How did we get here?

Reporting from Millennium to Sierra.
A little history…

- Naperville is a city of about 150,000 residents in the western suburbs of Chicago
- 3 buildings
- 70,000 registered cardholders
- Annual circulation ~ 4 million
- Collection over 600,000 items
- 1.5 million visits
- 100,000 Annual program attendance
- $2.6 million materials budget
- ILS
  - Millennium 2008, Sierra 2012
    - Current version of Sierra is 4.1
  - Encore
    - Current version is 4.6
  - MK Solutions Self-Checks (since May 2018)
    - Migrated from ExpressLane
  - Innovative modules/products
    - Homebound module
    - ERM
    - Reporter/Decision Center
    - INN-Reach
  - Other third party vendors
    - Shoutbomb
    - CHQ/ESP
Busy, Busy, Busy

- System/Database cleanup
- Circulation
- Tech Services
  - Cataloging
  - Acquisitions
- Selection and maintenance
  - Selection is centralized
  - Maintenance is distributed among librarians
- Interlibrary Loan
- Special Services (homebound)
- Holds On Mending (tsas)
- High Demand Holds (RB)
- ILL Overdue Items (MM)
- Claims Returned
- Dump Notice History
- Damaged with Holds (RB)
- Delete ILL Items
- Item Stranded Holds
- Bib Stranded Holds
- Staff Statement of Charges
- RB Statement of Charges
- Avail Items to Withdraw
- Preferred Searches
- Recently Billed
- Welcome Emails
- Item Transit Times
- Patron Addresses
- Trace w Holds
- Chill Check (NID)
- Home Bound (AB)
- Add and Replace (RB)
- Expiring Cards
- ILL Lost Items (MM)
- Update Daily Checklists
- Scrub Orders (AC, Roh.)
- Lost; Trace & Missing
- Notices
- Turnover
- Statistical Reports
## Tracking

### Report/Task

<table>
<thead>
<tr>
<th>Report/Task</th>
<th>May 2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Holds On Mending (tsas)</td>
<td></td>
</tr>
<tr>
<td>High Demand Holds (RB)</td>
<td></td>
</tr>
<tr>
<td>ILL Overdue Items (MM)</td>
<td></td>
</tr>
<tr>
<td>Claims Returned</td>
<td></td>
</tr>
<tr>
<td>Dump Notice History</td>
<td></td>
</tr>
<tr>
<td>Damaged with Holds (RB)</td>
<td></td>
</tr>
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<td>Delete ILL items</td>
<td></td>
</tr>
<tr>
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<td></td>
</tr>
<tr>
<td>Bib Stranded Holds</td>
<td></td>
</tr>
<tr>
<td>Staff Statement of Charges</td>
<td></td>
</tr>
<tr>
<td>RG Statement of Charges</td>
<td></td>
</tr>
<tr>
<td>Avail Items to Withdraw</td>
<td></td>
</tr>
<tr>
<td>Preferred Searches</td>
<td></td>
</tr>
<tr>
<td>Recently Billed</td>
<td></td>
</tr>
<tr>
<td>Welcome Emails</td>
<td></td>
</tr>
<tr>
<td>Item Transit Times</td>
<td></td>
</tr>
<tr>
<td>Patron Addresses</td>
<td></td>
</tr>
<tr>
<td>Trace w Holds</td>
<td></td>
</tr>
<tr>
<td>Chill Check (NID =&gt; Holly Y.)</td>
<td></td>
</tr>
<tr>
<td>Morning Holds</td>
<td></td>
</tr>
<tr>
<td>Paper Notices</td>
<td></td>
</tr>
<tr>
<td>Afternoon Holds</td>
<td></td>
</tr>
<tr>
<td>Change Tapes</td>
<td></td>
</tr>
<tr>
<td>Home Bound (AB)</td>
<td></td>
</tr>
<tr>
<td>Add and Replace (RB)</td>
<td></td>
</tr>
<tr>
<td>Expiring Cards</td>
<td></td>
</tr>
<tr>
<td>ILL Lost Items (MM)</td>
<td></td>
</tr>
<tr>
<td>Update Daily Checklists</td>
<td></td>
</tr>
<tr>
<td>Scrub Orders (AC, Roh.)</td>
<td></td>
</tr>
<tr>
<td>Lost / Trace and Missing</td>
<td></td>
</tr>
<tr>
<td>Clean Tape Drives</td>
<td></td>
</tr>
</tbody>
</table>

