Innovative (Polaris) Users Group, April 2-5, 2017

Innovative gave many reports on updating its system architecture:

- moving from client-based modules to cloud-based; LEAP is now called Polaris Web Application; the tech services modules will be the last to move and they'll be called "Knowledge Base" and eventually "Resource Management"
- the ILS will become the center of all library work, with workstreams for a variety roles among library staff, including Library Director.
  - SimplyReports will include an Analytics module with which you can compare your library to other libraries
- moving our instances from a local relational database to a cloud graph database (following definitions copied from a web page...)
  - Relational databases have been the power-horse of software applications since the 80s, and continue so to this day. They store highly structured data in tables with predetermined columns of certain types and many rows of the same type of information, and, thanks in part to the rigidity of their organization, require developers and applications to strictly structure the data used in their applications. *SQL!*
  - In some regards, graph databases are like the next generation of relational databases, but with first class support for “relationships”, or those implicit connections indicated via foreign-keys in the traditional relational databases. Each node (entity or attribute) in the graph database model directly and physically contains a list of relationship-records that represent its relationships to other nodes. These relationship records are organized by type and direction and may hold additional attributes. *BIBFRAME! RDF! triplets!*
- moving from NCIP (a resource-sharing standard) to ISO 10160:2015 (Open Systems Interconnection Interlibrary Loan Application)
- II calls all this open systems stuff IOLS (Innovative Open Library Stack) 
  <https://www.iii.com/solutions/open-library-experience/>
- the support site is now on support.iii.com
  - we asked that they load our financial and legal documents into the support site, plus our "Account Plan" (the SALSA rep is Dennis Carter).
- III will develop Polaris as the platform for public libraries and Sierra as the platform for academics; they'll let customers switch around
- hosted sites will be moved to Amazon Web Services!
- it was quite eerie: no sight nor sound of VTLS/Virtua libraries!

Cataloging:

- III is forming a Cataloging Focus Group
- III forgot to staff its SkyRiver presentation; Sky must be a low priority. Later I learned that SkyRiver (if one purchases it) will be a part of the Knowledge Base when tech services moves to cloud
- Knowledge Base will have an RDF editor
- the tech services Knowledge Base will happen in the Blizzard release; both Polaris and Sierra will get the same Knowledge Base module
- many III libraries have reformatted their catalogs for linked data; Zepheria has published many library catalogs
- I attended a session on deduplicating a database of shared bibs (Saskatoon consortium, based on the South Carolina consortium); they first used OCLC then wrote algorithms to find possible dups that remained
- collection codes are better than shelf locations; shelf locations better used for temporary spots such as New Books or Exhibit Case, etc.

Resource Sharing:
- in the III consortia about 15% of check-outs are from a lending library; the rest are from the patron's home library
- in a consortium about 60% of a particular library's holdings are unique
- even during budget cuts Colorado libraries chose to remain in Prospector; 90% of ILL requests filled in consortium; OCLC WorldShare costs significantly reduced
- INN-Reach now using APIs, eliminates the need for a Direct Consortia Borrowing (DCB) broker system, allowing all INN-Reach activities to be performed within Polaris or other non-III ILSs.
- INN-Reach now has 4 Polaris libraries
- consortia have a very difficult struggle when setting fines and fees; Polaris offers only 3 settings

PAC:
- PAC is now called Discovery
- Polaris release 5.5 will move the Discovery to a responsive version; MobilePAC will go away. Patrons can run searches that include terms similar to the ones input (stemming/lemmatization).
- Polaris Discovery will be available through the MyLibrary app, if you purchase that
- Breeze release will include deep links to PAC pages; export lists as styled citations
- Sun release will include FRBRized search results
- We can use custom portal page content to display: upcoming events, links to outside resources, anything that you can think of to promote your library
- promote events on the PAC using custom dashboards

SysAdmin:
- to get stats by bookmobile stop in offline mode use the username method, or you can create a separate workstation for each stop
- major update to utilities, reports, language editor scheduled for Breeze release
- Always make changes at library level, but check branch level too
Use permission groups
attended clean-up session on patron registration, loans & fines tables, cataloging

see attached slides for more info...

