

ARF-20764

Consent
Library

REGULAR SESSION AGENDA

Meeting Date: 01/26/2016

TITLE: Out of State Travel

Submitted By: Patty Gonzales, Library

Originals for signature:

No

Date Approved by County Attorney:

na County Attorney Initials:

Information

SUMMARY OF ITEM:

Approve Out of State Travel for Mary Miller from March 15-18, 2016 to San Francisco, CA to attend the Innovative User's Group 2016 Conference.

FUNDING SOURCE:

Accounting Unit, Project or Grant Name; 63200

Account Name; Library Travel

SPECIAL HANDLING:

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IUG PUG VUG

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Please make sure you complete all four (4) steps of the registration process, click the "Finish" button, and receive an e-mail indicating that you have completed the registration process. If you do not receive an e-mail with the subject line that starts: IUG 2016 Conference Registration, within 24 hours, contact Kathy O'Gorman at kathy@innovativeusers.org.

Innovative Users Group 2016 Conference

Tuesday, March 15, 2016 - Friday, March 18, 2016

San Francisco Hilton at Union Square
303 O'Farrell Street
San Francisco, California 94102
United States

Kathryn C. O'Gorman, IUG Business Manager
Innovative Users Group
6077 Far Hills Ave.
Centerville, OH 45459-1923 USA
leave message at 513.652.1143
e-Fax: 208.955.2264
E-mail: kathy@innovativeusers.org
IUG website: <http://www.innovativeusers.org/>
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Tuesday, March 15

09:30am - 12:00pm	Getting Started With Print Templates	B Other/General	S
09:30am - 12:00pm	 Sierra SQL 101	B Other/General	S
09:30am - 12:00pm	How to Do It Easier, Faster, and Cheaper: Managing and Assessing Technical Services Workflows	E Acquisitions & Serials	MS
09:30am - 04:00pm	 API Hackathon	I Other/General	SP
09:30am - 04:00pm	 Load Profile Refresher Workshop	I System Administration	MS
09:30am - 04:00pm	 Polaris SQL for Beginners	E System Administration	P
09:30am - 04:00pm	 Public Library Consortia Conference	E Other/General	MSPV
01:30pm - 04:00pm	Print Templates-Advanced	I Other/General	S
01:30pm - 04:00pm	Sierra SQL 102	E Other/General	S
01:30pm - 04:00pm	All of the Responsibility, None of the Authority	E Acquisitions & Serials	MSPV

Wednesday, March 16

11:00am - 12:00pm	What's That Innovative Ticket Number?	E Other/General	S
11:00am - 12:00pm	Flowsheet: a tool streamlines our processing workflow	E Cataloging & Authorities	S
11:00am - 12:00pm	Creating Items on-the-Fly to manage readers' ILL borrowing	E Circulation	S
11:00am -	Better to Bend Than to Break: Doing More	E Other/General	MSPV

12:00pm	with Less			
11:00am - 12:00pm	Managing RSS Feeds with FeedBuilder	E	Search/Discovery MS	
11:00am - 12:00pm	Tumblr for Libraries - A Beginners Guide	E	Other/General	MSPV
11:00am - 12:00pm	From project request to web application	E	Other/General	S
11:00am - 12:00pm	Using Data Mining to Improve Library Functions	E	Other/General	MS
11:00am - 12:00pm	United Stats	E	Reports & Statistics	MSPV
11:00am - 12:00pm	Cataloging with an Eye to the Patron	E	Cataloging & Authorities	MSPV
11:00am - 12:00pm	Missing in Action? Let's Find and Fix Missing OCLC Numbers	E	Cataloging & Authorities	MSPV
11:00am - 12:00pm	Equipment in the University Catalog	E	Cataloging & Authorities	MSP
11:00am - 12:00pm	Retrospectively adding cartographic genre/form terms with Sierra global update	E	Cataloging & Authorities	S
11:45am - 12:45am	WILIUG Birds of a Feather Lunch			
12:00pm - 01:15pm	All Conference Lunch			
01:30pm - 02:30pm	SQL / API Forum	E	System Administration	S
01:30pm - 02:30pm	Mobile Worklists: Collection maintenance made simple	E	Other/General	MS
01:30pm - 02:30pm	APIs for My Account, Search, and Library Card Registration	I	System Administration	P
01:30pm - 02:30pm	How to modify a print monographic level bib into an electronic serial level bib using MARCedit and Global Update without losing bib title access.	E	Cataloging & Authorities	S

