

2024 Systems Administration Training Agenda

September 17 to 19, 2024

9:00am to 12:30pm

Day 1 - Tuesday Checklist

Little Known Features & Tips:

Overview of Maintenance:

- General Settings
- User Setup
- Utilities
- Scheduled Tasks
- Completed Tasks
- Pending Tasks
- Admin Reports

Things I Should Know About My EOS.Web System:

- Product License
- What MARC format am I using? Why Important?
- Run Record Count Report – Overview

Login Display Settings:

- Enable User Setup
- Display User Name
 - ❖ Good for Troubleshooting
- Display Change Password
 - ❖ Easy way to change password.

Email Setup Settings:

- Why this is Important?
- Library Information screen - how to setup
- DKIM – what is it and setup procedure.
- Troubleshoot email problems

Staff-Side Branding:

- Staff-Side background image
- Add Favicon to your web URL
- Create desktop shortcut link for OPAC

Maintenance Display Settings Explained:

- Allow multiple windows
- Record template window size
- Complete display window size
- Start page
- Default page & address format
- Print Saved Report Name Instead of Given Name
- Edit media links labels
- Edit web OPAC item status labels
- Edit advanced search item status labels

Staff Title List Settings:

- Default sort & subort
- Show book covers
- Show search relevancy ranking
- Display multiple locations
- Show URL link
- Show first linked image
- Print title list In sort order
- Enable Google Book covers by culture
- Link all MARC tag 856 subfields
- Select fields to display on title list
- How to add, delete, edit, position fields
- Useful tips

Staff Complete Display View Page Setup:

- What does this do?
- Where to find it?
- Staff Complete Display Page Setup
- How to add, arrange, delete, and edit fields
- Useful tips

Maintenance - Cataloging – Import Settings:

- Import handling
- Local holding settings

Utilities - Import Task:

- Which should you import first authority, acquisitions or bibliographic records?
- Acquisitions vs bibliographic MARC: pros & cons.
- Authority import tips
- Bibliographic MARC import tips
- Acquisitions import tips

Import Excel to MARC:

- Overview – important tips
- How to import an excel file
- EOS Excel format map setup
- Step by step import of Excel file

Admin. Reports – Day 1:

- Selected reports

Day 2 - Wednesday Checklist

Little Known Features & Tips:

- Edit Advanced Search fields
- NIST 800-53 Security/Cookies Use/Policies Banner
- Other Settings

User Setup – Basic Setup:

- Group vs Individual User Pros & Cons
- Add vs Copy
- General User Settings

User Setup – Cataloging Authorization Overview:

- Prescribed Settings/Best Practices:
 - Authority Control
 - Bibliographic File Control
 - Deleted Records
 - Other Settings

User Setup – Cataloging Properties Overview:

- ❖ Look at your settings and Follow along
- Prescribed Settings/Best Practices:
 - Authority Control
 - Bibliographic File
 - Multi-Site Location
 - Record Status
 - Search Defaults

Maintenance – Search – Overview:

- Browse
- Cross Library Search Setup
- Diacritics
- General
- Index
- Leading Articles
- OpenSearch Configuration
- Punctuation
- Search Field Index

Search – General Details Explained:

- Authority Properties
- Index Sort / Display
- Publisher Browse
- Bulk Search
- Automatic Search
- Advanced Search
- Patron Search

Search – Index & Browse:

- Sort, Display, and Index Structure
- Browse – Title List Default Sort Direction
- How to add, delete, or edit a MARC tag
- Troubleshooting

Search – Punctuation Details:

- Name
- Ignored punctuation
- Tips how optimize ignored punctuation
 - Years
 - Authorities

Masks Fields:

- Mask Patron PII Fields:**
 - Example reports:
 - Does it affect notices?
 - Does it affect patron labels?
- Mask User PII Fields:**
 - Example report.
- Mask Vendor Contact PII Fields:**
 - Example report.

Utilities – Module Tasks:

- Selected reports

Staff Useful links:

- Overview

Admin Reports – Day 2:

- Selected reports

Day 3 - Thursday Checklist

Little Know Features & Tips:

- User Setup – search authorization

System Clean-Up – Records:

- Expansion
- Picklists
 - Are there duplicates, misspellings, UFOs?
- Picklist Categories

System Settings – Staff:

- User Settings
 - Explanation and demonstration
- Common Passwords
- IP Authentication

System Clean-up – Authority:

- Report: Authority Heading without Linked Media
- Report: Subject Authority
- Edit authority records
- Utilities:
 - Delete unused authorities
 - Recover missing authorities

User Setup – Circulation Authorization Overview:

- Circulation
- Overrides
- Patrons
- Temporary Records
- Reports
- Utilities

User Setup – Circulation Properties Overview:

- Multi-Site Location
- Record Status
- Search Defaults

Admin. Reports -- Day 3:

- Selected reports

Utilities Export Tasks Pros & Cons:

- Authority
- Bibliographic MARC
- Deletion MARC
- KnowledgeBuilder
- Patron

Search MARC, Save List Feature:

- Setup the Search
- Review Record Set Results
- Send to Bulk Title List
- Use Bulk Action – Global Replace

SAML Setup:

- What is SAML?
- Important fields
- Steps to request setup
- SAML log.gov Setup

HELP? SDSC Support Center Help Resources:

- Who Do You Call? 4 Ways to contact EOS Help Desk
 - Phone
 - Email
 - Live Chat: how to setup and chat.
 - SDSC Add Case.
- Tips how to use SDSC?
 - Overview of Help Resources
 - Shortcuts to Useful Resources