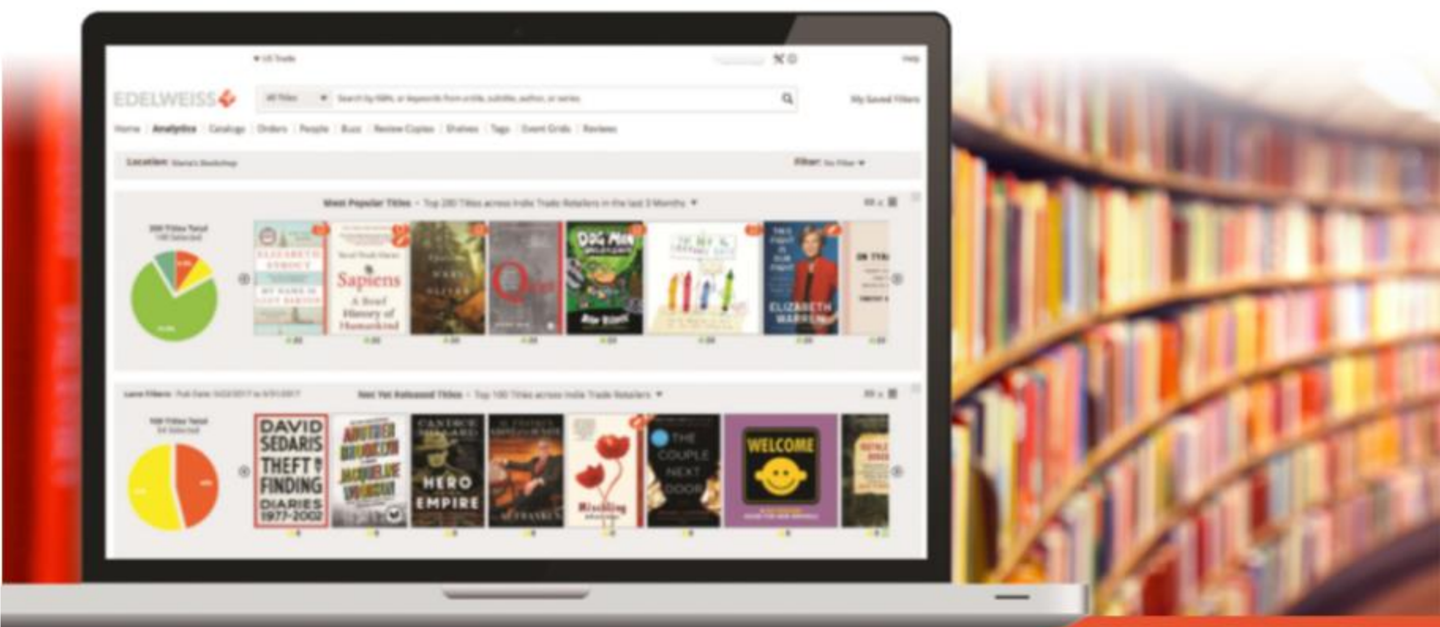
EDELWEISS ANALYTICS

ONBOARDING GUIDE

innovative

Your Partner for Library Success™



SIMPLIFY COLLECTION MANAGEMENT | BENCHMARK PERFORMANCE

EDELWEISS+ANALYTICS

YOUR JOURNEY TO SIMPLER COLLECTION MANAGEMENT

Connect your ILS to Edelweiss+Analytics

Edelweiss+ will need to integrate with your ILS. On the following pages are step-by-step instructions for a one-time setup that will keep Edelweiss+ connected to your ILS to ensure you're always looking at the most current information about your collection.

Verify that we understand your codes

ILSs use codes to identify everything from branches, to item statuses, to transaction types. After your ILS is connected with Edelweiss+Analytics, we'll verify with you that we are interpreting your codes correctly and make any adjustments necessary.

Reviewing and fine-tuning

Because of the unique complexity of each library, we may need to work with you to make some adjustments in the first few weeks. Don't worry! Our experts are on standby and ready to assist.

