

SKILLS

TRAINING

Innovative Services Update

Jason Boland

OH-IUG, Oct 12, 2018

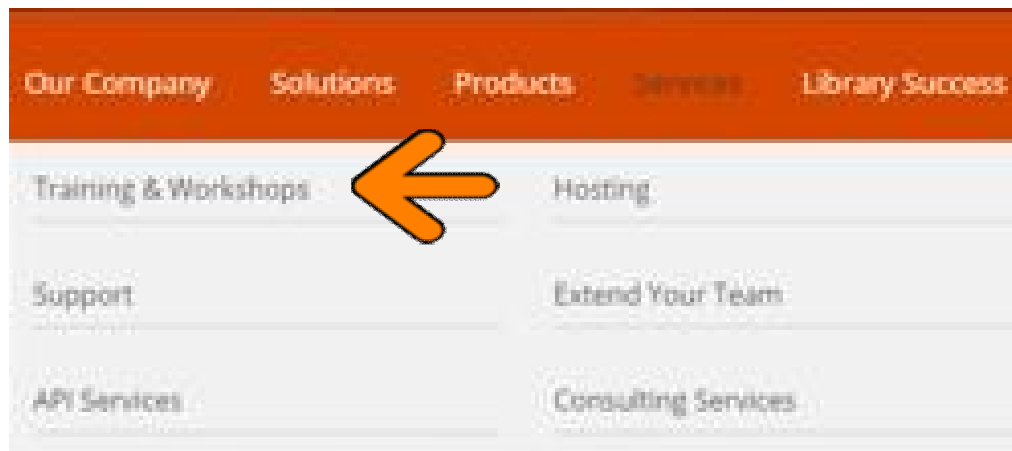


Transforming Your Library with Technology and Expertise



Training & Workshops

- ” From iii.com main page
- ” Hover over the Services header
- ” Click on “Training & Workshops” section



Training

- “ Online & onsite training
- “ FAQ’s:
 - “ How can I request a custom training plan?
 - “ How do I order online training?
 - “ Is there onsite training near me?

Other questions? Contact your account rep or email innou@iii.com



Brochures Available

- “ Detailed brochures
- “ Descriptions and outline of training topics
- “ Customize for your needs

innovative

TRAINING SERVICES FOR POLARIS LIBRARY PARTNERS

At Innovative, we understand the importance of training—when you join the Innovative family, when you upgrade to the latest versions of our software, and when you experience change in your library.

To ensure your staff is properly trained and can fully operate your Polaris solution, we offer a variety of training services—online or onsite—to help you navigate your system.

As Your Partner for Library Success, we're here to help you every step along the way. With our training services, an experienced Senior Library Training Consultant will engage your staff in a variety of ways:

ONLINE TRAINING

- **Who:** An individual library, up to ten attendees
- **What:** A three-cycle training experience conducted entirely online
- **Where:** Our virtual classroom offers training for staff in the same room, or separate locations
- **Duration:** Quoted in two-hour increments. A full day of online training is six hours

ONSITE TRAINING

- **Who:** An individual library, for all staff in need of training
- **What:** A three-cycle training experience, customized to your library's needs
- **Where:** Onsite at the location of your choice
- **Duration:** All training can be delivered onsite, but requires a minimum of two days of training

POLARIS TRAINING TOPIC

SUBSYSTEM	TOPIC	LENGTH
Acquisitions	Acquisitions refresher	3 hours
	Invoicing Options	3 hours
	Preparing and Executing a Fiscal Year-End Rollover	2 hours
	Purchase order options	3 hours
	Using Electronic Data Interchange (EDI)	2 hours
Cataloging	Adding New Items in Cataloging	2 hours
	Authority control options	3 hours
	Best Practices for Deleting Bibliographic Records and Items	2 hours
	Best Practices in Creating and Using Bibliographic and Item Templates	2 hours
	Cataloging refresher	3 hours
	Cataloging Shortcuts (Record Sets, Bulk Changes, and Macros)	2 hours
	Copy Cataloging Techniques	2 hours
	Creating and Using Import Profiles	2 hours
	Creating Cataloging and Serials Labels Using Label Manager	1 hour

Free (!) Training Resources

Supportal resources

Hot Topics

#HowKnowledgeLives



Training Resources on Supportal

- **Training videos**
 - Polaris
 - Decision Center
- **Quick Start Guides**
 - For Sierra
- **Hot Topic video links**



Upcoming Hot Topics

November

Polaris Authority Control Basics

& beyond

Check back soon

What do you want to learn about?



