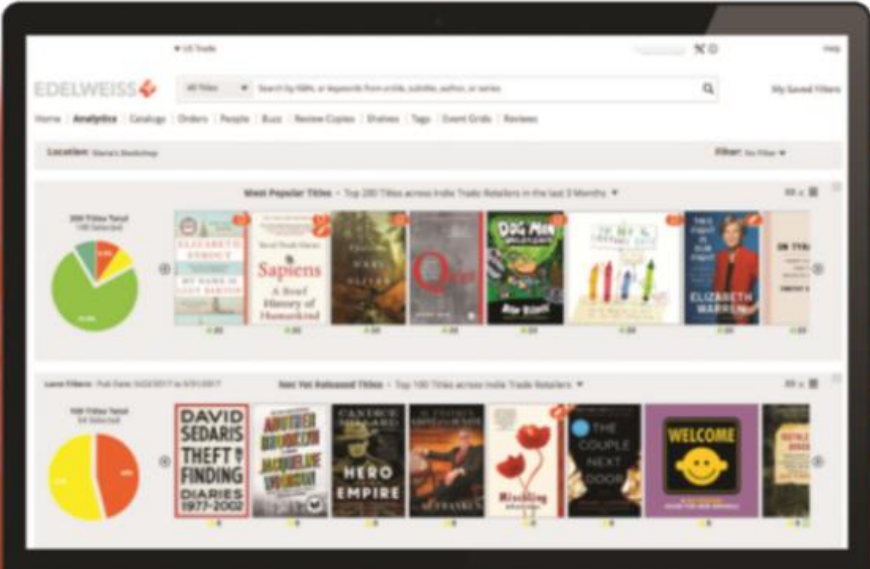


# EDELWEISS ANALYTICS

## ONBOARDING GUIDE



SIMPLIFY COLLECTION MANAGEMENT | BENCHMARK PERFORMANCE

## YOUR JOURNEY TO SIMPLER COLLECTION MANAGEMENT



### **Connect your ILS to Edelweiss+Analytics**

Edelweiss+Analytics 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.



## 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](mailto:support@abovethetreeline.com), or call 1-(734) 996-2730.

## EVERGREEN ONBOARDING STEPS

Integrating your Evergreen ILS with Edelweiss+Analytics is simple with the help of the team at Equinox!

Please let Equinox know that you'd like to add the Edelweiss+Analytics service. Go to [support.esilibrary.com](https://support.esilibrary.com) to submit your request. Enter your organization's contact information, and copy/paste the following text into the last text box for "Additional Information" (don't worry about the other boxes!) with the FTP account information that we provided to you via email:

Please set up Above the Treeline's Edelweiss+Analytics service for us, and copy [support@abovethetreeline.com](mailto:support@abovethetreeline.com) when completed. Our FTP credentials are:

Address: <ftp.abovethetreeline.com>

Username: <Your FTP Username>

Password: <Your FTP Password>

Please schedule the Circulation, Orders, and Holds files to transmit daily, and the Item and Bibliographic Record Data files to transmit weekly on Sundays at 2:00 am EST.

After Equinox adds the service, we'll send you another email with some details to review, and you'll be off and running!

Don't hesitate to contact us anytime at [support@abovethetreeline.com](mailto:support@abovethetreeline.com). We're always here to help you "work better, read more."