EDELWEISS+ANALYTICS

EDELWEISS + ANALYTICS

DATA CLEAN-UP

Before you begin loading your complete item and circulation data into your shiny new (and blank) Edelweiss+Analytics system, we suggest spending a little time cleaning up your data. Below are a few specific suggestions:

- If you haven't done an inventory lately, now would be a great time to do so. Eliminating titles from your catalog that you don't have any more, as well as finding titles that are on the shelf but not in the catalog, will make your analytics more accurate and efficient.

- Clean up your authority control, which is an area that can get muddled over time. Errors in your data will only translate to errors in analyzing it. If you need help with this, contact your ILS provider for instructions.

- Decide ahead of time which collections to upload into Edelweiss+Analytics. There may be a few that would not benefit from analytics at this time, such as in-house collections, e.g. iPads or e-readers.

Depending on the extent of clean-up you do beforehand, when you receive your first State of the Collection report, you may realize that the ILS data isn't perfect and it's impacting what you see. That's good news, because this represents very low hanging fruit to tackle prior to the next quarterly report! Above the Treeline will provide subscribing libraries with actionable reports to aid in simple data cleanup that can be done. Let us know if you have any questions!

Support @ Above the Treeline

We look forward to working with you and your team!

We're here as you need us to walk through the onboarding process, discuss any unique issues or concerns for your library, and answer any questions.

If you have questions at any time, we're never more than an email or phone call away!

You can reach us on the Edelweiss+ Help site, email support@abovethetreeline.com, or call 1-(734) 996–2730.

EDELWEISS+ANALYTICS

POLARIS ONBOARDING STEPS

The following are detailed steps for connecting your Polaris ILS to Edelweiss+Analytics.

We'll establish the connection by quickly creating five reports and scheduling them to run and link to the Edelweiss+ servers automatically.

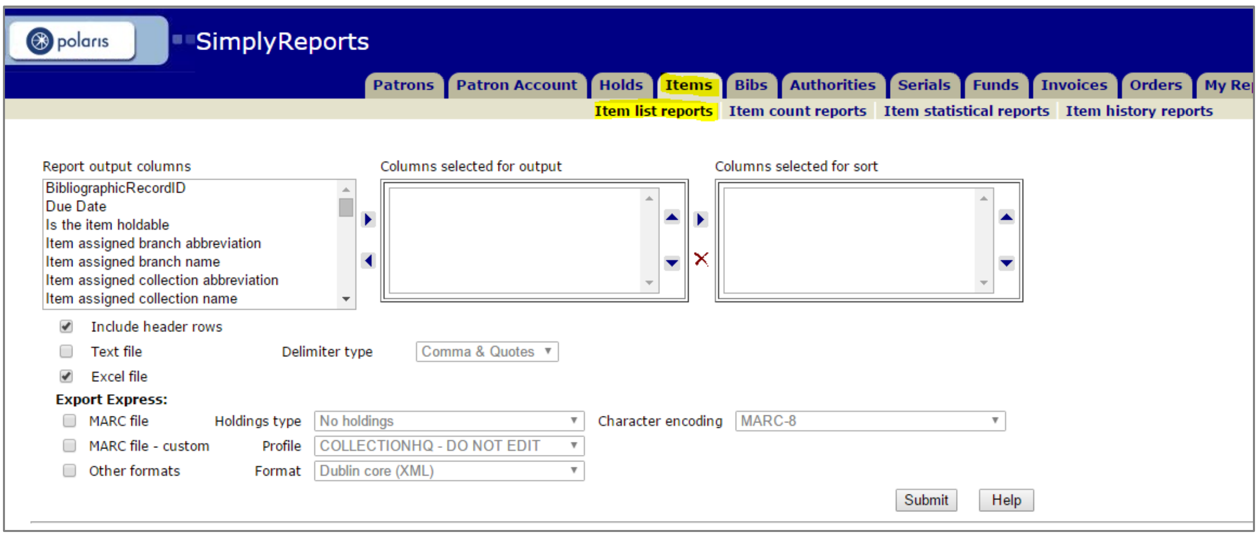
If you have any questions or trouble with the step-by-step instructions below, remember you can contact us at support@abovethethreeline.com anytime for assistance.

