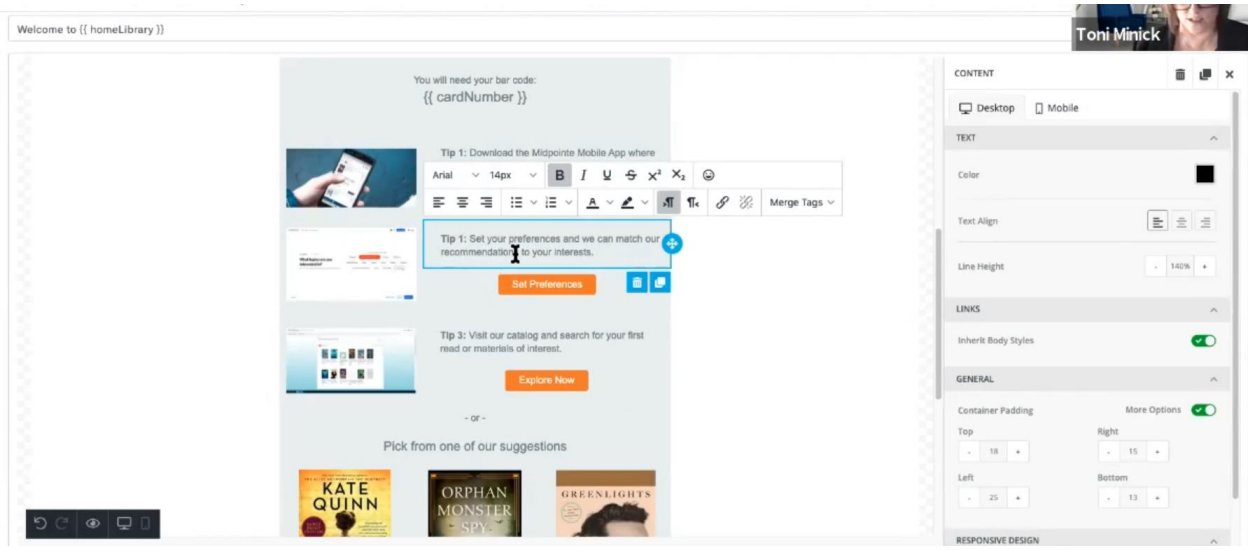
Difficult to integrate all the content to one location – Syndetics unbound included in Discover VEGA including metadata that's incorporated into context engine. If purchase interact and/or the other modules get Syndetics images. Available for Sierra now July for Polaris.

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

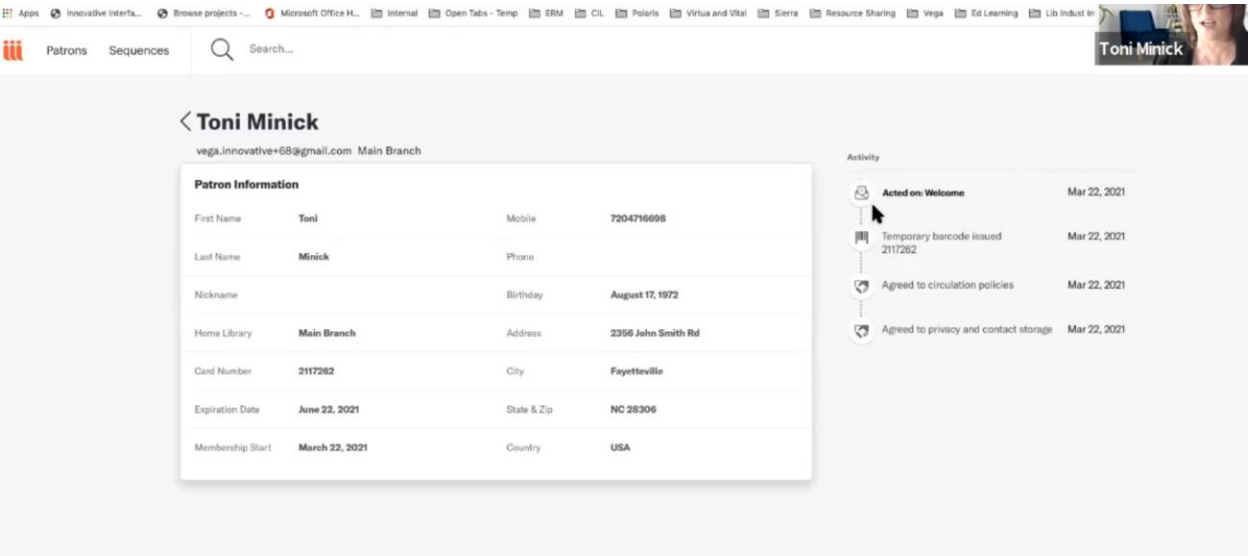
Vega universal messaging – one service delivers and receives msgs, add/remove channels – personalization, transactional, sequences, design, exceptions (beta demo below)

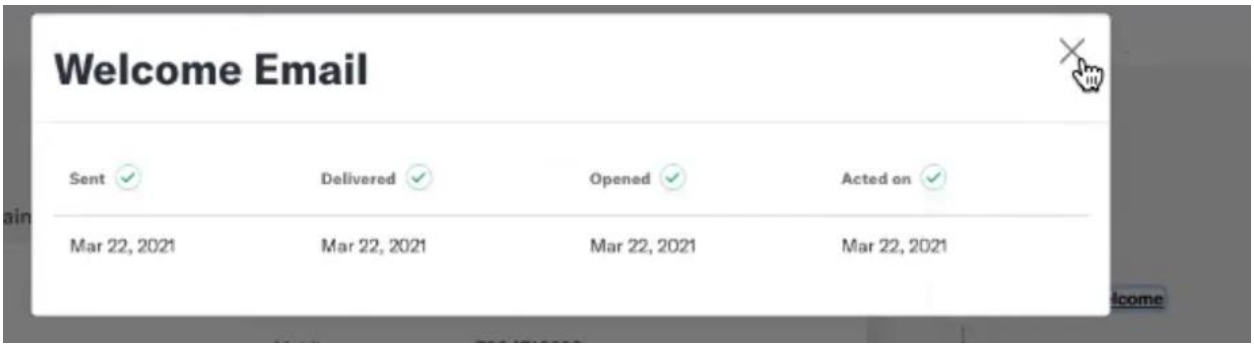
Sample journey – email registration drag and drop to edit





From staff perspective





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

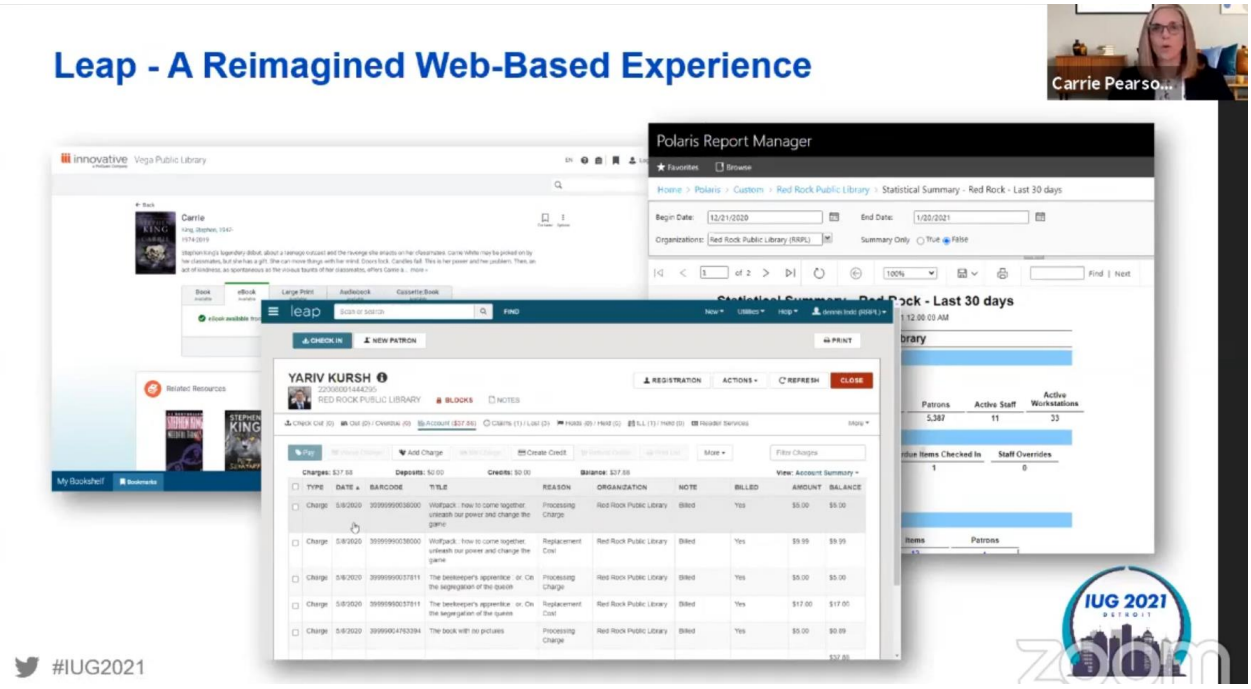
_____

Polaris – What's next

Carrie Pearson – Director New logo sales

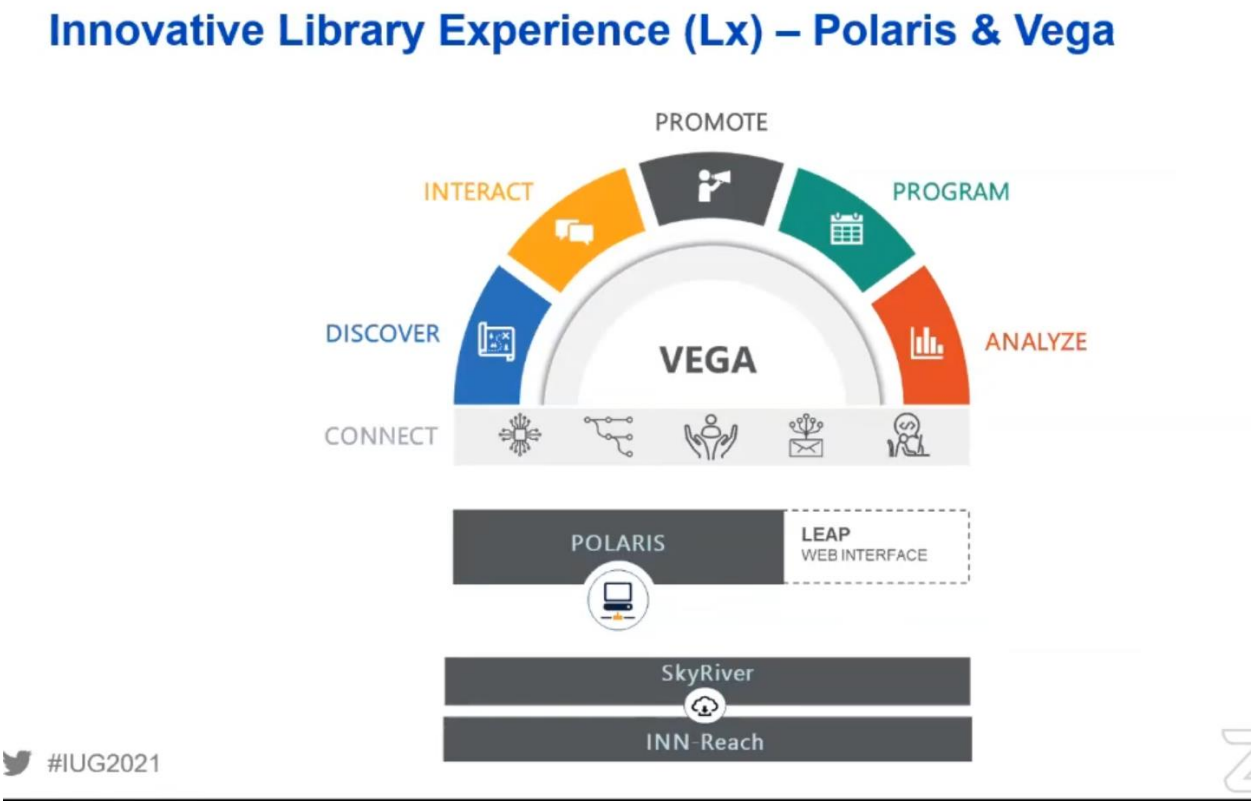
Samantha Quell sr team lead, Prod Mgmt – Polaris product mgr

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



70% of Polaris users using LEAP.

