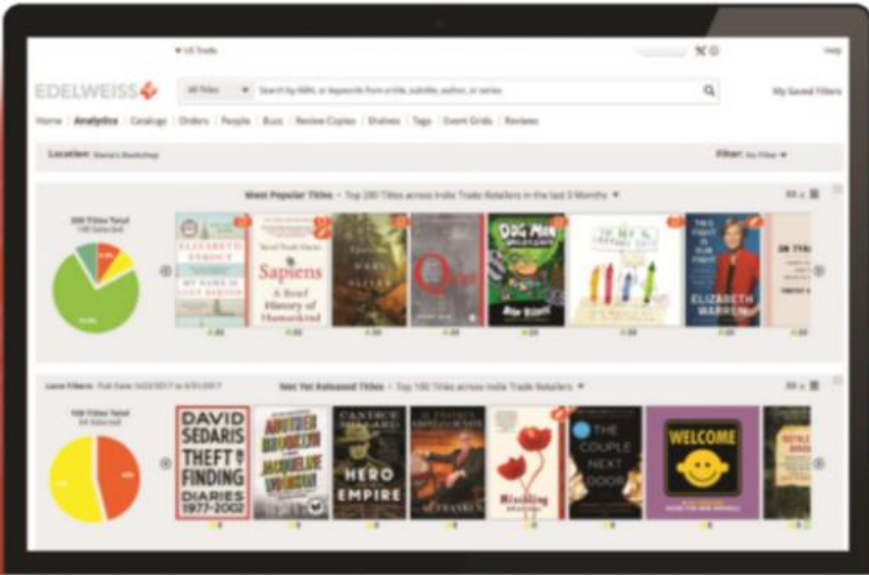


EDELWEISS ANALYTICS

ONBOARDING GUIDE



SIMPLIFY COLLECTION MANAGEMENT | BENCHMARK PERFORMANCE

YOUR JOURNEY TO SIMPLER COLLECTION MANAGEMENT



Connect your ILS to Edelweiss+Analytics

Basecamp 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, or call 1-(734) 996-2730.

EVERGREEN ONBOARDING STEPS

The following are detailed steps for connecting your Evergreen 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

EVERGREEN ONBOARDING STEPS

Edelweiss+Analytics Export Script

This script creates CSV files as specified in the Edelweiss Analytics for Libraries onboarding documentation.

The script can be obtained here:

http://git.evergreen-ils.org/?p=contrib/equinox.git;a=tree;f=above_the_treeline;hb=master

The following files are created:

Item

- Collects asset and circulation data for all time, previous month, and year. All holdings are pulled from descendants of the org defined in the `--org` parameter unless the item is deleted or the copy or copy location is set to non-circulating. The file is generated with a date stamp for the day it is run, e.g. `Item_20180220.csv` was generated on Feb 20th, 2018.

Circ

- Collects daily transaction data for the previous day. By default this is the previous day based on when the file is run, but it will use the date flag to give historical data as well.

Hold

- Collects holds based on materials owned by an included org unit and holds with a pickup library of an included org. This has no impact when the entire system is being exported, but when a subset of orgs in a consortium with resource sharing are exported some holds will not export. This will use the date flag to give you a data set of how many holds were unfilled on that date.

Order

- This gives acquisitions order data based on the ordering library and does not honor the date flag, giving current data for orders as they exist when the script is run.

EVERGREEN ONBOARDING STEPS

Bibs

- This can be the slowest of the files to generate and its speed will vary widely based on the database size and if it's run the first time or as a follow up. All other files capture that frame of time for statistics, but due to having to read individual MARC records the script will first generate a comprehensive table and then only update in subsequent runs for bibs that have since been edited. It does not honor the date flag.

Metarecords

- Provides a link between a bib that would fulfill a metarecord hold and the metarecord id referenced in the metarecord hold.

Typical cron entries will include a weekly update of bibs and items and daily updates of the other files, e.g.:

```
above_treeline_export.pl --db_host foo.org --db_user foo --db_database everfoo \
```

```
--db_password passfoo --org CONS --files hold,order,circ \
```

```
--ftp_host ftp.abovethetreeline.com --ftp_user user --ftp_password password
```

```
above_treeline_export.pl --db_host foo.org --db_user foo --db_database everfoo
```

```
--db_password passfoo --org CONS --files hold,order,circ \
```

```
--ftp_host ftp.abovethetreeline.com --ftp_user user --ftp_password password
```

EVERGREEN ONBOARDING STEPS

Switches

--org

Required; The short org unit name of the org unit to export. Could be a single system or a consortium.

--files

Optional; If not defined, all will be created. Accepts item|circ|hold|bib|order. More than one may be specified by using commas, e.g. --files circ,bib

--exclude_mods

Optional; Excludes circulation modifiers from export, e.g. --exclude_mods "EQUIPMENT,E READER"

--run_date

Optional; Used for generating files as if the script was being run on a previous date, if not supplied it defaults to today. Note that transactions run for the previous day so if you want transactions for 2018-02-19 supply the date it would run as as the 20th, e.g. --run_date 20180220

--db_host Required with failover

--db_user Required with failover

--db_database Required with failover

--db_password Required with failover

--db_port Optional, defaults to 5432

Database failover behavior: If the required database parameters are not sent, it will attempt to use a local socket connection.

--ftp_folder Optional

--ftp_host Required with failover

--ftp_user Required with failover

--ftp_password Optional

--ftp_port Optional, defaults to 21

FTP failover behavior: If there is no host and user, it will generate the file but not attempt to transfer it. User is required even if it is set to anonymous.