

# Ohio IUG

---

October 12, 2018

presented by **Dennis J. Carter, Business Director**



# 2017 Customer Experience Investments

Innovative evolved the products, fostered library partnerships, established enterprise class software support and services, and invested in the infrastructure required to better serve you.

## Library Partnerships

### Investments to Drive Strategic Library Relationships

- Account Plans
- Tiered Packages
- Support & Client Communications

## Investment in Flagship Products & Value-Added Services

### Advancement of Core Products & Service + Blueprint For the Future

- Stability, Scalability and Evolution of Current Products
- Value Added Consulting Services
- Expanded Training Services
- Managed Services, Technical & Data Services

## Next Generation Library Platform

### Next Generation Product Investment Plan

- Library Partnerships
- 208 Libraries Develop the “Blueprint” For the Future of our Partnership
- Design for 2018 Launch of Context Engine, Context-Based Discovery
- Proof of Concept to Confirm Blueprint

# 2017 By the Numbers

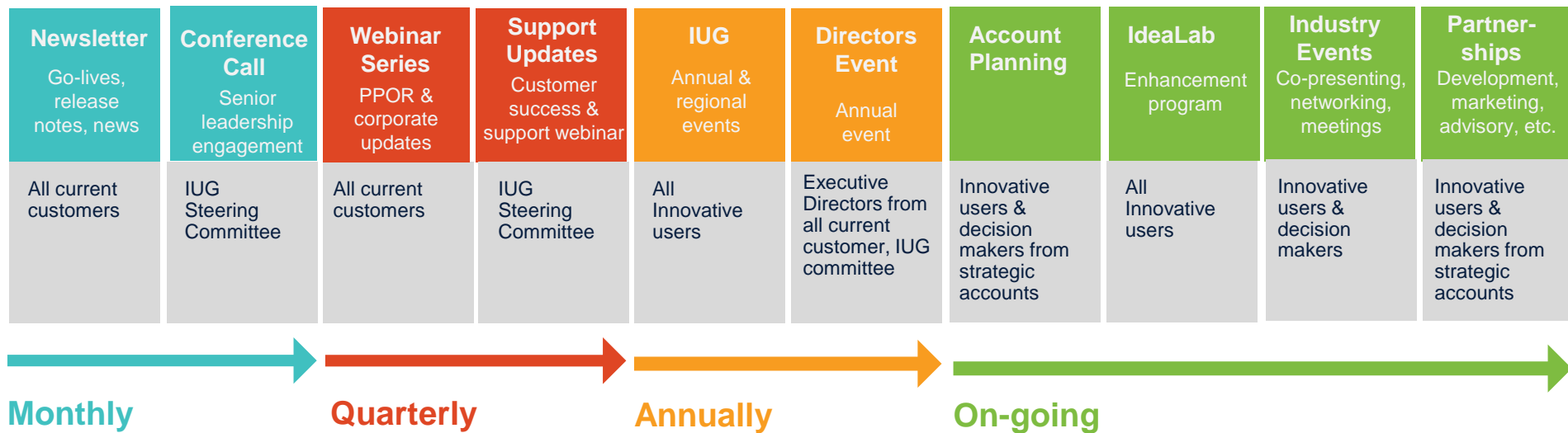
- **94** Libraries “Go Live” on Sierra & Polaris
- **26** Quarterly Product Releases For Sierra, Encore, Polaris, Mobile Worklists, Vital, Virtua, Resource Sharing, and MyLibrary.
- **127** Libraries joined ArticleReach or InnReach
- **18** Webinars with **7,182** total attendees providing updates on the company, products, customer support and services.