Here we go! The five reports we'll be creating and scheduling are:

1. Item File
2. Circulation File
3. Holds File
4. Orders File
5. Bibliographic Records File

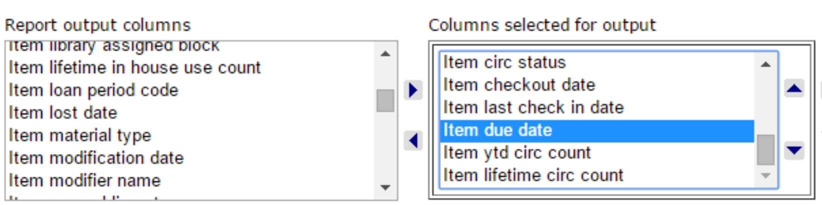
Item File

Login to SimplyReports, and select an Item List Report:



Select the following columns for output:

- ❑ Item record ID
- ❑ Item barcode
- ❑ MARC bibliographic record ID
- ❑ MARC sort ISBN
- ❑ MARC sort UPC
- ❑ Item assigned collection abbreviation
- ❑ Item statistical code
- ❑ Item material type
- ❑ Item assigned branch abbreviation
- ❑ Item call number
- ❑ Item shelf location
- ❑ Item owning organization abbreviation
- ❑ Item creation date
- ❑ Item circ status
- ❑ Item checkout date
- ❑ Item last check in date
- ❑ Item due date
- ❑ Item YTD circ count
- ❑ Item lifetime circ count



EDELWEISS ANALYTICS

POLARIS ONBOARDING STEPS

Click “Submit” to run the report one time.

When the report loads, check “Save report parameters for later use” to save the report parameters. Make sure to name your report “Item_Full”

☐ Download report output

☑ Save report parameters for later use

Report name: Item_Full

Report description: Data pull of all item records | **Save report parameters**

☐ Create item record set from report results

Preview limited to 1000 rows. There were 10000 results, to download the full report use the checkbox (above).

ItemRecordID	ItemBarcode	AssociatedBibRecordID	SortISBN	SortUPC	CollectionAbbr	ItemStatCodeDescr	ItemBranchAbb
715111	38576200372352	1	9780930370404			Nonfiction	SCPL
1624874		1	9780930370404		JUV	Fiction	MAB
1624875	457898jgt	1	9780930370404				JPL
1625467	30832000190702	1	9780930370404		DVD		E2
319482	32398001846294	35			JUV	Juvenile Nonfiction	CPCC-HARP2
201582	32398003984606	37			BEST	Nonfiction	STO

Click “Save report parameters” to save a copy of this report in SimplyReports:

Your report: 'Item_Full' has been saved.

