

Innovative Interfaces (iii)



In attendance: Donna Morris, Anne Fischer, Karen Marriott, Lloyd Lovely, Kay Bauman

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Stacy Betts and Michael Monroy presented Innovative Interfaces demonstration. The organization iii was established in 1978 and has 310 employees; 130 + are MLIS librarians and they are based in California. They offer 24/7 365 support to their customers.

Sierra (a java-based client) is the new ILS and using other 3rd party software to offer other applications. The previous ILS version is Millennium and has been since 1999. Scottsdale

public library is a robust user of Encore.

- Postgre SQL is an open source database
- Enhanced indexed using the Lucene searching engine
- API's (Application Programming Interface) expose business logic and services at each layer

Sierra: Circulation

- 1) Dashboard – like igoogole that can be built for each staff role
- 2) Encore is a traditional OPAC (Online Public Access Catalog) and Discovery layer
- 3) Encore mobile is the OPAC for a mobile device
- 4) Admin tools are through a separate web interface Sierra app user level options and requires the user to login
- 5) Reporting—any ODBC (Open Database Connectivity) client can use the data
 - a) Reporter – has many things; one is a google map mashup
 - b) Budget projection report is in a separate application called “Decision Center” that includes things like low circulation weeding report

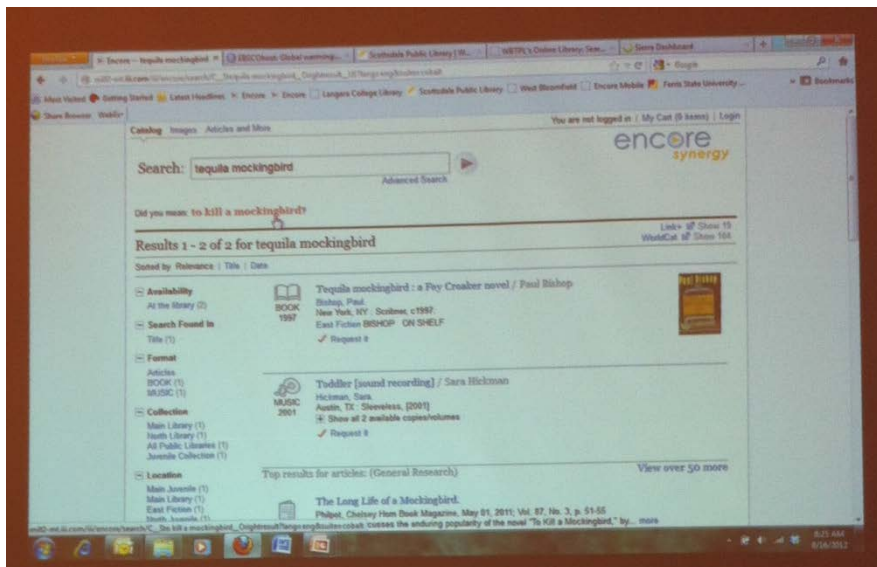
Encore – OPAC is 4 years old

- What is relevancy? They have a default and it can be customized (even in a specific time to maybe match when an author is visiting)
- Results include events currently happening. For example, if you search for gardening at the top of the list will be an upcoming event and the customer may also register for that event. Things

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like one word magazine titles (example: Time magazine) will be on the 1st screen of results. (These functions are a direct result of feedback they've received from public librarians).

- Can immediately open a full-text article when the customer pulls it up in the results
- The databases do not have to be [Z39](#) compliant.
- How does access to databases work for remote users? They will ask them to log on in order to authenticate for that session. It does what EasyProxy does or what we currently do with our databases link from the webpage, i.e., when they click on a database link, they login one time and then they can access any database without having to login again.
- We can get the book images included in the OPAC from anywhere, it will work with them.
- Can include community reviews and can make it so they won't publish until staff have reviewed them.
- System runs on a Linux Server
- Can post on all kinds of social sites
- Have a cart that can be saved; can reserve all or print from the cart; can export the titles to [RefWorks](#), which can put them into a citation format of your choice.
- It will look against your database and ask you if something similar matches your search. So, if you type Frak Lloyd Right it will ask you if you mean Frank Lloyd Wright. Another example is if you type tequila mockingbird it will come up with that title, which is a book, and it will ask you if you meant To Kill A Mockingbird.