Innovative Webinars	2015	2016	2017
Total Webinars	0	10	18
Webinar Registrations	0	2725	7212
Webinar Attendees + Views	0	3383	7182

**Building Strong Relationships With Clients**

# Innovative Customer Engagement

Addressing your feedback to hear more frequently from us on the topics that matter



# Have You Worked with Our Customer Relationship Center?

Innovative's Customer Relationship Center (CRC) is an additional resource to help you with quotes and information for smaller products, services and trainings. The team is available by phone or email Monday-Friday, 7 a.m. – 5 p.m. PT

HOW TO CONTACT THE CRC:

P: 510-619-3566

E: [sales@iii.com](mailto:sales@iii.com)

Jenna Morin, Inside Sales Manager

E: [jenna.morin@iii.com](mailto:jenna.morin@iii.com)



A close-up photograph of a person's hands typing on a laptop keyboard. The image is heavily tinted with a dark blue color. The text 'Next Generation Solutions' is centered over the image in a white, bold, sans-serif font.

# Next Generation Solutions

# Our Journey Together

## Library Partnership Services

- Customer Support (CRC)
- Product Enhancements
- Product Bundles, Contracts
- Professional Services
- AWS Hosting
- ISO27001 Security
- Proactive Monitoring

2016

## Next Generation Launch

- Context Engine
- Discovery
- Structure for Advanced Analytics

2018

## Next Generation Phase II

- Polaris integration
- Advanced Analytics

2019

2017

## Blueprint For The Future Of Libraries

- Expanded Account Reps
- Library Account Plans
- Product Enhancements
- Communication Plans
- Value Added Services
- 2018 – 2010 BluePrint
- Next Generation ILS POC

2020

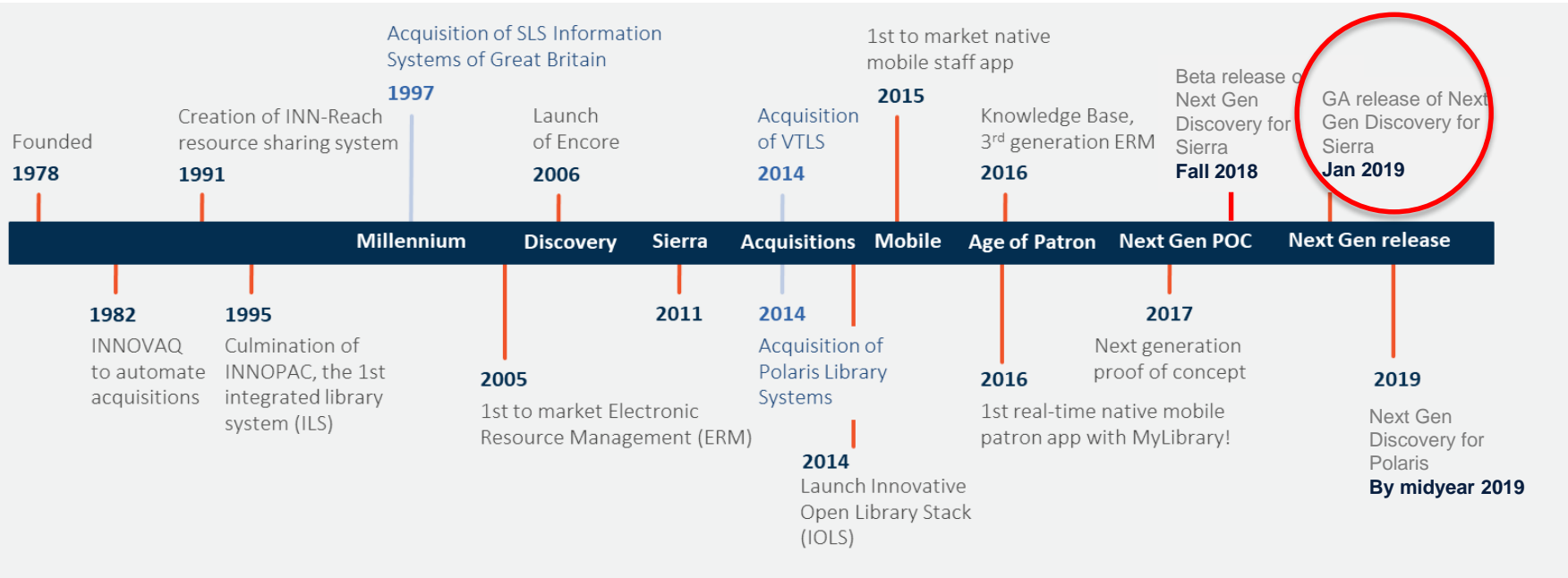
## Next Generation Phase III



# History of Innovation.... 2018 is a New Product Launch Year!

*Innovative's first product illustrated the origin of the company's name by providing a revolutionary and timesaving software solution for bibliographic record processing....*