☐ Download report output

☑ Save report parameters for later use

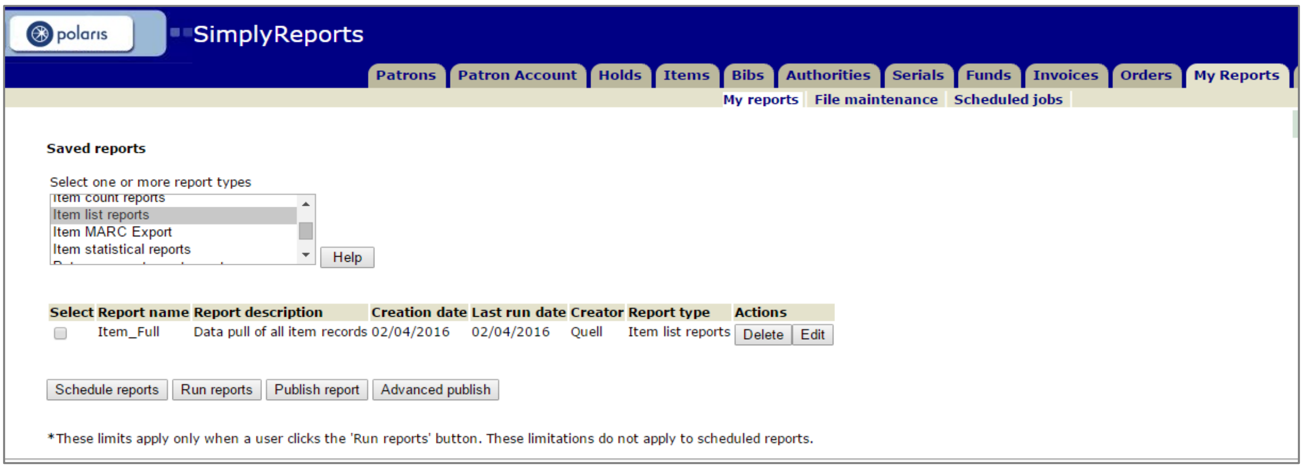
Report name: Item_Full

Report description: Data pull of all item records | **Save report parameters**

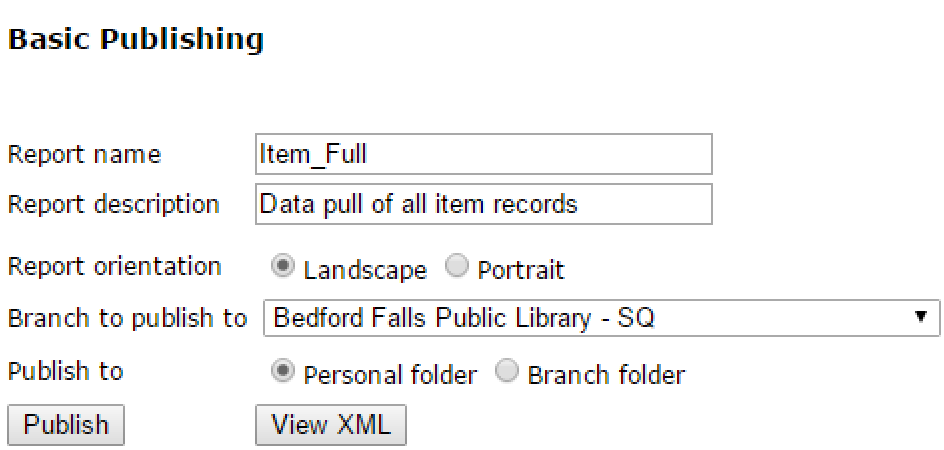
☐ Create item record set from report results

POLARIS ONBOARDING STEPS

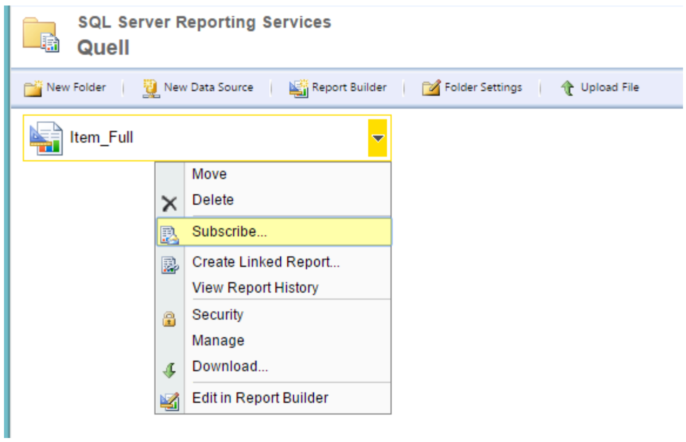
Go back into SimplyReports, and locate your saved report under My Reports > Saved Reports > Item list reports:



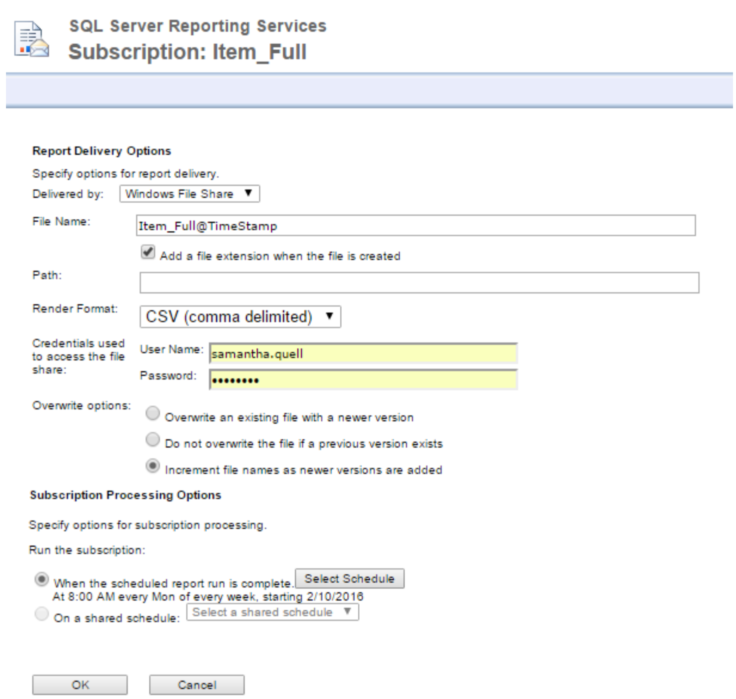
Select the "Item_Full" report, and click "Publish Report." Select the "Branch to publish to" and click "Publish" to send the report file to Reporting Services:



