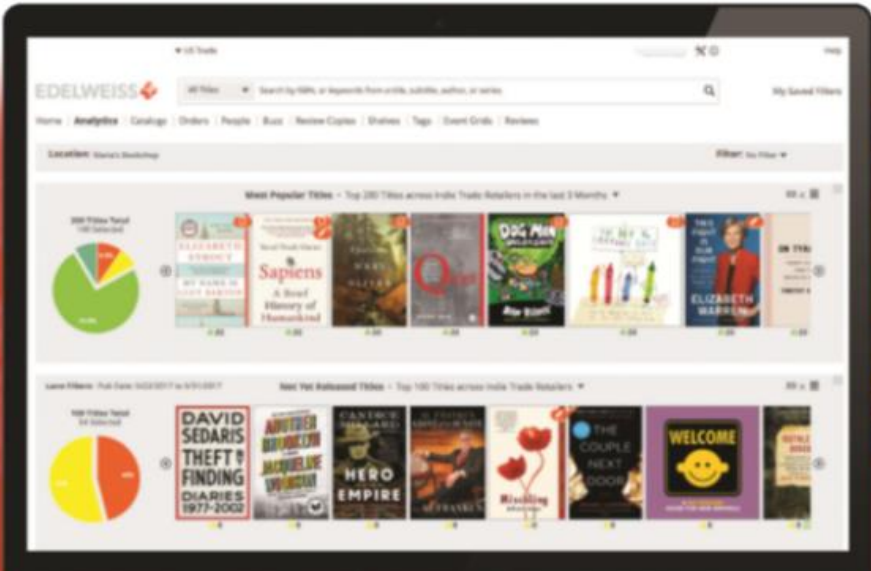


# EDELWEISS ANALYTICS

## SIERRA ONBOARDING GUIDE



## 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.



## 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.

## SIERRA ONBOARDING STEPS

The following are the steps to connect your Sierra ILS to Edelweiss+Analytics.

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

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

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

## SIERRA ONBOARDING STEPS

### Bibliographic Export for Edelweiss+Analytics

Run the following task weekly using review file 1.

Saved Search to limit to library (only necessary if part of a consortium) and exclude all electronic formats:

Term	Operator		Type	Field	Condition	Value A
1			BIBLIOGRAPHIC	LOCATION	starts with	b
2	AND		BIBLIOGRAPHIC	FORMAT	not equal to	3
3	AND		BIBLIOGRAPHIC	FORMAT	not equal to	u
4	AND		BIBLIOGRAPHIC	FORMAT	not equal to	y
5	AND		BIBLIOGRAPHIC	FORMAT	not equal to	m
6	AND		BIBLIOGRAPHIC	FORMAT	not equal to	w
7	AND		BIBLIOGRAPHIC	FORMAT	not equal to	v

*Bibliographic Export Task in Scheduler:*

It is important to remove the end bibliographic number and enter b\* for the stop value.

```

Task Name:BPL Edelweiss Bibs
Task Type                Output Delimited Records
Email Addresses          beth@flatironslibrary.org
Review File              bib01
Rename as                BPL Edelweiss Analytics Bibs
Store Record Type       b
Retain each box separately in
review file              false
Search on                b1000000-
Login                   milbag
Saved Search             bpl eldelweiss analytics bibs no electronic mat
Fields To Be Exported   b:81,b:i,b:v,b:30,b:t,b:a,b:s,b:p,i:62
Export Field Delimiter   |
Export Text Qualifier    |
Export Repeated Field Delimiter ;
Export Maximum Field Length (0-
1000)                   0
Filename                bpl_biblio.txt
Host                    ftp.abovethetreeline.com
User Name               JUW
Password                ***
Remote Directory        .
Secure Transfer         false
Transfer Type           binary
    
```

## SIERRA ONBOARDING STEPS

### Item Export for Edelweiss+Analytics

Run the following task weekly using review file 1.

Saved Search to limit to library (only necessary if part of a consortium).