- They indicated that we could incorporate the Oklahoma Images to get results in the list as well.
- There is a freeze reserve available for customers that holds their place in the reserve queue (don't move up the list during the freeze)
- They are [PCI Compliant](#)
- They can include a signature or photo in the customer record

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- Each customer can create his/her RSS feeds of things such as books due back or new books or whatever
- Customers can set preferred searches and they will get an email notice when something new is purchased
- Advanced search has many options and displays the phrase so the user can learn the language for the advanced search.
- The library may decide when an on order item shows up in the catalog
- Suggest a title is an option. Then the items are sent to the staff as a file for review

Sierra

- Roles define options that are visible to the staff
- Sierra is a Java-based client and it can be on a windows tablet. Because it runs on JAVA, they are developing a web-based version for an iPad.
- It looks very web like and similar to the Encore. Staff can pre-limit a search so that searching may be one step. It can search and display other languages.
- Client is optimized for use on a touch screen
- A check-out time period can be determined by patron type or material type. You define it to understand your loan rules.
- Linked customers linked customer feature- doesn't allow check-out of others' reserves at self-check but will allow it at circ desk
- Bookings
- There is an integrated ILL and you can create a virtual record so the item may be checked out with the system.
- All of this is in one spot for staff AND the customer
- Receipts – such as overdue notices, can include marketing information
- You can set languages for overdue notices via email or printed
- You can weight the reserves pull list based on delivery route

Rapid update is an iPhone app to do a quick update such as loan period or location for a display, as an example.

Decision Center offers reports that can be generated. As examples, you can see when a library is busiest for staffing purposes or for weeding, create a report specifying location/format/audience/number of circs within a set time period

Reporter has a postal code map that you can generate to see, for example, what library has the top holds placed and then you can export that as html.

- Catalogers can continue to use [Connexion](#) and it imports into Sierra.
- Sierra is [RDA](#) aware. URLs can be included in item records.

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- You can keep orders with the same bib number when they catalog it.
- One-Click is a batch function in TitleSource3 Baker & Taylor (B&T) that creates an order and puts an order with bib number in the catalog. You can tell B&T all the funds so that information is included automatically in the catalog when it gets ordered.
- Build carts in TSII and create order records for entire cart, either tied to an electronic order or to a “list in encore” for creating purchase orders.
- Bib record (parent record) is linked to item record and order record.
- Can match and attach to an existing record such as an order record; can protect fields that you don’t want to overlay.
- Can do authority work with search function; right click to check against an authority file; update all existing records in the catalog at once.
- Can batch order item numbers for multiple copies of a title.
- Inventory express- ISBN search of major vendors with real time access
- Funds update in real time; fund reports update as materials ordered.
- Funds can also be put into a hierarchy such as by selector responsibility.
- Several options for viewing status of funds e.g. by library, by type, by selector.
- Decision center- option for a report that will calculate allocation of funds based on last year’s circulation; “expensive mistakes” report shows items that cost over a specified amount with circs below a specified amount.
- They can interface with other financial applications such as PeopleSoft but it is opensource API and whatever software you want to interface with must be open to web communication.
- The Edifact standard is used to receive orders for payment. All big vendors are edifact compliant.
- Browse query function searches outside of SQL. Searches all fields.
- Can set up customer suggestions to go to a recommended list; will compile duplicate requests and show number; retains customer info for reserves ; from list, can “select “title to generate an order or “deny” title to send a “regret” email; ordered titles not automatically reserved for customer(s).
- Can check in and track serials, automatically create item numbers for issues, set receipt pattern and predict next expected issue, handle claims electronically.
- ExpressLane is their express check-out software that runs on any hardware and offers credit card and PayPal options for payment.
- Overdrive is communicating with Innovative Interfaces so they expect integration by the end of the year.
- Customers can register for a card online.
- Uncataloged paperbacks can be added in what they call Fast Add and it sounds like a similar process that MLS is currently doing.

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- Can have an online application with signature pad that can be embedded with the customer record.
- They have a queue option for customers similar to what Netflix offers for holds. Have Netflix type hold option for series (when one title sent, automatically reserves next title in the series).

During the afternoon Anne & Karen escorted the Innovative Interfaces reps to see Cataloging and Tech Processing at the Service Center. Heidi and Anne showed them some of the processing done at the Service Center, which included Big Bin, the tagging stations, and the sorter, all of which are important components to our ILS system.