



Ohio's Regional  
Innovative Users Group

## OH-IUG 2021 Conference Program September 24, 2021

**Presentations:** [OHIUG Conference Channel](#)

### Q & A Sessions

*Participants must register for each Q&A session separately*

**9:00 - 9:30 am**

Finding Messy Data: Create Lists and Excel

- [Presentation](#) | [Register for Q&A session](#)

Meet Them Where They Are: Making Circulation Limits Easy to Understand and Modify for Patron Services Staff

- [Presentation](#) | [Register for Q&A session](#)

**9:45 - 10:15am**

Participating in the III IdeaLab: How to Make Your Voice Heard for Innovative's Product Development

- [Presentation](#) | [Register for Q&A session](#)

Nurturing Collaboration While Weeding Collections: A New Interdepartmental Workflow

- [Presentation](#) | [Register for Q&A session](#)

**10:30 - 11:00am**

Innovative 2021 Corporate Status & Product Roadmaps\*

- [Presentation](#) | [Register for Q&A session](#)

**11:15 - 11:45am**

Using the Springshare LibCal API to Improve the User Experience of Reserving Spaces

- [Presentation](#) | [Register for Q&A session](#)

Innovative Mobile: There's an App for That!\*

- [Presentation](#) | [Register for Q&A session](#)

**1:00 - 1:30pm**

Forum: Valuable Things I've Learned About Sierra Over the Past Year

- [Register for Q&A session](#)

Vega Discover: Engagement Isn't One Thing, It's Everything\*

- [Presentation](#) | [Register for Q&A session](#)

**1:45 - 2:15pm**

Collection Analysis for \$5 a Month. CHEAP!

- [Presentation](#) | [Register for Q&A session](#)

From "Eeeek!" to "Ahhh": Implementing MessageBee for Library Email Notices

- [Presentation](#) | [Register for Q&A session](#)

**2:30 - 3:00pm**

Working With a Vendor to Enhance 4 Million Bibliographic Records in Sierra

- [Presentation](#) | [Register for Q&A session](#)

Getting it Done: Using KanBan in a Library Consortium to Improve What We Do and How We Do It

- [Presentation](#) | [Register for Q&A session](#)

**3:15 - 4:00pm**

SearchOhio Forum

- [Register for Q&A session](#)

*\*Programs from Innovative Interfaces, Inc. staff*

## **Program Descriptions**

### **Finding Messy Data: Create Lists and Excel**

*Mark Strang, Bowling Green State University*

This program will explore some of the ways that Create Lists and Excel can be used to find improperly coded records in your Sierra or Millennium system.

### **Meet Them Where They Are: Making Circulation Limits Easy to Understand and Modify for Patron Services Staff**

*Mike Fields, Central Library Consortium*

Modifying circulation rules in Polaris is a notoriously messy and time-consuming affair. The Patron Services staff know the circulation policies and what they want to accomplish, but often must work with an ILS Administrator who can interpret the data and tables to get the changes applied.

To bridge the gap between the subject matter experts and the data, the CLC created a method that allows the patron services staff to see their current circulation rules and update the data in a straightforward way using custom Polaris reports and Excel. The end result is hours of saved time for the ILS Administrator and virtually eliminates user error or miscommunication.

### **Participating in the III IdeaLab: How to make your voice heard for Innovative's product development**

*Brandon Walker, Cleveland State University*

III's IdeaLab is a collaborative effort between III and the IUG to ensure customers and users have a voice helping set priorities for Innovative product development. Users propose enhancements, discuss and vote on those enhancements, and participate in challenges and comparisons to select the most-wanted improvements to III products. Innovative, in turn, uses that to guide their product development process.

### **Nurturing Collaboration While Weeding Collections: A New Interdepartmental Workflow**

*Cara Mia Calabrese, Miami University*

*Kristen Adams, Miami University*

*Rob O'Brien Withers, Miami University*

Reviewing, transferring, and withdrawing materials is normally a hands-on and collaborative interdepartmental process. Last spring, our institution decided to expedite a closure of a branch library and consolidate holdings to the central location. These changes necessitated a rapid review of collections in both buildings so that a timely consolidation of materials could take place. This coincided with the beginning of the COVID-19 pandemic, when many library staff were working from home. In this session, staff from collection management, technical services and circulation will share their experiences in establishing and piloting a new workflow that included standardized weeding lists created by technical services, a sharing method to deliver the lists to selectors, maintaining list uniformity when further passing lists to circulation, and back to selectors. Other aspects of the project included, providing facilities access, and adding circulation staff to assist pulling materials from the shelves. Presenters will share progress on the project and identify which new practices we envision retaining or not for future reviews of the collection.

### **Innovative 2021 Corporate Status & Product Roadmaps\***

*Dean Cooper, Innovative Interfaces, Inc.*

Join Innovative staff for an update on Innovative's 2021 corporate goals and the status of the Clarivate Acquisition. We'll also talk about accomplishments in the Library Services organization over the past year and how Innovative continues to address Covid-19. Lastly we'll dive in to an update on the Sierra and Polaris roadmaps for 2021 – what's been release and what's planned for the remainder of the year.

## **Using the Springshare LibCal API to Improve the User Experience of Reserving Spaces**

*Mark Strang, Bowling Green State University*

This session will demonstrate our new room reservation web interface for patron-initiated reservations of spaces and equipment developed using the Springshare LibCal API. <https://lib.bgsu.edu/book/study-spaces> Examples will include unmediated and mediated patron reservations and unmediated staff only reservations. LibCal system emails and LibCal administration will be shown, as well as a brief survey of the PHP code used to deliver this service which will be hosted in our GitHub account after the conference.