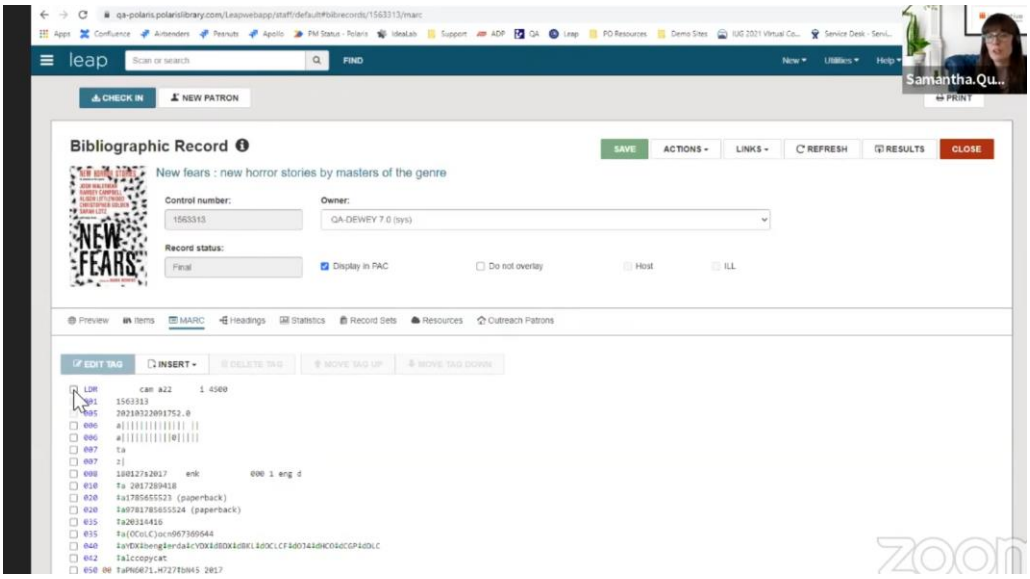
VEGA – add to ILS



2021 What's next

7 June

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



Bibliographic Record

SAVE ACTIO

New fears : new horror stories by masters of the genre

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

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LDR     cam a22     i 4500
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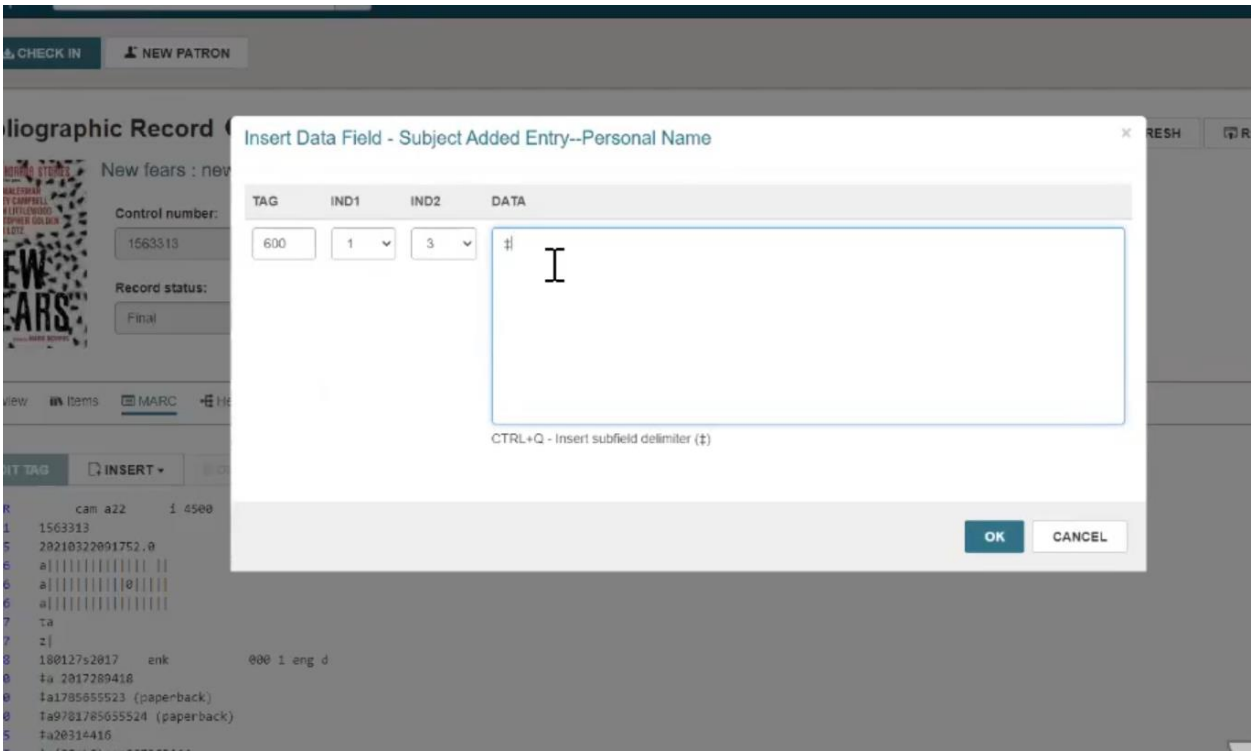
035     ‡a20314416
035     ‡a(OCoLC)ocn967369644
040     ‡aYDX‡beng‡erda‡cYDX‡dBDX‡dBKL‡dOCLCF‡dOJ4‡dHCO‡dCGP‡dDLC
042     ‡alccopycat
```

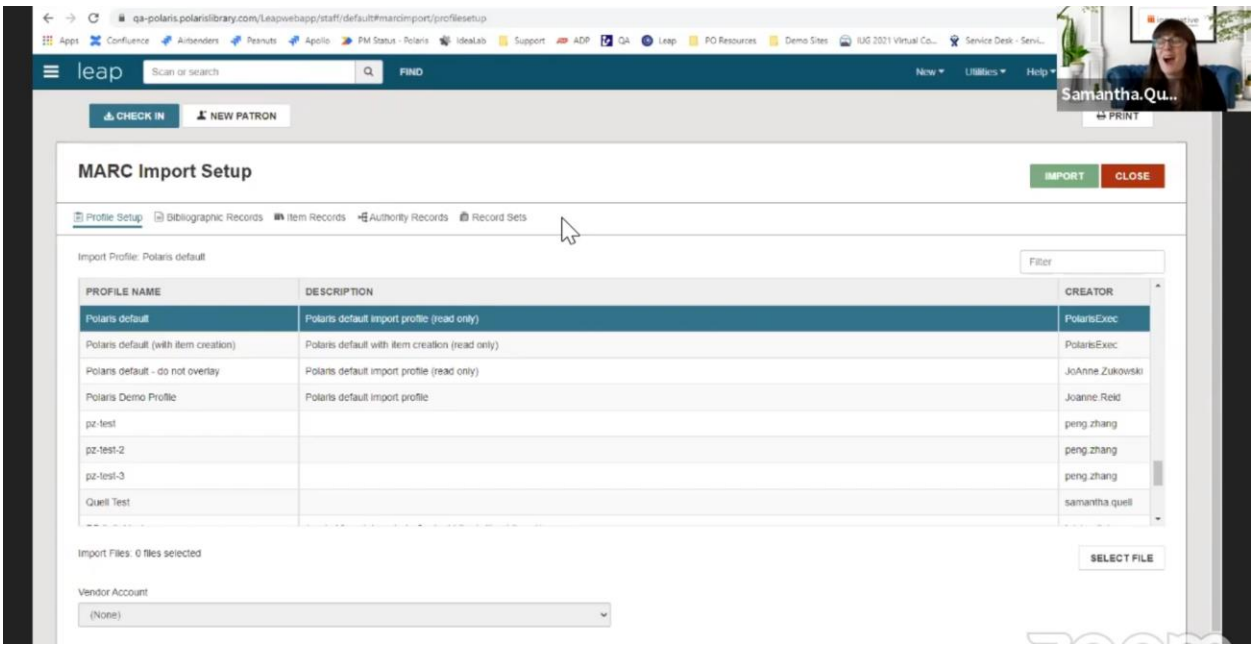
008--BOOKS (LDR/06 value a with LDR/07 values a, c, d, m and LDR/06 value t)

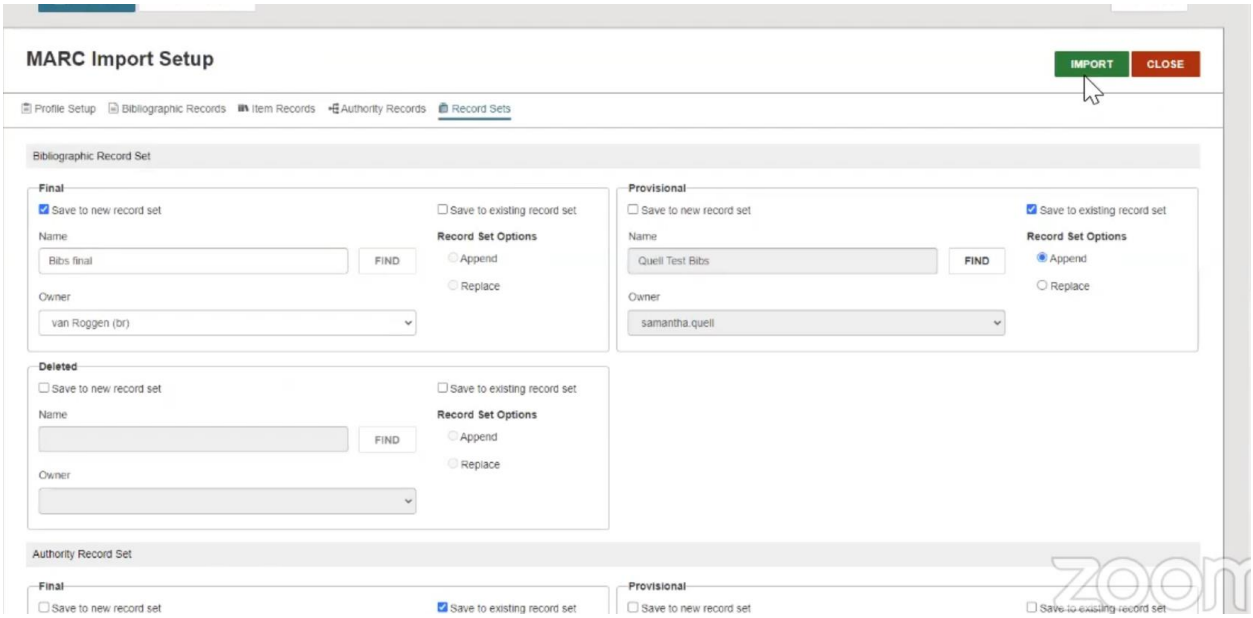
Entry date (00-05)	180127	Nature of contents (24-27)	- No specified nature of conten; 2 - Offprints; 5 - Calendars; 6 - Comics/graphic novels
Type of date (06)	s - Single known date/probai		
Date 1 (07-10)	2017		
Date 2 (11-14)		Government pub (28)	- Not a government publicati
Place of pub (15-17)	enk - England	Conference pub (29)	0 - Not a conference publica
Illustrations (18-21)	- No illustrations; a - Illustrations; b - Maps; c - Portraits	Festschrift (30)	0 - Not a festschrift
		Index (31)	0 - No index
		Literary form (33)	1 - Fiction (not further specif
Audience (22)	- Unknown or not specified	Biography (34)	- No biographical material

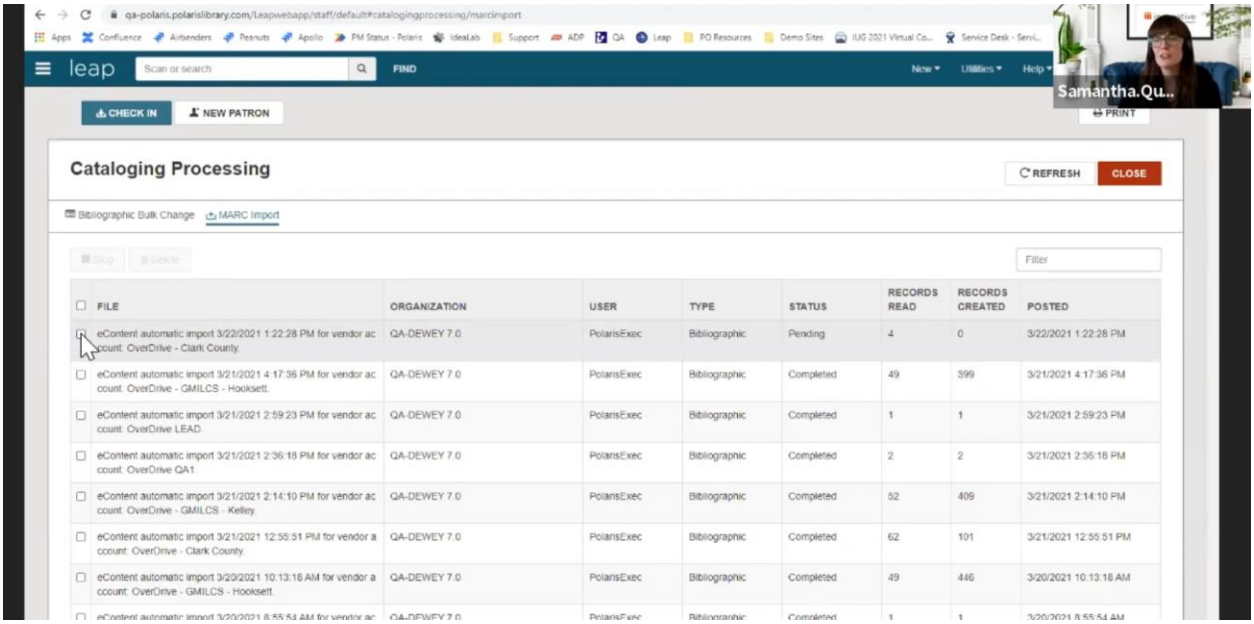
OK | CANCEL



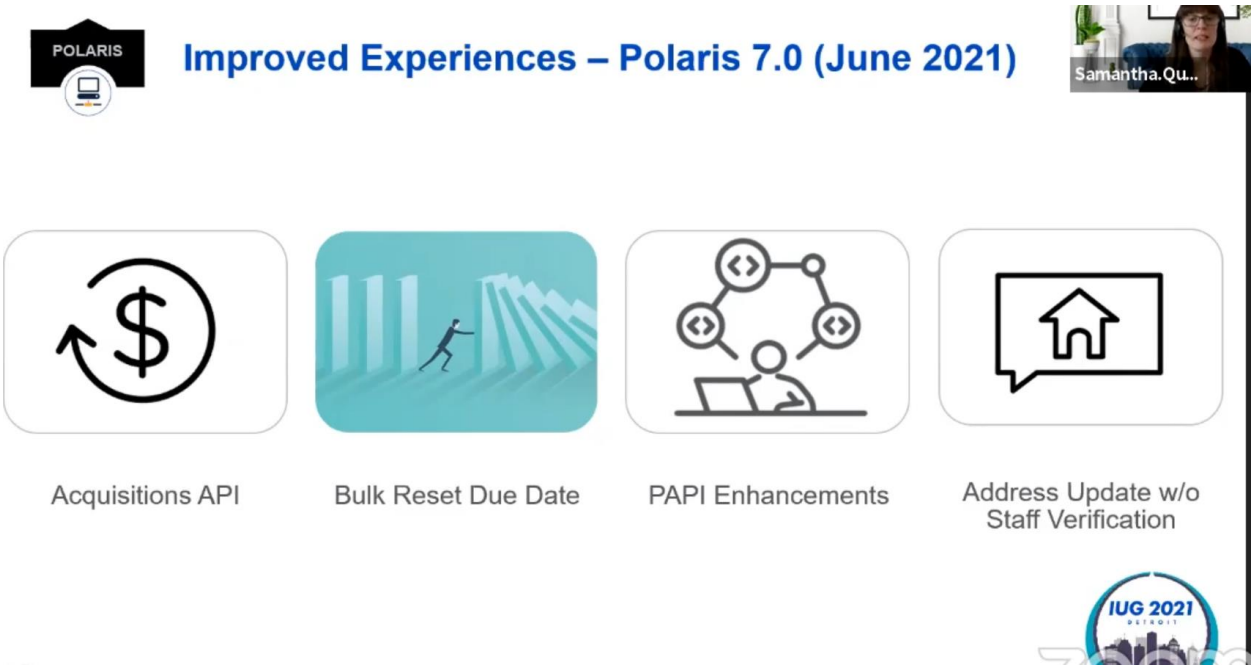
Starting LEAP with express import – some filters to search, find files on desktop and import from there,







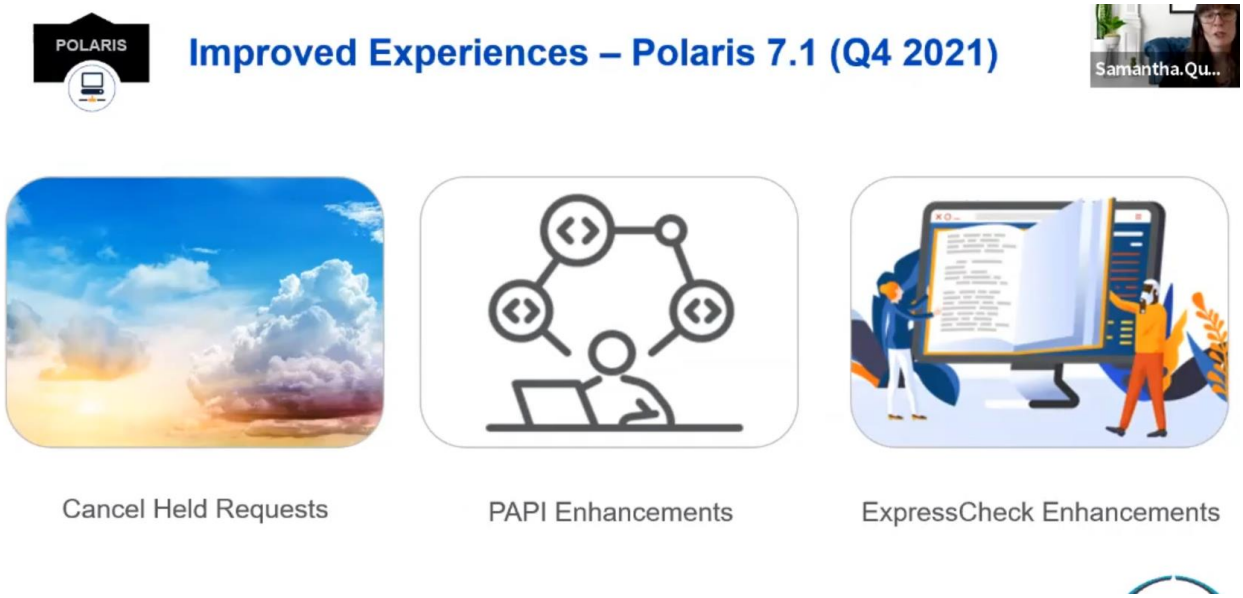
Improved Experiences - Acq API working with B&T TS 360 click on submit in cart – auto generates PO in Polaris without intervention – will expand to other vendors after functional. Bulk Reset due date from record set; PAPI enhancements – allow/cancel ILL req, detail system block info, user defined field 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

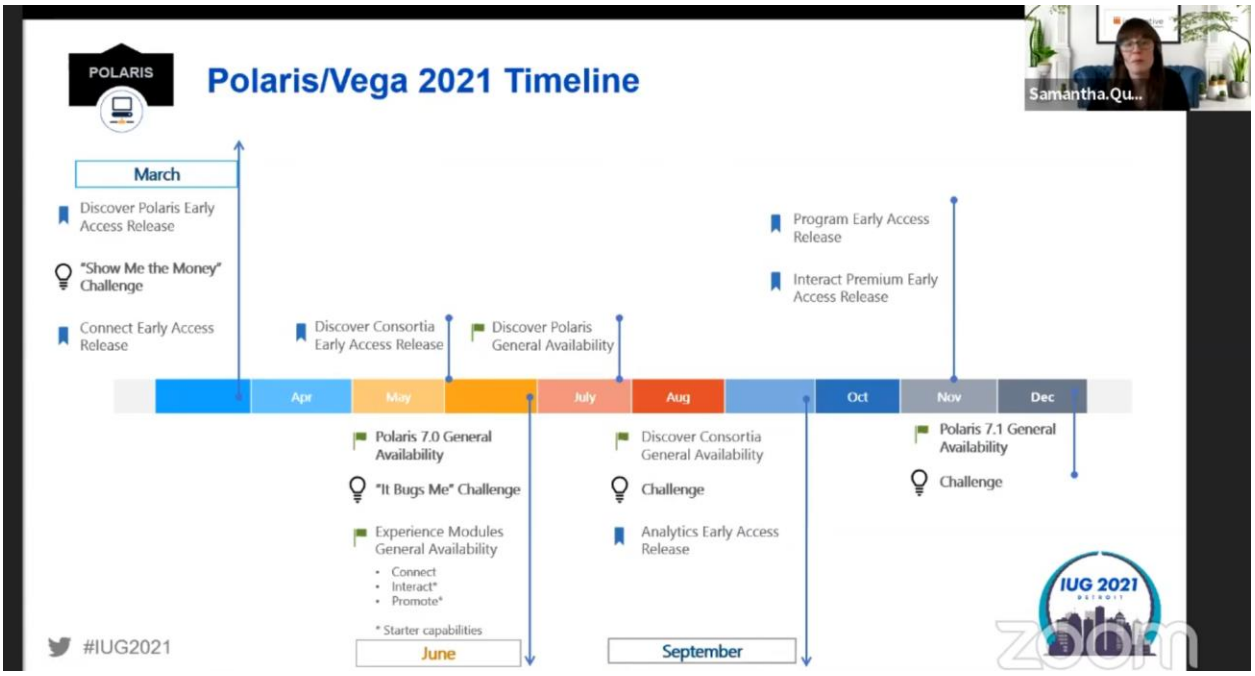


7.1 (Q4 2021)

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



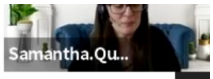


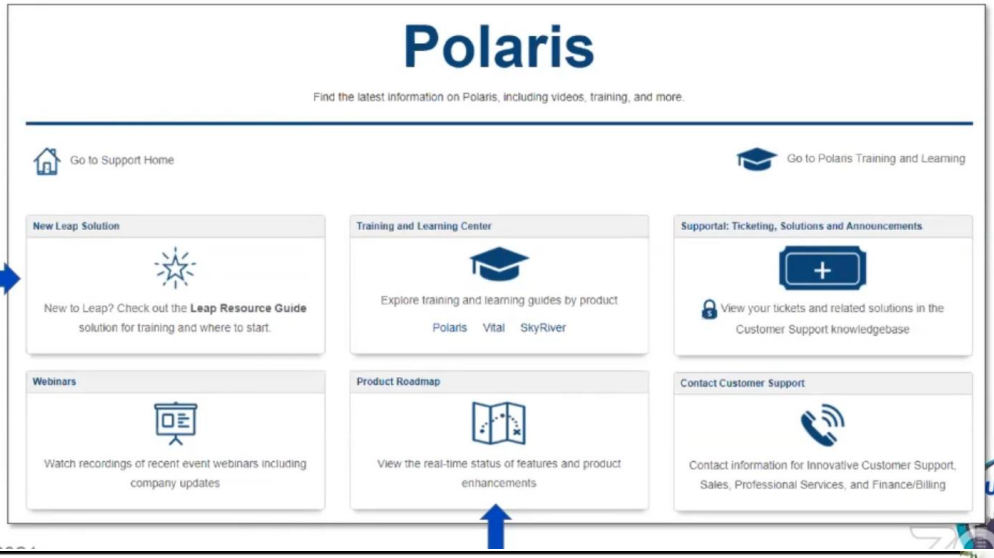
Show me the money challenge – support preferred ISBN/UPC (eliminate red excl point add something to 970?) and bulk change POLI seg fields – fund code and selection specifically

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)

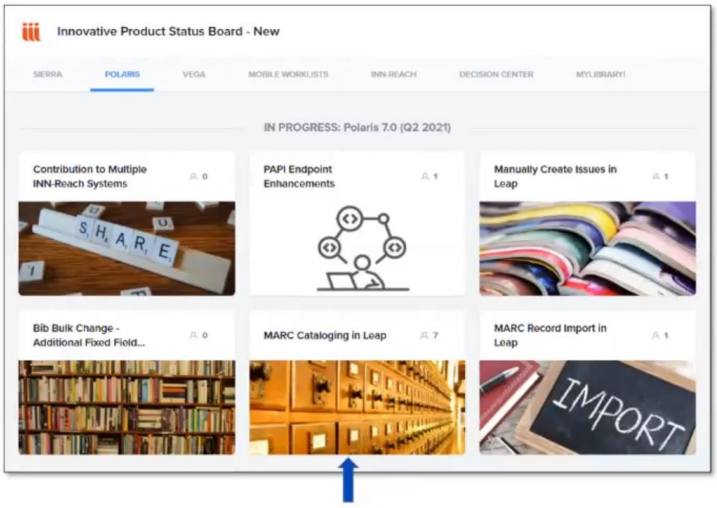
Resources-

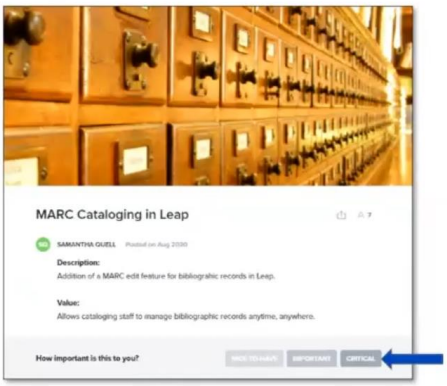
Resource – Support.iii.com





Resource – Public Product Roadmaps





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

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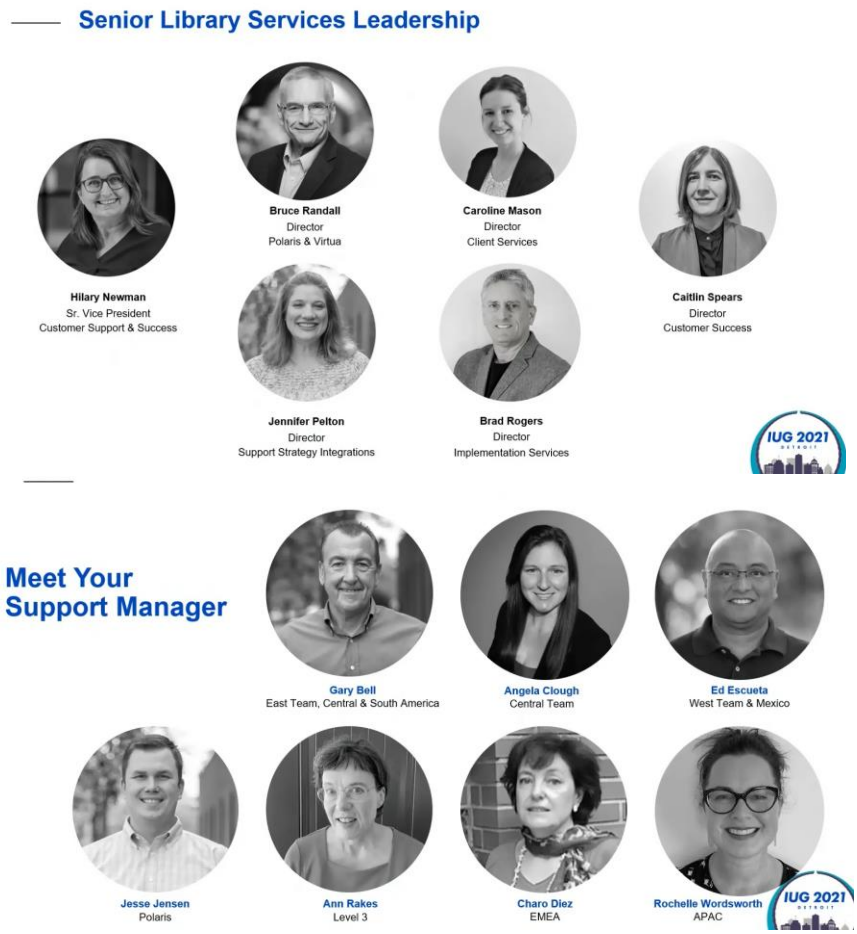
Customer Experience – New and Ahead (Hilary Newman)



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 Guivernau
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

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)

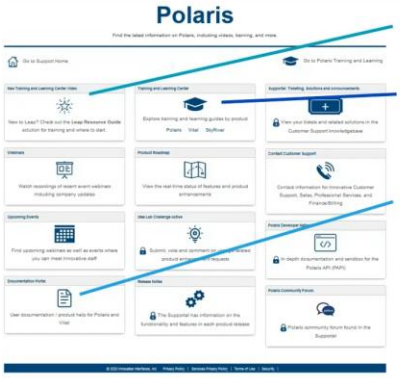
Take advantage of the most modern public library ILS and web client available!

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

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)

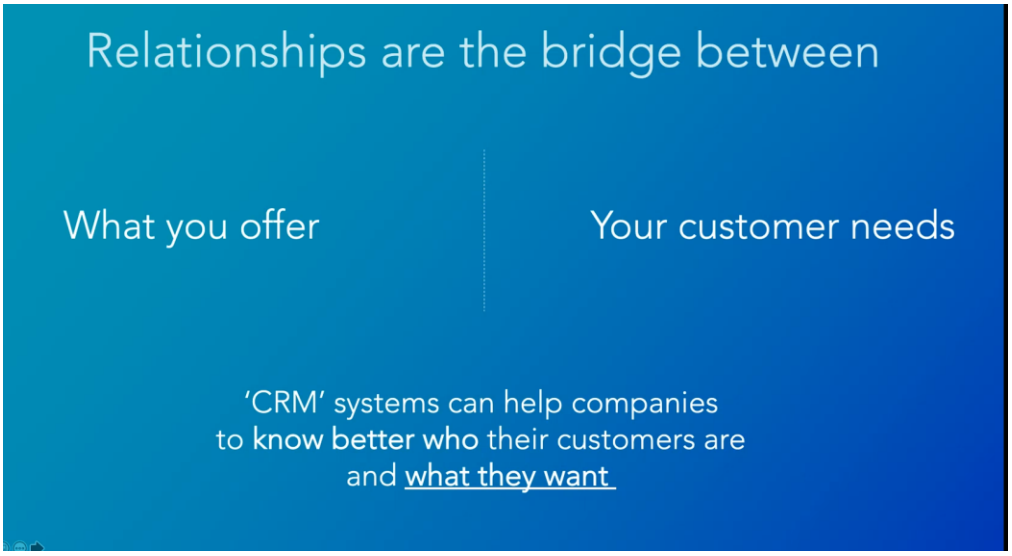
Is customer success paid or free – free

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

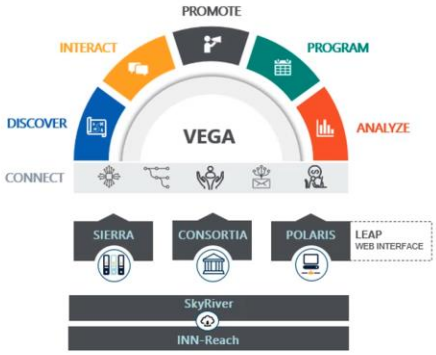
Physical library has to shift to digital (PAC). If PAC isn't as easy, convenient or personalized will go somewhere else. Libraries need to move to discovery led model to take patrons through flywheel.

'CRM' and Engagement Management Solutions Can

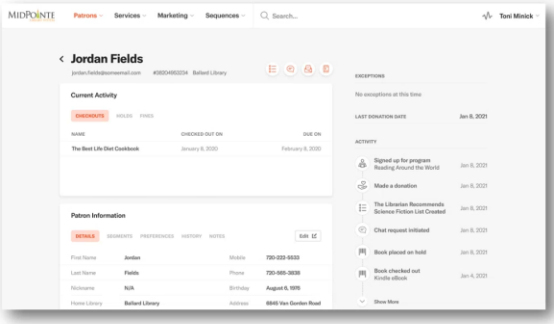
1. Better anticipate needs and maintain great relationships
2. Better, speedier communications and service
3. Better segmentation and personalization
4. Better protection of data privacy
5. Better analytics

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 anonomized
5. Capture and tie engagement data together with anonomized patron data, track flywheel segments, track roadblocks and weak areas, id where trends are going

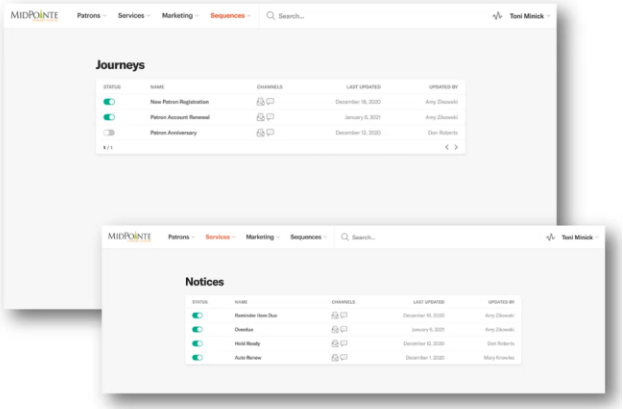
Vega: The Library Experience Platform



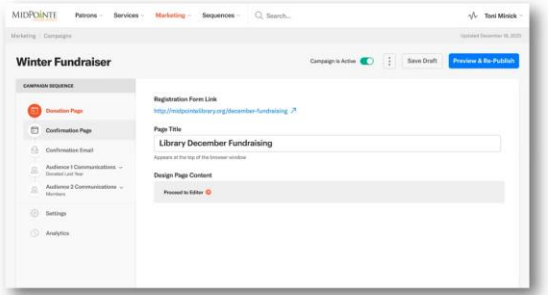
Extended Patron Record with Activity Stream



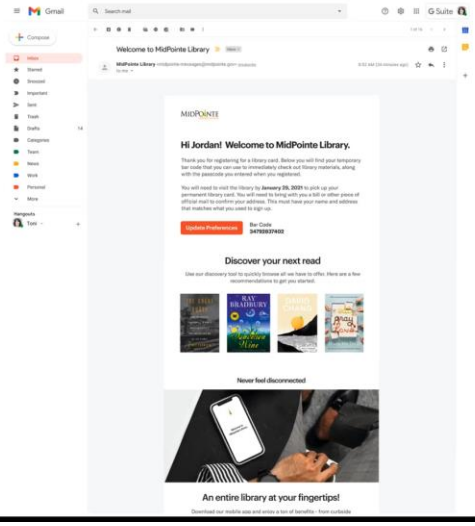
Automated Journeys & Notices



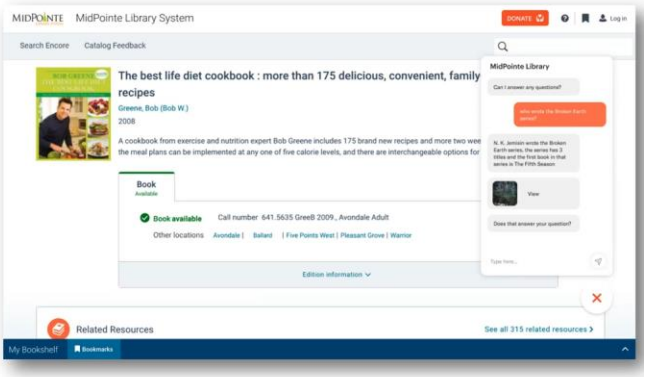
Easy to Create Campaigns



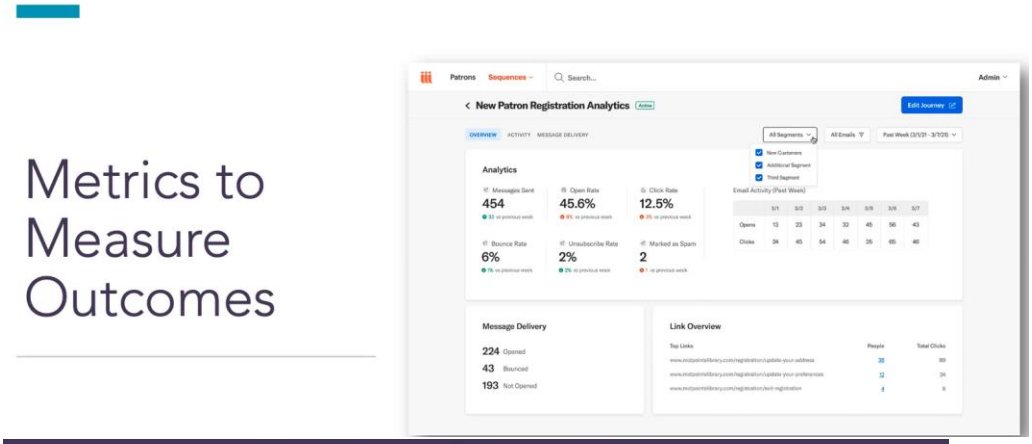
Beautiful Emails & Marketing Automation

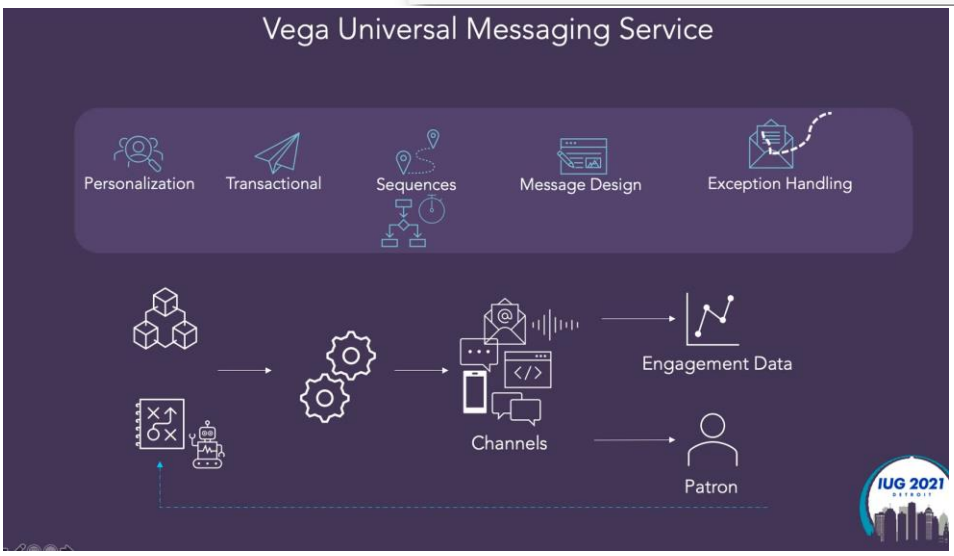


Chatbot & 1:1 Chat

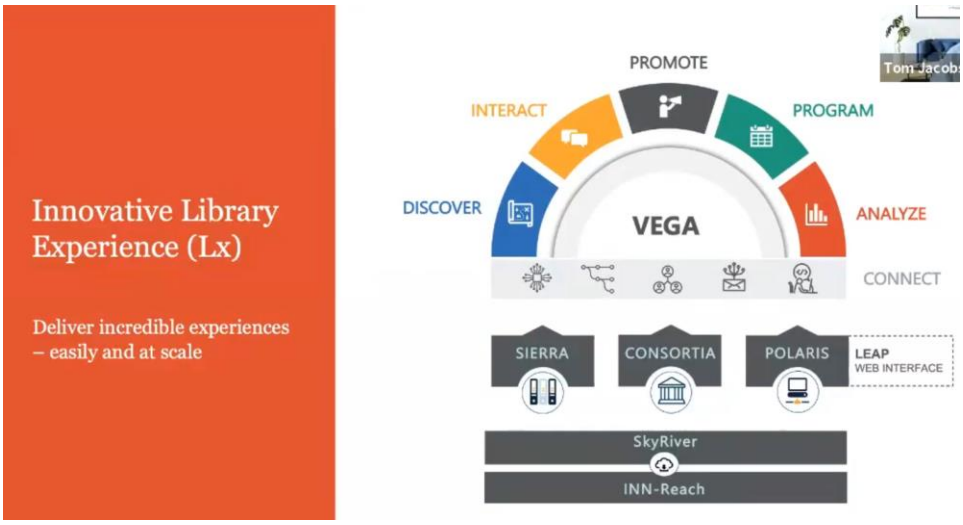


Guided learning, voice assistance (Alexa, Google home)

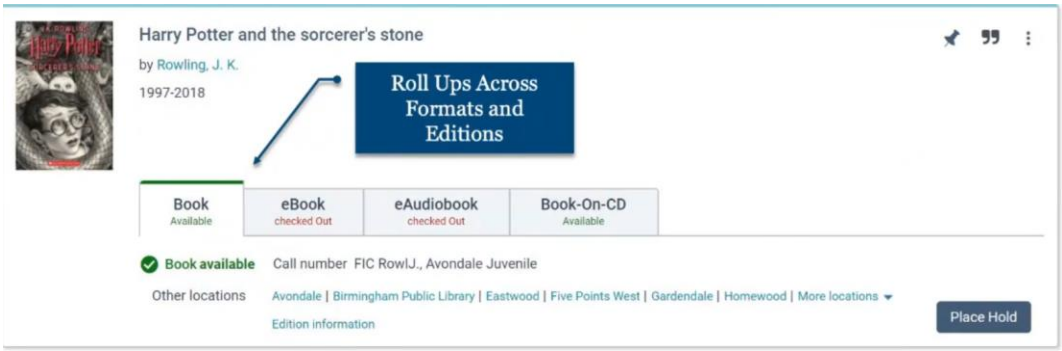


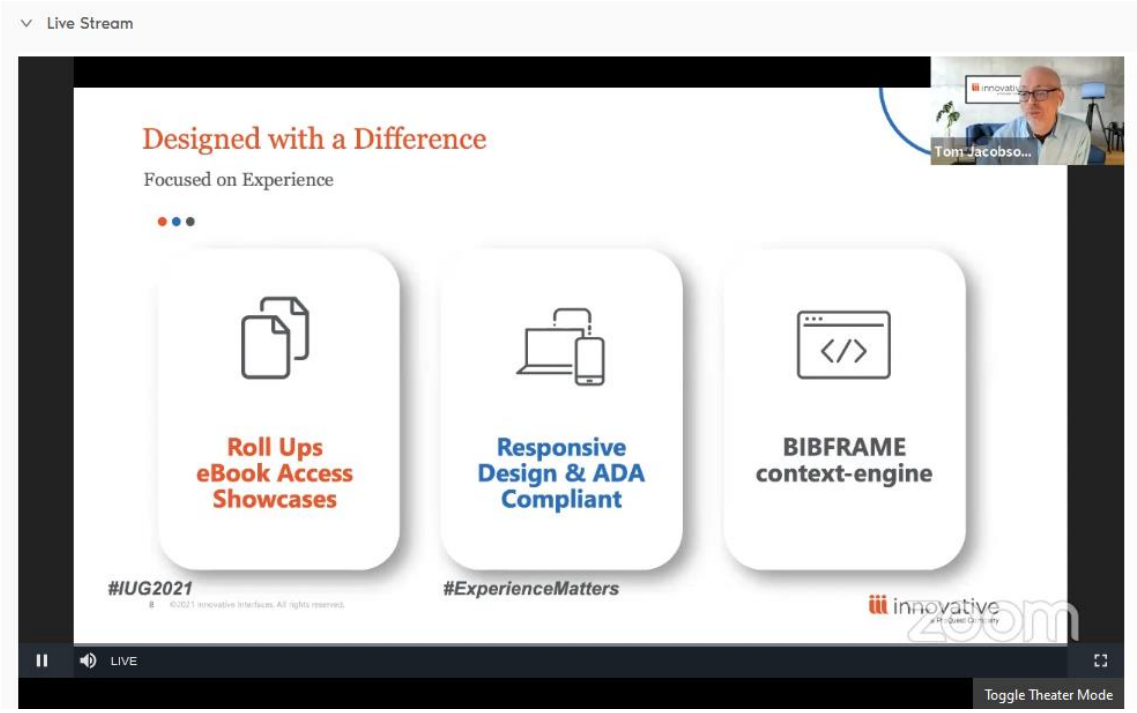


VEGA discover happy hour

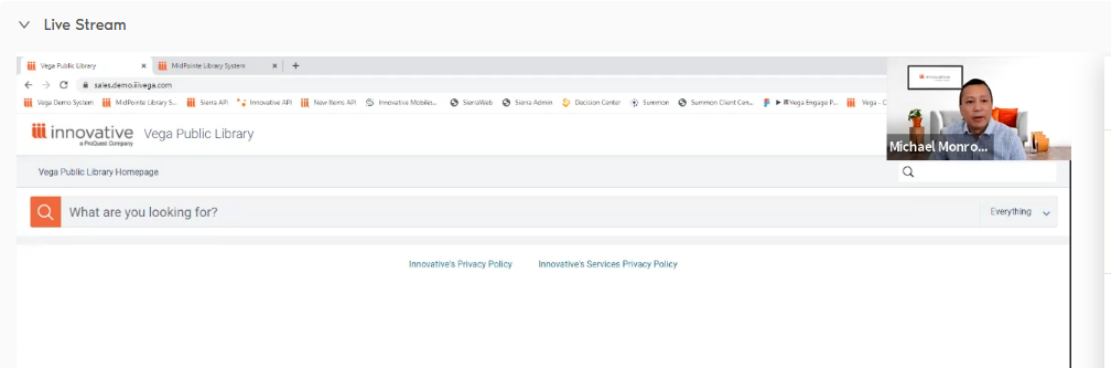


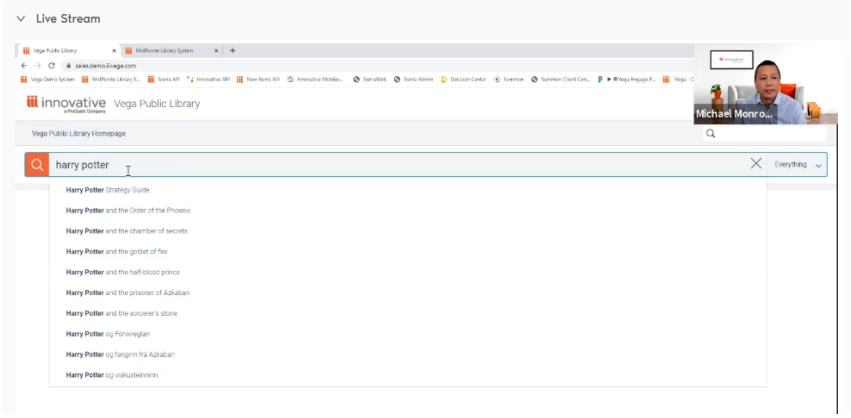
Platform to help manage user experience