**Frequency:**
- Daily
- Weekly
- Monthly
- Quarterly
- Annually
- As needed/On Demand

---

*Clean Only When "Clean" Light is Illuminated*
Scrub Orders – Intended to clear old orders and reduce their impact with overnight link maintenance

Weekly Holds – Acq staff track holds on new items. Currently run manually but will be added to autorun list

Holds on Mending – Used by staff to identify items mended ready to go back to the shelf

Damaged with Holds – These items either need to be replaced or sent to ILL

High Demand Holds – Accounts for holds including frozen holds, the number of items on order, as well as our popular picks

Add and Replace – Used to track spending on adds and replacements

Damaged with Holds – These items either need to be replaced or sent to ILL

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Weekly Holds – Acq staff track holds on new items. Currently run manually but will be added to autorun list

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Technical Services
<table>
<thead>
<tr>
<th>Service</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item and Bib Stranded Holds</td>
<td>Used to pull available items for holds that haven’t been filled</td>
</tr>
<tr>
<td>Trace With Holds</td>
<td>Used to search for items with holds that were not found on shelf during hold search</td>
</tr>
<tr>
<td>Item Transit Times</td>
<td>Used to search for items still in transit that are available to fill holds</td>
</tr>
<tr>
<td>Claims Returned</td>
<td>Used to search for items</td>
</tr>
<tr>
<td>Recently Billed</td>
<td>Used to search for items for which customers have been billed</td>
</tr>
<tr>
<td>Patron Addresses</td>
<td>Used to verify/confirm the correct entry of new patrons into Sierra</td>
</tr>
</tbody>
</table>
## Public Services

<table>
<thead>
<tr>
<th>ILL - Used by ILL staff (we do not have the ILL module)</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Overdue items</td>
</tr>
<tr>
<td>• Lost items</td>
</tr>
<tr>
<td>• Items to delete</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Public Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Chill Check</td>
</tr>
<tr>
<td>• Used to change location of items when they come off of the new book shelf</td>
</tr>
<tr>
<td>• Lost; Trace and Missing</td>
</tr>
<tr>
<td>• Used by librarians to maintain the collection (weed and replace)</td>
</tr>
</tbody>
</table>
▪ Outstanding holds
  ▪ Used to reconstruct hold lists if customer deletes or unfreezes all their holds

▪ Circ transaction table
  ▪ Used to answer questions about transactions; patron information was not kept

▪ Fines paid
  ▪ Used to reconcile Sierra WebPAC, Self-check against vendor totals

▪ Monthly statistics
  ▪ Used to create statistical reports for Admin, Board, staff, and Surveys

▪ Welcome Emails and Expired Cards
How?

- Perl scripts
- AutoIT
- Manually run in Create Lists
- Some Automatically run scripts (Perl)
  - Separate PC used to process certain tasks and reports
  - Circ transactions pulled daily
  - Holds pulled daily
  - Geocoding patron addresses for GIS mapping
Example of AutoIT script
# Expanded report summary

## AutoIt Daily Report Summary

This document is a complete reference for running the regularly scheduled AutoIt reports. These reports can be found on the daily reports checklist that’s maintained in the “Millennium Daily Reports Checklist.xlsx” spreadsheet in the miadmin folder. These reports include the reports in the Weekly and Monthly folders. Note that the Weekly folder contains not only weekly reports but daily reports as well.

