

OH-IUG 2018 Conference Overview

October 12, 2018 - State Library of Ohio, Columbus, OH

Registration – 9am – 10am

Opening Session – 10am – 10:50am

Innovative Company/Product Update

[Morning Breakout Sessions](#) (11am – 11:50am)

Authority Control Without Tears

Acquisitions Polaris

*What's New in Polaris Leap

How Sierra SQL Changed My Life

Lunch and Networking (12:00pm - 1:00pm)

[1st Afternoon Breakout Sessions](#) (1:00pm - 1:50pm)

New Tricks for All Dogs: Tips and Tricks for Making the Most of Create Lists

Polaris SQL introduction

*i-tiva Overview

Polaris Checklist for Adding New Branches

[2nd Afternoon Breakout Sessions](#) (2:00pm - 2:50pm)

Managing Electronic Resource Collections and Batch Loads

Goodbye Teleforms. Hello i-tiva!

SearchOhio PCIRC Forum

*This session is being presented by a representative from III.

The following Innovative staff will be attending the conference:

Jason Boland and Dennis Carter

Registration (9:00am - 10:00am)

Opening Session (10:00am - 10:50am)

***Innovative Company / Product Update**

Morning Breakout Sessions (11:00am - 11:50am)

Authority Control Without Tears

Craig Boman, Miami University

Mike Monaco, University of Akron

Can't afford to hire an authority control vendor but you'd like to get a handle on the "Headings used for the first time" report? Learn how you can leverage the Headings Report itself to automate searching for authority records to match new headings! Craig Boman (Miami University) and Mike Monaco (The University of Akron) explain how they brought the vision of extracting search terms from headings reports to reality, using tools you already have or can get for free! Craig will explain the underlying architecture of headings reports in Sierra and Mike will walk you through the steps to retrieve authority records using a series of SQL queries and batch searching with OCLC Connexion.

Acquisitions Polaris

Wes Osborn, Central Library Consortium

Do you feel intimidated by the Acquisitions process in Polaris? So do I! After working with Technical Services librarians for the past 9 years, I've picked up a few tricks along the way. We'll discuss the major steps of using Acquisitions in Polaris, including the EDI process, and troubleshooting tools for problems you might encounter.

***What's New in Polaris Leap**

Jason Boland, Innovative Interfaces, Inc.

Jason will provide an in-depth look at new features and capabilities available in Leap 5.6, 6.0 and 6.1.

How Sierra SQL Changed My Life

Phil Shirley, Cuyahoga Falls Library

Even if you don't know much about SQL, you can do a lot with simple queries or things you get from other people. We'll show some simple queries for system administration tasks like getting spreadsheets of all your locations (and other codes), logins, permissions, etc. We'll also talk about how Cuyahoga Falls Library uses SQL queries as part of a process that creates lists of new a popular titles for the web site, plus reports for selectors. This is intended primarily for system administrators but some parts might be of general interest. No SQL experience is required.

Lunch and Networking (12:00pm - 1:00pm)

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 (1:00pm - 1:50pm)

New Tricks for All Dogs : Tips and Tricks for Making the Most of Create Lists

Mike Monaco, University of Akron

Learn some of the powerful tools in the Sierra "Create lists" module. Systems Librarian Susan Ashby will demonstrate the capabilities of the Classic, Enhanced, and JSON queries and go over some of the features and tricks in Create Lists you never knew you need! Cataloger Mike Monaco will then show some queries that can speed up clean-up projects and how you can use regular expressions to unravel knotty problems.

Polaris SQL Introduction

Mike Fields, Central Library Consortium

In this session, you'll learn the basics of how to connect to Polaris SQL. You'll also see how to perform SQL joins and where to find information on the Polaris SQL database structure. Finally you'll learn how to use SQL statements you've developed in the Polaris Find Tool. This will allow you to perform searches that are far more complex than those offered by Polaris Power Searches.

***i-tiva Overview**

Sean Young, TALKINGTECH, Inc.

The presentation will cover the background of TALKINGTECH, the features of I-tiva, the relationship with Innovative and replacing teleforms (Sierra telephony), what is required from the library, what Innovative and TALKINGTECH will provide, and specifics of how the project would work. i-tiva provides libraries with a robust service for patron notifications directly through Innovative from an award-winning service provider.

TALKINGTECH's i-tiva library service, used by over 600 public libraries including Polaris library partners, provides personalized telephone notifications to patrons.

Polaris Checklist for Adding New Branches

Kelly Hock, Central Library Consortium

Branch locations in Polaris are used for a variety of reasons. From new drive-up windows, to vending machines, 24 hour pickup lockers, school locations and self-service kiosks, you might be adding a new branch to your Polaris system sooner than you think. Kelly will walk you through CLC's checklist for adding a new branch so you can make sure the next time you need to add a branch to your Polaris system that you cross all your i's and dot all your t's.

2nd Afternoon Breakout Sessions (2:00pm - 2:50pm)

Managing Electronic Resource Collections and Batch Loads

Susan DiRenzo Ashby, University of Akron

Based on a tool created by Kent State University Libraries Technical Services, University Libraries Electronic Services at The University of Akron developed a Record Loading Guide. The Record Loading Guide is a tool used to vet, manage, and provide instruction for batch loading MARC records for electronic resource sets. During the course of the presentation, the presenter will describe the development and use of the Loading Guide and the roles of Electronic Services personnel involved in the vetting, managing, and batch loading processes. She will also share other documents used when vetting and/or editing MARC records for batch loads.

Goodbye Teleforms. Hello i-tiva!

Karen Perone, Rodman Public Library; Maria Armitage, Columbus Metropolitan Librayr; and Dennis Carter, Innovative Interfaces, Inc.

Rodman Public Library switched from Teleforms to i-tiva from TALKINGTECH one year ago. The presentation will talk about the advantages of the new setup from the library's perspective and what is involved on the vendor's side for the conversion to the new system.

SearchOhio PCIRC Forum

Members or those interested in learning more information about Ohio's Public Library INNReach consortium will have the opportunity to meet and share tips and tricks. A forum moderator will also pass along any questions about the central server to the Westerville Public Library.

A free registration option is available for those who would like to attend ONLY the SearchOhio PCIRC forum. Even if you're only planning to attend the PCIRC forum, please register to help conference organizers plan for room sizes.

Conference Ends 3:00pm