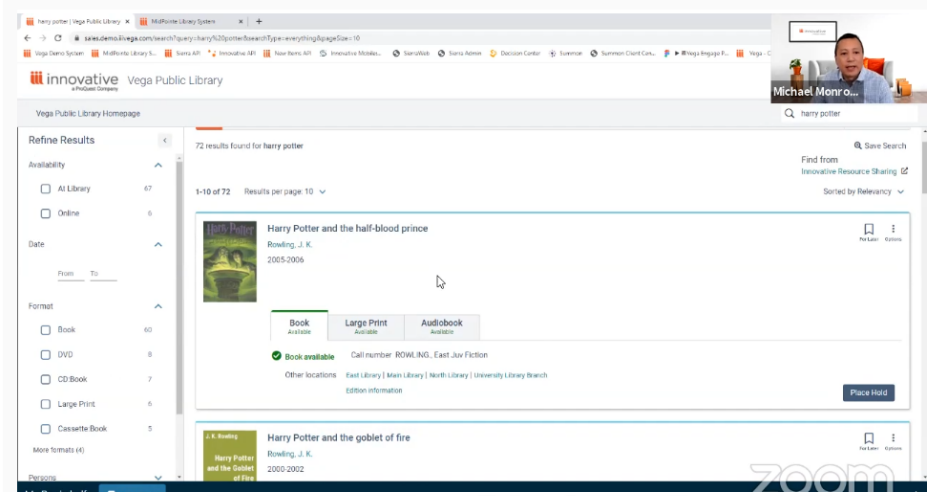


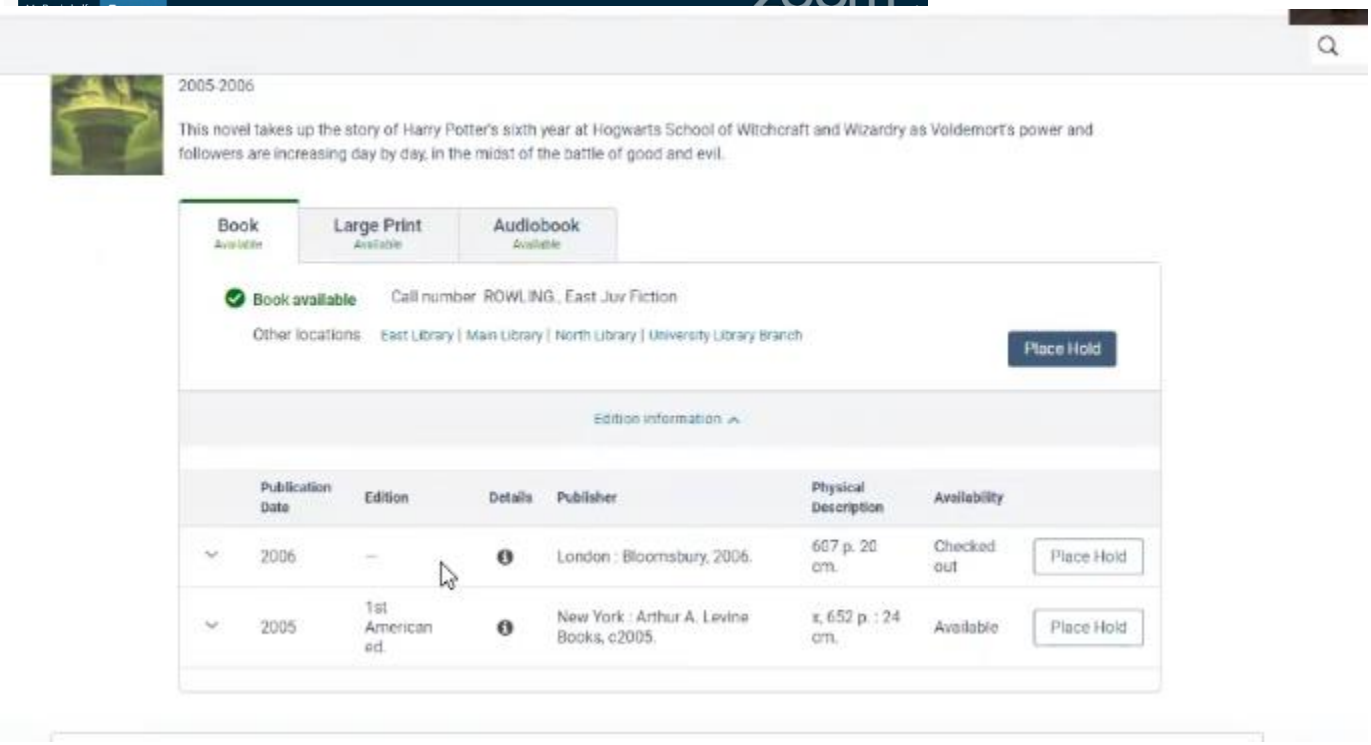


Live demo (test and Mid Pointe library system) both Sierra libraries not out for Polaris untl next month

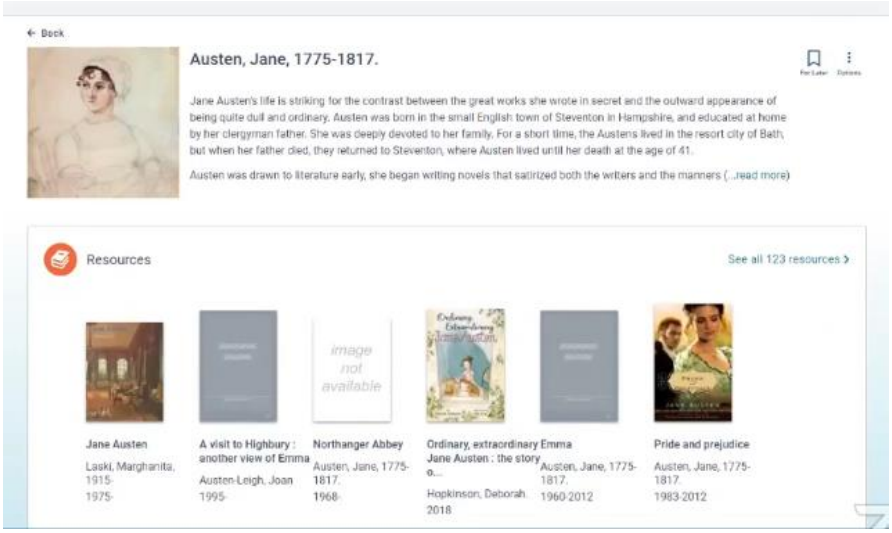




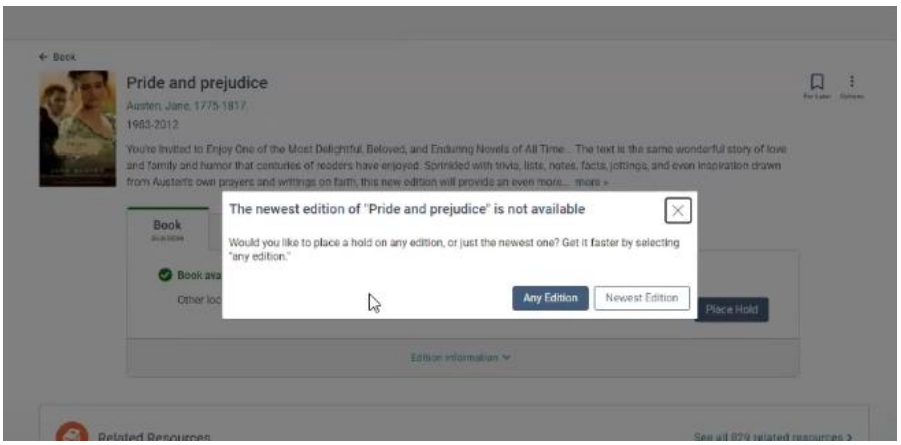


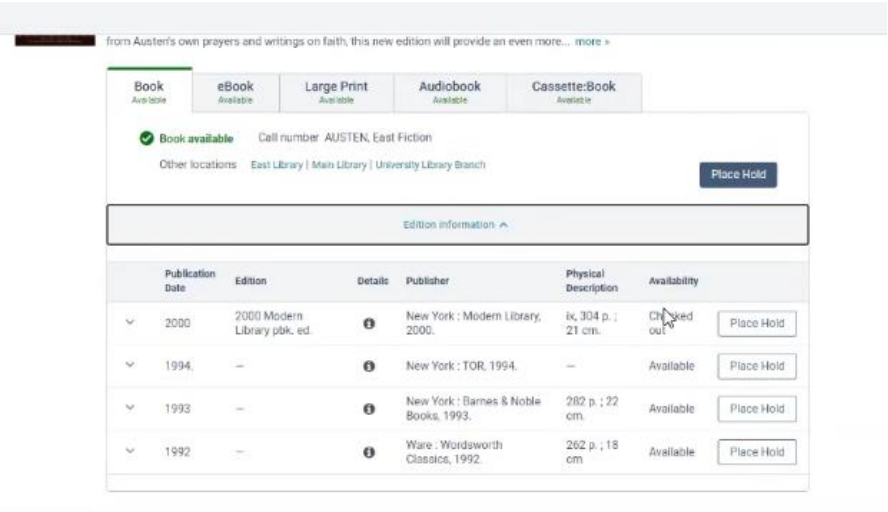


Jane austen search (view the person) – Syndetics unbound used to display basic info on Jane Austen. Will work with other vendors but Syndetics is partner. Syndetics included

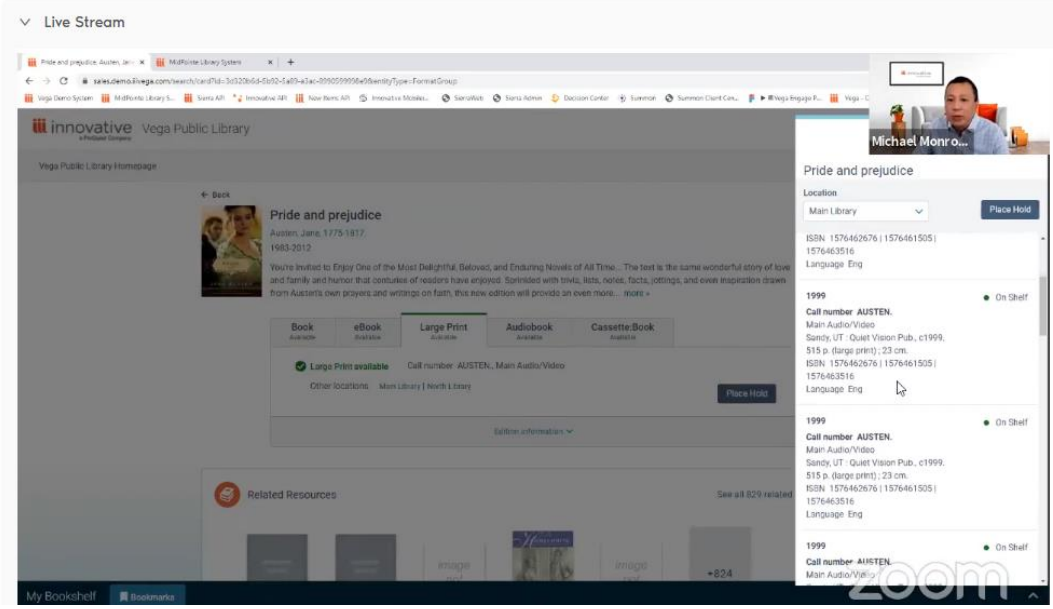


Click pride and prejudice and click place hold

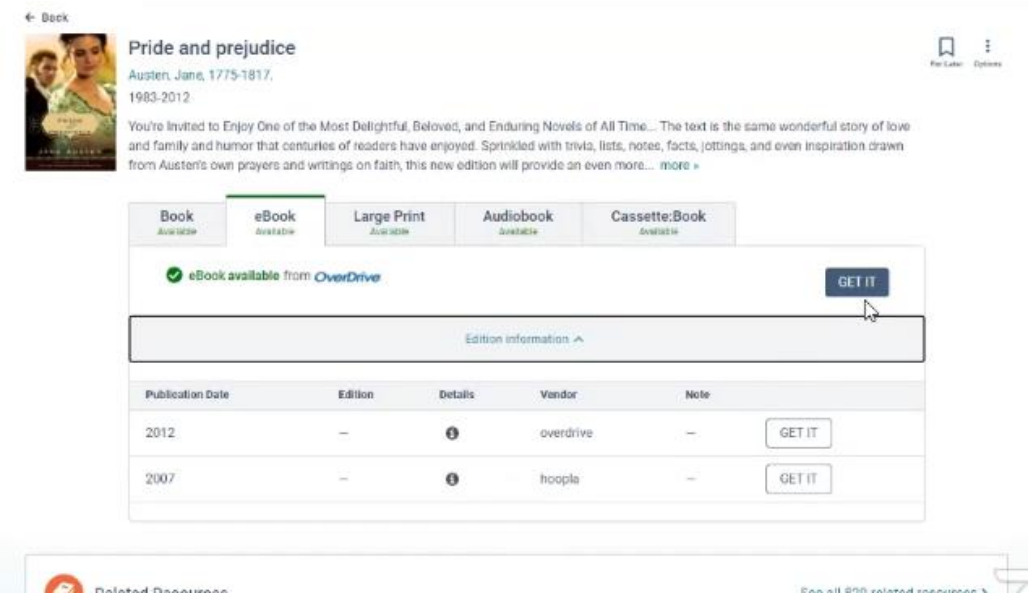




Click lp and main library

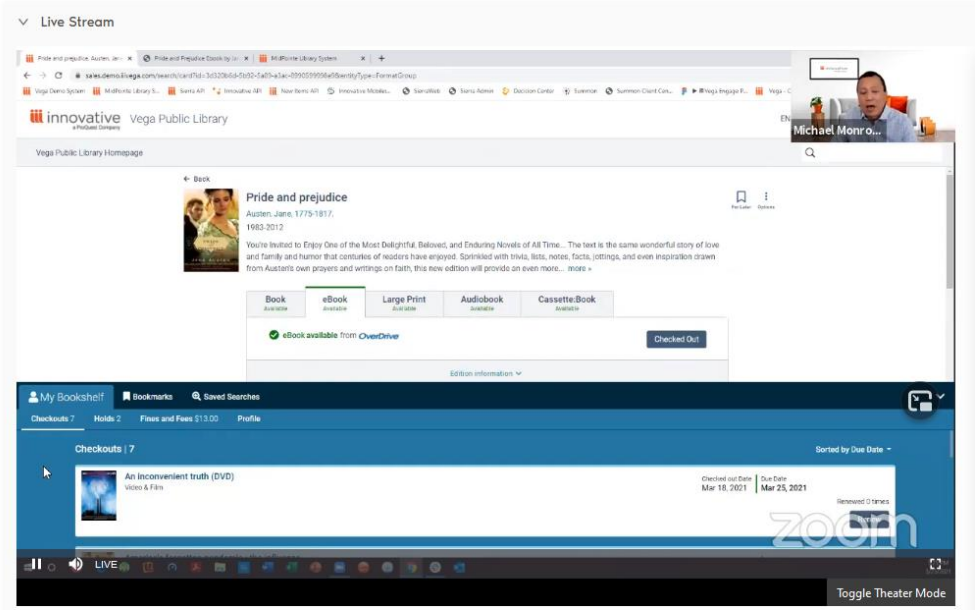


eBook

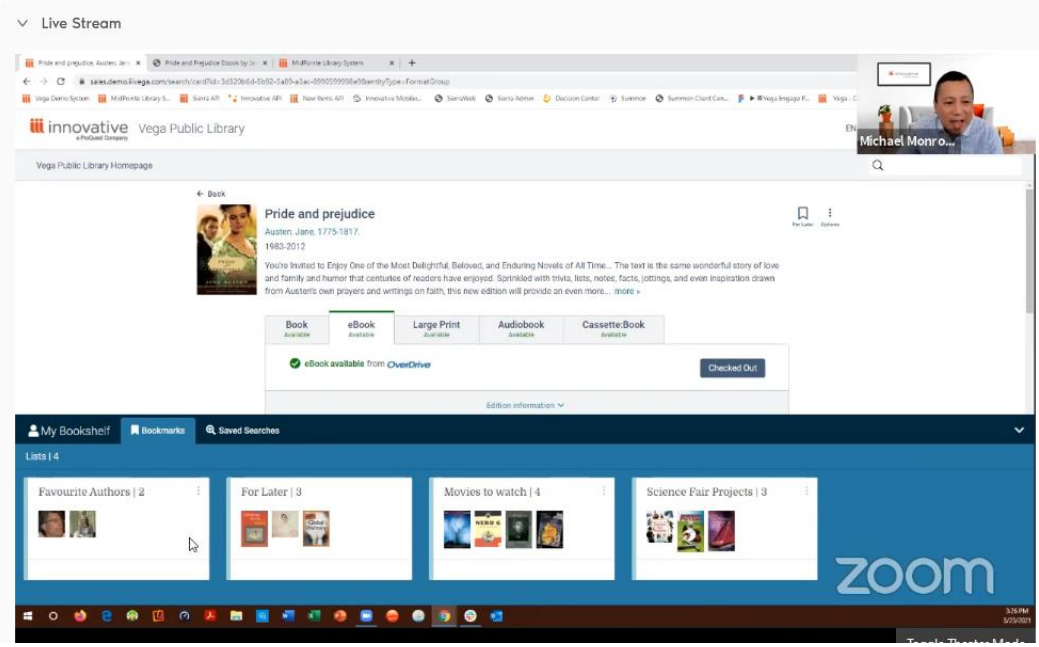


Hoopla have to sign in, go to hoopla interface and get it

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

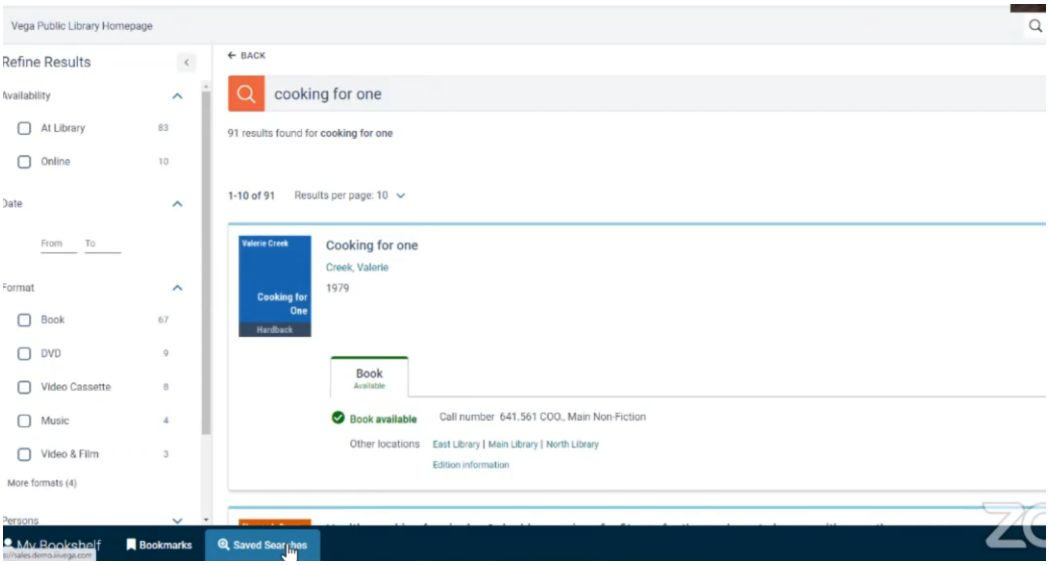


Bookmarks – if logged in as staff then curate lists using bookmarks (this is patron login)



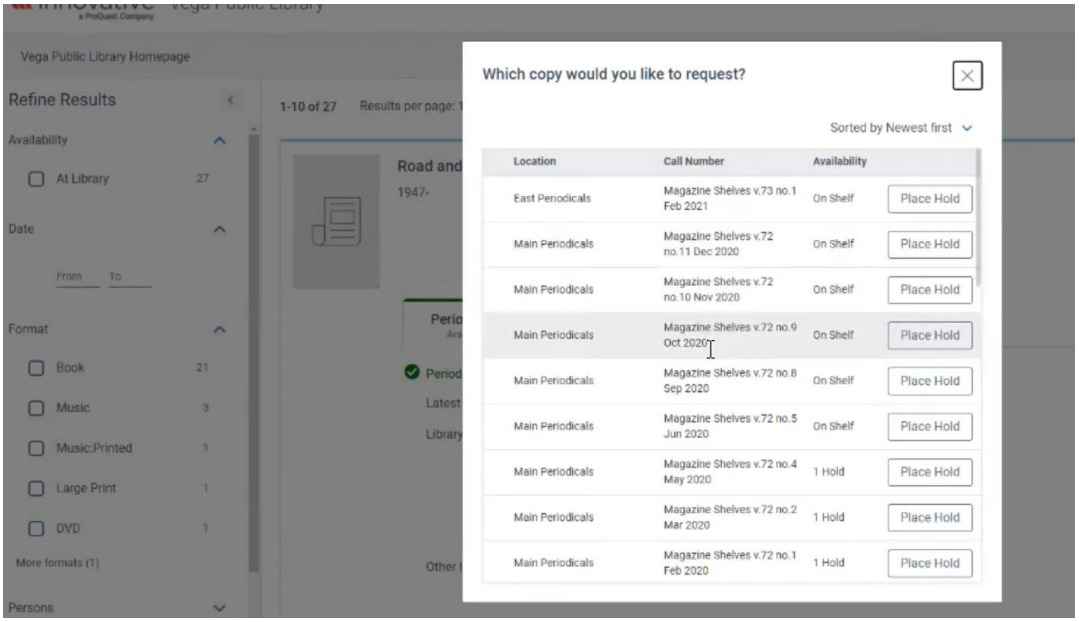
When open a book title get related resources/book jackets; other titles by author

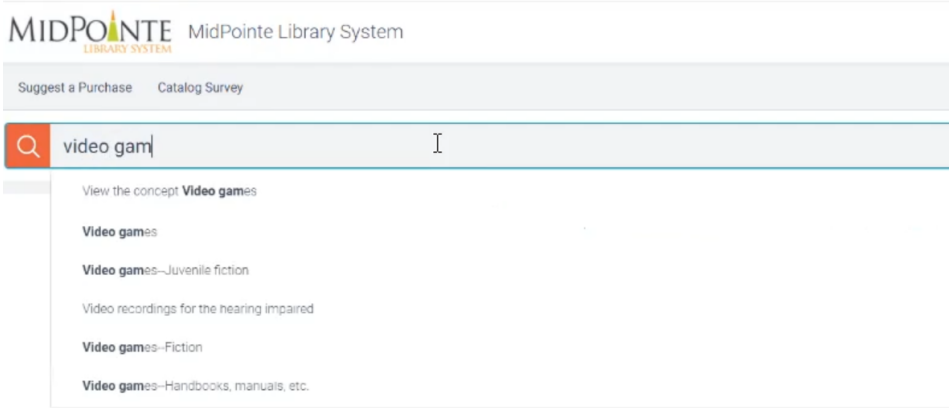
Saved search is live and can email to someone

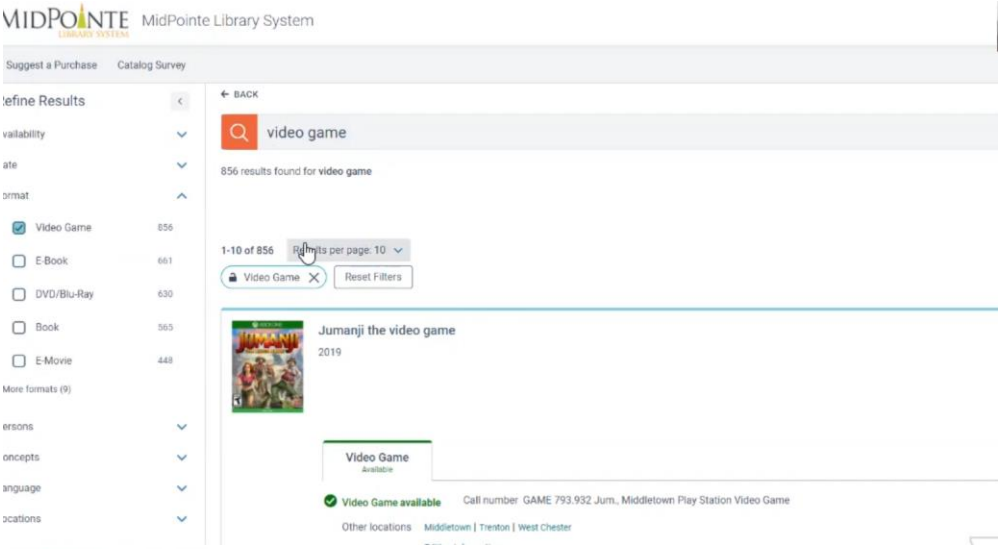


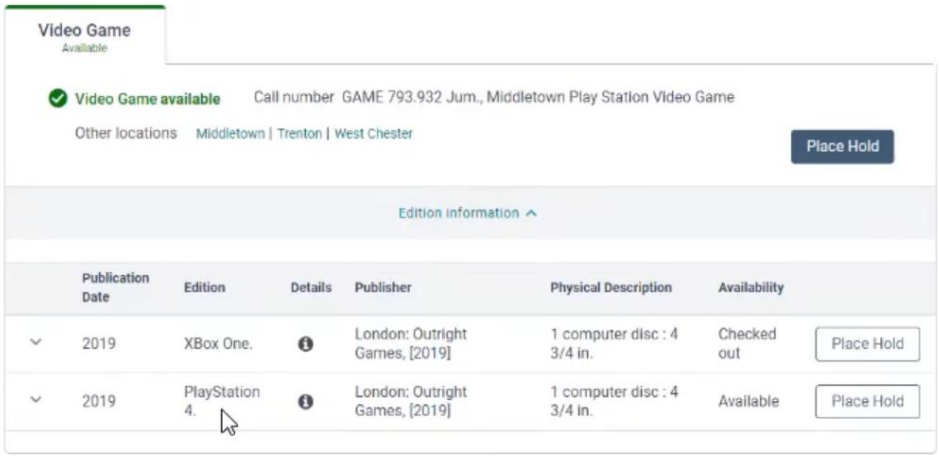
Can view concept' mystery and detective stories' open an item – showcases: best seller young adult NYT, related resources – NYT is API feed done by VEGA automatically (uses what you own compared to holdings)

Periodical

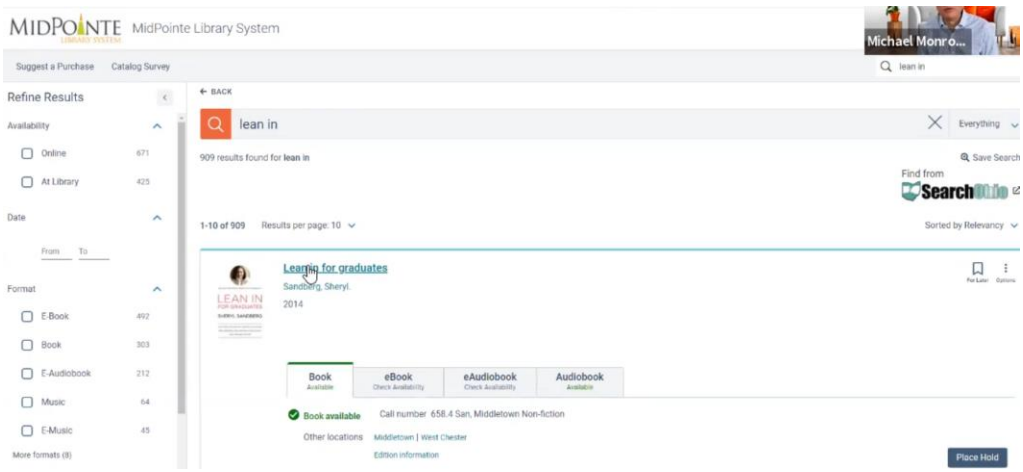

Vega Public Library Homepage
Refine Results
Availability
At Library 27
Date
From To
Format
Book 21
Music 3
Music:Printed 1
Large Print 1
DVD 1
More formats (1)
Persons
1-10 of 27
Results per page:
Road and
1947-
Which copy would you like to request?
Sorted by Newest first
Location
Call Number
Availability
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


MIDPOINTE
LIBRARY SYSTEM
MidPointe Library System
Suggest a Purchase
Catalog Survey
video gam
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.

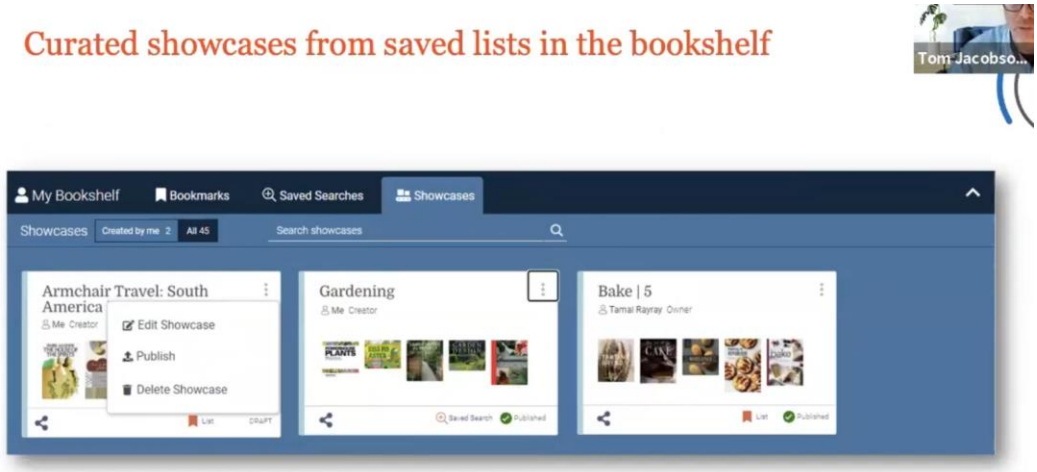




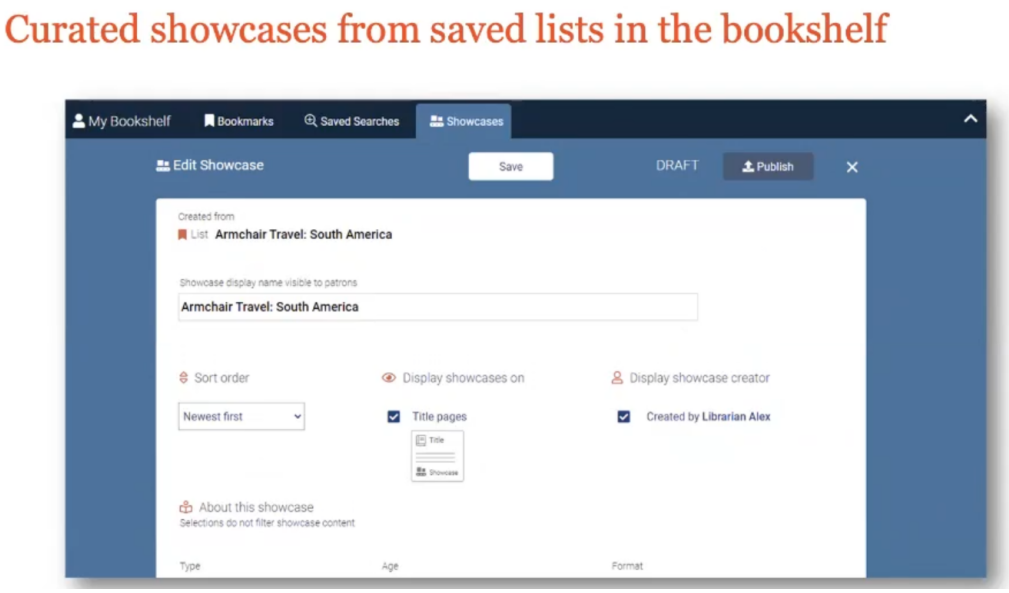
Can go out to INNReach site (SearchOhio)



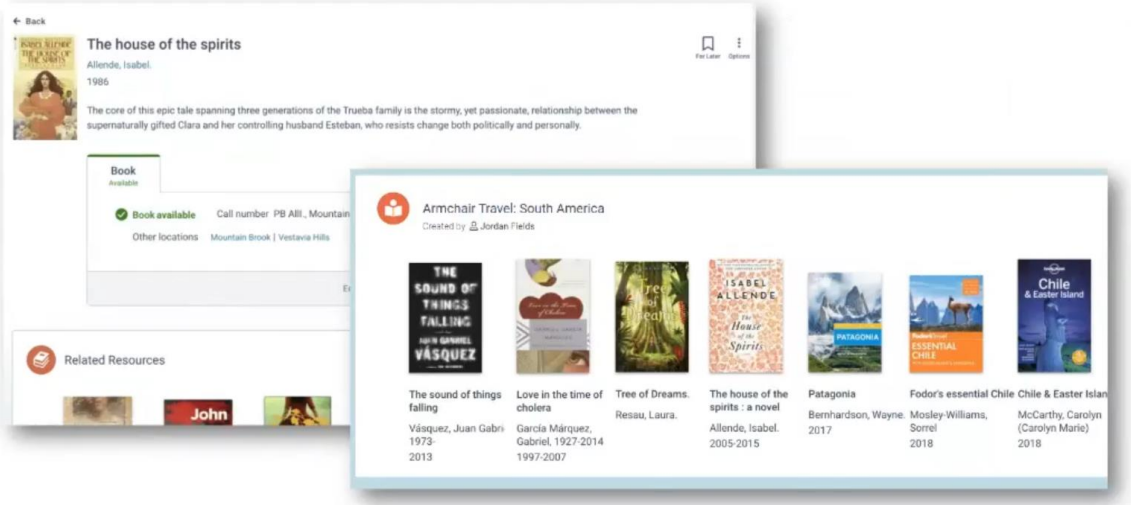
Consortia after Polaris – local branding for those sharing DB



Take bookmarked list and publish it

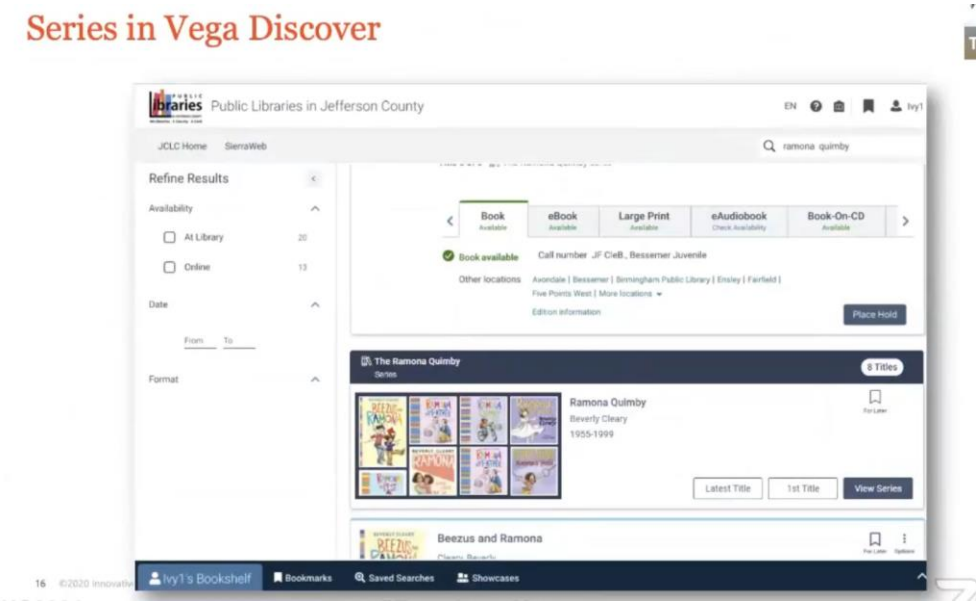


Curated showcases appear within Vega Discover

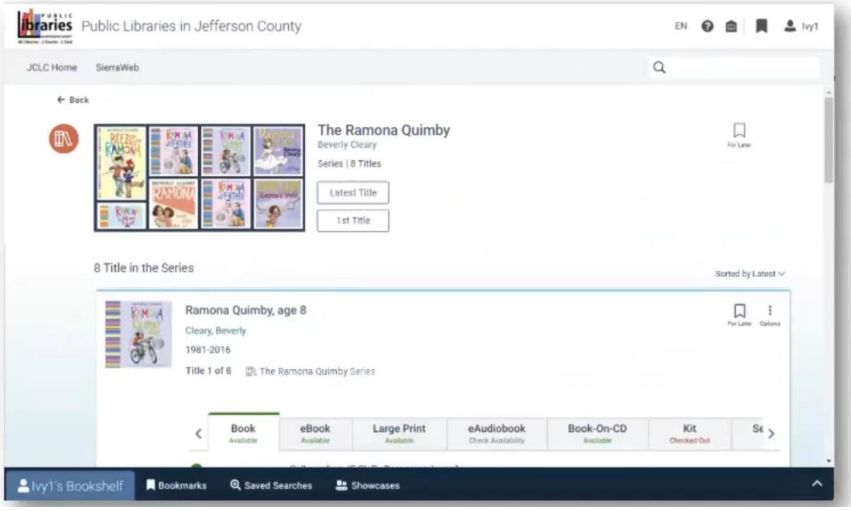


Coming soon- using data from Syndetics

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)

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 aother 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

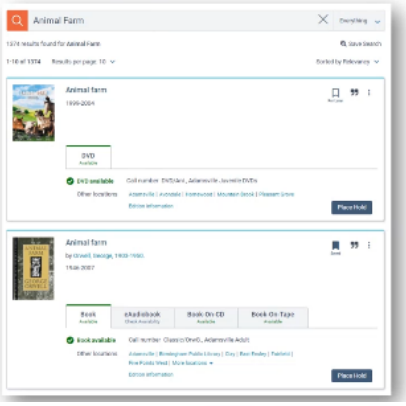
Librarian Experience

#IUG2021

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

Does my library have the book?

YES!



#IUG2021

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

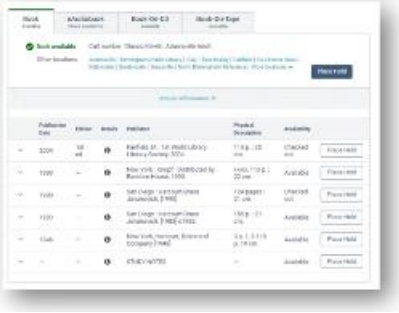
How do I get a copy if I want to pick it up at a library?

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.

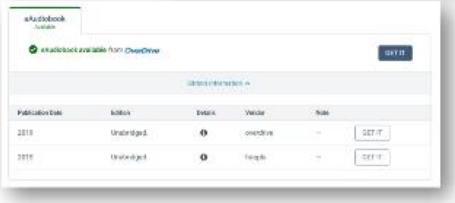


#IUG2021

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

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

Driven by user needs and expectations.

#IUG2021

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

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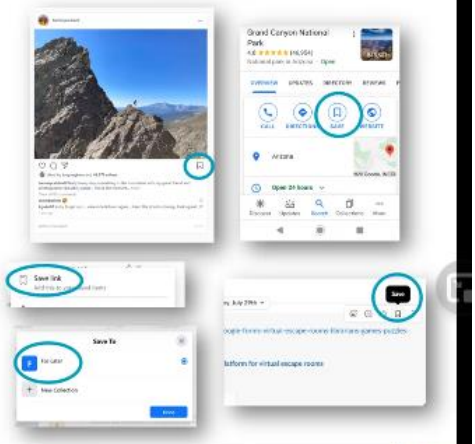
User Experience: Liquid Expectations

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.

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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.

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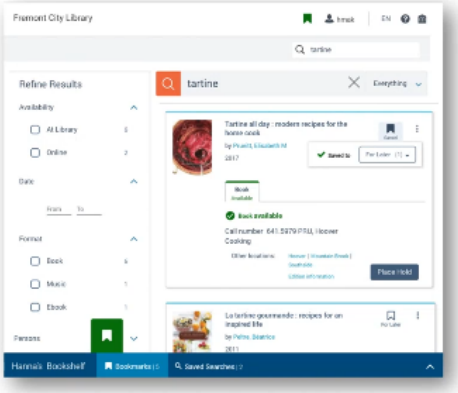
User Experience: Save for later

Lesson:

Beautiful or fun design is not necessarily usable design.



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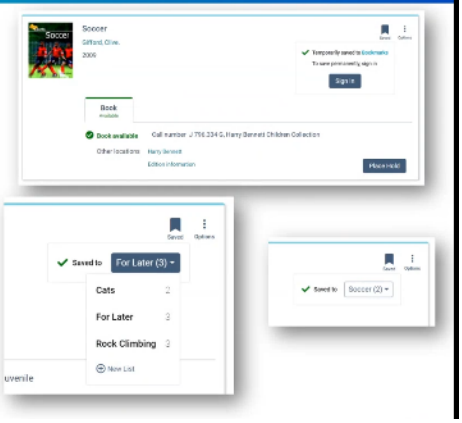
User Experience: Save for later

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.

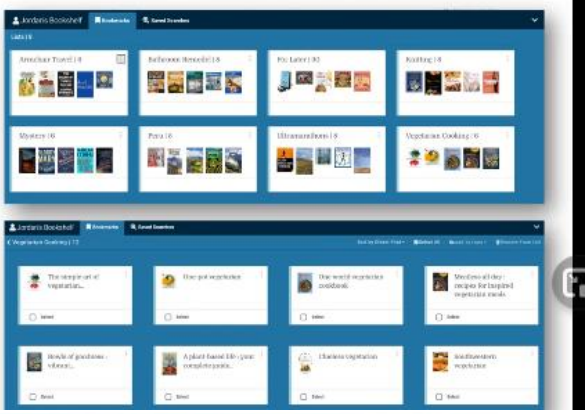


#IUG2021

25

User Experience: Save for later

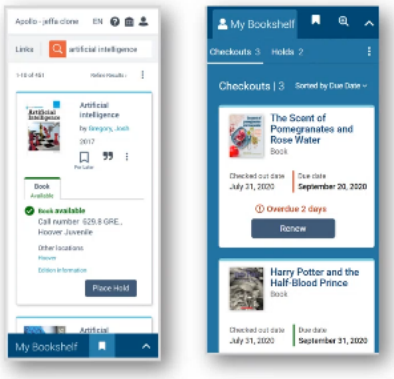
All lists are accessible from the patron's Bookshelf.



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.



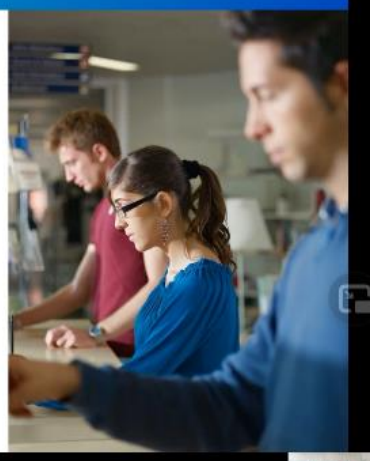
Beware of Feature Fatigue

"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

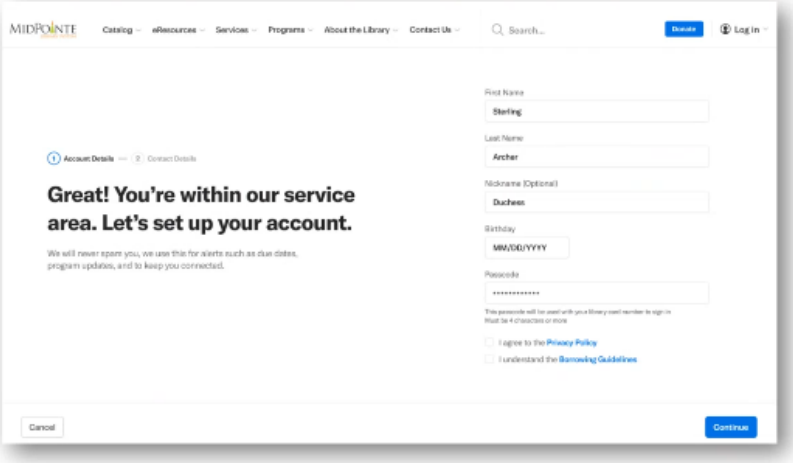
How many touchpoints does your library have?

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

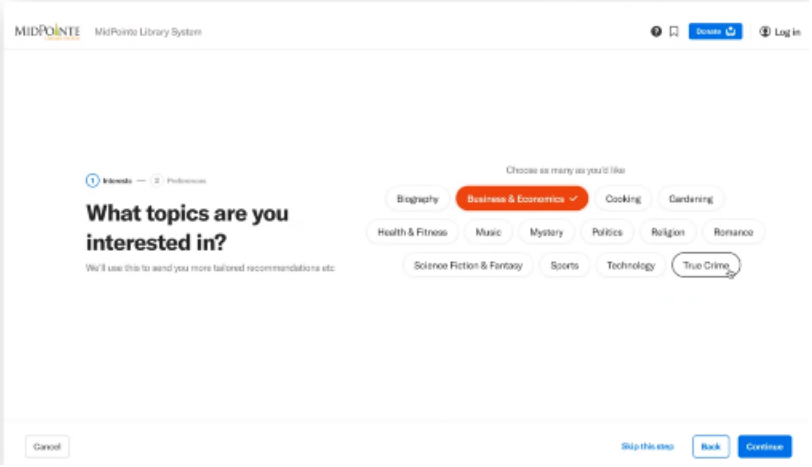
How do you know you're providing a consistent, excellent customer experience?

#IUG2021

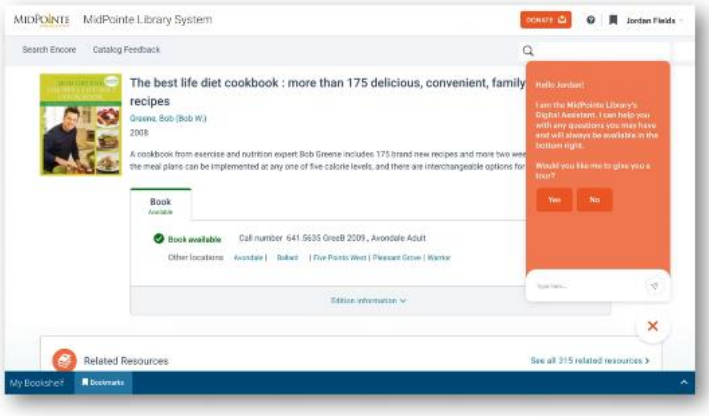
Customer Experience: Onboarding



Customer Experience: Onboarding



Customer Experience: Onboarding



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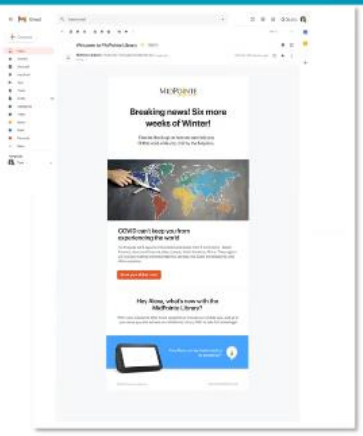
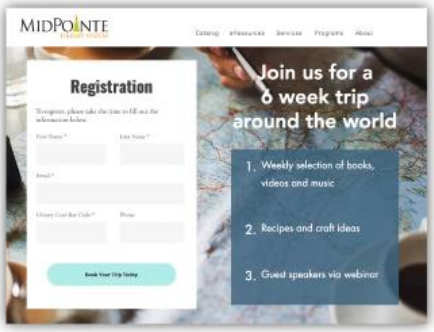