Before running the report, you must have the Millennium Administration module open to the Create List window. Highlight the empty slot you want to use for the report based on the Max Records column from the table. Now you can either a) run **LoadRunSortReport** and select the report to run, or b) go to the folder containing the “DoIt” batch file and double click on the batch file to run it.

The output file created by the report will be found in one of the folders under the **Output** folder. Which sub-folder depends on where the original report was run; the **Output** folder contains a **Weekly**, **Monthly**, **As Needed**, etc., sub-folder that will contain your output report file.

<table>
<thead>
<tr>
<th>Report Name</th>
<th>Max Records</th>
<th>Report Perf Script</th>
<th>Extra Step</th>
<th>Output File</th>
<th>When to Run</th>
<th>Recipient/Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Holds on Mending</td>
<td>500</td>
<td>csv_to_dynic.pl</td>
<td>none</td>
<td>holds_on_Mending.pdf</td>
<td>Monday</td>
<td>Email PDF to <a href="mailto:ltsa@naperville-lib.org">ltsa@naperville-lib.org</a></td>
</tr>
<tr>
<td>High Demand Holds</td>
<td>25,000</td>
<td>high_demand_holds.pl</td>
<td>Open high_demand_holds.csv and save as Excel spreadsheet.</td>
<td>high_demand_holds.xlsx</td>
<td>Monday</td>
<td>Email spreadsheet to Rachelle Bell</td>
</tr>
<tr>
<td>ILL Overdues</td>
<td>500</td>
<td>csv_to_dynic.pl</td>
<td>none</td>
<td>ILL_Overdues.pdf</td>
<td>Thursday</td>
<td>Email PDF to Martha Mota</td>
</tr>
<tr>
<td>Damaged with Holds</td>
<td>500</td>
<td>damaged_with_holds.pl</td>
<td></td>
<td>Batch script generates and sends report in an email.</td>
<td>Tuesday</td>
<td>Email is sent to Rachelle Bell</td>
</tr>
</tbody>
</table>

| Delete ILL Items          | 500         | None               |            |                                 | Monday      | N/A                                      |

**Staff Statement of Charges** *(There are two forms of this report: run either the Monday or Tues-Fri version of it.)*

<table>
<thead>
<tr>
<th>Staff Statement of Charges</th>
<th>Max Records</th>
<th>Report Perf Script</th>
<th>Extra Step</th>
<th>Output File</th>
<th>When to Run</th>
<th>Recipient/Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>500</td>
<td>None</td>
<td></td>
<td></td>
<td>Monday</td>
<td>Email each squeezed TXT file as an attachment to the staff person’s manager</td>
</tr>
</tbody>
</table>

---

1. Report Perf Script:
   - **csv_to_dynic.pl**: Script to convert CSV files to Dynic format.
   - **high_demand_holds.pl**: Script to handle high demand holds.
   - **damaged_with_holds.pl**: Script to manage damaged holds.

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2. Extra Step:
   - **Batch script generates and sends report in an email.**
   - **Using the Review File created from the “Delete ILL Items” report, go to the Delete Records module and delete those ILL item records and parent bib records as well. (In other words, click the lower radio button.)**

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3. Output File:
   - **holds_on_Mending.pdf**
   - **high_demand_holds.xlsx**
   - **ILL_Overdues.pdf**
   - **damaged_with_holds.pl**

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4. When to Run:
   - **Monday**
   - **Tuesday**
   - **Thursday**

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5. Recipient/Notes:
   - **Email PDF to ltsa@naperville-lib.org**
   - **Email spreadsheet to Rachelle Bell**
   - **Email PDF to Martha Mota**
   - **Email is sent to Rachelle Bell**
   - **Email each squeezed TXT file as an attachment to the staff person’s manager**

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Identify what's produced now: Who, what, and when?

Similarities or redundancies? Can we consolidate reports?

