



**OH-IUG 2017 Conference Overview**  
**September 22nd, 2017**  
**State Library of Ohio, Columbus, OH**

Registration - 8:30am - 9:30am

Opening Sessions - 9:30am - 10:30am

Morning Breakout Sessions - 10:40am - 11:30am

Lunch and Networking - 11:30am - 12:30pm

1st Afternoon Breakout Sessions - 12:30pm - 1:20pm

2nd Afternoon Breakout Sessions - 1:30pm - 2:20pm

3rd Afternoon Breakout Sessions - 2:30pm - 3:20pm

Conference ends 3:30pm

**\*Note:** An asterisk next to a program title Indicates the session is being presented by an Innovative Interfaces representative.

**The following Innovative staff are attending the conference:**

Jim Tallman (CEO)

Bill Schickling (Executive Vice President)

Dennis Carter (Sales)

## Opening Sessions (9:30am - 10:30am)

### **\*Innovative Company / Product Update - Sierra & Millennium**

Innovative representatives will provide a company update and information about their various product lines.

### **\*Innovative Company / Product Update - Polaris**

Innovative representatives will provide a company update and information about their various product lines.

## Morning Breakout Sessions (10:40am - 11:30am)

### **Building an SQL Query Repository (Sierra)**

*Leigh Duncan, Wright State University Libraries*

After trying (and failing) to keep up with and efficiently collect the SQL queries being generously shared on the IUG forums and Sierra listserv, we opted to create a repository using Navicat for PostgreSQL. This presentation will demonstrate how we set up the Navicat software, and how we collected, customized, and tested the queries shared by other libraries.

### **Space wanted: Weed within - Using Sierra and Millennium to transform library space through large-scale weeding projects and collaborative deduplication**

*Linda Brown & Bo Butler, Bowling Green State University*

Are you concerned about lack of space, de-duplication, or de-selection? These issues were raised when the library began to enlarge its role as a campus resource. Presenters will cover methods of collection management using created lists from Millennium and Sierra and Excel analysis for a single institutional collection and for a regional depository and Ohio Depository member. We will describe the philosophical and practical considerations as well as the processes – working with colleagues at a sister library, exploiting big data to identify items to withdraw, withdrawal procedure, results and implications for the future.

The following efforts will be discussed:

- Weeding project to review 150,000 titles in the library's Main Stacks and transfer to the Ohio Depository
- De-duplication between two library contributors to a regional depository and to the Ohio Depository

### **Using Polaris and MARC-EDIT to enter Lexile and Accelerated Reader information**

*Doug Williams, Campbell County Public Library*

This session will describe the process and techniques used by Campbell County Public library to get Lexile and AR processed records from MARCive, edit them with MARC-EDIT, and then uploading them and displaying them in Polaris.

### **Tips and tricks for PCI Compliance (Any ILS - Birds of a Feather)**

*Paul Robson, Central Library Consortium*

PCI Compliance is an ongoing challenge. During this Birds of a Feather session, you have the opportunity to share ideas and tips with your colleagues and talk about the upcoming changes with PCI DSS v. 3.2.

## **\*Director's roundtable discussion with Jim Tallman (CEO - Innovative Interfaces)**

*Jim Tallman, Innovative Interfaces Incorporated*

An opportunity for library Directors and other key decision makers to discuss the future of the Innovative partnership with Ohio Libraries. To help facilitate an effective discussion, please fill out any questions you might have for Mr. Tallman when registering for this session.

## **Lunch and Networking (11:30am - 12:30pm)**

A boxed lunch will be provided (make your selection during registration) along with a selection of sodas and bottled water. Take the lunch break as an opportunity to network with your peers in the main conference room or the hallway area.

## **1st Afternoon Breakout Sessions (12:30pm - 1:20pm)**

### **System Setup for Patron Privacy (Polaris and Sierra)**

*Phil Shirley, Cuyahoga Falls Library; Wes Osborn, Central Library Consortium*

Learn about the settings in your systems that affect patron privacy and the broader concepts behind them. We'll talk about Polaris, Millennium, Sierra, and other library IT, including things like reading history, transaction logs, online payment, and last patron, as well as system security, HTTPS/TLS, and email. We'll also discuss improvements that we'd like to see from Innovative. There will be useful details for IT staff and higher-level discussions of interest to everyone.

### **Intro to SQL ...and now what? (Sierra)**

*Ray Voelker, The Public Library of Cincinnati and Hamilton County*

Introduction to general SQL concepts with the Sierra SQL feature in mind. A few examples of useful queries will be shown and explained. I will then discuss some methods in which SQL can be used to schedule the running of regular reports.

### **Improving the User Experience: Facilitating Scholars in their access of Library Use Only materials in archival collections (Sierra)**

*Andrea Boehme, John Kloor, Lindy Smith, Mark Strang, Bowling Green State University*

The unique materials in the special collection libraries at BGSU (Music Library and Bill Shurk Sound Archives, Browne Popular Culture Library, and the Center for Archival Collections) contain treasure troves of materials for researchers. Until recently, all collection use was tracked using paper registration forms but with the advent of the ACA/PCA's (American Culture Association/Popular Culture Association) Popular Culture Summer Research Institute at BGSU in 2016, closed stack special collections experienced intensive use in conjunction with the Institute that overwhelmed the paper processes of the past and were unsustainable!