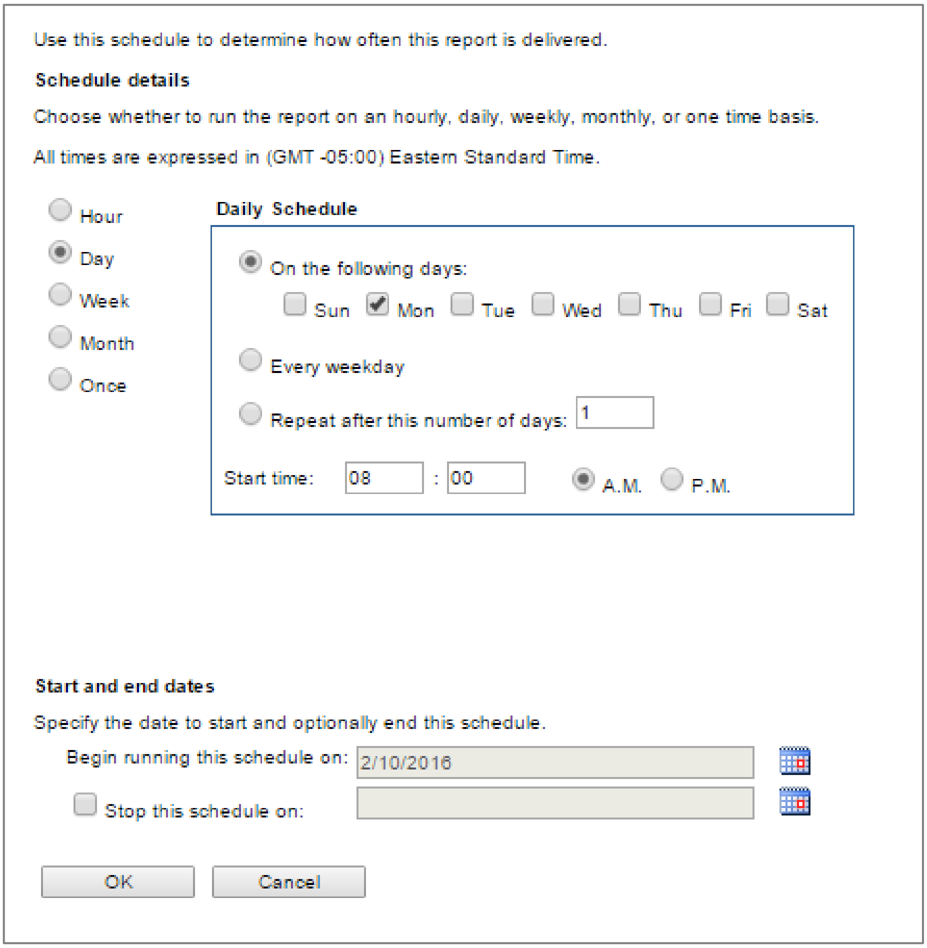
Navigate to Reporting Services on your server. Locate your “Item_Full” report under Custom > [Branch Name] > [Polaris User Name]. Hover over the report until the black arrow appears. Click the black arrow to expand the report options and select “Subscribe”



Update the delivery option for the report output (Windows File Share for FTP transmission). Set the file name to “Item_Full@Timestamp” so the final file name will read “Item_Full_YYYY_MM_DD_HHMNSS.” Update the path with the file location you would like the report files sent to (\\[ServerName]\c$\treeline\temp). Set the render format to “CSV (comma delimited).”



Use the “Select Schedule” button to modify the report run time and frequency. Fill out the schedule so your full item extract is run weekly (we recommend setting the start time to 02:00 AM).