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505-476-9730
Slide highlights from IUG 2017

PPOR – Product Plan of Record

Cataloging is in the Resource Management row:

Long Term Portfolio Architecture Direction

<table>
<thead>
<tr>
<th>Architecture</th>
<th>Elastic Cloud Infrastructure based on a hybrid multi-tenant model including national and local data support.</th>
<th>Web Services based API layer through destination application portfolio extension</th>
<th>Geospatial and geospatial data management moving to underlying RDF model</th>
<th>Leverage of web services layer and application extension support for abstract resource management.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resource Management</td>
<td>Plug-in knowledge base access; social networks connecting national, regional, and global resource types; independence.</td>
<td>Collection, deposit, and preservation of resource management for digitalization.</td>
<td>Global and local resource catalog with automatic real-time customized integration.</td>
<td>Dynamic management of resources driven by type and workflow engine.</td>
</tr>
<tr>
<td>Staff Experience</td>
<td>Mobile enablement of work processes for sustainable operational efficiency.</td>
<td>Event-driven collaboration based on notifications, task management, and messaging.</td>
<td>Predictive analytics based on content and metadata types, workflow status, subscription, and external integration.</td>
<td>Workstream enabled with best practice customization based on roles and library end-to-end setup.</td>
</tr>
<tr>
<td>End User Experience</td>
<td>End user experience integrated with library resource management through mobile.</td>
<td>Enable discovery through regular web search with linked data and schema.org support.</td>
<td>Social and end user experience enhanced into all resource types and leveraged reference behaviors.</td>
<td>Contextual support and experience through 3D graphic visualization.</td>
</tr>
</tbody>
</table>

IUG2017
Cataloging is in the Knowledge Base box:

Architecture, marketecture, schmarketecture!!

Future Library Technology Marketecture

predictive

ACCESS POINT

Enterprise Systems

Resource Sharing

Enterprise Resource

analytics services

PATRON MANAGEMENT SERVICES
discovery • account • activity

ACCESS MANAGEMENT SERVICES
copyright • inventory • circulation

RESOURCE MANAGEMENT SERVICES
utilities • types • repositories

FINANCE MANAGEMENT SERVICES
acquisitions • budget • demand

descriptive

DEVICE ACCESS

COMPLIANCE REGULATIONS

KNOWLEDGE BASE

EXTERNAL INTEGRATIONS

{ elastic } platform services { secure }
our hosted site eventually moves to Amazon (AWS)

Anticipating Your Questions!

• Is moving to AWS required?
  – Yes. All III customers currently hosted in one of our data centers will be moving to AWS. With a few exceptions, all new hosted implementations will be on AWS.

• What is the time frame for this?
  – Note: These are the current project targets and the dates noted are the phase starts. The migrations will stretch out over time.
  – This is a three phase project.
    • Phase 1 just kicked off and entails moving Dublin DC based customer to AWS.
    • Phase 2 involves migrating the Syracuse DC based customers to AWS targeted to begin in Q3 2017.

*current schedule, subject to change

how about this!!

Polaris is built to work without Authority Control

Authorities end up being a 2nd class citizen

Over 70 authority related enhancement requests

“Is there a setting that could/would include the content of see and see also references in keyword and exact searching in both the pac and the staff client?”

“Polaris does not take free floating subdivisions into account when reporting blind references.”
Catalogs published using linked data

What is happening

When “Worthington” is included in search terms our content shows up in results.

Expectation
- Links to our PAC records in search results

What is happening
- On occasion we see direct links to our catalog
- More often we see links to our link.library portal
- Prior to publishing data we never saw links to our catalog in search results
What do you highlight when you present this project to your Administration?

- We highlight the fact that we are experimenting with Bibframe, which is most likely to be the successor to MARC.

- While not new in 2016, I highlight the before/after proposition: previously our catalog data simply could NOT be found using a web search engine, whereas it can now be indexed, discovered, and navigated. We publish 3.7M linked-data resources that web bots can crawl, and we're doing so within a network of trusted library partners.

- The ability to get our data on the web, and ongoing enhancements to BIBFRAME are important steps to increasing our presence in our community and beyond.