Customer Experience: Personalization

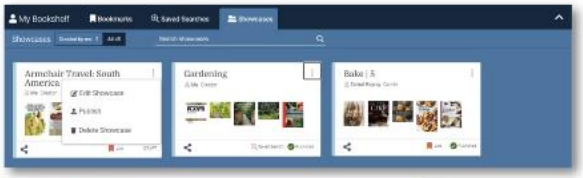


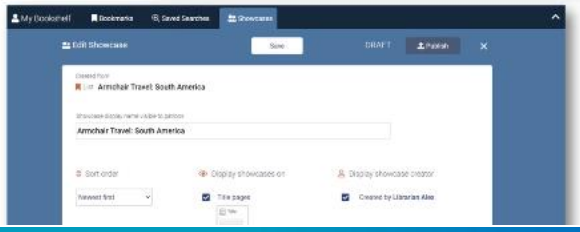


Customer Experience: Accessibility

Librarian Experience

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

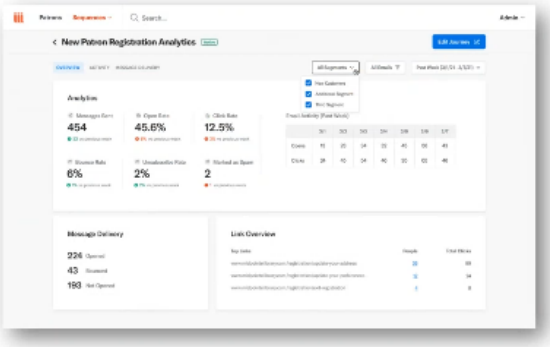




#IUG2021

Librarian Experience

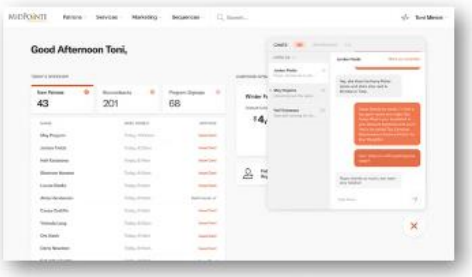
Do you have the tools you need to understand how your patrons are interacting with the library across channels?



#IUG2021

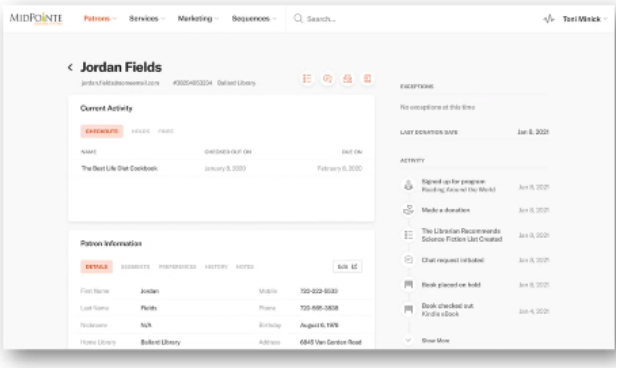
Librarian Experience

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.



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Innovative Library Experience (Lx)

Deliver incredible experiences — easy and at scale

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

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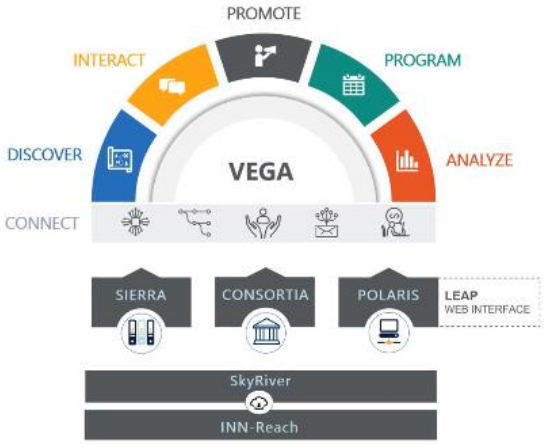


Q/A Vega replacing Encore

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 misunderstood? 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 algorythm 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

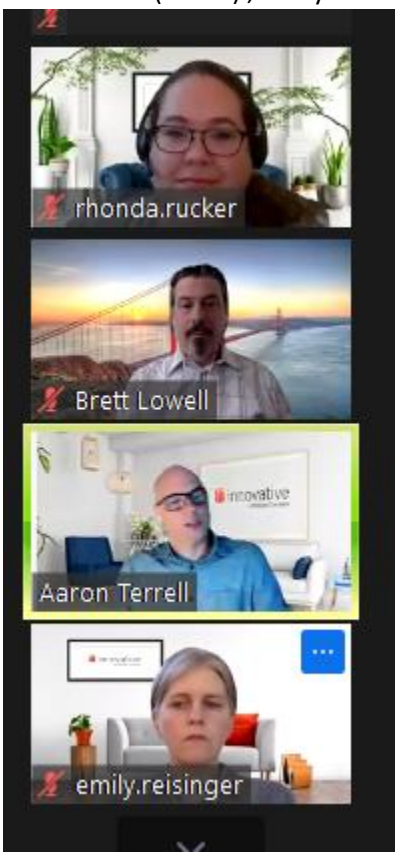
If a library is currently utilizing a different discovery layer, can they still purchase Vega's other modules like Connect? Or is Discover required first to build on any of the other modules? Can get pieces on own

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.

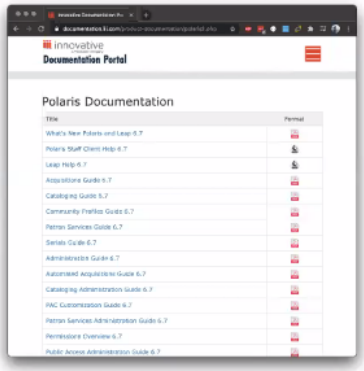


Older products get less priority……. Skyriver and INNReach being 2

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



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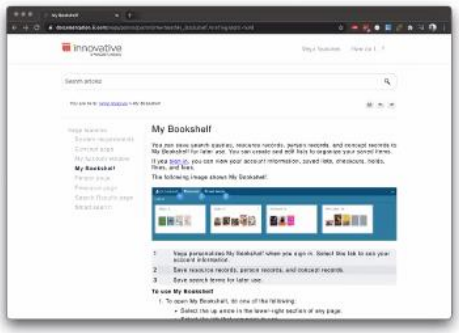
Upcoming team priorities

- **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*)



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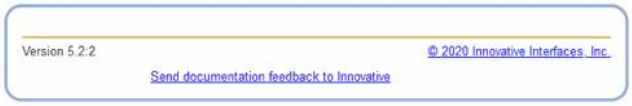
Submitting feedback to the Documentation team

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.



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

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

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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)

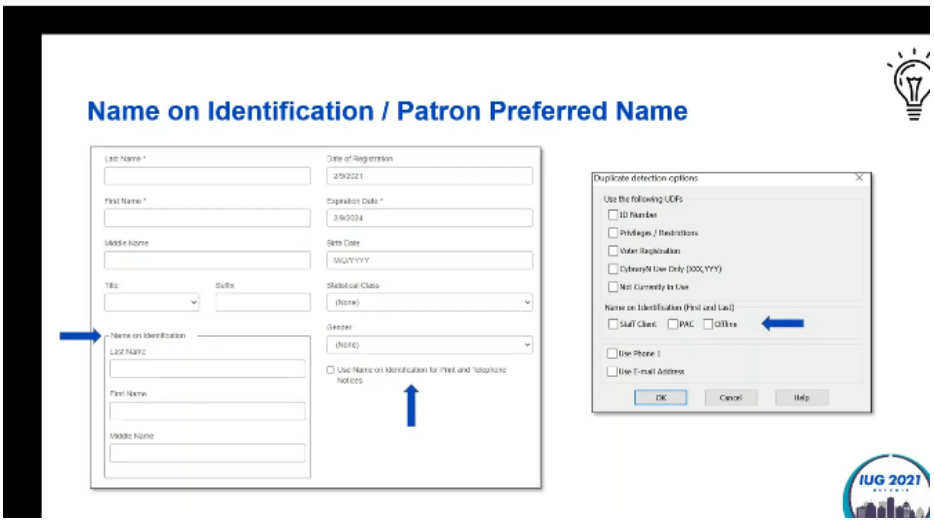
Agenda

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

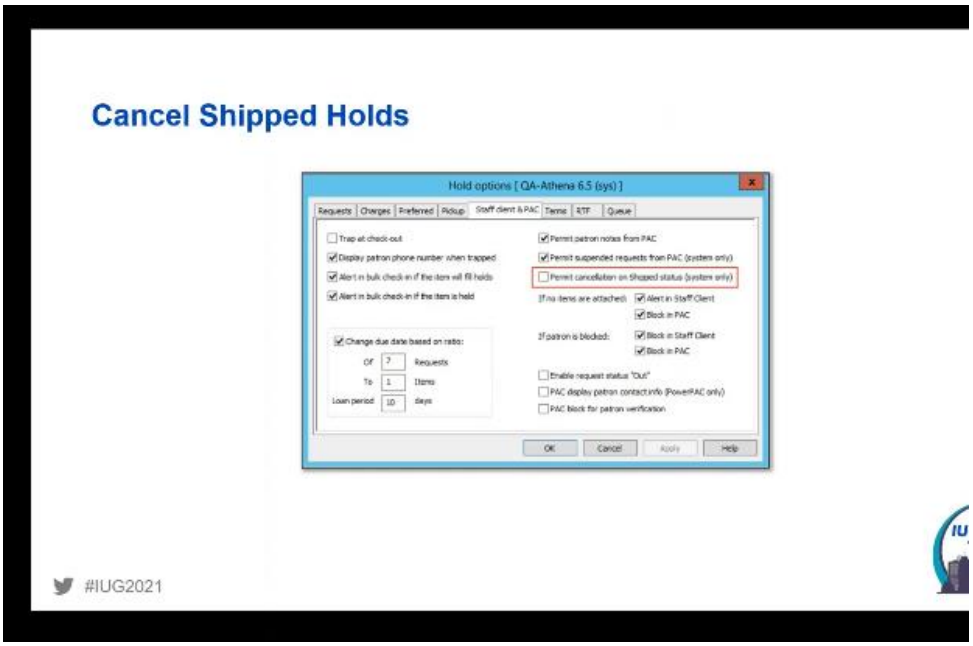
Development

- 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

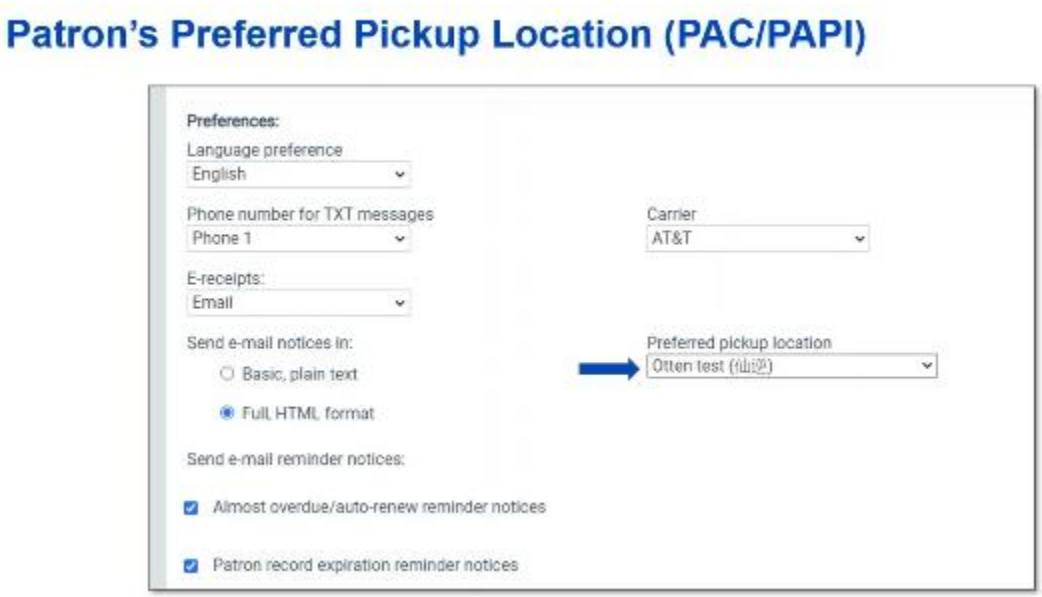


Client option applies client and LEAP

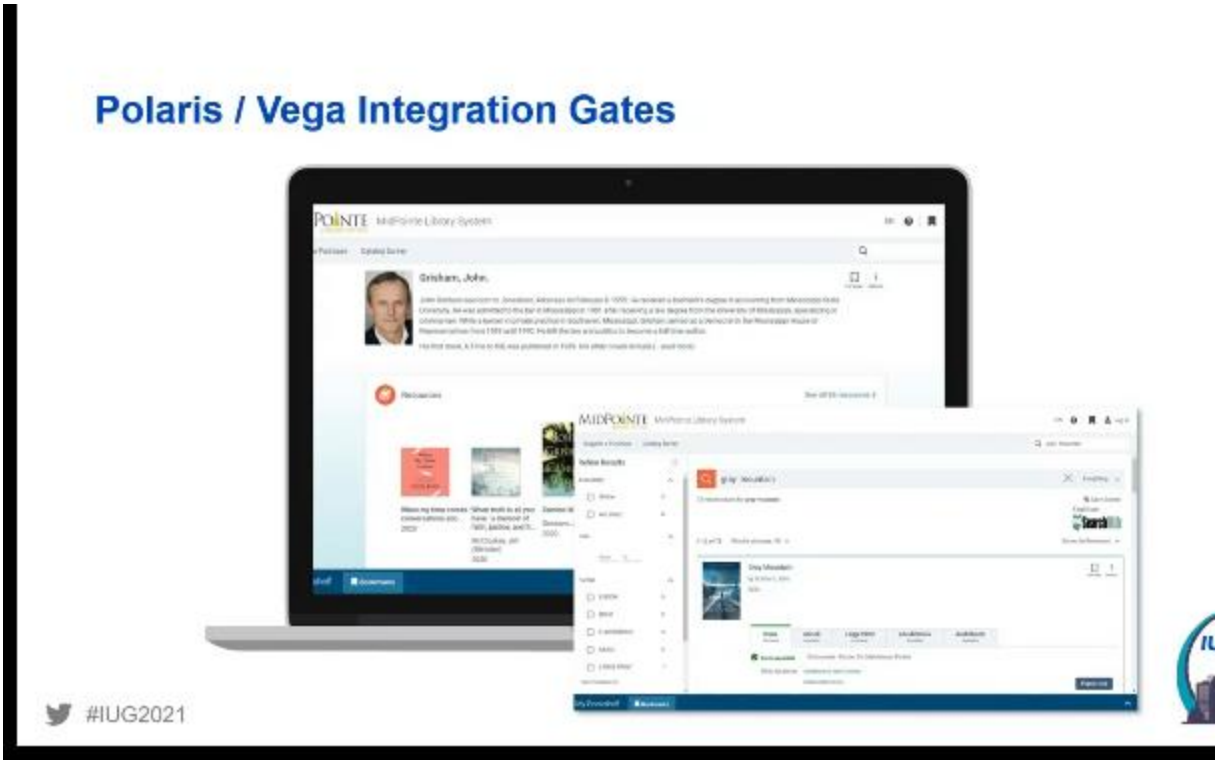


Opt in – sys level only

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

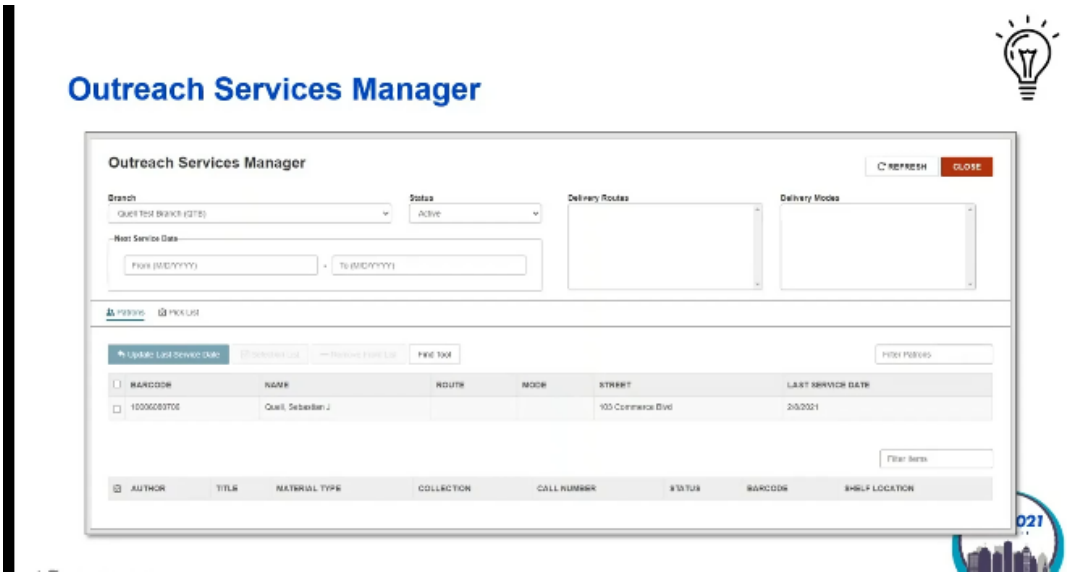


Exposes preferred pickup point in my account – honors SA settings re: what is available for pickup in PAC (patron reg branch)

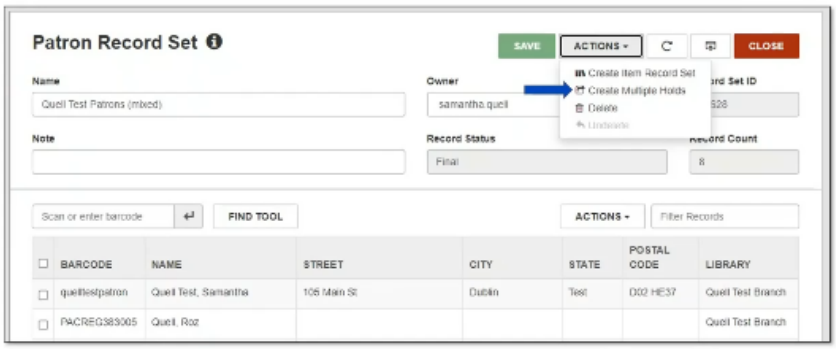


Lots of new PAPI endpoints and prep for streaming

Need to be on 6.7 for VEGA



Create Multiple Holds from Patron Record Set



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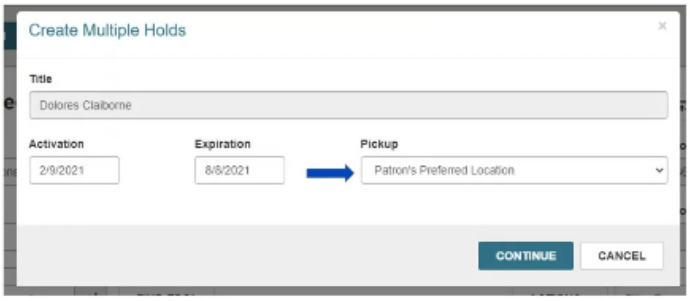
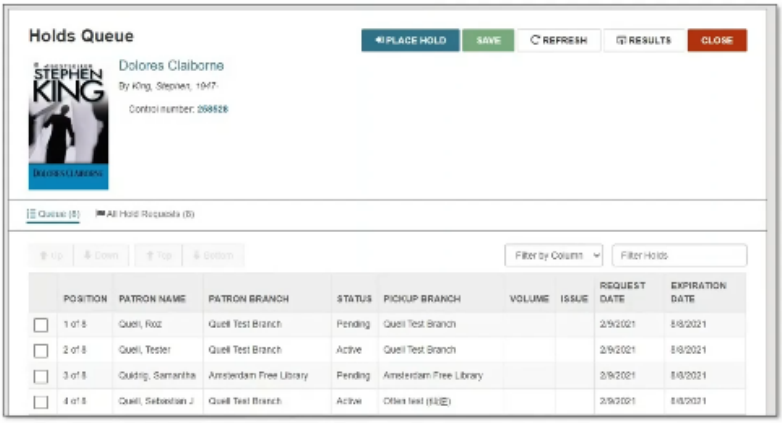


Uses preferred location or reg branch (if no preferred)

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



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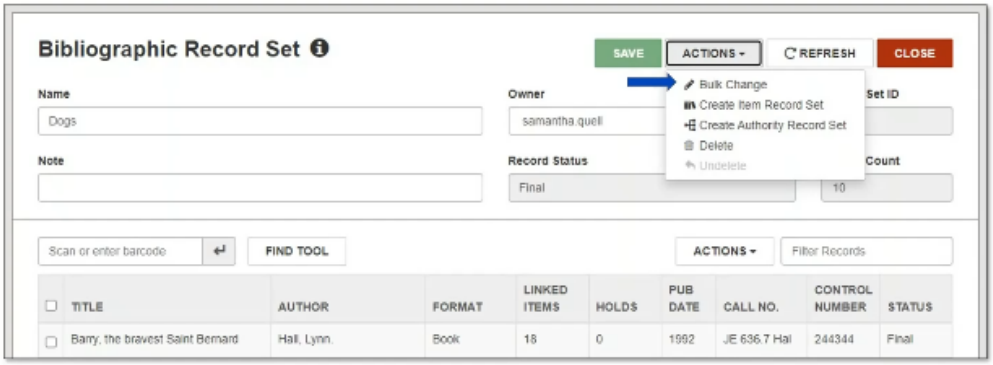
Holds queue is randomized so it isn't as appear in patron set used

Bibliographic Bulk Change



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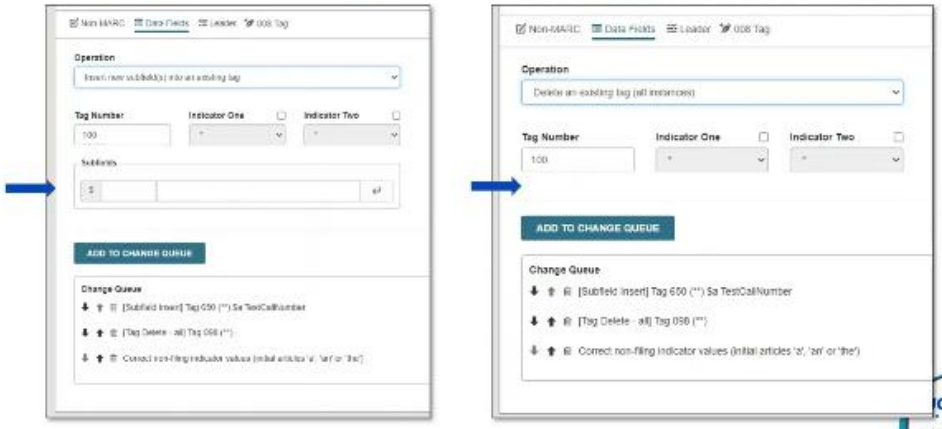
Bibliographic Bulk Change



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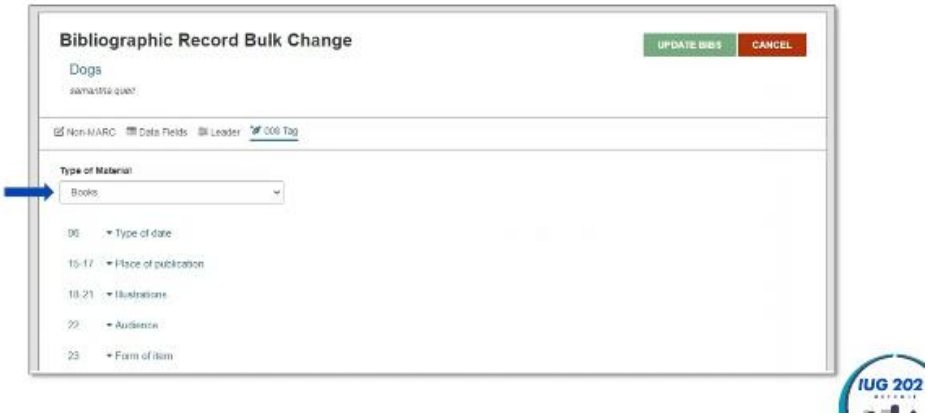
Fields are dynamic – only need to see fields used for that operation

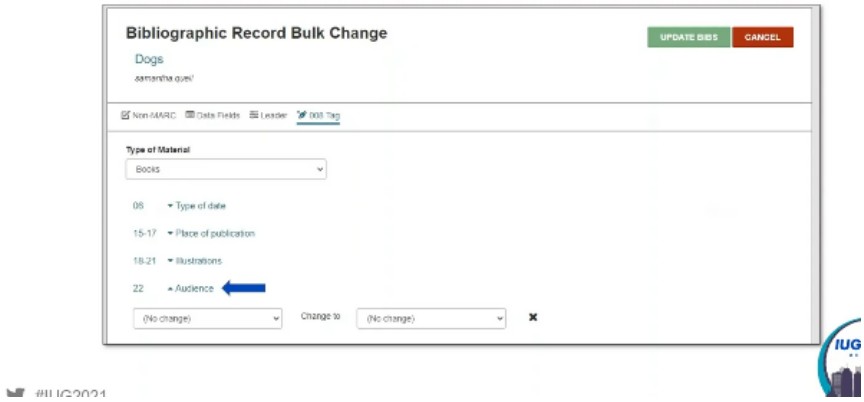
Same operations as staff client

Bibliographic Bulk Change



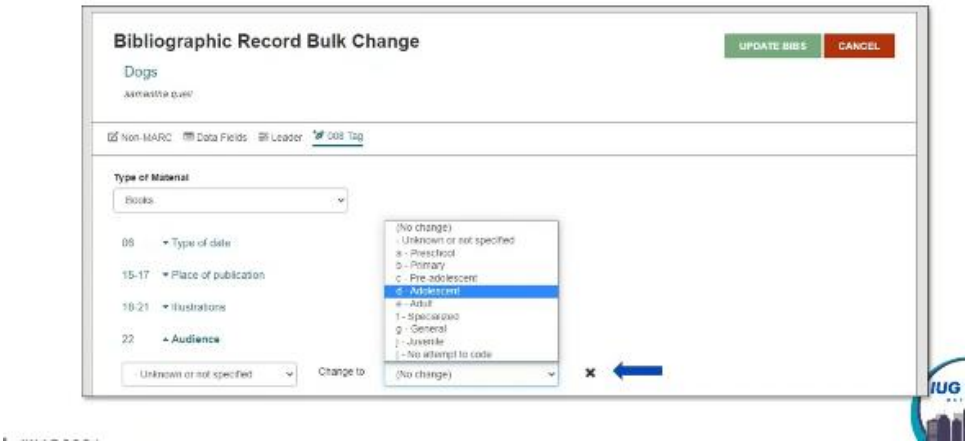
Select which type will modify and then will go through which fields available

Bibliographic Bulk Change

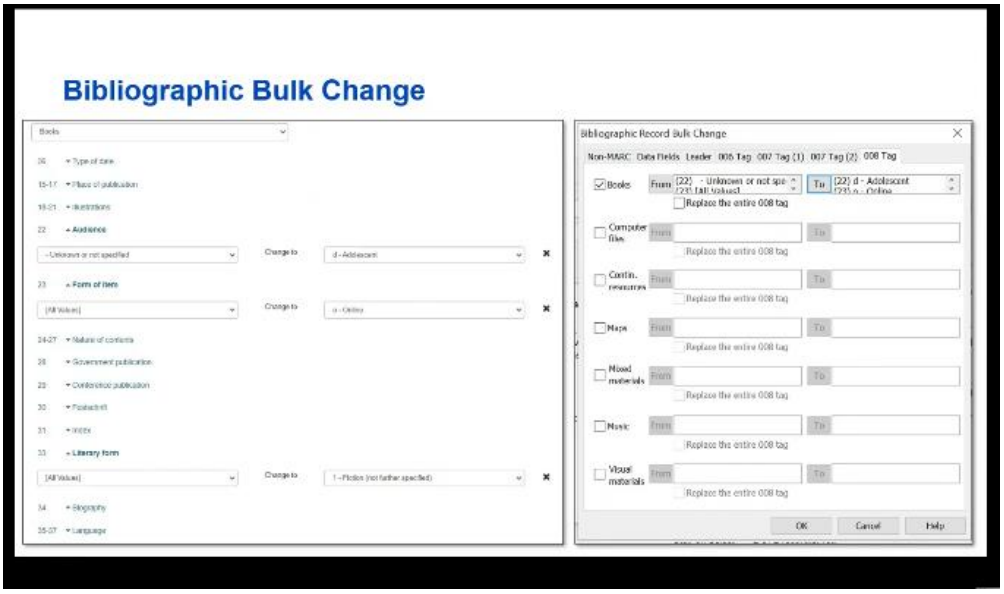


Click on audience (all those option clickable)

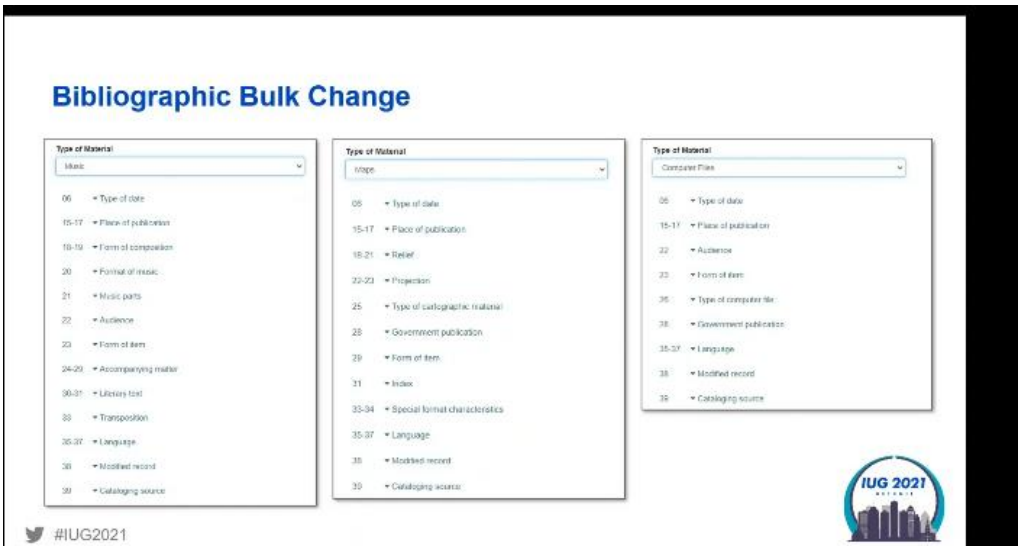
Bibliographic Bulk Change



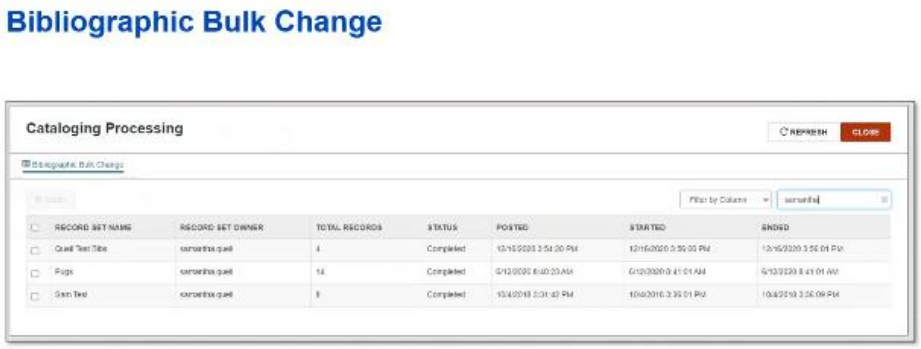
X closes or clears out options

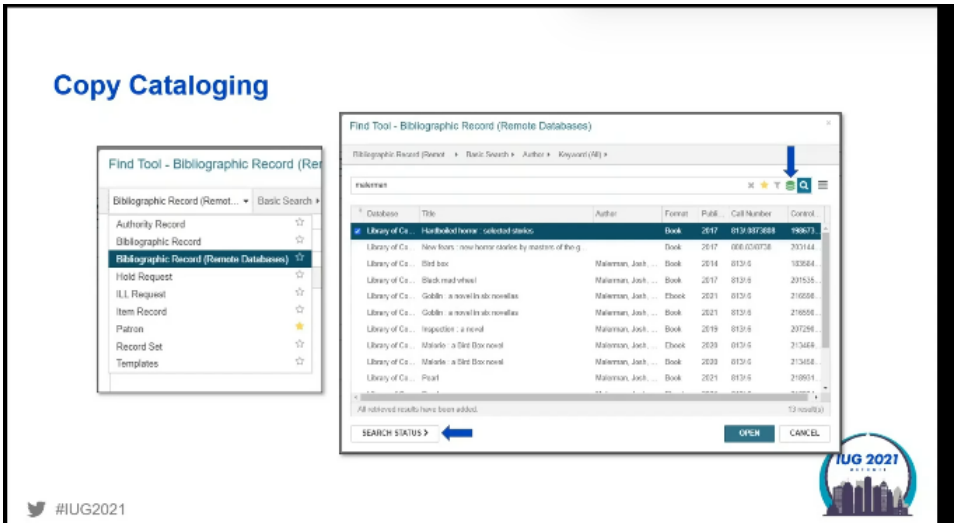


Same bulk change request (3 changes) LEAP on left and client on right



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

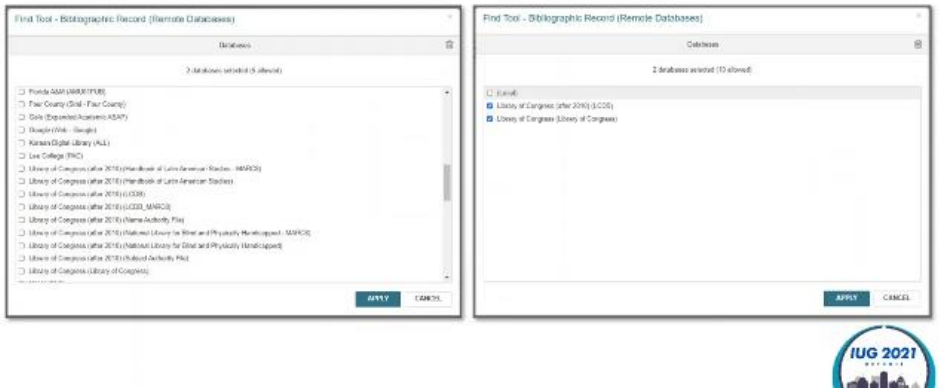




First time accessed no databases (user defaults in client and LEAP different) after you select first time they will come up

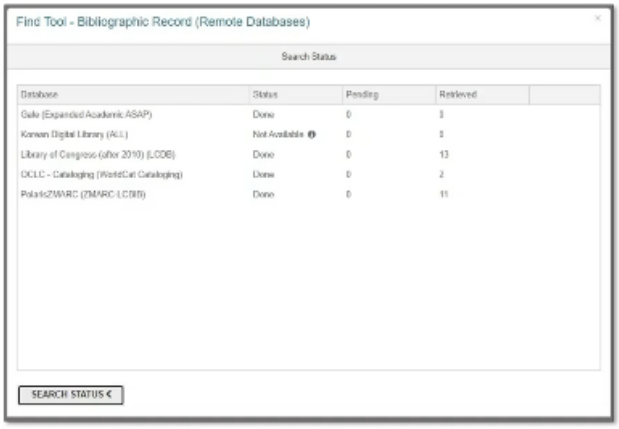
Click on db see this (one of them)

Copy Cataloging



Added some SA settings based on login location – how many db can be searched and how many records can be returned (PAC 1,000 this is 250 records) timeout threshold can be configured. Logic in workform – if too many DB selected (determined by SA setting), local option is selecting Polaris,

Copy Cataloging