The special collections departments worked with Access Services and Library IT to find a way to use Sierra and enhancements to the local OPAC to improve patron experience, automate collection of usage statistics, strengthen security, and streamline service point workflows. Members of each of these units will describe the role they played and the outcomes they've observed as a result of these changes.

## **Technical Services Roundtable and Accelerated Development Proposal Review (Polaris)**

*Cathy Mason, Columbus Metropolitan Library*

An opportunity for Technical Services staff to share ideas and tips. Also during this session, the Central Library Consortium (CLC) is hoping to get feedback from other Polaris customers on some Accelerated Development proposals. CLC is hoping to fund Technical Services related improvements to Polaris in 2018 and your feedback will help guide those efforts.

## **2nd Afternoon Breakout Sessions (1:30pm - 2:20pm)**

### **Surviving Migration to Hosted (Sierra)**

*Karen Perone, Rodman Public Library*

It was less than a year ago that Rodman Public Library opened its server to Louisville Public Library and became a consortium. The Sierra turnkey server was nearing end-of-life and the decision had been made that the consortium would move to hosted sometime in 2017. That decision came sooner than expected when PayPal's new TLS 1.2 requirements were announced. With a deadline of June 30 to upgrade, the libraries took the leap and migrated to hosted. This presentation will explain the process, preparation, and perils that followed with words of wisdom for those planning a move in the future.

### **Utilizing Payment Data with Excel VBA (Sierra)**

*Gregg Harris, University of Akron; Luke Avsec*

Trying to effectively review and analyze payment data exported from Sierra can be difficult and time-consuming. This is because the data is often not exported in a way that is useful to librarians. Examples of problems experienced when exporting this data include multiple payments on one record displaying in a single row, often dozens of columns across, and only being able to export very limited information when exporting invoice records. Before using VBA, the faculty and staff at The University of Akron would solve this problem by reformatting the data row by row and keeping a separate Excel sheet where invoice information was entered manually. This extra work took up a lot of our time and was prone to errors.

Now through VBA programming this same data is quickly reorganized and formatted in a way that is easy for us to use. This has led to improved workflows in both acquisitions and collection management, an increase in the accuracy of our data, and greater insights as to how the library spends its money. See the benefits of using VBA to work with payment data and learn how your library might benefit from doing the same.

### **Is it time to perform some housekeeping? (Polaris)**

*Kelly Hock, Central Library Consortium*

System configurations need be updated as library collections and library staff change. Have your settings gotten a bit dusty? Is it time to do a little housekeeping? This presentation will suggest settings to review and tables to be familiar with in order ensure your settings are working they way you want them to. Notices, loan periods, Lost item recovery and permissions will all be discussed.

## 3rd Afternoon Breakout Sessions (2:30pm - 3:20pm)

### **Find out more about fine free (Any ILS)**

*Monica Baughman, Worthington Public Libraries; Charlie Hansen; Columbus Metropolitan Library, Pam Taylor, Delaware County District Library*

A discussion about the process and impacts of going fine free at a public library.

### **Do It Yourself Search Tools: Practical Applications of Sierra DNA and REST API**

*Cameron Schrode, Akron-Summit County Public Library*

Interested in the new possibilities using Sierra's REST API and Sierra DNA? Akron-Summit County Public Library presents interesting examples of how we use them, including the ability to build business intelligence dashboards through the use of open-source software. Also included in this presentation, is a simple tool that corrects most e-mail address typos using a human-supervised machine learning tool written in PHP, simplified and able to give an idea of what's already possible.

### **Enhancing Your Catalog with MarcEdit: Batch-Adding Subject Headings and an OhioLINK Refresh Project (Sierra)**

*Paul Heyde, Case Western Reserve University; Mike Monaco, University of Akron*

The Kelvin Smith Library at Case Western Reserve University recently conducted a project to add subject access to approximately 80,000 bibliographic records with no subject headings, most of which had not been updated in more than 25 years since the library originally adopted Innovative Millennium. Using MarcEdit, Paul Heyde batch downloaded OCLC records, merged them with records extracted from the local catalog, and then used a special load table to load subject MARC fields into Sierra. Paul will discuss some of the considerations made in designing the workflow and reflect on the outcomes of the project.

At the University of Akron, after a discrepancy in the number of records expected and actually found in the catalog were noticed, we decided to reload the back files of OhioLINK shared electronic resources going back more than 10 years. Mike Monaco will explain some of the problems posed by the project and how he used Sierra's data exchange, several of MarcEdit's tools, and a pair of specialized load tables to handle them. The final result was to improve the records which had already been in the system and to add thousands of records that had been missed over the years.

**Conference ends 3:30pm**