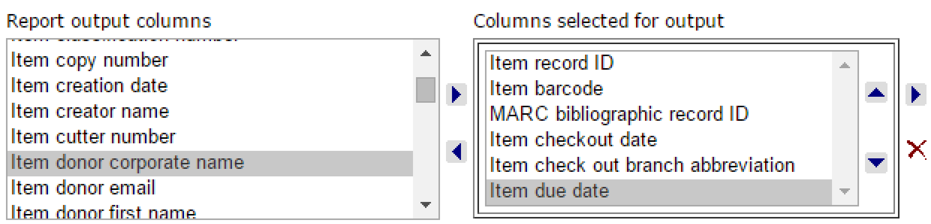
When the report is run, the csv file will appear under the path you specified.

Circulation File

Login to SimplyReports and select an Item List Report.

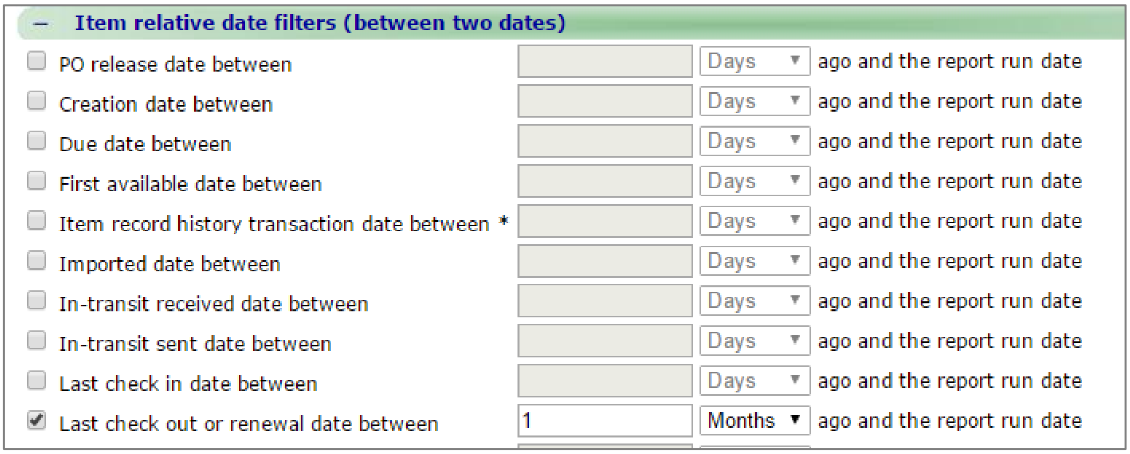
Select the following columns for output:

- ❑ Item record ID
- ❑ Item barcode
- ❑ MARC bibliographic record ID
- ❑ Item checkout date or, ideally, the more comprehensive *last checkout/renewal date*
- ❑ Item check out branch abbreviation
- ❑ Item due date
- ❑ Item last check in date



When all the output columns have been selected, scroll down to the item relative date filters (between two dates). Expand the filter options and select the "Last check out renewal date between…"

Set the time period to match the frequency the update will run. For example, if you will send weekly updates, enter 7 days. Monthly updates, enter 1 month.



POLARIS ONBOARDING STEPS

Click “Submit” to run the report one time.

When the report loads, check “Save report parameters for later use” to save the report parameters. Make sure to name your report according to the frequency it will be run. For example: “Circ_Weekly” or “Circ_Monthly”

Click “Save report parameters” to save a copy of this report in SimplyReports.

Go back into SimplyReports and locate your saved report under My Reports > Saved Reports > Item list reports.

Select the appropriate “Circ_” report and click “Publish” to send the report file to Reporting Services.

Navigate to Reporting Services on your server. Locate your “Circ_[]” report under Custom > [Branch Name] > [Polaris User Name]. Hover over the report until the black arrow appears. Click the black arrow to expand the report options and select “Subscribe.”

Update the delivery option for the report output (Windows File Share for FTP transmission, Email for Email transmission). Set the file name to “Circ_[]@Timestamp” so the final file name will read “Circ_[]_YYYY_MM_DD_HHMNSS.” Update the path with the file location you would like the report files sent to (\\[ServerName]\c$\treeline\temp). And set the render format to “CSV (comma delimited).”