*Since inception Innovative has continued it's namesake becoming the first vendor to create a vision for an open library experience sparking a new generation of solutions for libraries, with future evolution in product direction to incorporate new trends and the latest advances in technology.*





A close-up photograph of a person's hands typing on a laptop keyboard. The image is heavily tinted with a dark blue color. The text 'Innovative Context Engine' is overlaid in the center in a white, bold, sans-serif font. The background shows the person's arms and the laptop's keyboard and trackpad area.

# Innovative Context Engine

# How We Interact with Information



**A Wrinkle in Time** by Madeleine L'Engle

Preview book

45 Goodreads

82% liked this book

Google users

A Wrinkle in Time is a science fantasy novel written by American writer Madeleine L'Engle, first published in 1962, and in 1979 with illustrations by Leo and Diane Dillon. **Wikipedia**

**Author:** Madeleine L'Engle  
**Series:** Time Quintet  
**LC Class:** #PZ L5385 W4 1962  
**Followed by:** A Wind in the Door  
**Characters:** Charles Wallace Murry, Meg Murry, Calvin O'Keefe, The Black Thing, IT  
**Genres:** Young adult fiction, Science fantasy

Buy ebook

- Barnes & Noble From \$9.99
- Google Play Books From \$9.99
- Kobo From \$9.99

Borrow ebook

Available at libraries near you

- Berkley Public Library - West Branch
- Berkley Public Library - South Branch, Berkley Publ...
- Alameda County Library
- Albany Library, San Lorenzo Library, Dublin Library, Uk...
- Northern California Digital Library
- West End Library, Alameda Free Library, Bay Farm Isl...

Donna, allen o'connor for

**Top stories**

[Ava DuVernay Unsure How 'Wrinkle in Time' Will Be Received | New Yorker Festival 2017](#)  
The Hollywood Reporter · 2 days ago

[Why A Wrinkle in Time Could Be Great](#)  
IGN.com · 2 weeks ago

→ [More for a wrinkle in time](#)

[SparkNotes: A Wrinkle in Time: Summary](#)

# Digital Natives vs. Data Natives?

- Digital Generation

- Ready access to computing



- Data Native Revolution

- What can technology do for them?



*“While digital natives were most concerned with what they can do with technology, data natives are more concerned about what that technology can do for them.”*