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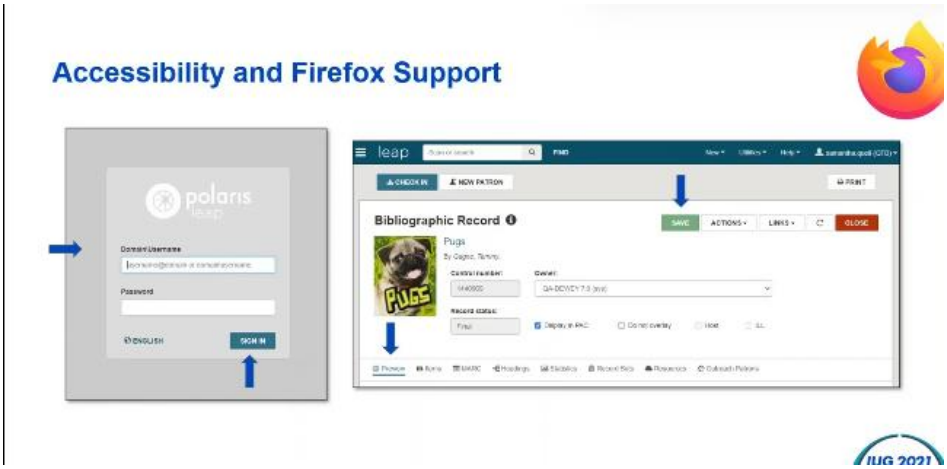
Select one

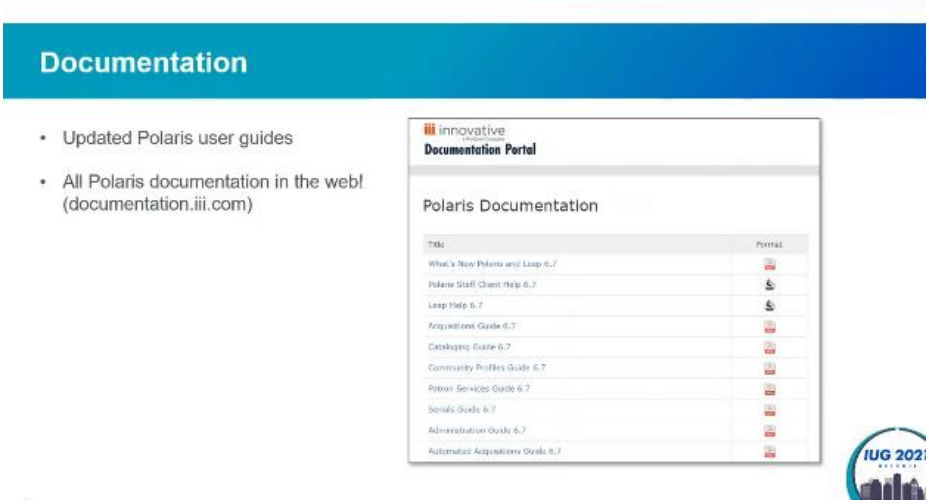
Copy Cataloging

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



VPAT can be shared for accessibility – contact site mgr

Changed contrast, added grey and darkedn grey and green



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"

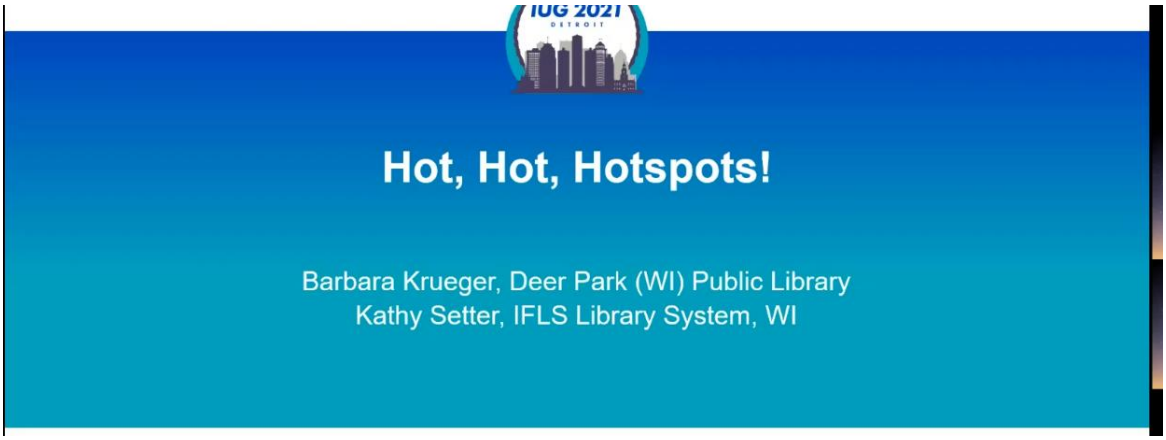
Idea Lab Challenge Winners

- 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

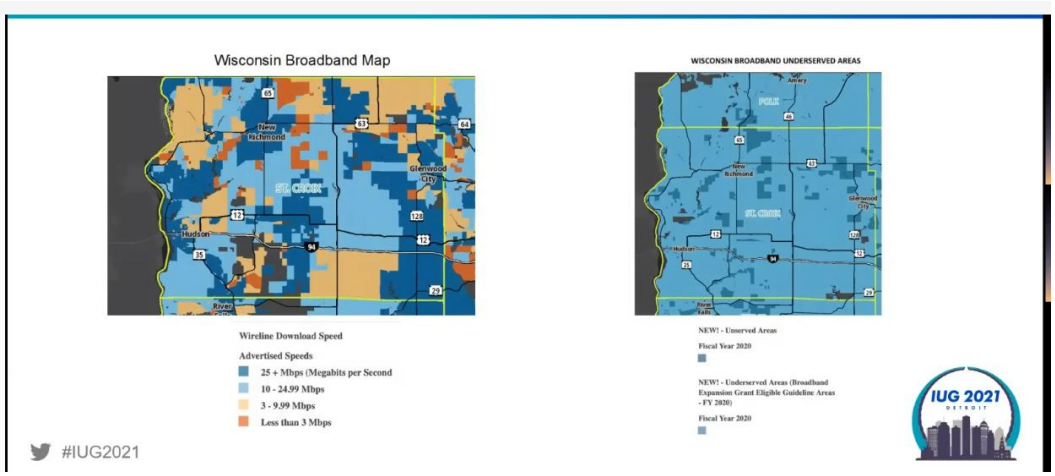
- What's New documentation and webinars
  - Support.iii.com
  - https://vimeopro.com/innovativeiii/webinars
- Polaris/Leap documentation and user guides
  - Support.iii.com
  - Documentation.iii.com (6.7 and higher)
- Polaris/Leap roadmap
  - Support.iii.com
  - https://portal.productboard.com/iii/6-innovative-product-status-board-new/tabs/23-polaris

Hot, hot hotspots



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



- 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

- 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)

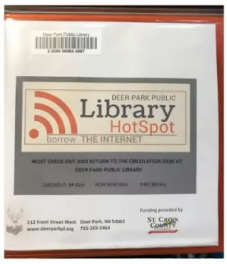
Marketing materials

Copy of WiFi Hotspot Brochure with County Fu...

Copy of WiFi Hotspot Flyer ...

Copy of WiFi Hotspot Brochure with County Fu...

WiFi Hotspot Brochure with County Funding



Playaway view case

Issues:

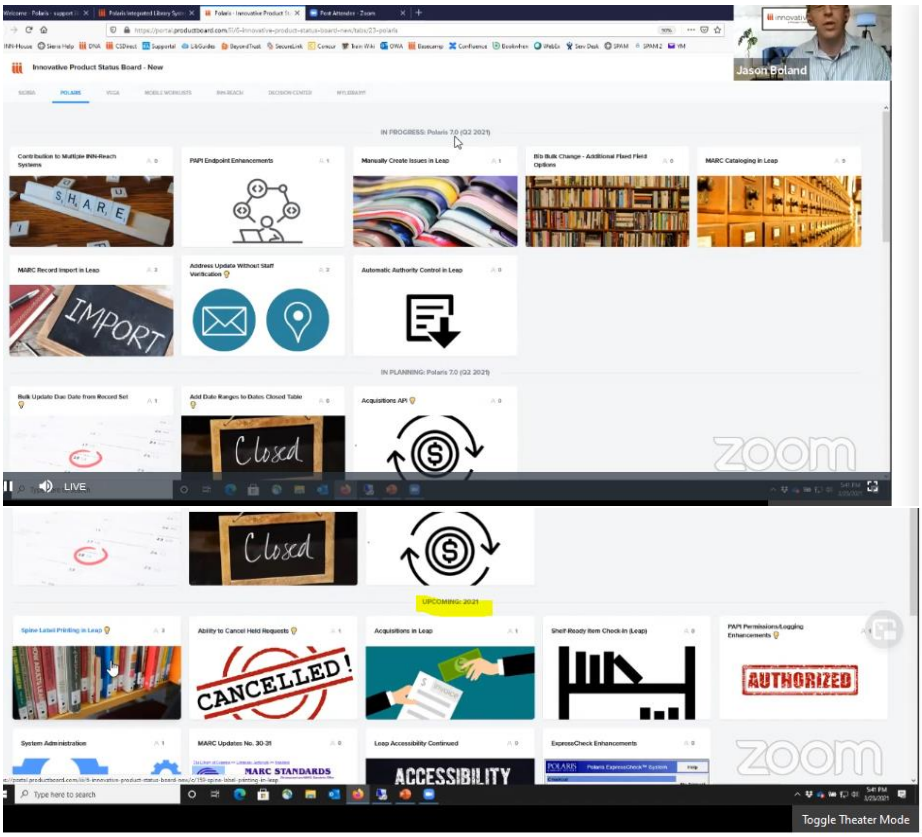
- Equipment
  - Inserting the correct SIM card
  - Defective SIM cards
  - No cellular service in library area
- Lack of a checklist of the steps that each library needed to complete
- Confusion regarding type of account
  - Government program so a different web portal than the general retail site
  - 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

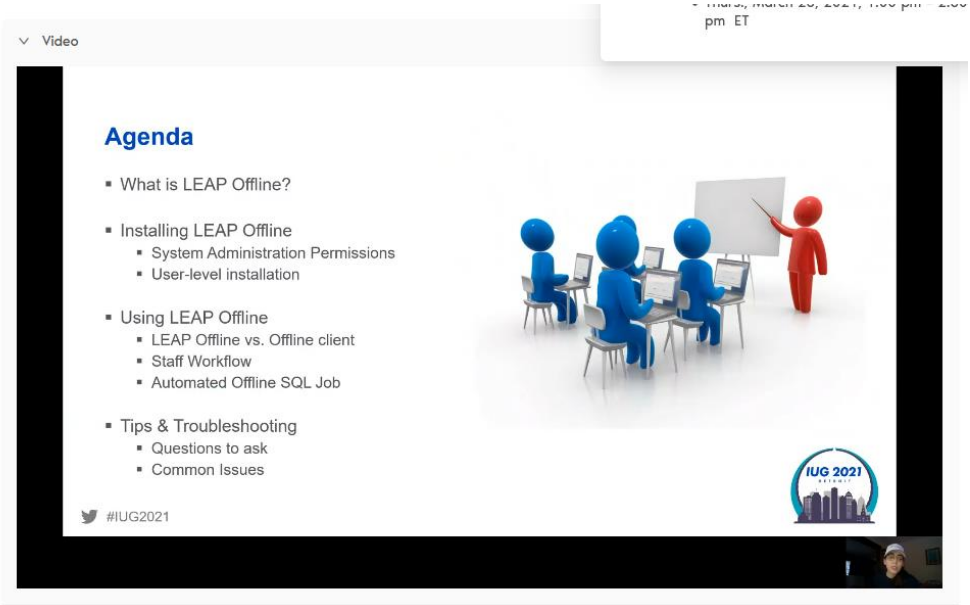
- Help/keyboard Complete checkout is a ‘Ctrl+shift+.’ (ctrl/shift/period)

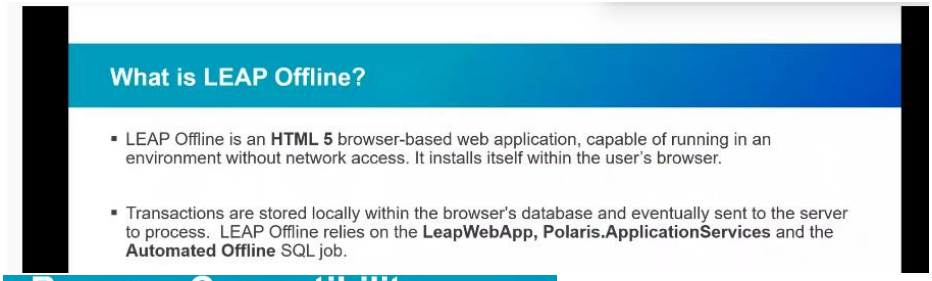
Would it be possible to have multiple Find windows open at once? Sometimes I am working on one patron's question while they're off browsing, and another patron comes up. Or I might be working on a Record Set when a patron comes

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-





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:

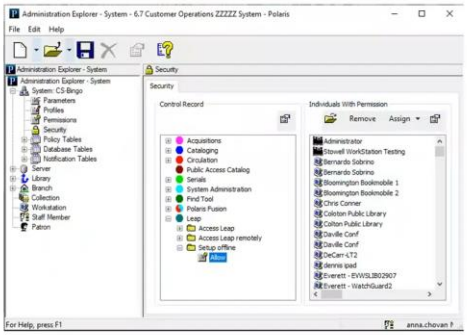
- Windows Internet Explorer (all)
- iOS Safari 1.0-11.2

System Administration Permissions

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

  System > Security > Leap > Setup Offline > Allow

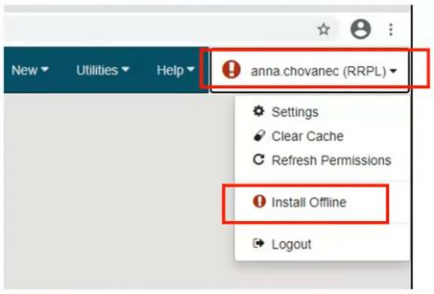
- This permission is not assigned at upgrade.
- Workstation access is permitted by default.
- The permission is not overridable.



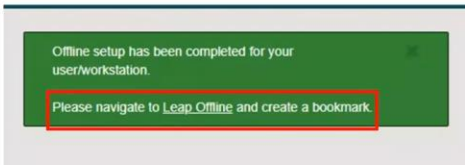
User-level Installation

- 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.



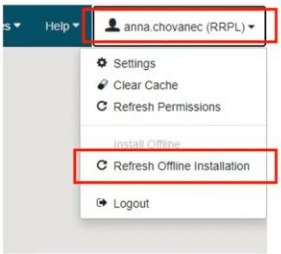
- Create a bookmark for LEAP Offline for use in the event of a loss of network connectivity.



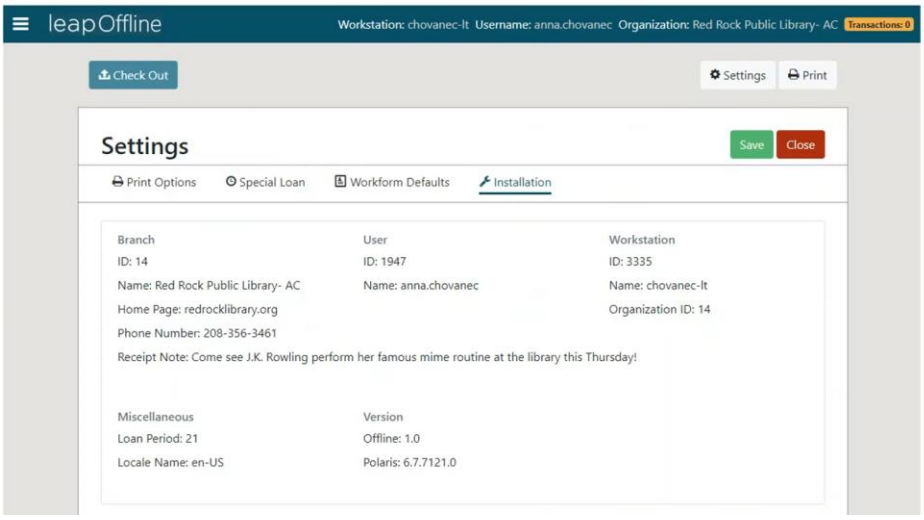
url is case sensitive for bookmark

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

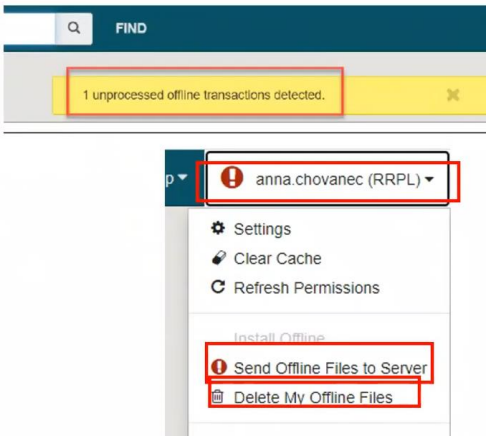
- Check in, Update inventory date, Check out, Patron registration (new and update)
- Generates .TRN files on the user's workstation
- Automated Offline SQL job optional
  - User can upload files directly through Bookmobile

LEAP Offline

- Check out only
- Generates data that imitates .TRN files within the user's browser cache
- Automated Offline SQL job required
  - As there are no files, user cannot upload manually

Staff Workflow

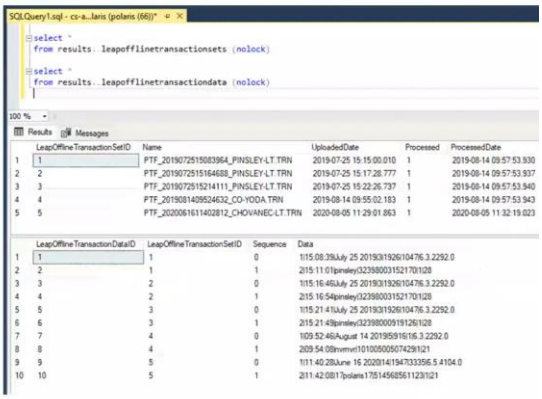
1. Navigate to leapoffline site via browser bookmark
2. Perform checkout transactions **[DO NOT clear browser cache]**
3. Login to live LeapWebApp site **[Yellow toast indicating unprocessed offline transactions]**
4. Send offline files to server or delete them if unwanted



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"



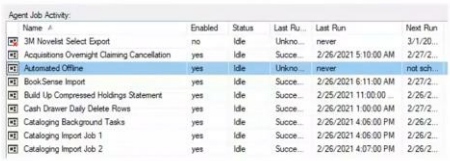
Automated Offline SQL Job

- 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:

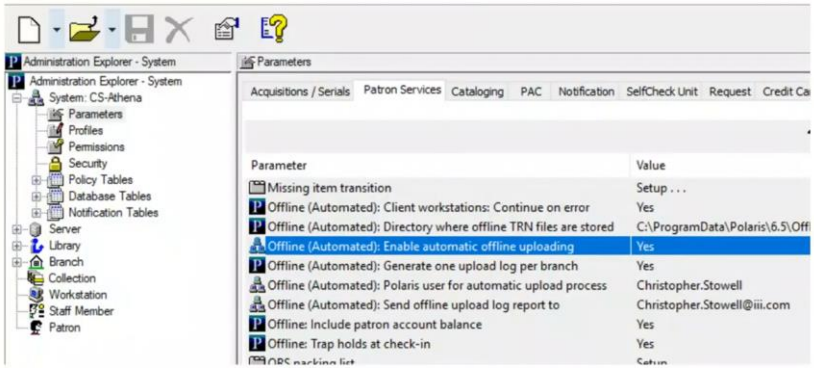
  C$\ProgramData\Polaris\[version]\OfflineTransaction



****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.



#IUG2021

1. User performs transactions in Leap Offline
2. Offline transactions are stored in the browser's database
3. User logs into Leap and is notified of unprocessed transactions
4. User uploads unprocessed transactions to database via Polaris.ApplicationServices (API)
5. Automated Offline Circulation Upload Processing (AOCUP) SQL job is started
6. AOCUP creates .TRN files from uploaded Leap offline transactions
7. AOCUP copies .TRN files from Polaris workstations and/or a network location
8. AOCUP processes the .TRN files into intermediate database tables
9. AOCUP launches OfflineTransactionUploadingProc.exe to perform the actual transactions

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

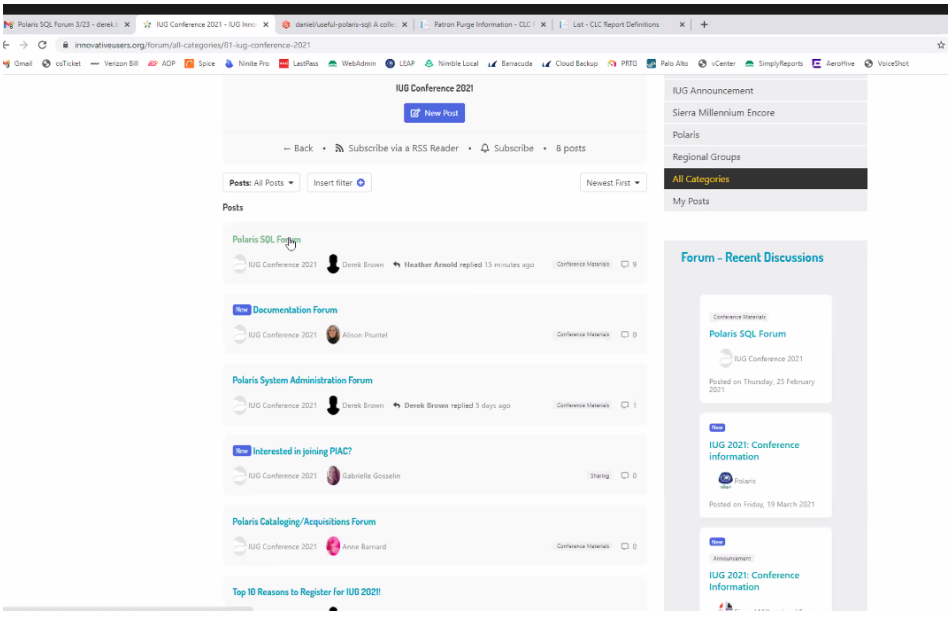