Term	Operator	Type	Field	Condition	Value A
1		ITEM	LOCATION	starts with	b

*Item export task in scheduler.*

It is important to remove the end item number and enter i\* for the stop value.

```

Task Name:BPL Edelweiss Items
Task Type                Output Delimited Records
Email Addresses          beth@flatironslibrary.org
Review File              bib01
Rename as                BPL Edelweiss Items
Store Record Type       i
Retain each box separately in
review file              false
Search on                i1000000-
Login                   milbag
Saved Search             bpl edelweiss items
Fields To Be Exported   i:81,i:b,b:81,b:i,b:v,i:79,i:c,i:e,i:83,i:88,i:78,i:63,i:68,i:65,i:109,i:110,i:76,i:f
Export Field Delimiter   |
Export Text Qualifier    .
Export Repeated Field Delimiter ;
Export Maximum Field Length (0-1000) 0
Filename                bpl_items_full.txt
Host                    ftp.abovethetreeline.com
User Name               JUW
Password                ***
Remote Directory        .
Secure Transfer         false
Transfer Type           binary
    
```

## SIERRA ONBOARDING STEPS

### Order Export for Edelweiss+Analytics

Run the following task weekly using review file 1.

Saved Search to limit to library (only necessary if part of a consortium) and orders that are not yet cataloged.

Term	Operator	Type	Field	Condition	Value A
1		ORDER	LOCATION	starts with	b
2	AND	ORDER	CDATE	equal to	- -
3	AND	ORDER	STATUS	not equal to	z

*Order export task in scheduler.*

It is important to remove the end order number and enter o\* for the stop value.

```

Task Name:BPL Edelwiess Orders
Task Type                Output Delimited Records
Email Addresses          beth@flatironslibrary.org
Review File              bib01
Rename as                BPL Edelweiss Orders
Store Record Type       o
Retain each box separately in
review file              false
Search on                o1000000-
Login                   milbag
Saved Search             bpl edelweiss orders
Fields To Be Exported   b:81,o:05
Export Field Delimiter   |
Export Text Qualifier
Export Repeated Field Delimiter ;
Export Maximum Field Length (0-
1000)                   0
Filename                bpl_orders.txt
Host                    ftp.abovethetimeline.com
User Name               JUW
Password                ***
Remote Directory        .
Secure Transfer         false
Transfer Type           binary
    
```

## SIERRA ONBOARDING STEPS

### Circ Export for Edelweiss+Analytics

Run the following task daily using review file 1.

Saved search to limit to library (only necessary if part of a consortium) and items circed the previous day.

Term	Operator	Type	Field	Condition	Value A
1		ITEM	LOCATION	starts with	b
2	AND	ITEM	OUT DATE	equals yesterday	

*Circulation export task in scheduler.*

It is important to remove the end item number and enter i\* for the stop value.

```

Task Name:BPL Edelweiss Circ
Task Type                Output Delimited Records
Email Addresses          beth@flatironslibrary.org
Review File              bib01
Rename as                 BPL Edelweiss Analytics Circ
Store Record Type        i
Retain each box separately in
review file              false
Search on                i1000000-
Login                    milbag
Saved Search              bpl edelweiss circ
Fields To Be Exported    i:81,i:b,b:81,i:63,i:64,i:65
Export Field Delimiter    |
Export Text Qualifier
Export Repeated Field Delimiter ;
Export Maximum Field Length (0-
1000)                    0
Filename                  bpl_circ_daily.txt
Host                      ftp.abovethetreeline.com
User Name                 JUW
Password                  ***
Remote Directory          .
Secure Transfer           false
Transfer Type             binary
    
```



## SIERRA ONBOARDING STEPS

### **Hold Export for Edelweiss+Analytics**

Run the Sierra report for High Demand. Once run, export to excel and delete all columns except for bib number and holds. Save the file as a text file named XXX\_Hold\_DD-MM-YYYY.txt. Once saved, send to Edelweiss+ FTP account.