<https://www.recode.net/2014/4/10/11625490/the-rise-of-the-data-natives>

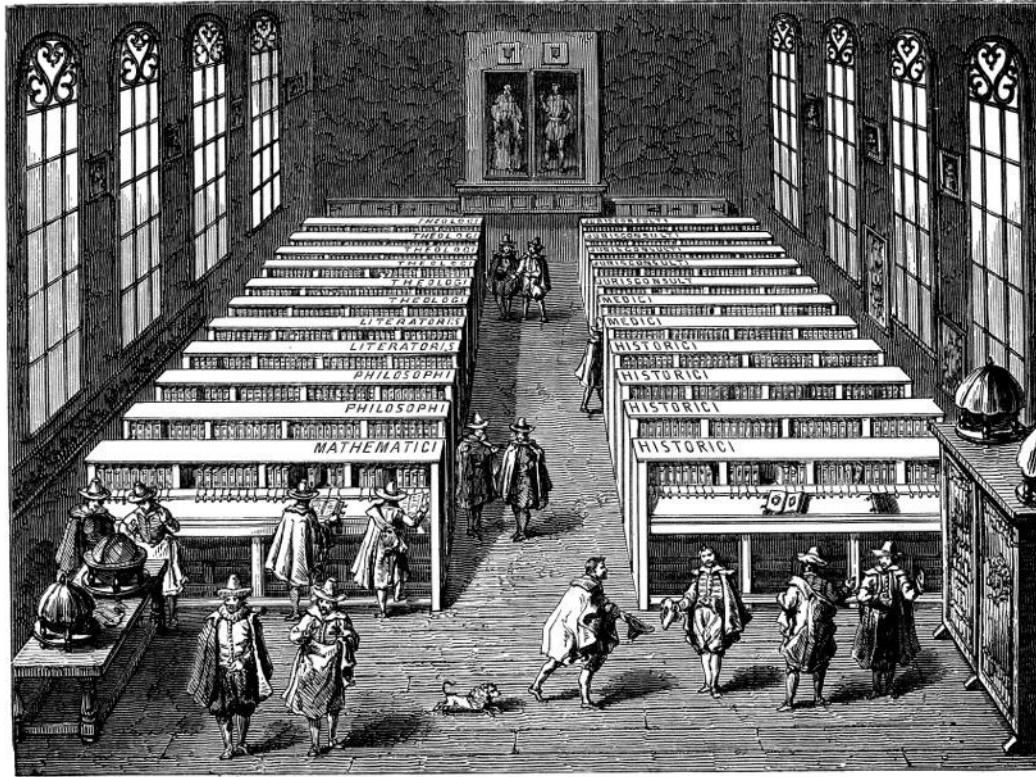
# What does it look like?

- Digital natives program their thermostat. Data natives expect the thermostat to program itself.
- Digital natives use the Starbucks mobile app. Data natives want the app to recommend a Starbucks with a shorter line.
- Digital natives use a cloud-connected baby monitor. Data natives expect their baby monitor to automatically calculate crying percentiles based on millions of other babies.





# How Libraries Manage Information



We are building an entirely  
new approach to the work  
of the library and a  
new category of tools  
to achieve it.

For today,  
let's call this approach  
**KNOWLEDGE ENABLEMENT.**

We are putting  
*knowledge in context.*

We are helping to  
curate *connections.*

# Why Connections Matter

- Structured data
- Recognized
- Accessible to external technologies

The screenshot shows a Google search for "oakland public library". A grey speech bubble with the word "Value!" is positioned above the search bar. The search results are displayed in a structured format. On the right side of the results, there is a detailed card for the Oakland Public Library, which includes a map, a "Directions" button, and a "Popular times" bar chart. The bar chart shows activity levels throughout the day, with a peak around 3:00 PM. The card also lists the address, hours, and phone number.

**Value!**

Google oakland public library Sign in

Web Videos News More Search tools

About 26,600,000 results (0.64 seconds)

**Oakland Public Library |**  
[www.oaklandlibrary.org/](http://www.oaklandlibrary.org/) Oakland Public Library  
Catalog search via telnet, library hours and information.

125 14th St, Oakland, CA 94612  
(510) 238-3134

**Locations & Hours**  
Locations & Hours ... Image of African American Museum ...

**Main Library**  
Located between downtown and Lake Merritt, Oakland's Main ...

**Oakland Public Library Online**  
Oakland Public Library logo Encore Catalog · Library Home ...

**eBooks and other digital content**  
eBooks and Other Digital Content ... can download digital content ...

**Online Services**  
Online library services you can use from your computer at home or ...

**Cards and Visiting**  
Cards and Visiting ... Locations, Library Cards, and How to ...

[More results from oaklandlibrary.org »](#)

**Oakland Public Library - Wikipedia, the free encyclopedia**  
[https://en.wikipedia.org/wiki/Oakland\\_Public\\_Library](https://en.wikipedia.org/wiki/Oakland_Public_Library) · Wikipedia  
The Oakland Public Library is the public library in Oakland, California. Opened in 1878, the Oakland Public Library currently serves the city of Oakland, along with ...