Trouble Locating the Offline Site?

- 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.

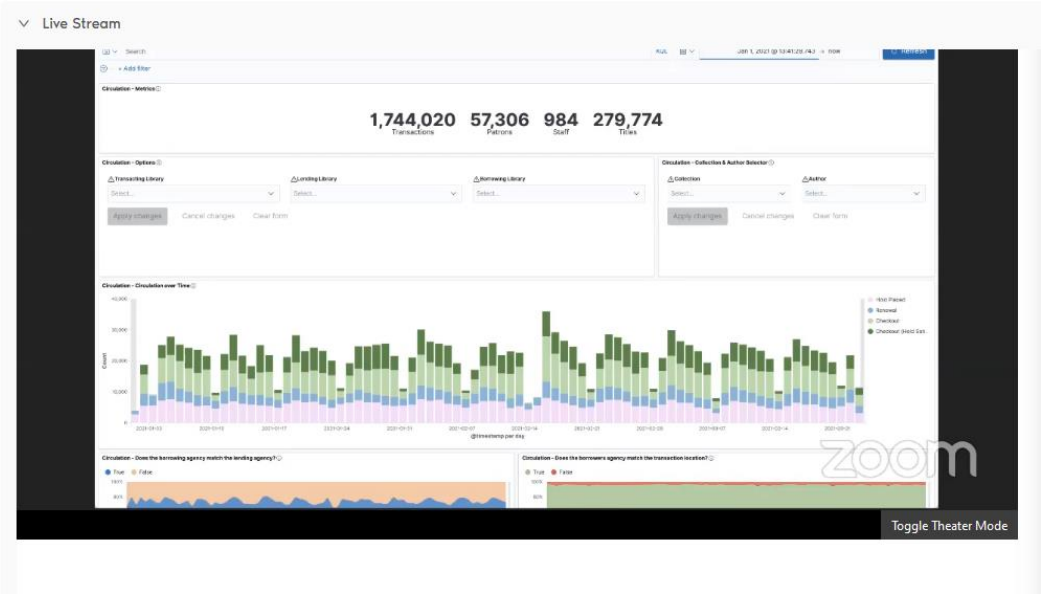
https://documentation.iii.com/polaris/PolarisPDFGuides/PolarisImportingStudentRecordsGuide_6.7.pdf

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

IUG 2021

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

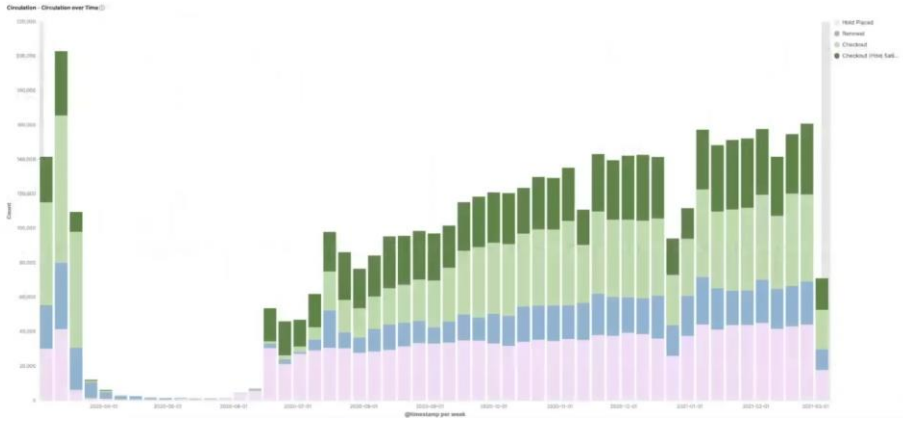
IUG 2021 DETROIT

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

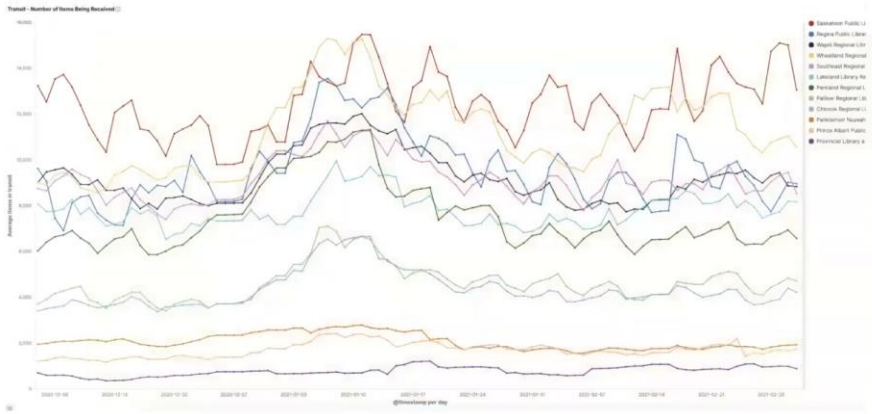
Developing Data Services

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



Developing Data Services

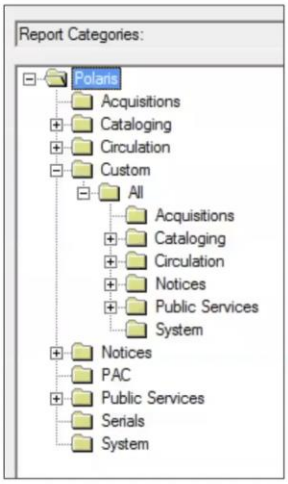
This visualization shows items in transit by receiving library.



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



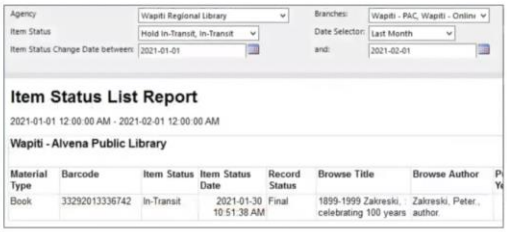
It's Too Complicated!

- 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

It's Too Complicated!

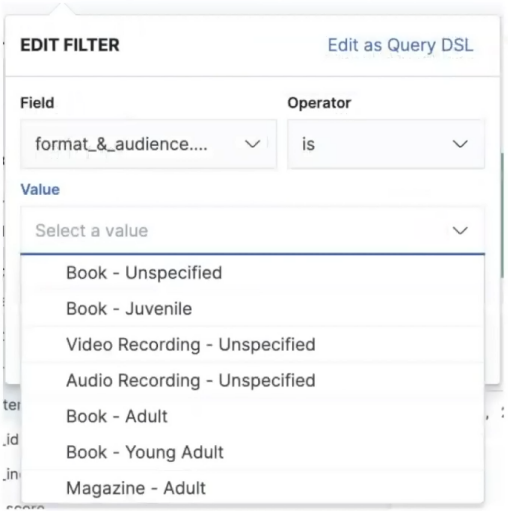
SSRS reports were not as helpful as they could be:

- 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



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.

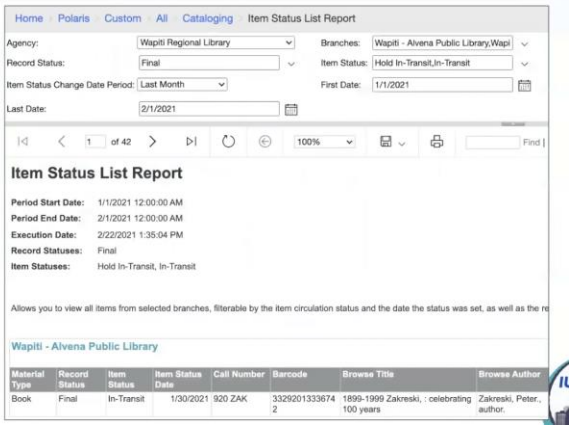
Putting the pieces together

- 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

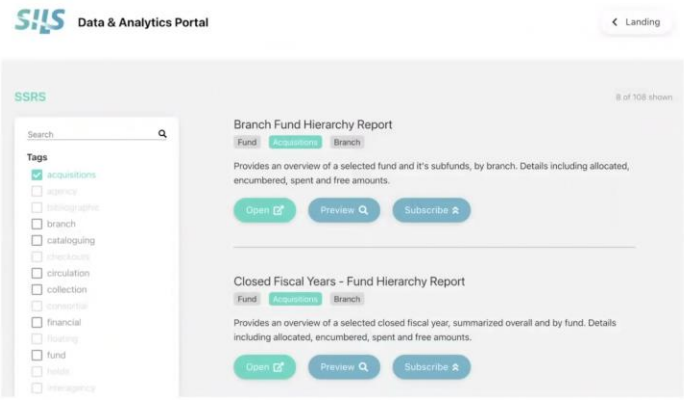
Through this work, **DAP** (the Data & Analytics Portal) was developed!

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.

Putting the pieces together

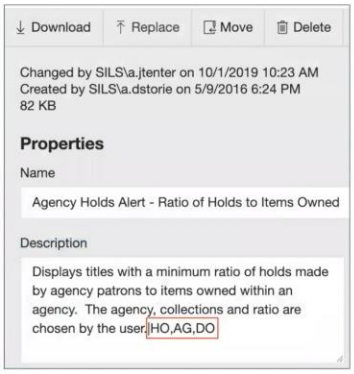
DAP’s SSRS search page with tag filters applied:



Putting the pieces together

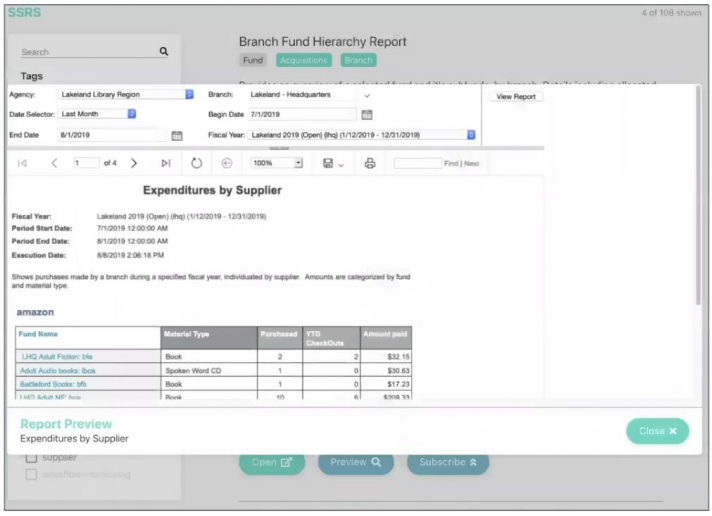
The file used to add reports to DAP includes (for each report):

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



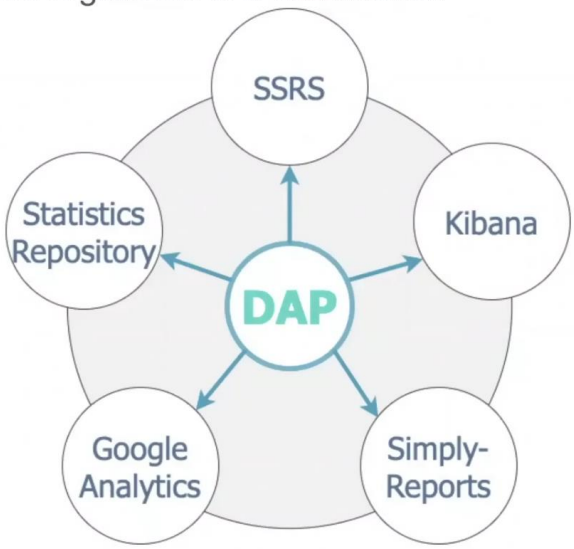
Putting the pieces together

DAP's SSRS page showing a preview screenshot:



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

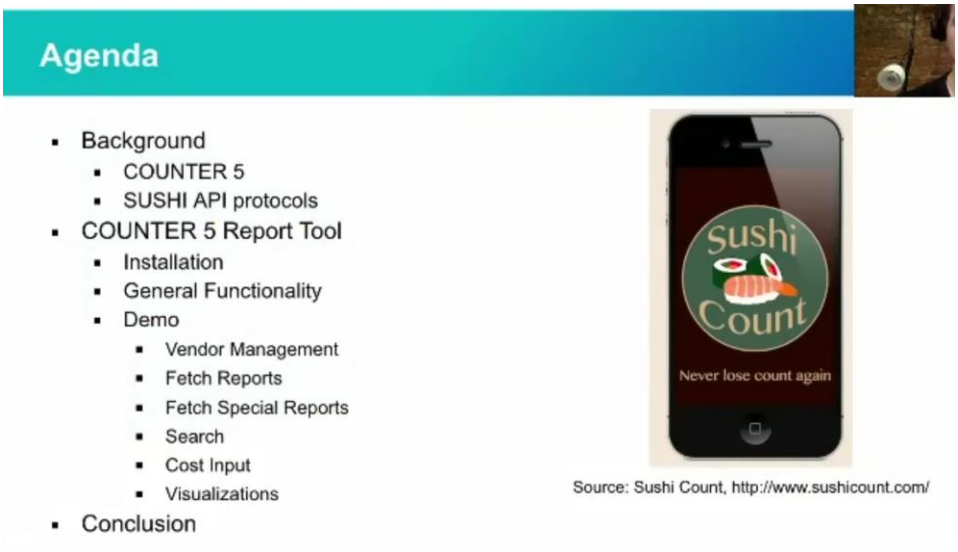
Eleanor Crumblehulme: ecrumblehulme@sasklibraries.ca

Jason Tenter: jtenter@sasklibraries.ca

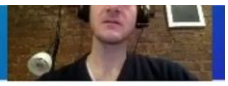
SILS: https://www.sasklibraries.ca/

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

SUSHI Made Easy



Introduction - What is COUNTER 5?

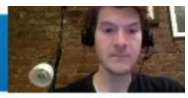


"COUNTER provides the Code of Practice that enables publishers and vendors to report usage of their electronic resources in a consistent way. This enables libraries to compare data received from different publishers and vendors." (Project COUNTER, n.d.)

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

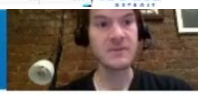
Gal Report

Introduction - What is COUNTER 5 (continued)



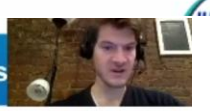
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Report_Nam	Platform Master Report													
2	Report_ID	PR													
3	Release	5													
4	Institution_N	Metro Museum of Art Watson Library													
5	Institution_I	Gale:new72306													
6	Metric_Types														
7	Report_Filters														
8	Report_Attributes														
9	Exceptions														
10	Reporting_Pl	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_Pl	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	593	115	39	56	28	52	79	82	27	42	20	32	21
16	Gale	Total_Item_Investigations	315	156	14	15	17	10	5	44	5	14	17	8	10
17	Gale	Total_Item_Requests	309	156	14	15	17	10	5	43	5	14	12	8	10
18	Gale	Unique_Item_Investigations	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_Title_Investigations	122	35	13	10	13	6	3	11	3	9	8	5	6
21	Gale	Unique_Title_Requests	120	35	13	10	13	6	3	10	3	9	7	5	6
22	Gale	Total_Item_Investigations	34	4	1	14	1	0	5	0	0	5	0	4	0
23	Gale	Total_Item_Requests	34	4	1	14	1	0	5	0	0	5	0	4	0
24	Gale	Unique_Item_Investigations	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	Total_Item_Investigations	1525	206	107	172	46	99	115	211	83	62	9	70	345
27	Gale	Total_Item_Requests	1312	206	107	172	46	99	115	115	67	28	5	12	340
28	Gale	Unique_Item_Investigations	1334	169	86	169	35	83	101	130	80	55	8	64	294
29	Gale	Unique_Item_Requests	1142	169	86	169	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=[redacted]&api_key=&begin_date=2020-01&end_date=2020-09

Also has table of vendors and if SUSHI compliant

Customizing LEAP – Chicago Public, Paul Keith

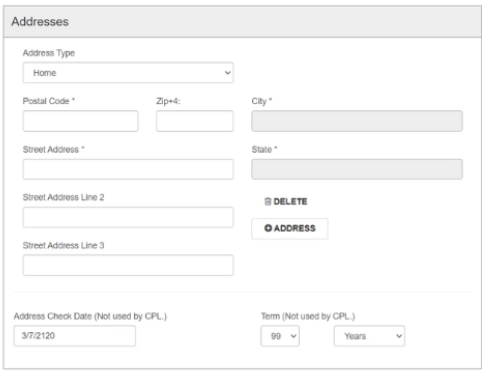
Paul Keith
pkeith@chipublib.org

Agenda

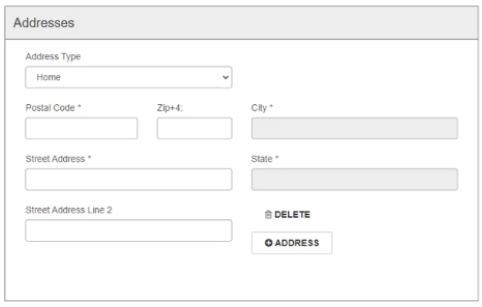
- About CPL
- Reasons to customize/Reasons not to
- HTML and CSS
- Selectors and Declarations to Know
- Practicalities
- Examples

Hide fields in Patron Reg

Default

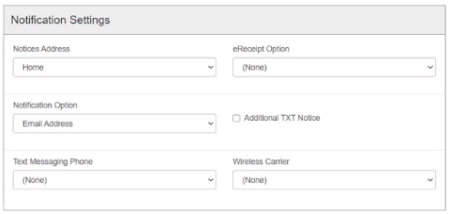


Custom



Notification settings

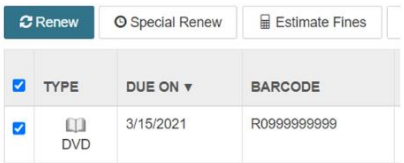
Default



Custom

Default

Custom



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

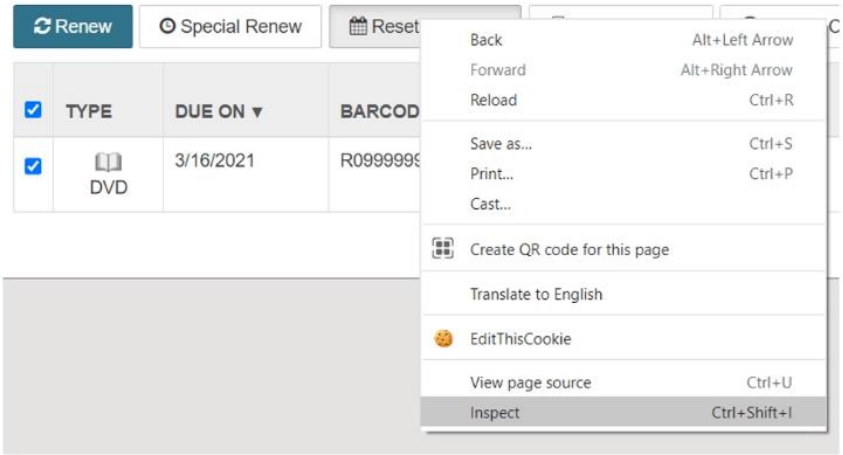
Reasons Not to Customize

- 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