01:30pm - 02:30pm	Floating Collections Start-Up	E Circulation	MS
01:30pm - 02:30pm	My IUG: About the IUG and how to get involved	E Other/General	MSPV
01:30pm - 02:30pm	Monitoring your ILS infrastructure with PRTG	E System Administration	MSPV
01:30pm - 02:30pm	Encore Duet Implementation and Customization Tips	E Search/Discovery S	
03:00pm - 04:00pm	Acquisitions Forum	E Acquisitions & Serials	MS
03:00pm - 04:00pm	Polaris Technical Services Forum	E Cataloging & Authorities	P
03:00pm - 04:00pm	Polaris Notification Methods: Choosing and Using Print, Telephony, Email and Texting	E Circulation	P
03:00pm - 04:00pm	Together We Can make such Sweet Music: A Creative Cataloging Method Combining Students, Excel, MarcEdit, and Innovative Table Loading at Bowling Green State University for Popular 45 rpm Sound Recordings	I Cataloging & Authorities	MSPV
03:00pm - 04:00pm	The Limits of Customer Self-Sufficiency: Filling the Gaps When Request Failures Happen	E Circulation	M
03:00pm - 04:00pm	Getting started with AutoIt	B Other/General	MSPV
03:00pm - 04:00pm	DIY API: A Sierra-Based, Homegrown Catalog API	E System Administration	S
03:00pm - 04:00pm	Sierra Search Strategies	B Circulation	S
04:30pm - 05:30pm	Texas Users Group - Let's bring it back		
04:30pm - 05:30pm	Polaris Expresscheck Users		

04:30pm - 05:30pm	ERM Enhancements Forum	E E-Tools	MS
04:30pm - 05:30pm	Polaris Patron Services Forum	E Circulation	P
04:30pm - 05:30pm	Stored procedures : how to understand, leverage and create your own	E System Administration	P
04:30pm - 05:30pm	Customizing eContent MaRC records with MarcEdit - an Introduction	B Cataloging & Authorities	MSPV
04:30pm - 05:30pm	An Introduction to the Loan Rule and Loan Rule Determiner Tables	B Circulation	S
04:30pm - 05:30pm	New Life for Local History Special Collections: Migrating from ContentDM and Websites into a Vital Showcase	E Digital Asset Management	MSPV
04:30pm - 05:30pm	The Power of Innovation: How we designed and deployed a Library Collection Analysis System	E Reports & Statistics	MSPV
04:30pm - 05:30pm	Customizing Token-Generated Content in the WebPAC using JavaScript	I Search/Discovery M	

Thursday, March 17

07:30am - 08:30am	Training Tips and Tools of the Trade	E Other/General	MSPV
07:30am - 08:30am	Encore Duet Implementation and Customization Tips	E Search/Discovery S	
07:30am - 08:30am	Power to the People! Maximizing cataloging and acquisitions to put materials in our patrons' hands	E Acquisitions & Serials	MSPV
07:30am - 08:30am	Simply Reports is Your Friend: Collection Maintenance at Denver Public Library	E Reports & Statistics	P
08:00am - 09:00am	Law Library Breakfast		
09:00am - 10:00am	Circulation Forum (Millennium/Sierra)	E Circulation	MS

09:00am - 10:00am	Polaris Enhancements Forum	E Other/General	P
09:00am - 10:00am	All The Answers with Advanced Polaris SQL Access	I Reports & Statistics	P
09:00am - 10:00am	Print Templates 101	B Circulation	MS
09:00am - 10:00am	Perpetual Access Information in Serials Holdings Records	E Acquisitions & Serials	MS
09:00am - 10:00am	Load Profile Problems -- and Solutions	A Cataloging & Authorities	MS
09:00am - 10:00am	Using ICode1 for Meaningful Statistics	E Reports & Statistics	MS
09:00am - 10:00am	Hacking the WebPAC : Adding dynamic features to the library catalog	A Search/Discovery	MS
10:30am - 11:30am	Cataloging and Authorities Forum	E Cataloging & Authorities	MS
10:30am - 11:30am	Polaris PAC Forum	E Other/General	P
10:30am - 11:30am	Learning to swim in the new floating environment	E Other/General	P
10:30am - 11:30am	Using Program Registration	E Other/General	MS
10:30am - 11:30am	Grr to Ahh: Evaluating, Maintaining and Documenting Local Use of Fixed and Variable Fields	E Other/General	MSPV
10:30am - 11:30am	"Get Off My Lawn!": Using Sierra DNA to Clean Up Your Patron Database	E Other/General	S
10:30am - 11:30am	Lightning Round Presentations	E Other/General	MSPV
10:30am - 11:30am	Optimizing your OPAC: Letting Library Users Drive Development	B Search/Discovery	MS
01:30pm -	Bibliocommons Users Roundtable		