**Oakland Public Library: Home**  
[www.oaklandlibrary.org/](http://www.oaklandlibrary.org/)  
This site may be hacked.  
Oakland Public Library is located in Oakland, NJ. ... Oakland children, ages 2 and up

**Oakland Public Library** Directions  
Public Library  
The Oakland Public Library is the public library in Oakland, California. Opened in 1878, the Oakland Public Library currently serves the city of Oakland, along with neighboring smaller cities Emeryville and Piedmont. [Wikipedia](#)

**Address:** 125 14th St, Oakland, CA 94612  
**Hours:** Open today · 10:00 am – 5:30 pm  
**Phone:** (510) 238-3134

**Popular times** Tuesdays  
6a 9a 12p 3p 6p 9p

# MARC: Building Blocks for the ILS



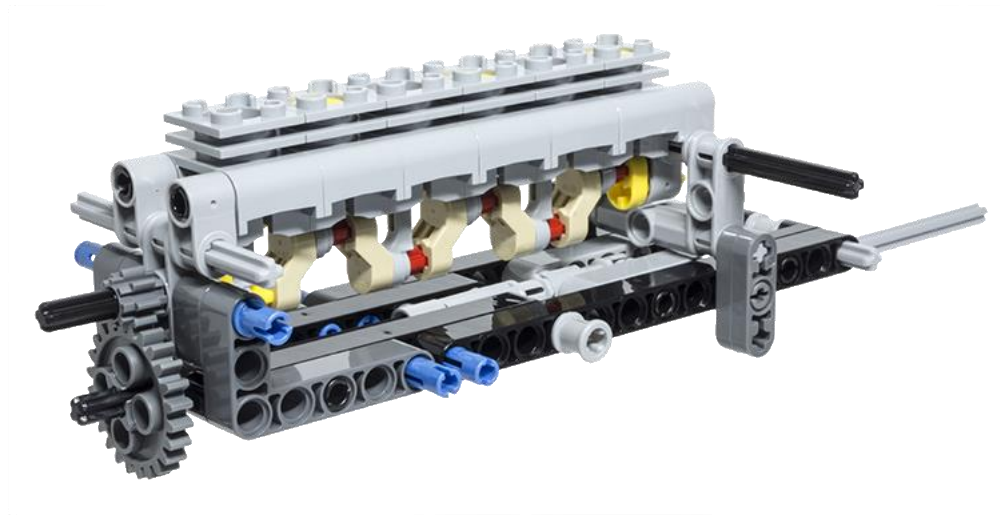


# The Linked Data Universe



# Innovative's Context Engine

- **Liberate knowledge**– Maximize the impact of collection development and outreach
- **Bring knowledge to life** – Engage with users how users want to discover



# It Starts with Metadata

- RDF (Resource Description Framework) was developed as a standard language for web-based applications.
- RDF relies not merely on linked data, but on defined relationships
- MARC is not RDF-compliant and cannot be made RDF-compliant
- MARC can support URIs, but cannot define the context of those URIs