Workshops

- ” Our complete 2018 workshop schedule:
 - ” <https://bookwhen.com/innovative>
 - ” Sign up directly for workshops

Sierra Workshops	Polaris Workshops	Millennium Workshops
Bootcamps	Free Hot Topics	Load Profile Training
EMEA Time Zones	APAC Time Zones	



New Workshops in 2018

” For **Sierra/Millennium**

- ” Introduction to Sierra RESTful APIs
- ” 1-2-3 : Steps to clean up and optimize your Database
- ” Better Call Number Reporting (SCAT table optimization)
- ” Creating Location Code Hierarchies

We want to hear from you! Email us at innou@iii.com



New Workshops in 2018

“ For **Polaris**

- “ Managing Polaris Cataloging
- “ Polaris Reports A-Z
- “ 1-2-3 : Steps to clean up and optimize your Database
- “ Introduction, Intermediate and Designing Polaris SQL Reports

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Certification Program

- “ Reviewing and updating our certification programs
- “ For Polaris . new certification program coming soon
- “ For Sierra, currently:
 - . System coordinator track
 - . Technical services manager track

<https://csdirect.iii.com/innou/certification.php>



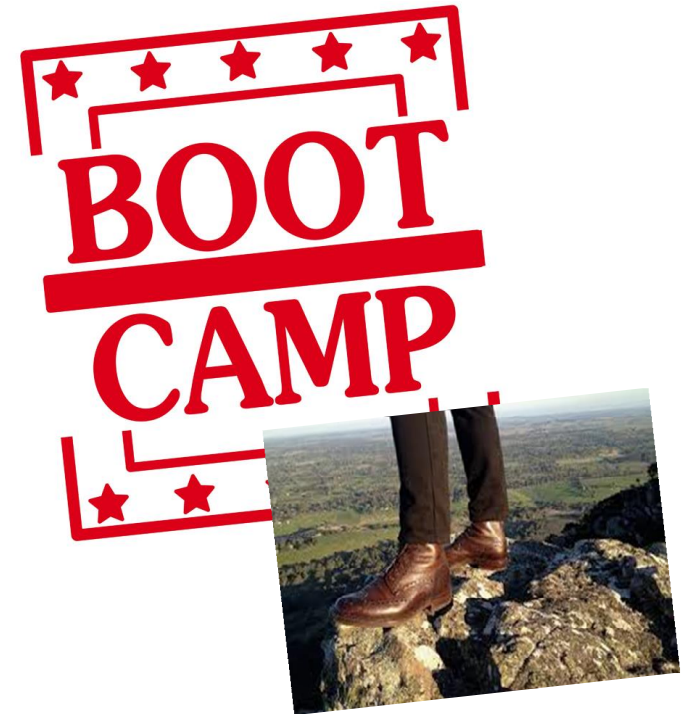
Boot Camps

November

Cataloging Essentials for the accidental cataloger+/
Martha Rice Sanders

Coming soon...

Scripting for Sierra with APIs/ with Jason Boland



Innovative Consulting Services

- ” **Workflow Consulting**
- ” **Managed Services**
- ” **Extend Your Team**

<https://www.iii.com/services/consulting-services/>

Questions? Ask your account manager or email innou@iii.com



Workflow Consulting

- “ We implemented our system years ago and haven’t made changes to improve workflows.+
- “ When we started using our system, we never thought we’d need all those reports. How do we get them?+
- “ Usually conducted onsite
- “ 2 day minimum with senior trainer
- “ Formal written report after the visit



Managed Services

- “ System hosting
- “ Remote systems librarian
 - . Temporary or permanent addition to your staff
 - . 5-20 hours/month typically

<http://www.iii.com/wp-content/uploads/2017/02/Managed-Service-for-Sierra-Millennium.pdf>

Interested? Ask your account manager or email innou@iii.com



Extend Your Team

- “ WebPAC refresher services
- “ Custom web development
- “ Holds consultation
- “ Location code change services
- “ API success services

<https://www.iii.com/services/extend-your-team/>

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Thanks!