02:30pm

01:30pm - SCIUG (Southern California Innovative Users
02:30pm Group) 2016 Steering Committee meeting

01:30pm - InnReach Forum E Circulation MS
02:30pm

01:30pm - Will you be my BETA partner? Beta testing
02:30pm the MyLibrary! Patron App E E-Tools S

01:30pm - Technical services workflow analysis E Cataloging & P
02:30pm Authorities

01:30pm - MarcEdit, Excel, and You: Data Entry outside
02:30pm the ILS to create Bibliographic records or Item I Cataloging & MSP
records. Authorities

01:30pm - Bootcamp for Circulation - Back to Basics B Circulation MS
02:30pm

01:30pm - DIY APIs : Creating Simple, Easy to Use
02:30pm RESTful APIs Using Sierra's Direct SQL I E-Tools S
Access and PHP Scripting

01:30pm - Sierra Information Workflow: What Goes In,
02:30pm What Goes Out E Other/General MS

01:30pm - Tumblr for Libraries E Other/General MSPV
02:30pm

03:00pm - Sierra Systems Administration E System S
04:00pm Administration

03:00pm - IUG Regional Groups Forum E Other/General MSPV
04:00pm

03:00pm - Bookstore Browsing with Polaris Item
04:00pm Records E Search/Discovery P

03:00pm - Power to the People! Maximizing cataloging
04:00pm and acquisitions to put materials in our E Acquisitions & MSPV
patrons' hands Serials

03:00pm - Managing Library Student Workers E Circulation MSPV
04:00pm

03:00pm - Mobile Worklists: Collection maintenance E Other/General MS

04:00pm	made simple			
03:00pm - 04:00pm	Give Them a Fish or Teaching Them to Fish: Three Models for Reporting from Sierra's PostgreSQL Database	E	Reports & Statistics	S
03:00pm - 04:00pm	Linked Data: The Libhub Initiative Experience	E	Other/General	MSPV
04:30pm - 05:30pm	Academic Libraries Forum	E	Other/General	MSPV
04:30pm - 05:30pm	Public Library Consortia Forum	E	Other/General	MSPV
04:30pm - 05:30pm	Creating and Implementing Digital Access Patron Cards for Local Schools in a Public Library Using Polaris	E	Other/General	P
04:30pm - 05:30pm	Gained in Translation: Using Maps in Load Profiles	A	Cataloging & Authorities	MS
04:30pm - 05:30pm	Building a Home-Brew Text Message Notification System for Sierra	E	Circulation	S
04:30pm - 05:30pm	Migration from the Middle: Tips & Tricks for migration and using Sierra	B	Other/General	S
04:30pm - 05:30pm	Cost-effective resource sharing	E	Resource Sharing	MSPV
04:30pm - 05:30pm	Search Engines, Meet BIBFRAME! Unlocking Library Data for the Web	E	Other/General	MSPV
09:30pm - 12:30am	Leaders of the Pack			

Friday, March 18

07:30am - 08:30am	Learning to swim in the new floating environment	E	Other/General	P
07:30am - 08:30am	Sierra Search Strategies	B	Circulation	S
09:00am -	Load Profile Forum	E	Cataloging &	MS

10:00am

Authorities

09:00am -
10:00am

Polaris Systems Manager's Forum

E System
Administration P09:00am -
10:00amYour catalog connects your patrons to the
world

E Search/Discovery P

09:00am -
10:00am

Print Templates 102

I Other/General MS

09:00am -
10:00amUsing Load Table, Excel, and MarcEdit to
batch change email address in Patron Records

I Circulation S

09:00am -
10:00am"Get Off My Lawn!": Using Sierra DNA to
Clean Up Your Patron Database

E Other/General S

09:00am -
10:00amBringing it all together: streamlining
workflow in Technical Services

E Other/General S

09:00am -
10:00amOptimizing your OPAC: Letting Library Users
Drive Development

B Search/Discovery MS

10:30am -
11:30am

MarcEdit users - Birds of a Feather

10:30am -
11:30amCreate Lists, Global Update & Rapid Update
ForumE Reports &
Statistics MS10:30am -
11:30am