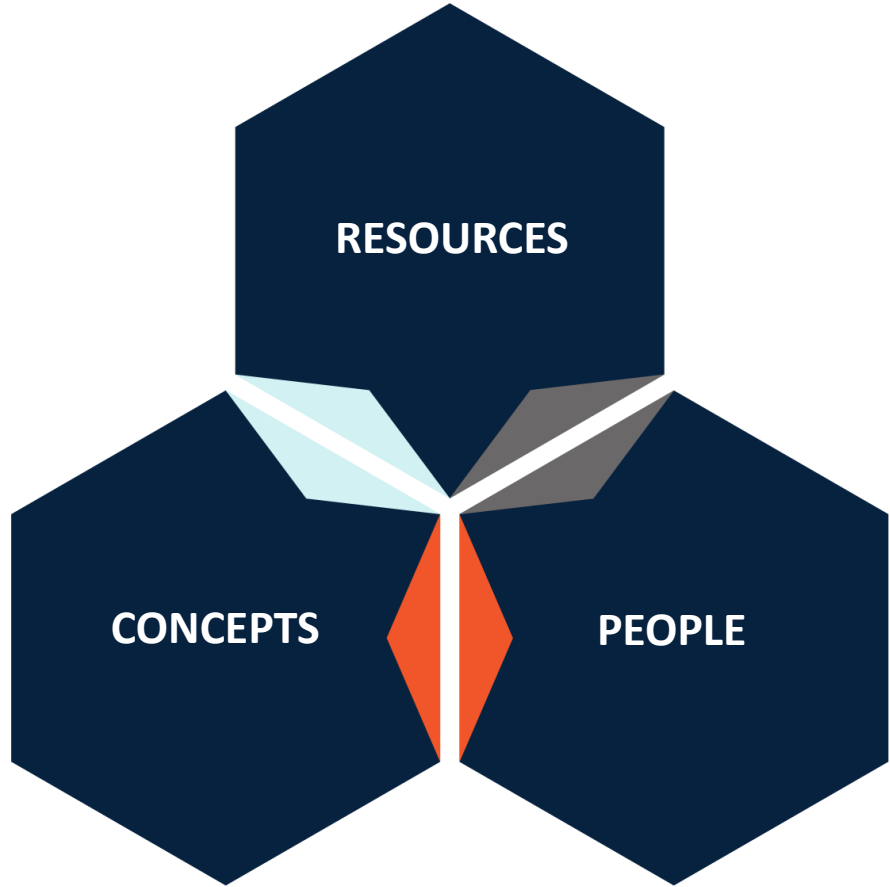


```
LEADER 00000cam 2200000 a 4500a
001 50906019
003 OCoLC
005 20030715092633.0
008 021023s2003 ilu b 001 0 eng
010 2002151683
015 GBA3-Y7095
020 0838908470
040 DLC|cDLC|dUKM|dC#P|dXFF|dKSU|dCoLC
049 KSUU
050 00 Z666.S|b.C37 2003
082 00 025.3|221
100 1 Caplan, Priscilla
245 10 Metadata fundamentals for all librarians /|cPriscilla
    Caplan
260 Chicago :|bAmerican Library Association,|c2003
300 ix, 192 p. ;|c28 cm
504 Includes bibliographical references and index
505 00 |tMetadata basics --|tSyntax, creation, and storage --
    |tVocabularies, classification, and identifiers --
    |tApproaches to interoperability --|tMetadata and the Web
    --|tLibrary cataloging --|gThe|tTEI header --|gThe|tDublin
    Core --|tArchival description and the EAD --|tMetadata for
    art and architecture --|tGILS and government information -
    -|tMetadata for education --|tONIX International --
    |tMetadata for geospatial and environmental resources --
    |gThe|tData Documentation Initiative --|tAdministrative
    metadata --|tStructural metadata --|tRights metadata
650 0 Metadata
650 0 Information organization
```

# It Starts with Metadata

- BIBFRAME is RDF-compliant and natively supports linked data
- Other metadata schemas – such as Dublin Core and MODS – can be made RDF-compliant with linked data support
- The Innovative Context Engine is built data native at its core:
  - MARC -> BIBFRAME
  - DC -> DC
  - MODS -> MODS
  - **NO** abstraction layers. **No** conversion to a single forced standard. All metadata stays within its own context.