What do you highlight when you present this project to your Administration? (Continued)

- We highlight the number of data refreshes that occur in a month, the number of Link URLs that are submitted to search engines for indexing, the number of Link URLs that get indexed, the number of Link impressions or URLs that surface in user search engine results, the average position of those results, activity on our Link site (sessions), where geographically those sessions are coming from, referrals to our online catalogue from the Link site, the number of new users from the Link site to our online catalogue, and the bounce rates.
Transformations to Linked Data

<table>
<thead>
<tr>
<th>Library Type</th>
<th># of MARC Records</th>
<th># of Transformed Resources</th>
<th># of Resulting Links</th>
</tr>
</thead>
<tbody>
<tr>
<td>Regional Public Library</td>
<td>177,307</td>
<td>776,863</td>
<td>2,615,128</td>
</tr>
<tr>
<td>Multi-Branch Public Library</td>
<td>349,797</td>
<td>1,516,840</td>
<td>4,712,084</td>
</tr>
<tr>
<td>Urban Public Library</td>
<td>1,478,311</td>
<td>6,378,300</td>
<td>18,481,054</td>
</tr>
<tr>
<td>Academic Library</td>
<td>3,406,074</td>
<td>13,384,284</td>
<td>40,483,644</td>
</tr>
</tbody>
</table>

+12X the opportunities for visibility...

Libraries Publish Linked Data through Local Link Graphs

Each MARC record is transformed into individual “Resources” and published and linked in the Library’s Local Link Graph pages.
SkyRiver and Linked Data

Local database → Output MARC records and transform to MARCXML → BIBFRAME conversion → Literary link store → Harvesting and linking

SkyRiver to III Knowledgebase → New data storage (RDF triples) → BIBFRAME profile editors

IUG2017
Innovative Resource Sharing now

- Sharing of returnables and consortium purchased electronic resources
  - Lowest total cost of ownership
  - Real-time and automated operations
  - Works for all—platform agnostic
- Requesting and supplying non-returnables, ArticleReach for Document Delivery
  - Same design principles as INN-Reach
  - Fast, easy, inexpensive

Since we last met...

- Four local Polaris libraries in four INN-Reach systems are LIVE on the Direct to INN-Reach APIs!
- Added 9 libraries to ArticleReach Direct
- Linked Data implementation at MeL
- 6 INN-Reach systems added new members
- Sales campaign targeting growth of existing systems
- In beta for 3.0 SP1, numerous enhancements and bug fixes
- Reviewing the Direct to INN-Reach API documentation with other ILS vendors
Link+ vs. Traditional ILL

<table>
<thead>
<tr>
<th>Link+</th>
<th>ILL</th>
</tr>
</thead>
<tbody>
<tr>
<td>No charge</td>
<td>Borrowing and Lending Fees</td>
</tr>
<tr>
<td>Delivery time: Less than a week</td>
<td>Delivery time: 3-4 weeks</td>
</tr>
<tr>
<td>Only participating libraries</td>
<td>Most libraries worldwide</td>
</tr>
<tr>
<td>Books and media</td>
<td>Books, microfilms, special items</td>
</tr>
<tr>
<td>Staff time: Less than 5 min/item</td>
<td>Staff time: Up to an hour/item</td>
</tr>
<tr>
<td>Patron places requests</td>
<td>Library staff must place requests</td>
</tr>
</tbody>
</table>

Request

- Patron searches the Link+ catalog
  - Classic or Encore
- Clicks “Request it”
- Completes the form
- Link+ servers send request to a library with that item available
Routing and Delivery

- Request is sent to owning library
- Owning library packages items
- Shared courier delivers
- Staff note problems and check items in
- Patron is notified through their local ILS

Borrowing

- Loan period depends on item type and local library rules
- Late fees
  - $1/day all items
- Replacement fee
  - $115 maximum
  - Link+ Coordinator works with owning library to determine $
Paging Slips

- Printed daily
- Slip inside front cover of item

Labels

- Paper wraps or removable Avery labels
- Template provided by Link+
- Labels include:
  - Owning Library and Courier Number
  - Destination Library and Courier number
  - Destination Branch
  - Patron Information
25TH ANNUAL
INNOVATIVE USERS GROUP CONFERENCE
APRIL 2 - 5, 2017
Polaris ILS
What’s New and Ahead