WebPAC Forum

E Other/General MSPV

10:30am -
11:30amSimply Reports is Your Friend: Collection
Maintenance at Denver Public LibraryE Reports &
Statistics P10:30am -
11:30am

Load Profile Problems -- and Solutions

A Cataloging &
Authorities MS10:30am -
11:30amPlaying by the (Loan) Rules: Tips to Make
Your Circulation System a Winner

B Circulation MS

10:30am -
11:30am

Training Tips and Tools of the Trade

E Other/General MSPV

10:30am -
11:30amDIY API: A Sierra-Based, Homegrown
Catalog APIE System
Administration S

10:30am -

Will you be my BETA partner? Beta testing

E E-Tools S

11:30am	the MyLibrary! Patron App			
12:00pm - 01:00pm	Oberlin Group Lunch			
12:00pm - 01:15pm	Public Library Lunch			
01:30pm - 02:30pm	Encore Forum	E	Other/General	MSPV
01:30pm - 02:30pm	Better to Bend Than to Break: Doing More with Less	E	Other/General	MSPV
01:30pm - 02:30pm	Why am I still being surprised? My updated checklist for server maintenance Or, Learning server maintenance the hard way	E	System Administration	P
01:30pm - 02:30pm	Fund Report for Selectors	E	Acquisitions & Serials	S
01:30pm - 02:30pm	Keeping Unwanted Guests Out of Your ILS: Securing your Sierra or Millennium Server	I	System Administration	MS
01:30pm - 02:30pm	Making e-books more visible and accessible in Sierra and Opac using Create Lists, Load Tables and Marc edit. Experiences from two local projects at Malmo university	E	Cataloging & Authorities	S
01:30pm - 02:30pm	Customizing Thirdy-Party Content in Encore	I	Search/Discovery	S
01:30pm - 02:30pm	Search Engines, Meet BIBFRAME! Unlocking Library Data for the Web	E	Other/General	MSPV
03:00pm - 04:00pm	Credit Cards, PCI Compliance and DSS 3.0 Challenges			
03:00pm - 04:00pm	IUG Enhancements Forum	E	Other/General	MS
03:00pm - 04:00pm	Where The Manual Stops: An In-House Procedures Showcase	E	Other/General	S
03:00pm - 04:00pm	Credit card payments: Can't live with 'em, can't live without 'em!	B	System Administration	P
03:00pm -	OCLC Records for Electronic Holdings: Why	E	Cataloging &	MSP

04:00pm	and How We Use the OCLC KB	Authorities
03:00pm - 04:00pm	Circulation Basics from a Systems Perspective	B Circulation MS
03:00pm - 04:00pm	Trading Spaces: Who Moved My Desk?	E Other/General MSPV
03:00pm - 04:00pm	Spring Cleaning: Using Create Lists to Find (and fix) Data Entry Errors	E System Administration MS
03:00pm - 04:00pm	Hacking the WebPAC: Adding dynamic features to the library catalog	A Search/Discovery MS

IUG 2016 Pre-Conference Sessions

Session A – 9:30 am – 4:00 pm

A1 Polaris SQL for Beginners Cost: \$100 Cap: 15

Join this all-day session to learn the basics of the Polaris database structures, keys and how to form a basic SQL query. ***All participants must bring a wi-fi enabled laptop with Remote Desktop installed in order to participate in this hands-on workshop.

A2 API Hackathon Cost: \$25 Cap: 64

Calling all librarians, software developers, designers, and makers - join us for the first ever IUG Hackathon! This all-day event brings together multi-disciplinary teams to develop real solutions for libraries using Sierra APIs, or Polaris APIs. We encourage working together in groups of 2-3, including at least one developer with skills to create software using RESTful APIs, so you can build a working feature to show off for your fellow hackers and all Innovative libraries at the end of the conference. Each team must bring a laptop computer pre-loaded with a development environment ready to interact with Sierra APIs or PAPI. Pre-registrations is required, and refreshments and lunch will be provided. See more information here:

<https://www.iii.com/iug-2016-hackathon>

A3 Load Profile Refresher Cost: \$100 Cap: 25

Refresh your load profile skills in this all-day session. We'll review core load profile concepts, best-practices, and configuration strategies that can help you prepare for your next project or give you the confidence to evaluate your existing profiles for efficiency. The workshop will be presented seminar-style (not hands-on) by Innovative Data Profiling Analysts with access to reference materials to support your ongoing projects. This one-day session is intended as a refresher course for those who have previously taken the full multi-day Load Profile workshop and have authorization to edit load profiles at their libraries.