Identify staff/stakeholders - Re-evaluate needs? Do they still need report? Do they need a change to the report? Do they need a new report?

Report Audit
- Add Circulation Transactions
- Add Circulation Transactions (Previous Days)
- Add New Items
- Amount Saved By Customers
- Bibs with no items with holds
- Billed Items
- Report Board Circulation
- Overview File Creation Board Overview
- Active Cardholders
- Board Overview Stats
- Compilation Circ By Hour
- Circ By Hour (Previous Days)
- Circ Transaction Differences
- Circ Workbook Data Compilation
- Circ Workbook File Creation
- Circ Workbook File Creation (Annual)
- Clear Hold Shelf
- Damaged with Holds
- High Demand Holds
- Holds on Mending
- Homepage Report
- Hotspot Checkout
- Hotspots (All)
- Hotspots (Spare)
- ILL Lost Items
- ILL Overdues Notices
- Bills (Reprint) Notices
- Courtesy Notices
- Holds Notices
- Holds (Afternoon) Notices
- Overdues
- Outstanding Holds
- Problem Holds
- Recently Billed
- Unlinked Juvenile Cards
- Update Bib-Item Links
- Update Bib-Order Links
- Update Funds
- Update Item Info
- Update Item Statuses
- Update Item Types
- Update Location Codes
- Update Material Types
- Update Order Record CMFs
- Update Order Record Received
- Update Order Records
- Update Patron Types
- Video Games Checked Out
1. Automatically run using PHP, SQL, APIs
2. Some are On Demand and run as needed directly by staff
3. We still run a handful of reports using AutoIT
4. Manually run in Create Lists

How Now?
Automated Report Queue

1. Each report has definitions
   - Frequency
   - Time
   - Who emailed to
   - Others

2. Task Scheduler set to call a PHP batch file every 5 minutes (Windows Server)

3. Most can be run On Demand as well

4. Access On Demand reports from Dashboard

5. Login using Windows login (Active Directory)

6. Permission levels - basic (1-5 with 5 being highest level of access)

7. Some on demand do not require a login - while others do due to sensitive information

8. Automated Reports...
Both are used in conjunction with PHP to create reports

When/Why use APIs?
- APIs are stable
- Versioned
- Some data available only via API (example - hold shelf expiration date)
- Use APIs mostly for notices - combined with DNA

DNA access to large amount of data -
- some information only available via DNA - INN-Reach Data

APIs and Sierra DNA
How are auto reports received

Mary,

Here are the results of running report 20041, ‘Recently Billed’ report.

The results can be viewed at https://nplstats.naperville-lib.org/stats/generatedreports/47/recently_billed_20190531_075000.xlsx