```
<li>
    <button type="button" class="action btn btn-default reset-due-date disabled-in-readonly">
        <i class="glyphicon glyphicon-calendar"></i>
        Reset Due Date
    </button>
</li>
```

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;
}
```

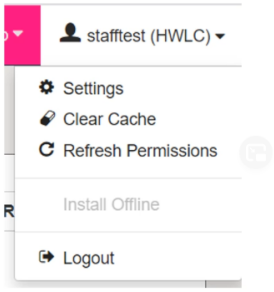
Selectors to know – ID – Unique name given to element or site – this is for menu offline install instead of graying it out they hide it – can refer to it using #menuofflineinstall (rules in curly braces)

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] …

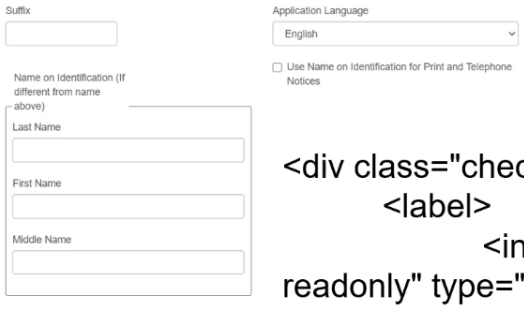
Element inside Another

```
<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




```
<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

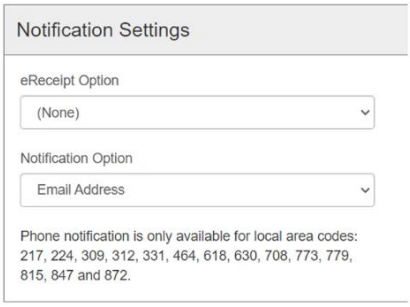
!important

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

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

Also of interest…

- margins
- padding
- borders
- content



CHICAGO PUBLIC LIBRARY

Content – adds content before/after element

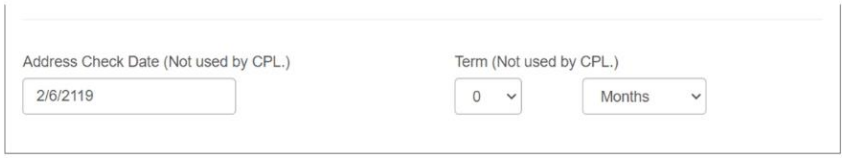
Practicalities

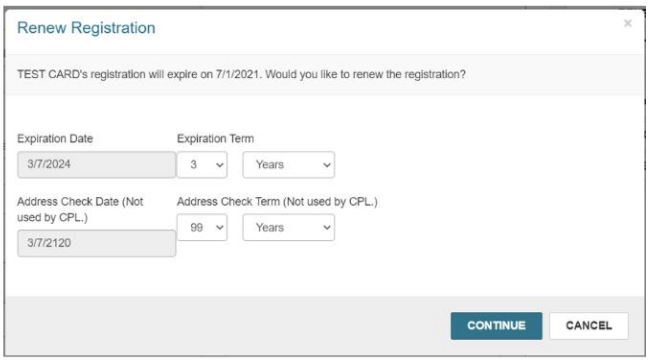
- /leapwebapp/circulation/css/polaris.css
- login.css
- Always add rules, never change existing rules
- Be as specific as possible when “writing” your selectors

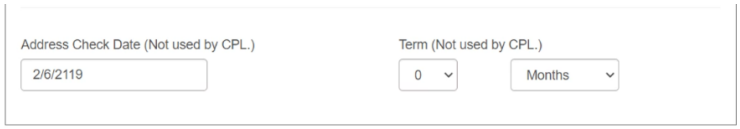
Will get wiped out during upgrade

Examples – hide address check date

Address Check Date








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

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

Extra line still appears so

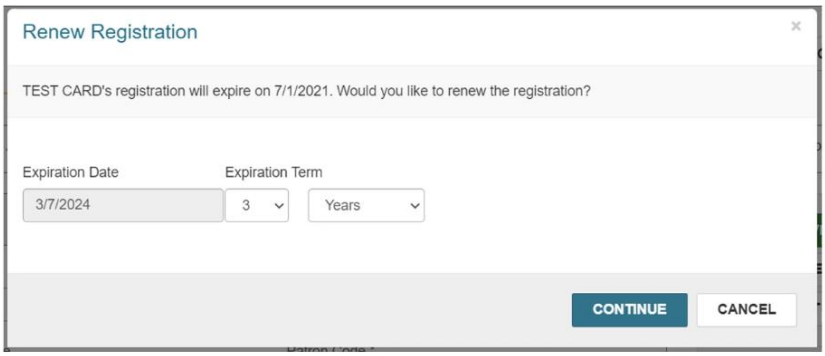
```
form.address { border-bottom: none !important; padding-bottom: 0px !important; margin-bottom: 0px !important;}
```

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>
```

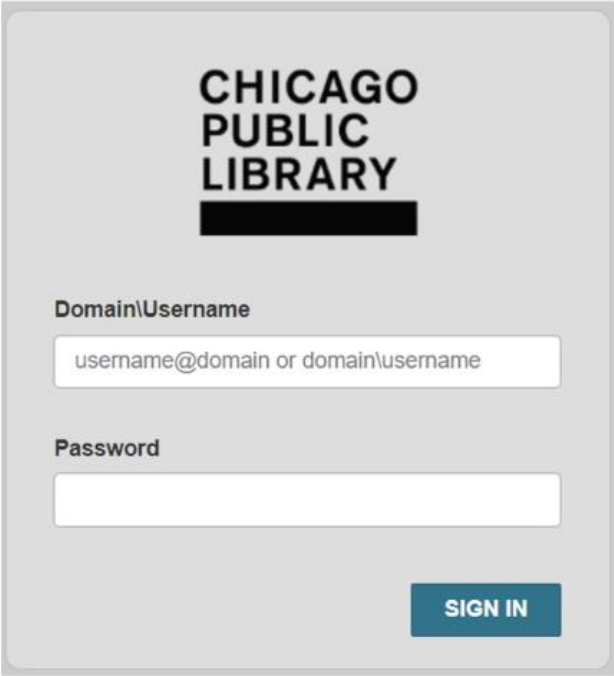
```
#renew-patron-content div.col-md-12:nth-child(2) { display: none; }
```

Looks like this now



Put logo on page

Leap Login




```
<div id="polaris-logo">
<h1>
<img
src="https://chicago.polarislibrary.com/leapw
ebapp/circulation/images/leap_logo_white.p
ng" aria-label="Polaris Leap">
</h1>
</div>
```

First hide Poloris 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;
}
```

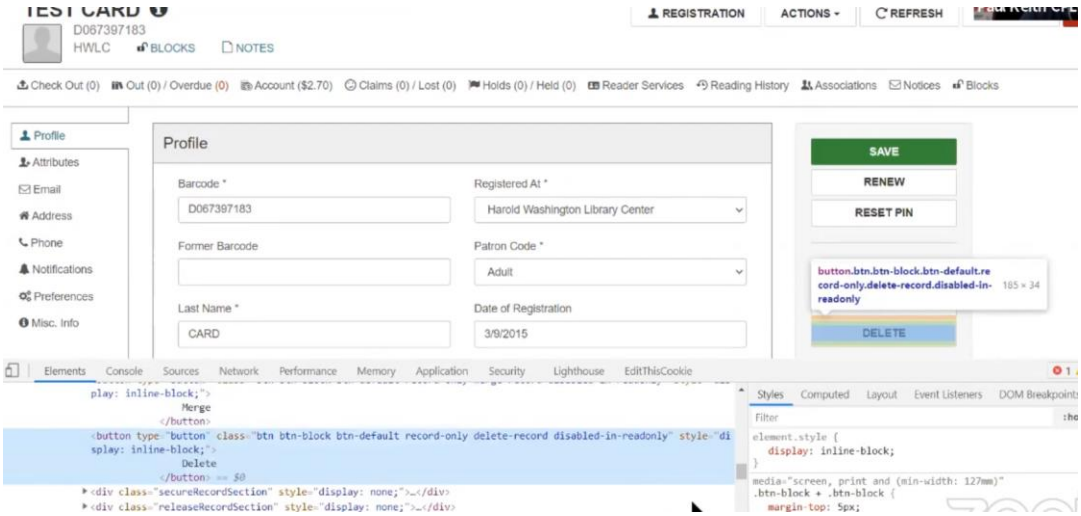
Q&A - Can edit text in WebAdmin for some fields. CSS can be used to hide some things. Changes are System-wide not branch specific – css doesn't use user name/branch ID