A4 Public Library Consortia Meeting Cost: \$0 Cap: 50

Join your colleagues and Innovative staff for a full day pre-conference focused on the unique needs and experiences of Public Library Consortia. Open to public consortia and member libraries using Sierra, Millennium, Polaris, or Virtua platforms, we encourage participation from all. The program offers both joint and break-out sessions to cover common issues and platform-specific topics, such as: o Enhancement recommendation process for consortia o Circulation, paging, holds, and workflow o Resource sharing and INNReach o Product roadmaps There is no charge to attend this conference day, but pre-registration is required for all attendees. Refreshments and lunch will be provided. See more information here:

<https://www.iii.com/public-library-consortia-meeting-iug-2016>

Session B – 9:30 – 12:00

B1 Sierra SQL 101 Cost: \$50 Cap: 25

Made the move to Sierra, but not sure where to begin with SQL? This half-day session will give you the tools you need to start working with your Sierra database. We'll review the basics of the Sierra PostgreSQL database schema, how to connect to a database, using SQL syntax to form a basic query, and how to interact with SierraDNA views. Content will be presented seminar-style (not hands-on) by Innovative experts. Intended for beginners or anyone who needs a refresh on the basics. We'll do our best to prepare you for a hands-on session later in the day.

B2 Getting started with print templates Cost: \$50 Cap: 30

Gain valuable insight and experience working with Millennium and Sierra's print templates module and iReport! Participants in this session will learn the basics of print template manipulation. Session presenters

will lead participants through hands-on activities that include: importing and exporting templates; adding and deleting fields; moving fields; modifying text; crafting visually appealing and informative templates; and assigning and activating print templates. Session participants must bring their own laptop preloaded with their ILS (Millennium or Sierra) and Jasper iReport or Jasper Studio. Presented by Carla Myers, Shad Harder, Richard Jackson, Brandon Cole.

B3 How to do it Easier, Faster, and Cheaper : Managing and Assessing Technical Services Workflows Cost: \$50 Cap: 72

This preconference will share tools and strategies in implementing and assessing technical services workflows, which will lead to easier, faster, and cheaper processes for the library. Topics discussed will be applicable to all types of libraries and will include: electronic invoicing, shelf-ready processes, authority control outsourcing, acquisition and deselection of material, using data analysis to increase circulation, demand-driven acquisitions, and proactively fixing e-resource access issues (using methods other than URL checker) Presented by Jessica Harris, Yu-Lan Chou, Carey Hunt and Wen-ying Lu.

Session C – 1:30 – 4:00

C1 Sierra SQL 102 Cost: \$50 Cap: 25

Made the move to Sierra but not sure where to begin with SQL? If you have successfully installed PGAdmin III on your workstation and established a connection to your Sierra Database what do you do now? This two hour hands on bootcamp will build upon the morning Sierra SQL pre-conference session by using PGAdmin III to explore the Sierra DNA PostgreSQL database structure. Participants will obtain hands on experience constructing and running queries to learn how to access the data in their Sierra SQL database to build reports.

Participants are required to bring a wifi enabled laptop to this session with PGAdmin III installed. We encourage participants to have their host agency install and configure PGAdmin III on their work desktop and to open the necessary ports to establish a connection to their Sierra SQL Database server before the conference. To optimally experience this workshop we advise that participants use some type of remote desktop connection between their conference laptop and their properly configured office desktop to access their Sierra SQL data. Presented by Mark Strang, Ray Voelker and Brent Searle.

C2 Print templates advanced Cost: \$50 Cap: 30

Gain valuable insight and experience working with Millennium and Sierra's print templates module and iReport! Participants in this session will learn advanced template manipulation. Session presenters will lead participants through hands-on activities that include: adding URL's to templates; inserting images; adding Java Scripting; and inserting barcodes. Session participants must bring their own laptop preloaded with their ILS (Millennium or Sierra) and Jasper iReport or Jasper Studio. Presented by Carla Myers, Shad Harder, Richard Jackson, Brandon Cole.

C3 All of the Responsibility, None of the Authority Cost: \$50 Cap: 72

This will be an interactive session for people who manage an acquisitions budget but don't manage the corresponding personnel who select materials (e.g. subject librarians). How do you encourage appropriate collection development decisions? How do you help revision collection development for long-time employees, or get others to change their workflows to be more efficient? How do you encourage subject librarians to make data-driven decisions? Attendees will work in groups and participate in role playing scenarios to develop strategies for working with colleagues without having explicit authority over those colleagues' work. Presented by Rice Majors.