**CONTEXT** is  
relationships  
between  
**concepts,**  
**resources,**  
and **people.**

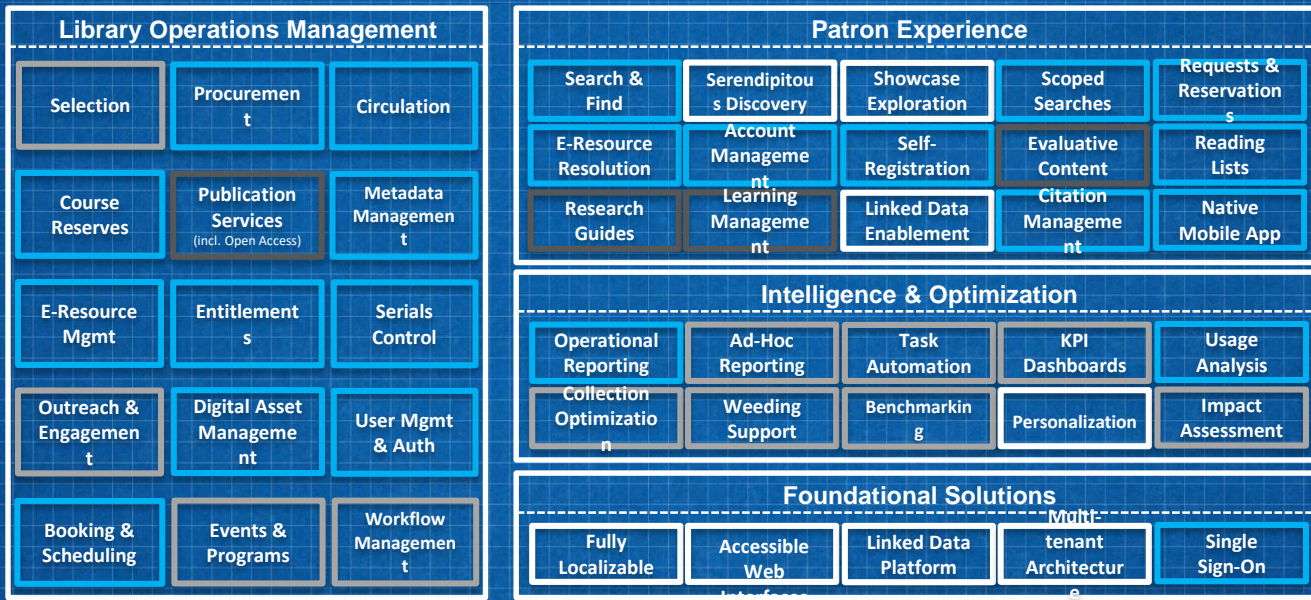


# Innovative Has the “Blueprint” for Next-Gen Library Solutions

## Our Library Systems “Blueprint” Is Our Plan for Long Term Success

*Informed by IdeaLab & Strategic Partners*

- Current Product Offerings
- Integrations with Value-Added Partners
- Next-Gen Discovery Solution (2019)
- Next-Gen Displacement Solutions (2019+)





A close-up photograph of a person's hands typing on a laptop keyboard. The image is heavily tinted with a dark blue color. The text 'Flagship Products: Sierra & Polaris' is overlaid in white, bold, sans-serif font on the left side of the image.

# Flagship Products: Sierra & Polaris

# Sierra Product Plan of Record

Improved financials & general ease of use

Release 4.0  
Q2 2018

- \* Automatic Renewal
- \* System limit expansions
- \* Staff password security
- \* "Expand All" for Compact Browse
- \* Improved performance and data integrity protections

GDPR analysis and development, Idea Lab winner, continuing limit expansion, Sierra Web concurrent user increase

Release 4.1  
Q3 2018

- \* GDPR analysis of needs and initial development
- \* Idea Lab Winner: re-placing of cancelled holds
- \* Sierra Web support for 30 concurrent users
- \* Find in record
- \* Copy and paste complete fields
- \* Generate new Private Key

Improve system privacy and security, including GDPR; protection of personal data

Release 4.2  
Q4 2018

- \* HTTPS Everywhere for WebPAC (GDPR)
- \* Patron Pin Security (GDPR)
- \* Publish Library Privacy Policy in WebPAC (GDPR)
- \* Secure Offline Circ Upload (GDPR)
- \* Scheduler improvements to output delimited records
- \* Sierra Web analysis and testing of horizontal scaling

Improved functionality and user experience, Integration with Next-gen Discovery

Feldspar

- \* Erasure of high risk patron data
- \* Integration with next-gen Discovery
- \* EDI Improvements
- \* Reading list integration
- \* SMS improvements
- \* Improvements to Create Lists UI
- \* Expansion of fields available via SQL queries