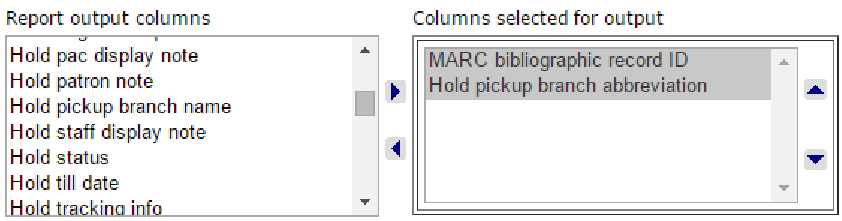
Use the “Select Schedule” button to modify the report run time and frequency. Fill out the schedule so your circulation extract is run daily (we recommend setting the start time to 02:00 AM).

When the report is run, the csv file will appear under the path you specified.

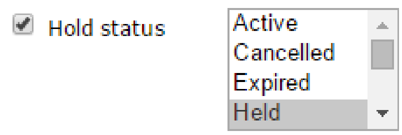
Holds File

Login to SimplyReports and select a Holds Count Report. Select the following columns for output:

- MARC bibliographic record ID
- Hold pickup branch abbreviation



Scroll down to the "Hold general filters" and select "Hold Status." Set the status to "Held" so the report will only contain titles currently being held for a patron.



Click "Submit" to run the report one time.

When the report loads, check "Save report parameters for later use" to save the report parameters. Make sure to name your report "Holds".

Click "Save report parameters" to save a copy of this report in SimplyReports.

Go back into SimplyReports and locate your saved report under My Reports > Saved Reports > Hold count reports. Select the appropriate "Holds" report and click "Publish" to send the report file to Reporting Services.

Navigate to Reporting Services on your server. Locate your "Holds" report under Custom > [Branch Name] > [Polaris User Name]. Hover over the report until the black arrow appears. Click the black arrow to expand the report options and select "Subscribe."

Update the delivery option for the report output (Windows File Share for FTP transmission, Email for Email transmission). Set the file name to "Holds@Timestamp" so the final file name will read "Holds_YYYY_MM_DD_HHMNSS." Update the path with the file location you would like the report files sent to (\\[ServerName]\c$\treeline\temp). And set the render format to "CSV (comma delimited)."

Use the "Select Schedule" button to modify the report run time and frequency. Fill out the schedule so your holds extract is run daily (we recommend setting the start time to 02:00 AM).

When the report is run, the csv file will appear under the path you specified.

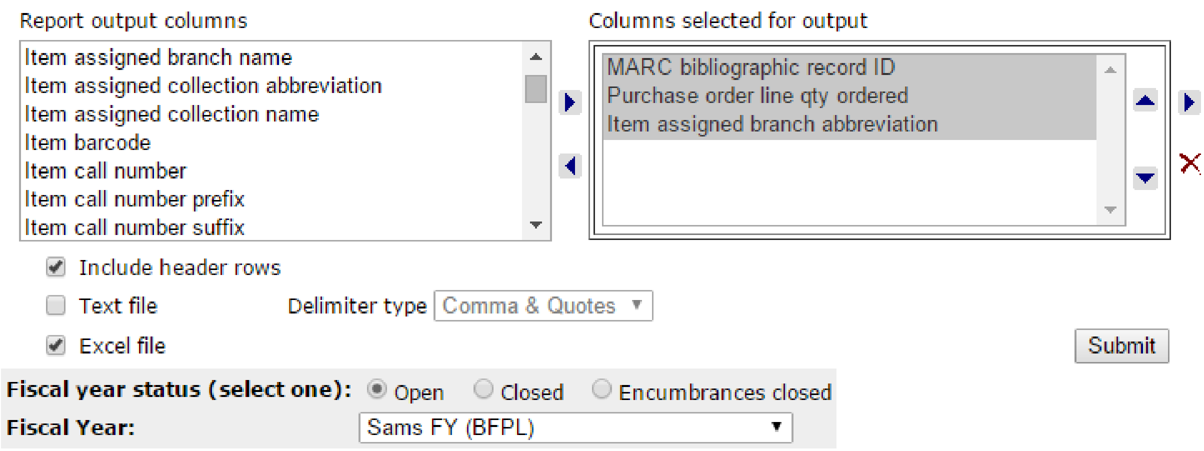
Orders File

Login to SimplyReports and select a Purchase Order List Report.