Sent: Friday, May 31, 2019 at 7:50:01 am
<table>
<thead>
<tr>
<th>Loc Code</th>
<th>Call Number</th>
<th>Barcode</th>
<th>Assessed Date</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>ban</td>
<td>517.68 MOO 2018</td>
<td>3118044961843</td>
<td>05/30/2019</td>
<td>p1</td>
</tr>
<tr>
<td>bij</td>
<td>J 946.53 OHL</td>
<td>3118039617897</td>
<td>05/30/2019</td>
<td>p1</td>
</tr>
<tr>
<td>mje1</td>
<td>E SCH</td>
<td>3118044525855</td>
<td>05/30/2019</td>
<td>p1</td>
</tr>
<tr>
<td>mjf</td>
<td>J ROWLING</td>
<td>3118039570576</td>
<td>05/30/2019</td>
<td>p1</td>
</tr>
<tr>
<td>mjf</td>
<td>E SIM</td>
<td>3118044079825</td>
<td>05/30/2019</td>
<td>p1</td>
</tr>
<tr>
<td>mjj</td>
<td>J 641.5972 LOC</td>
<td>3118010382665</td>
<td>05/30/2019</td>
<td>p1</td>
</tr>
<tr>
<td>mjj</td>
<td>J 616.8553 SQU</td>
<td>3118039942926</td>
<td>05/30/2019</td>
<td>p1</td>
</tr>
<tr>
<td>mjj</td>
<td>J 641.578 WAG</td>
<td>3118035872620</td>
<td>05/30/2019</td>
<td>p1</td>
</tr>
<tr>
<td>mjj</td>
<td>J 649.10248 BRO</td>
<td>3118009466685</td>
<td>05/30/2019</td>
<td>p1</td>
</tr>
<tr>
<td>mjj</td>
<td>J 649.10248 MAT</td>
<td>3118014720812</td>
<td>05/30/2019</td>
<td>p1</td>
</tr>
<tr>
<td>mjj</td>
<td>J 649.10248 RIS</td>
<td>3118035994291</td>
<td>05/30/2019</td>
<td>p1</td>
</tr>
<tr>
<td>myf</td>
<td>YA BERGIN</td>
<td>3118036417169</td>
<td>05/30/2019</td>
<td>p1</td>
</tr>
<tr>
<td>san</td>
<td>478 LOW</td>
<td>3118025485235</td>
<td>05/30/2019</td>
<td>p1</td>
</tr>
<tr>
<td>san</td>
<td>366.487 MCG</td>
<td>3118029614566</td>
<td>05/30/2019</td>
<td>p1</td>
</tr>
<tr>
<td>sanh</td>
<td>895.63 MUR</td>
<td>3118047394654</td>
<td>05/30/2019</td>
<td>p1</td>
</tr>
<tr>
<td>sjf</td>
<td>J RUCKMAN</td>
<td>3118035738805</td>
<td>05/30/2019</td>
<td>p1</td>
</tr>
<tr>
<td>sjf</td>
<td>J KRUUK</td>
<td>3118033478511</td>
<td>05/30/2019</td>
<td>p1</td>
</tr>
<tr>
<td>sjf</td>
<td>J MCDONALD</td>
<td>3118098768858</td>
<td>05/30/2019</td>
<td>p1</td>
</tr>
<tr>
<td>lsyf</td>
<td>YA FITZPATR</td>
<td>3118036353299</td>
<td>05/30/2019</td>
<td>p1</td>
</tr>
<tr>
<td>sylg</td>
<td>YA YANG</td>
<td>3118025435581</td>
<td>05/30/2019</td>
<td>p1</td>
</tr>
</tbody>
</table>
# On Demand Reports Dashboard

## Quick Links
- SIRSI Genesis Management Reports
- Statistical Reports

## Comparison Reports
- 2013 - 2019 Comparison
- 2019 Year in Review

## On Demand Reports
- Address Lookup
- Barcode Generator
- IBS with Hold Items with Holds Counts
- Card Renewal Email Stats
- Card Renewals
- Circulation by Hour
- Circulation by Record
- Cost of Lost Items
- Collection Performance
- Collection Performance (Fund)
- Control Fields
- Cost Per Circ
- Current Statistics
- Dead Items
- Funds Dashboard
- Generate Excel File
- Gobally Items
- Holdings Group Circ Breakdown
- Item Type Circ Breakdown
- Notice History
- Outstanding Items
- People Counter
- Test Address Formatting

## Statistics Dashboard

### Amount Saved

<table>
<thead>
<tr>
<th></th>
<th>2019</th>
<th>2018</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yesterday</td>
<td>$152,338.66</td>
<td>$215,892.10</td>
<td>-29.64%</td>
</tr>
<tr>
<td>May</td>
<td>$3,812,109.67</td>
<td>$3,836,788.90</td>
<td>-0.64%</td>
</tr>
<tr>
<td>April</td>
<td>$4,128,316.04</td>
<td>$4,163,588.15</td>
<td>0.62%</td>
</tr>
<tr>
<td>Entire Year</td>
<td>$21,095,762.26</td>
<td>$21,112,523.10</td>
<td>-0.09%</td>
</tr>
</tbody>
</table>