Kellie Conner
Product Owner
Innovative Interfaces
Introductions

• Kellie Conner
  – Started at Gaylord Information Systems in 1998
  – Product Owner
  – Escalation path for support
  – All around customer advocate
  – Email: kellie.conner@iii.com
Agenda

discovery: what’s new
staff client: what’s new
PAPI: what’s new
what’s ahead in Polaris Discovery
roadmap review
open q&a
What’s New Discovery – Availability Facet

- New facet under “Narrow your search”
- Use alone or with Assigned Branch facet
What’s New Discovery – Requested Indicator

1. This changes everything : capitalism vs. the climate
   by Klein, Naomi, 1970- author.

You requested this on: 3/28/2017

x, 564 pages ; 22 cm

Available locally: 2 (of 2)
Available system-wide: 2 (of 2)
Current Holds: 1

Configure the display using
Title Display Configure
What’s New Discovery – Title List

- Multi-select
- Paging/Sorting
- “Live” data
What’s New Discovery – Bulk Holds

- From Title List, select titles to request
- If patron is over any limit, they are stopped before proceeding.
- Non-holdable and duplicate titles are identified
What’s New Staff Client

Patron Registration

Check Dates

- Updates accomplished quickly
- Expiration blocks automatically removed
What’s New Staff Client

Floating Collections
You can now override load balancing settings and float an item into a branch that is over the collection limit.
What’s New Staff Client

• ‘Claim Missing Part’ Design Change
  – Items with system blocks for missing parts can now be checked in at any branch
  – Blocks automatically removed; no manual intervention
What’s New Staff Client

Modify Funds, Branches, Collections in PO Lines after PO Release

- Linked on-order items automatically updated
What’s New Staff Client

• Additional INN-Reach Integration Features
  – API messages:
    • Patron Claims Returned
    • Owner Renew
  – SIP check-in for INN-Reach holds
  – INN-Reach reports:
    • Borrowing ‘Too Long’: In-Transit, Received, Requested, Returned
    • Lending: Institutional Overdues, Paged Too Long
What’s New Staff Client

• Ongoing Commitments
  – Industry Standards changes
    • Support 020$q in Acquisitions
    • MARC Updates
  – Simply Reports
    • Support editing saved Bibliographic List and Count reports
What’s New in PAPI
What’s New - PAPI

- PAPI was rewritten
  - Moved from Microsoft WCF (Windows Communication Foundation) framework to Microsoft .NET Core
- Implementation of Swagger for testing
- New and updated methods
What’s New - Swagger

- Swagger: open source framework for REST APIs
- PAPI now has a Swagger endpoint
  - Provides code and documentation to customers and third party vendors

- [Http://swagger.io/](http://swagger.io/)

- Installed as an option under the PAPI service during the server installation
What’s New – PAPI updated methods

• Patron Authentication now supports username or barcode

• Notification Update now supports email and text messaging for expected notice types

• PatronHoldRequestGet now supports designation and volume number, as well as PAC display notes
What’s New – PAPI updated methods

• PatronItemsOut: now supports designation and volume number, as well as the CanItemBeRenewed flag

• PatronRegistrationCreate: now supports ExpirationDate, AddressCheckDate and PatronCode

• PatronUpdate: supports the three fields above, in addition to reaching parity with the Polaris PAC.
  – I.e. All updateable fields in PAC are now supported by PAPI
  – Controlled by SA values unless otherwise stated in the call
What’s New – PAPI new methods

- DatesClosed
- PatronCodesGet
- PatronILLRequestsGet
- RecordSetContentPut
- RecordSetRecordsGet
- SAMobilePhoneCarriersGet
- UpdatePickupBranchID
What’s Ahead in Polaris Discovery
What’s Ahead in Polaris Discovery

- **Responsive Theme**
  - All features on all devices
  - Freshened themes and updated look
  - Existing SA configurations are preserved

- **Related words**
  - Plurals and stemming
    - dog / dogs
    - walk / walking / walked
  - Synonyms and name variations
    - Ben / Benjamin
    - Jim / James
  - Alternate spellings
    - color / colour
    - gray / grey
Polaris Discovery – Responsive Theme