# Polaris Product Plan of Record

## Usability improvements for Discovery

**Release 6.0**  
Q1 2018

- One-click Holds
- Lexile Facet
- 001 to 001 Duplicate Detection
- Syndetics Unbound integration
- Polaris Web: eCommerce and Hold Request Manager

## Integration enhancements for Discovery

**Release 6.1**  
Q2 2018

- NoveList Similar Titles integration
- Recorded Books and CloudLink eContent integrations
- Polaris Web: Item Bulk Change and Hold Request Manager for INN-Reach

## Patron and Staff Engagement

**Breeze**

- "FRBR like" results in PAC
- Patron Account landing page
- EDS integration
- Polaris Web: MARC import
- Polaris Web: MARC editing

## Technology evolution

**Blizzard**

- Integration with next-gen discovery
- Prevent new control number on overlay
- Polaris Web: Patron / Bib bulk change
- Polaris Web: Utilities and Reports

# Resource Sharing Roadmap

Support

**Resource Sharing 3.1**  
2018 Q2

Support ArticleReach for Resource Sharing Broker

Support Sierra data expansion

Develop the Direct to INN-Reach (D2IR) API

Enhance agency model conversion capabilities

Expansion

**Resource Sharing 3.2**  
2018 Q4

On-board partners for D2IR API

Release the D2IR API into GA

Release agency model conversion into GA

Improve central detailed holdings display

GDPR research and planning

Encore 4.7.3: Improve pass-through searching to Central Encore

Polaris 6.2: Develop D2IR API

Parity

**Resource Sharing 3.3**  
2019 Q2

GDPR development

Problem Report blitz

SSO Logout Support

Support for RedHat 7 and CentOS 7

Associate library 856s for Central Display

Research D2IR & NCIP support for PUA and VP

Polaris 6.3: Release D2IR API to GA

Extensions

**Resource Sharing 3.4**  
2019 Q4

Problem Report blitz

Release NCIP messages for PUA

Release D2IR API endpoints for PUA and Visiting patron

Filter eResources by local patron entitlements

Develop to the BLDSS API

Release Shared Knowledge Base for Distributed Consortium



Union Catalog Harvesting API

# Engaging with Libraries: Enhancements through IdeaLab

- Increased Product Management engagement with enhancement process
  - Director of ILS Product Management, Martha Gettys, will lead team engagement for in-market solutions, ensuring:
    - Time-bound challenges as a standard part of product planning processes
    - Ongoing evaluation, feedback, and acceptance of “Always Open” ideas
  - Ongoing strategic oversight from SVP and VP of Product Management
- Leveraging IdeaLab in conjunction with Strategic Partner Program for “next-gen” solutions
  - Planning to use time-bound and “rapid” challenges for input on key strategic and tactical issues related to Context Engine and Context-Based Discovery
- Exploring “rapid challenge” in conjunction with IUG
  - Provide a formal mechanism for soliciting feedback on strategy, collecting the great ideas that emerge through face-to-face dialog and networking

# Innovative Offerings Are Continually Best in Class

*Our partnership to introduce and enhance industry-leading products has resulted in **Modern Library Awards** three years in a row!*

	Sierra Mobile Worklists	Polaris Web Application	INN-Reach Resource Sharing
2018	 <p>2018 MODERN LIBRARY AWARDS PLATINUM AWARD ★ MULTIYEAR HONOREE</p>	 <p>2018 MODERN LIBRARY AWARDS GOLD AWARD</p>	 <p>2018 MODERN LIBRARY AWARDS PLATINUM AWARD ★ MULTIYEAR HONOREE</p>
2017	 <p>2017 MODERN LIBRARY AWARDS PLATINUM AWARD</p>	 <p>2017 MODERN LIBRARY AWARDS GOLD AWARD</p>	 <p>2018 MODERN LIBRARY AWARDS HONORABLE MENTION</p>
2016	 <p>2016 MODERN LIBRARY AWARDS PLATINUM AWARD</p>	 <p>2016 MODERN LIBRARY AWARDS GOLD AWARD</p>	 <p>2017 MODERN LIBRARY AWARDS HONORABLE MENTION</p>



THANK YOU!