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

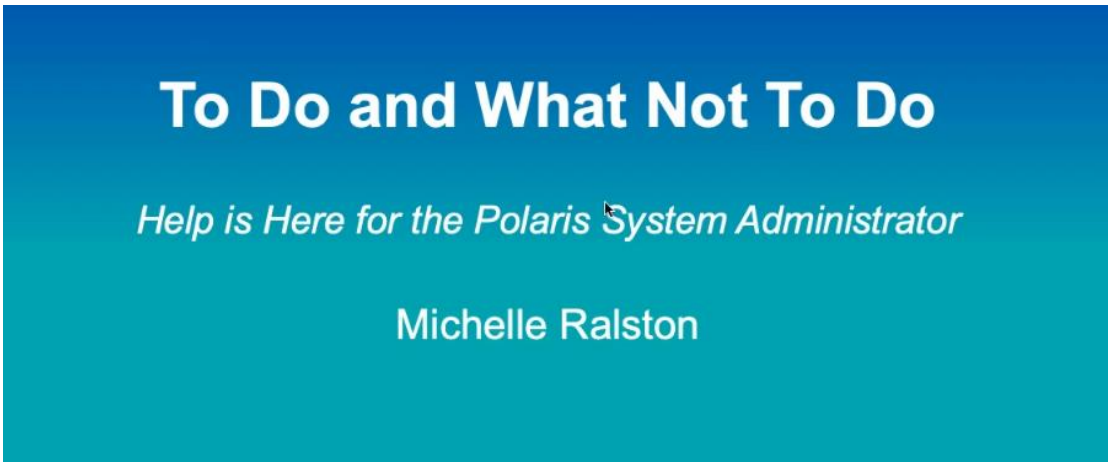
W3schools.com – css selector reference

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



In This Presentation

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

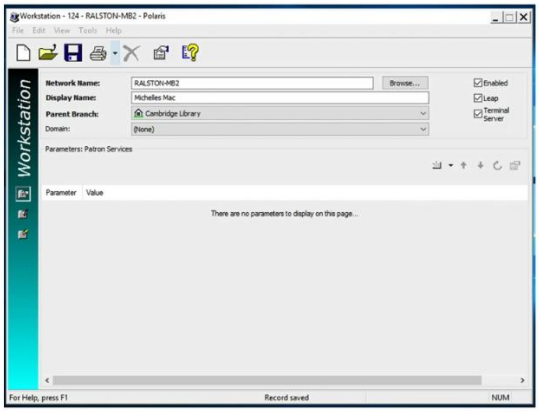
System Administration

- 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

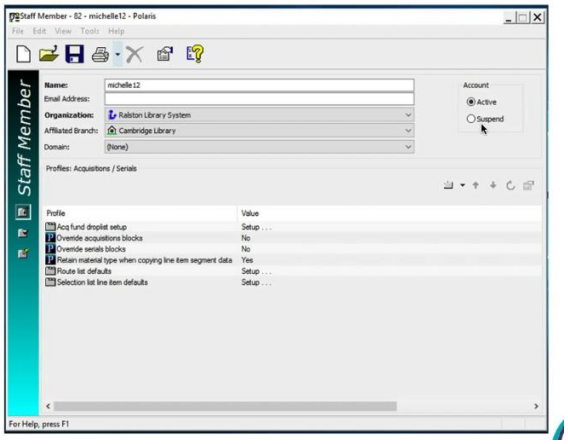
Workstations



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

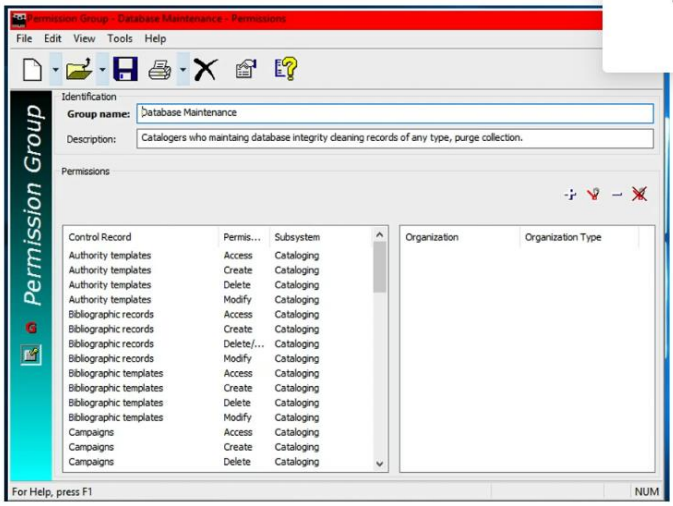
Staff Member Records

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

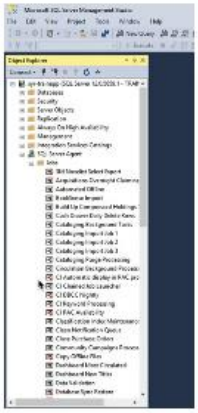


Permissions

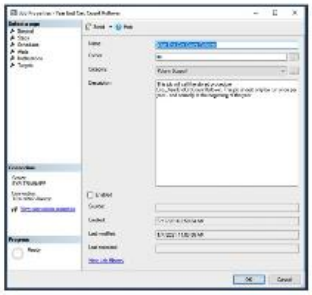
- Review Permissions
- Create new groups if needed



SQL Jobs

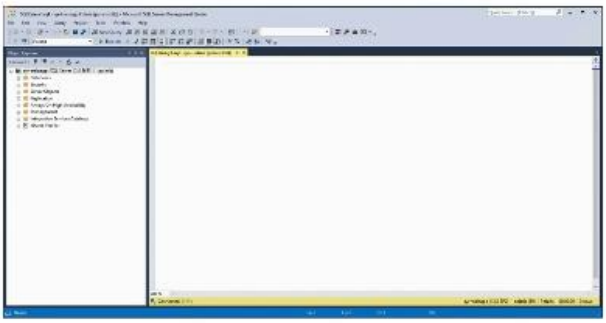


- Year End Circ Count Rollover



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?

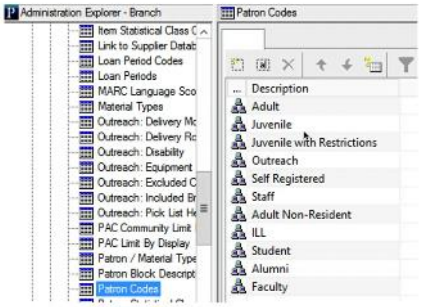
- Policy Changes
- New Workflows
- Something isn't working as expected

Check Known Issues

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

Release Notes and Upgrades

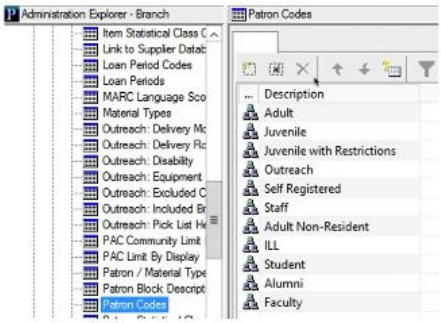
Reviewing Policy/Database Tables



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 Retention	Specifies tags to retain when an existing authority record is overlaid with a new one.	System, Library, Branch
Authority Record Import Preferred Cataloging Source	Lists the codes for cataloging sources the organization considers to be valid sources for authority records. If this table is simply, any imported authority record with any code in tag 040 $a or considered to come from a preferred cataloging source.	System, Library, Branch
Bibliographic Tags to Retain/Delete	Specifies tags to retain when an existing bibliographic record 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 do 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?

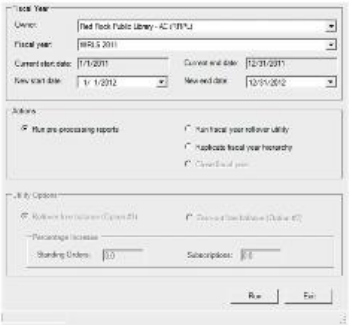
Technical Services

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

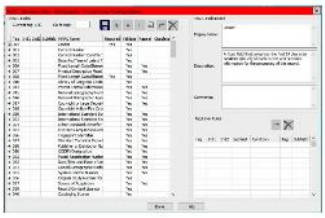


Task – Purge Cataloging Records

- 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

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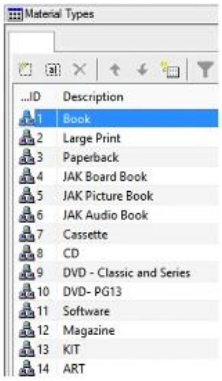
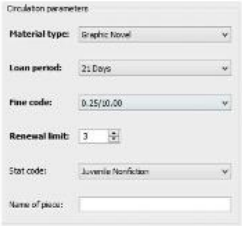
Codes/Templates Cataloging – Material Types

- 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

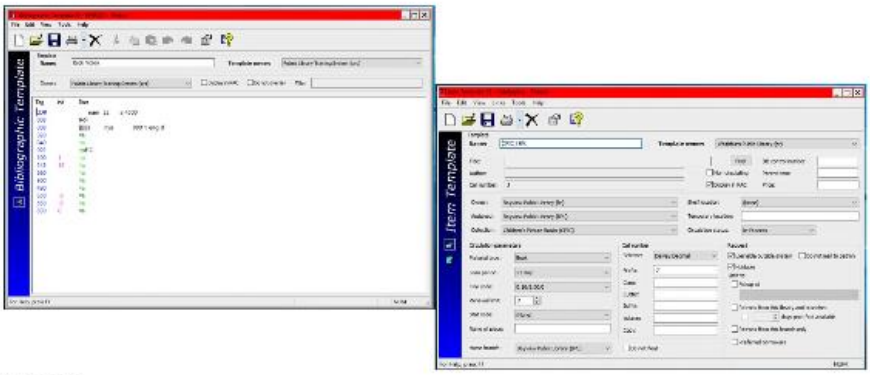
- A way to group items separately from collections
- Primarily used for reporting
- Unique to the individual branches
  - Created at the branch level only

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

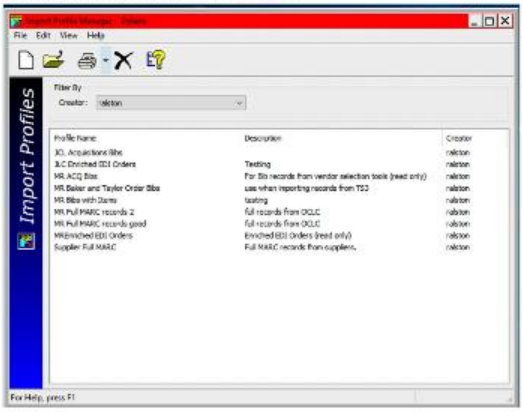
Codes/Templates Cataloging – Bib & Item Templates

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



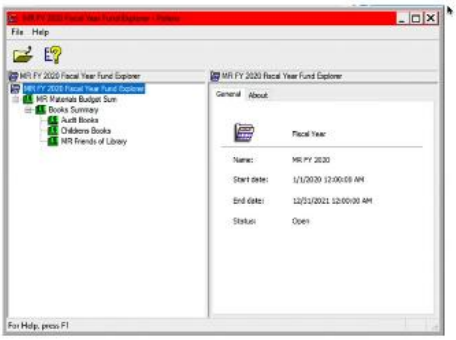
Codes/Templates Cataloging – Import Profiles

- These are the rules for how records get into Polaris



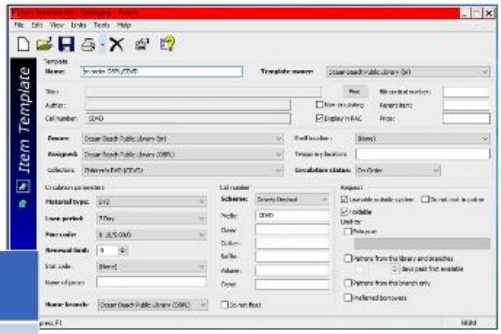
Codes/Templates Acquisitions/Serials – Funds/Structure

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



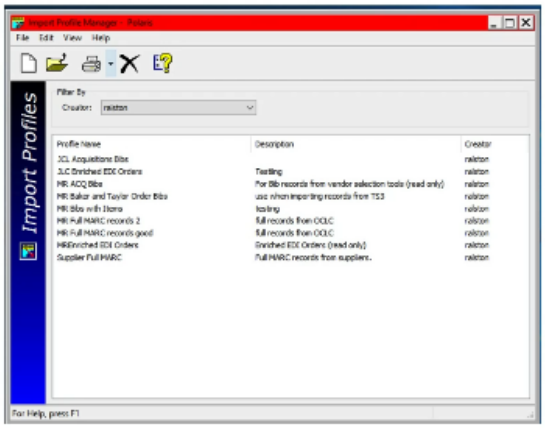
Codes/Templates Acquisitions/Serials – On Order Bib/Item Templates

- 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

Codes/Templates Acquisitions/Serials – Import Profiles



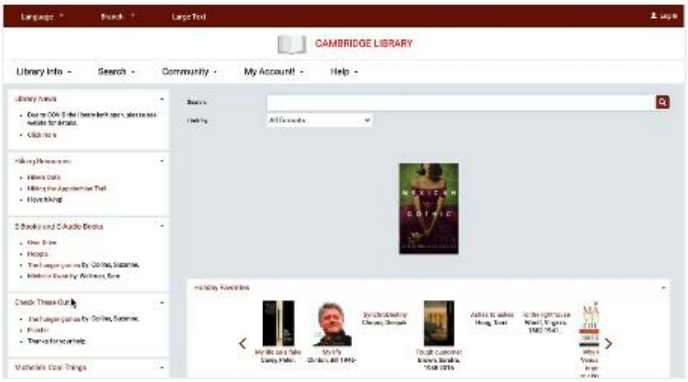
- Differ from Cataloging imports
- Might have different profiles for different suppliers

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

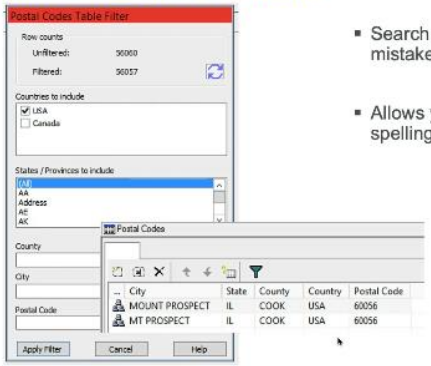
- Have there been new features added (and you've upgraded) that could benefit your patrons?
- Check any Dashboard or Resource Links



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

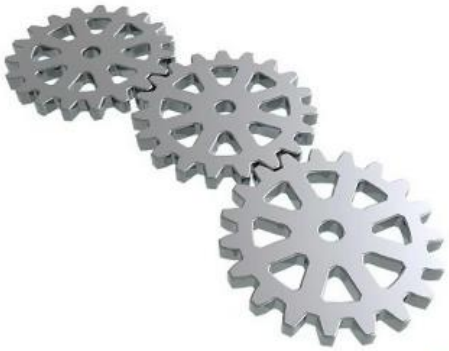
Tasks – Postal Code Table



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

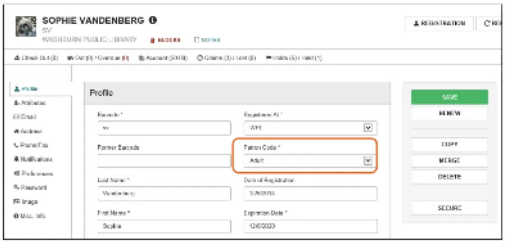
Patron Services/Circulation Settings to Review

- 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

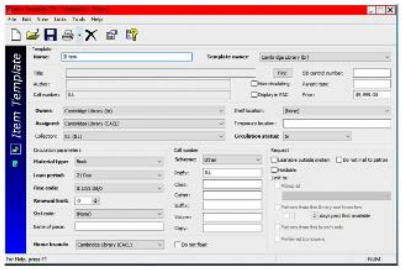
Patron Statistical Class Codes

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 and 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

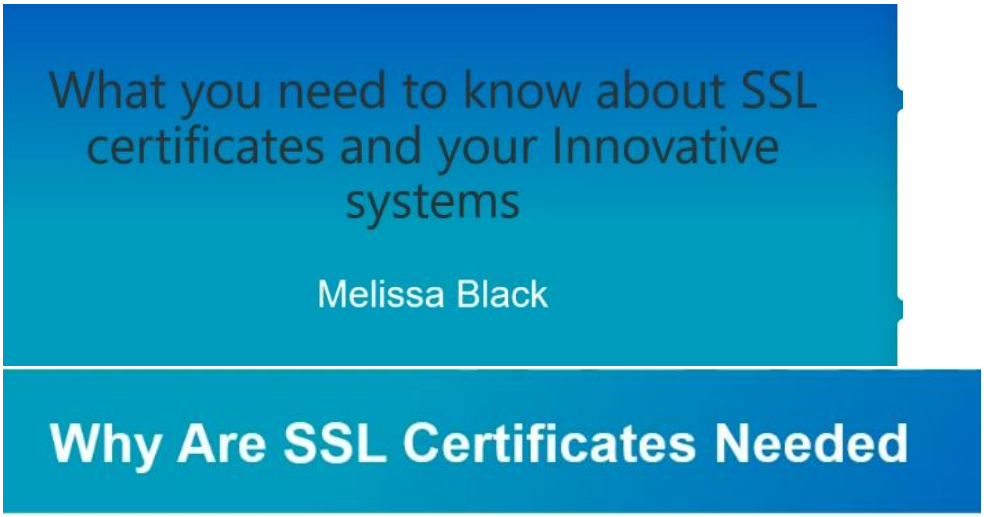
Q&A

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/amye_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



Help to protect identity and data

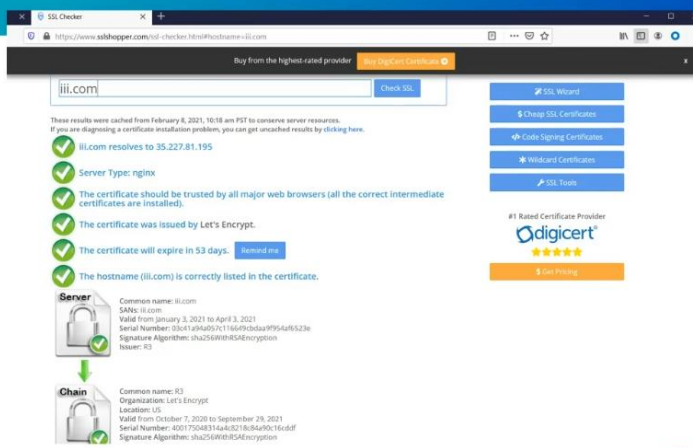
May be required by vendors

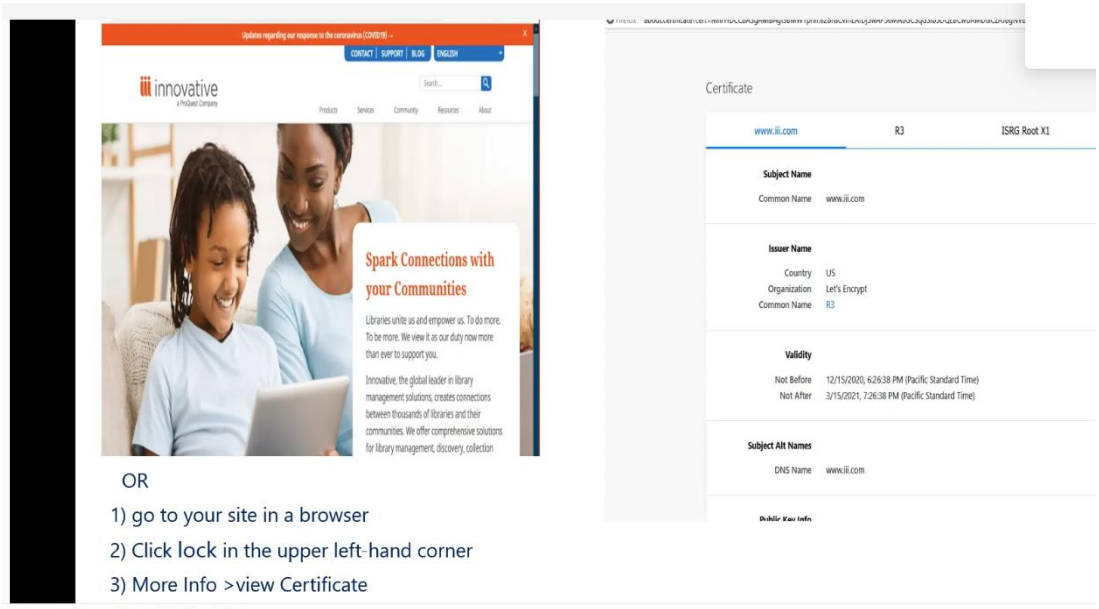
Improve search engine ranking

Alleviates consumer peace of mind

How to determine whether your certificate needs to be renewed

Visit sslshopper.com and enter your hostname





OR

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

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

Generate a CSR with server information

Submit to cert vendor

Get the certificates

Provide them to III 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

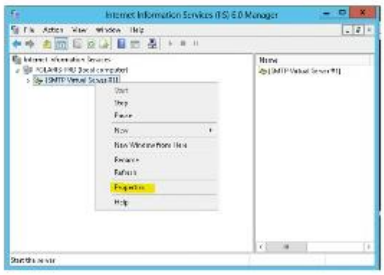
Configuration – SMTP Service

- 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

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 #1and select Properties



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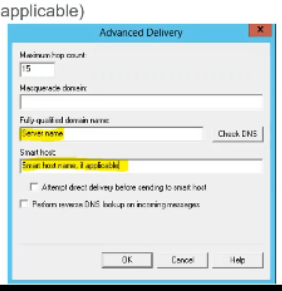
Configuration – IIS 6.0

- 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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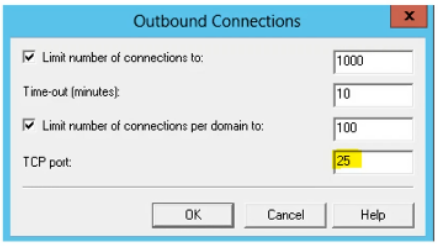
If using office 365 this is where it is designated

Configuration – IIS 6.0

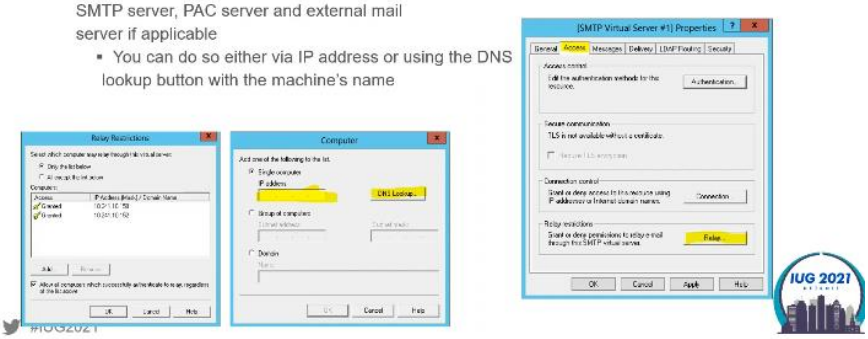
- Click Outbound Connections
  - TCP Port shows the port SMTP is utilizing, this is the port you would want to test via telnet



May use port 465 – depends on external host

Configuration – IIS 6.0

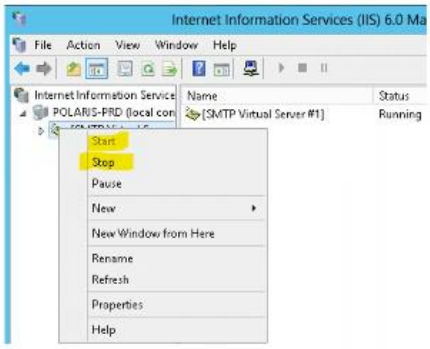
- Navigate to the Access tab and select Relay
- Click Add and add IP addresses for your SMTP server, PAC server and external mail server if applicable
  - You can do so either via IP address or using the DNS lookup button with the machine's name



May need to add PAC. Phone server or PROD

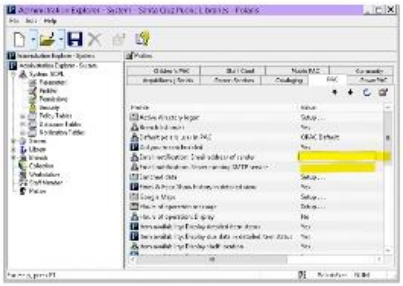
Configuration – IIS 6.0

- 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 SmartHost, e.g. Gmail or Office 365, additional configurations will be necessary.
- If you submit a ticket, a Support Engineer can assist you in configuration.

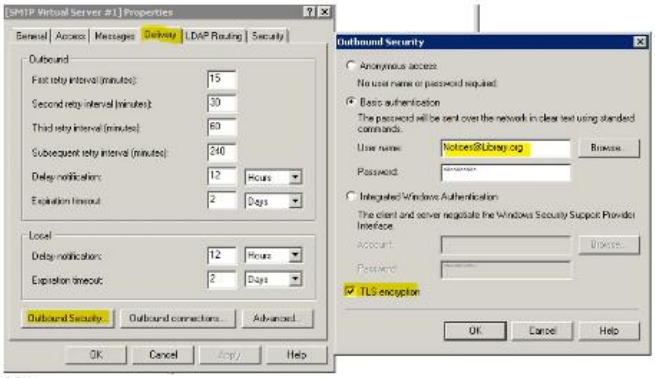
Advanced Configuration

- 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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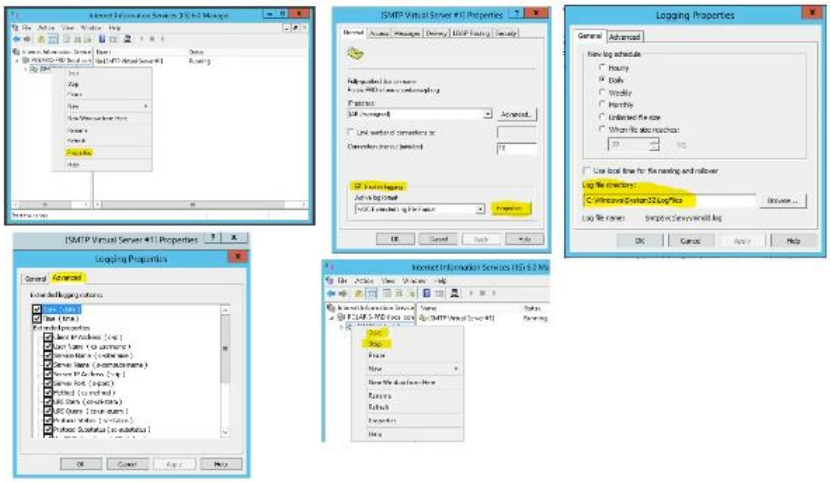
Logging - PolEmailManager

- 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



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Logging - Inetpub

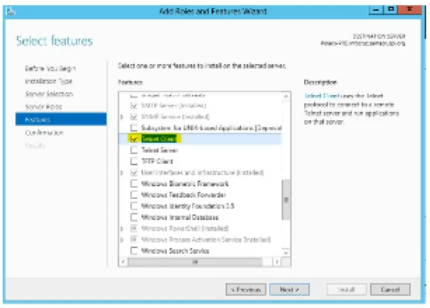
- In Inetpub, you can see whether mail is leaving the outgoing queue or getting stuck and sent to the Badmail folder
  - C:\inetpub\mailroot
- By navigating to C:\inetpub\mailroot\Queue, you can see whether mail is entering/leaving the queue. If it isn't, mail may be sending directly to the exchange 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

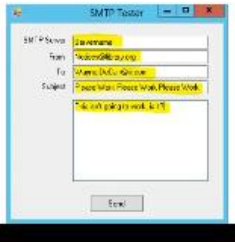
Testing - Telnet

- 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



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



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

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/amye_wccls_org/EYxMOxDgvgJEk7Ceu6T1pCkBORqIlhpKN39U3NWB0bgMvA?e=SAlXgj

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