### Physical Item Circulation

<table>
<thead>
<tr>
<th></th>
<th>2019</th>
<th>2018</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yesterday</td>
<td>5,739</td>
<td>8,59</td>
<td>-32.63%</td>
</tr>
<tr>
<td>May</td>
<td>145,776</td>
<td>149,03</td>
<td>-2.20%</td>
</tr>
<tr>
<td>April</td>
<td>196,773</td>
<td>162,864</td>
<td>-18.71%</td>
</tr>
<tr>
<td>Entire Year</td>
<td>582,282</td>
<td>831,679</td>
<td>-3.53%</td>
</tr>
</tbody>
</table>

*Information up through May 30th for each time period.*
Running On Demand Reports
# On Demand Report

## Cost Per Circ

Cost per Circ from April 1st, 2019 to April 30th, 2019

<table>
<thead>
<tr>
<th>Item Type</th>
<th>Description</th>
<th>Item Count</th>
<th>Total Circ</th>
<th>Avg. Circ</th>
<th>Total Value</th>
<th>Avg. Item Value</th>
<th>Cost Per Circ</th>
</tr>
</thead>
<tbody>
<tr>
<td>163</td>
<td>Adult Biography</td>
<td>912</td>
<td>1,057</td>
<td>1.16</td>
<td>$23,690.26</td>
<td>$26.22</td>
<td>$22.63</td>
</tr>
<tr>
<td>56</td>
<td>Adult Blu-ray Fiction</td>
<td>5,202</td>
<td>9,665</td>
<td>1.79</td>
<td>$173,025.90</td>
<td>$32.70</td>
<td>$18.28</td>
</tr>
<tr>
<td>48</td>
<td>Adult Blu-ray Fiction Multi</td>
<td>260</td>
<td>358</td>
<td>1.38</td>
<td>$16,350.88</td>
<td>$62.52</td>
<td>$46.70</td>
</tr>
<tr>
<td>57</td>
<td>Adult Blu-ray NF</td>
<td>128</td>
<td>186</td>
<td>1.45</td>
<td>$3,994.30</td>
<td>$31.21</td>
<td>$21.47</td>
</tr>
<tr>
<td>46</td>
<td>Adult Blu-ray NF Multi</td>
<td>16</td>
<td>17</td>
<td>1.06</td>
<td>$907.84</td>
<td>$56.26</td>
<td>$58.70</td>
</tr>
<tr>
<td>0</td>
<td>Adult Book</td>
<td>4,147</td>
<td>4,642</td>
<td>1.12</td>
<td>$31,663.11</td>
<td>$22.10</td>
<td>$19.75</td>
</tr>
<tr>
<td>32</td>
<td>Adult Book on CD</td>
<td>1,697</td>
<td>1,892</td>
<td>1.11</td>
<td>$77,292.63</td>
<td>$45.55</td>
<td>$40.85</td>
</tr>
<tr>
<td>80</td>
<td>Adult Compact Disc</td>
<td>5,546</td>
<td>6,582</td>
<td>1.19</td>
<td>$56,150.30</td>
<td>$17.34</td>
<td>$14.61</td>
</tr>
<tr>
<td>60</td>
<td>Adult DVD Fiction</td>
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</table>
One more thing...

- Online patron registration - Fall launch expected
  - All registrations will be done online
  - Auto-verify address against city database
  - Write directly to Sierra
  - Library card on demand
  - Currently in the testing phase
Recommendations

▪ Deficiencies of the ILS to define need not “because you can”
  ▪ Freeing up staff time
  ▪ System Integrity

▪ Staff/stakeholders involvement

▪ Nothing is perfect

▪ Have a backup plan
  ▪ Understand reports origins
  ▪ Alternatives if problems arise

▪ Documentation
QUESTIONS?

MARY GOLDEN
MGOLDEN@NAPERVILLE-LIB.ORG