## **Innovative Mobile: There's an App for That!\***

*Dean Cooper, Innovative Interfaces, Inc.*

*Maria Laude, Innovative Interfaces, Inc.*

See just how customizable the Innovative Mobile App can be. There will be a live demonstration of customers apps as well as a demo environment for Sierra and Polaris. See how patrons can use the app for Self-Checkout, Curbside Pickup, Placing Holds and much more.

## **Valuable Things I've Learned About Sierra Over the Past Year**

*Bob Gaydos, Stark County District Library*

Three and a half years functioning as a Sierra administrator and I'm constantly amazed at how much more there is to learn. I will share nuggets from across the Sierra spectrum: Sierra tables (views) and SQL bits, tweaking a load profile, adding a Preferred Pronouns field to the Patron record, location code considerations, regular expressions in Create Lists, dealing with an older release on aging hardware and more things I'll have to read through a gazillion email messages and closed iii tickets to be reminded of. If time permits, I may give an overview of Stark Library's implementation of Quipu™ eCARD, which has replaced the stock WebPAC selfreg form.

## **Engagement isn't One Thing, it's Everything\***

*Brielle Maynor, Midpointe Library*

*Dean Cooper, Innovative Interfaces, Inc.*

The past two years have demonstrated that patrons don't just engage with the library when they walk through the front doors or complete one activity, they engage with the library through hundreds of different micromoments, online and in-person. MidPointe Public Library will share their experience about launching Vega Discover. As Innovative works with libraries on what life looks like moving forward, we're more passionate than ever on the need for the Vega Library Experience (LX) platform for public libraries. We'll share an update on Vega Discover and highlight what's coming next for the Vega LX platform.

## **Collection Analysis for \$5 a Month. CHEAP!**

*Ray Voelker, Cincinnati and Hamilton County Public Library*

In this talk, I'll show how to create a flexible data-analysis platform, using free and open-source software, inexpensive hosting options, and regular ILS data-snapshots. The intended audience for this talk are members of galleries, libraries, archives, and museum (GLAM) institutions who are interested in data-analysis, or interested in provide additional data-resources to staff, researchers and the public. The example scripts and workflow I'll provide and briefly outline, use the Sierra ILS SQL feature, but this method should be applicable to other ILS platforms where SQL, or other bulk-export options are available. This solution is inexpensive (the software, and

“baked data pattern” work well on a \$5 per month virtual private server) and flexible (the open-source software powering this solution, Datasette, has many useful and easy-to-use options and plug-ins available).

The tool can be found here: <https://ilsweb.cincinnati.library.org/collection-analysis/>

More information about Datasette (the software powering this tool--developed by Simon Willison) can be found here: <https://datasette.io/>

This talk is an expanded version of this recent talk--“I ♥ Datasette: An Open Source Multi-tool for Exploring and Publishing Data”--I developed for the 2021 PyOhio conference.

<https://www.pyohio.org/2021/program/talks/i-datasette-an-open-source-multi-tool-for-exploring-and-publishing-data>

## **From "Eeeek!" to "Ahhh": Implementing MessageBee for Library Email Notices**

*Wes Osborn, Executive Director, Central Library Consortium*

The Central Library Consortium recently migrated email notices from the ILS’s built-in solution, a plain-text, static, scanned message, to MessageBee, a much more modern and dynamic solution. We will share our experience and insights about migrating and the results that provided a substantial improvement in quality, information-sharing and customization for libraries, their patrons, and the CLC.

Robert Klaus, President, and Michael Kuhr, Library Development Consultant at Unique Management Systems will join Wes during the live Q&A session.

## **Working With a Vendor to Enhance 4 Million Bibliographic Records in Sierra**

*Morris Levy, The Ohio State University Libraries*

*Rocki Strader, The Ohio State University Libraries*

In July 2019, the Ohio State University Libraries began discussions with Backstage Library Works to update 4 million of our bibliographic records by adding URIs for name, title, and subject access points as well as enhancements to make our records more RDA-compliant. Twenty-three months later, with the parameters and funding in place, we sent Backstage our bibliographic records in files of 1.3 million each. This presentation will review how we determined which records would be sent, the parameters we selected for the enhancements, the challenges of overlaying 4 million records and not overwhelming our local Sierra iteration nor the OhioLINK Central Catalog (which is on Millennium), and some of the cleanup issues we’ve uncovered since the project was completed.

## **Getting it Done: Using KanBan in a Library Consortium to Improve What We Do and How We Do It**

*Wes Osborn, Executive Director, Central Library Consortium*

With 5 dedicated staff members and 17 member libraries, the CLC has lots of ideas about how to best serve the libraries and improve patron experience, and the capacity for only a fraction of them. For the past three months, we have been moving our work from a HelpDesk and a long list of projects to the KanBan workflow management method in order to lay bare all of our work, use feedback loops and data to prioritize what’s most impactful, and get it from backlog to done in a predictable and repeatable way.

We are still building our process and while we have a long way to go, we have already seen marked improvements in the quality, speed, and consistency of the work that flows through the KanBan boards.

Wes Osborn, Executive Director at the CLC will share our journey – sometimes messy, always satisfying – in implementing this new way of working.

## **SearchOhio Forum**

*Steve Owley, Westerville Public Library*

*Jessica Curtis, Westerville Public Library*

Members or those interested in learning more information about Ohio's Public Library INNReach consortium will have the opportunity to ask questions and share tips and tricks.