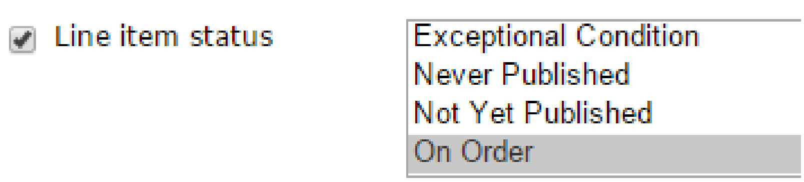
Select the following columns for output:

- MARC bibliographic record ID
- Purchase order line qty ordered
- Item assigned branch abbreviation

Select the fiscal year you would like to report on.



Scroll down to the "Purchase order line item filters" and select "Line item status." Set the status to "On Order" to restrict the results to only on order titles.



POLARIS ONBOARDING STEPS

Click “Submit” to run the report one time.

When the report loads, check “Save report parameters for later use” to save the report parameters. Make sure to name your report “Orders”.

Click “Save report parameters” to save a copy of this report in SimplyReports.

Go back into SimplyReports and locate your saved report under My Reports > Saved Reports > Purchase order list reports.

Select the appropriate “Orders” report and click “Publish” to send the report file to Reporting Services.

Navigate to Reporting Services on your server. Locate your “Orders” report under Custom > [Branch Name] > [Polaris User Name]. Hover over the report until the black arrow appears. Click the black arrow to expand the report options and select “Subscribe.”

Update the delivery option for the report output (Windows File Share for FTP transmission, Email for Email transmission). Set the file name to “Orders@Timestamp” so the final file name will read “Orders_YYYY_MM_DD_HHMNSS.” Update the path with the file location you would like the report files sent to (\\[ServerName]\c$\treeline\temp). And set the render format to “CSV (comma delimited).”

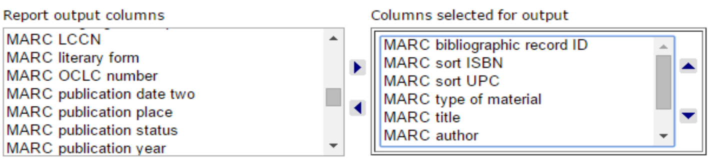
Use the “Select Schedule” button to modify the report run time and frequency. Fill out the schedule so your orders extract is run daily (we recommend setting the start time to 02:00 AM).

When the report is run, the csv file will appear under the path you specified.

Bibliographic Record File

Login to SimplyReports and select a Bib List Report. Select the following columns for output:

- MARC bibliographic record id
- MARC sort ISBN
- MARC sort UPC
- MARC type of material
- MARC title
- MARC author
- MARC publication date one
- MARC sort publisher number



Click “Submit” to run the report one time.

When the report loads, check “Save report parameters for later use” to save the report parameters. Make sure to name your report “Biblio_Full”.

Click “Save report parameters” to save a copy of this report in SimplyReports.

Go back into SimplyReports and locate your saved report under My Reports > Saved Reports > Bib list reports.

Select the “Biblio_Full” report and click “Publish” to send the report file to Reporting Services.

Navigate to Reporting Services on your server. Locate your “Biblio_Full” report under Custom > [Branch Name] > [Polaris User Name]. Hover over the report until the black arrow appears. Click the black arrow to expand the report options and select “Subscribe.”

Update the delivery option for the report output (Windows File Share for FTP transmission, Email for Email transmission). Set the file name to “Biblio_Full@Timestamp” so the final file name will read “Biblio_Full_YYYY_MM_DD_HHMNSS.” Update the path with the file location you would like the report files sent to (\\[ServerName]\c$\treeline\temp). And set the render format to “CSV (comma delimited).”

Use the “Select Schedule” button to modify the report run time and frequency. Fill out the schedule so your bibliographic data extract is run weekly (we recommend setting the start time to 02:00 AM).

When the report is run, the csv file will appear under the path you specified.