Hours screen – full display mode
## Red Rock Public Library

**Hours for: Red Rock Public Library**

<table>
<thead>
<tr>
<th>Day</th>
<th>Open</th>
<th>Close</th>
</tr>
</thead>
<tbody>
<tr>
<td>MON</td>
<td>9:00 AM</td>
<td>9:00 PM</td>
</tr>
<tr>
<td>TUE</td>
<td>9:00 AM</td>
<td>9:00 PM</td>
</tr>
<tr>
<td>WED</td>
<td>9:00 AM</td>
<td>9:00 PM</td>
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<tr>
<td>THU</td>
<td>9:00 AM</td>
<td>4:30 PM</td>
</tr>
<tr>
<td>FRI</td>
<td>9:00 AM</td>
<td>6:00 PM</td>
</tr>
<tr>
<td>SAT</td>
<td>9:00 AM</td>
<td>6:00 PM</td>
</tr>
<tr>
<td>SUN</td>
<td>1:00 PM</td>
<td>5:00 PM</td>
</tr>
</tbody>
</table>

We're extending our hours! Come be a part of our hot summer reading program!
Polaris Discovery – Responsive Theme

Slide out menu – smartphone mode
Keyword search – full display mode
Polaris Discovery – Responsive Theme

Keyword search – tablet mode
### Items Out

<table>
<thead>
<tr>
<th>#</th>
<th>Format</th>
<th>Due Date</th>
<th>Title</th>
<th>Renewals Left</th>
<th>Call Number</th>
<th>Assigned Branch</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>📚</td>
<td>3/24/2011</td>
<td>Glue fingers</td>
<td>2</td>
<td>J FIC CHRI</td>
<td>Damascus Central Library</td>
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<tr>
<td>2</td>
<td>📚</td>
<td>7/21/2011</td>
<td>Graveyard of the Atlantic : short stories</td>
<td>0</td>
<td>F HAGY ALY 1</td>
<td>Pottsville Public Library</td>
</tr>
<tr>
<td>3</td>
<td>🚘</td>
<td>7/28/2011</td>
<td>The collectors [sound recording ( unabridged Playaway)]</td>
<td>22</td>
<td>PLAY FIC BAL</td>
<td>Conner Street Branch</td>
</tr>
<tr>
<td>4</td>
<td>📚</td>
<td>9/7/2011</td>
<td>WALTER THE BAKER</td>
<td>1</td>
<td>943.07 HAM 1</td>
<td>Pottsville Public Library</td>
</tr>
<tr>
<td>5</td>
<td>📚</td>
<td>12/1/2011</td>
<td>The Red '48ers; Karl Marx and Friedrich Engels</td>
<td>0</td>
<td>745.5 WAR 2001</td>
<td>Foster Branch Library</td>
</tr>
<tr>
<td>6</td>
<td>📚</td>
<td>1/9/2012</td>
<td>The complete guide to glues &amp; adhesives</td>
<td>0</td>
<td></td>
<td>Pottsville Public Library</td>
</tr>
</tbody>
</table>

**My Lists**
- Saved Title Lists
  - New List (6)
  - New Orleans (4)
  - Create new saved list...
Polaris Discovery – Responsive Theme

Red Rock Public Library

Chabon, Michael

Items Out

- more information

Refresh eContent

<table>
<thead>
<tr>
<th>i</th>
<th>Format</th>
<th>Due Date</th>
<th>Title</th>
<th>Renewals Left</th>
<th>Call Number</th>
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<td>J FIC G1</td>
<td>Carnegie Central Library</td>
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<td>Graveyard</td>
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<td>Pottersville Public Library</td>
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</tr>
</tbody>
</table>

Items Out – smartphone mode
Polaris Discovery – Related Words

Activated by link

Include related words (97 more titles)

1. *Puppies*
   by Spink, Kathryn.

Series: *Color nature library.*

... A photographic display of different varieties of *puppies*...
Related Words

- See what was added (97)
- See original list (62)

Availability

Library Location

Format
- Book (147)
- Projected Medium (8)
- Videorecording (8)
- Visual Materials (8)
- Sound Recording (6)


... *Puppy* parenting: a month-by-month guide to the first year of your puppy's life.
Thank you
Polaris ILS

What’s New and Ahead