SIRSIDYNIX Connections SUMMIT

5 Things You Didn't Know EOS Could Do for You

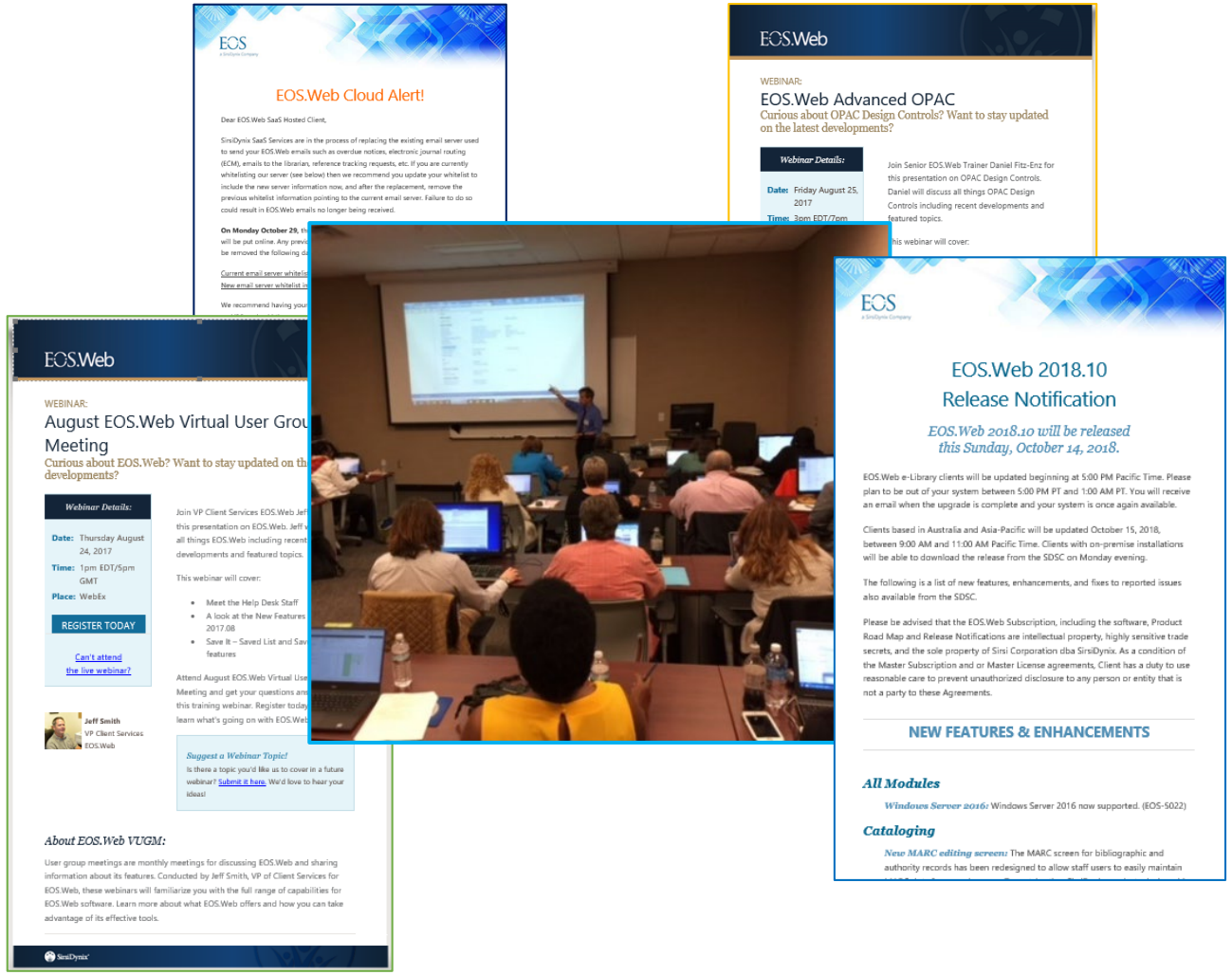
Jeff Smith| VP Client Services

1

Webinars & Events – are you connected?

Are you receiving invitations for:

- Training
- User Group Meetings
- Webinars
- Release Notes
- SaaS Alerts



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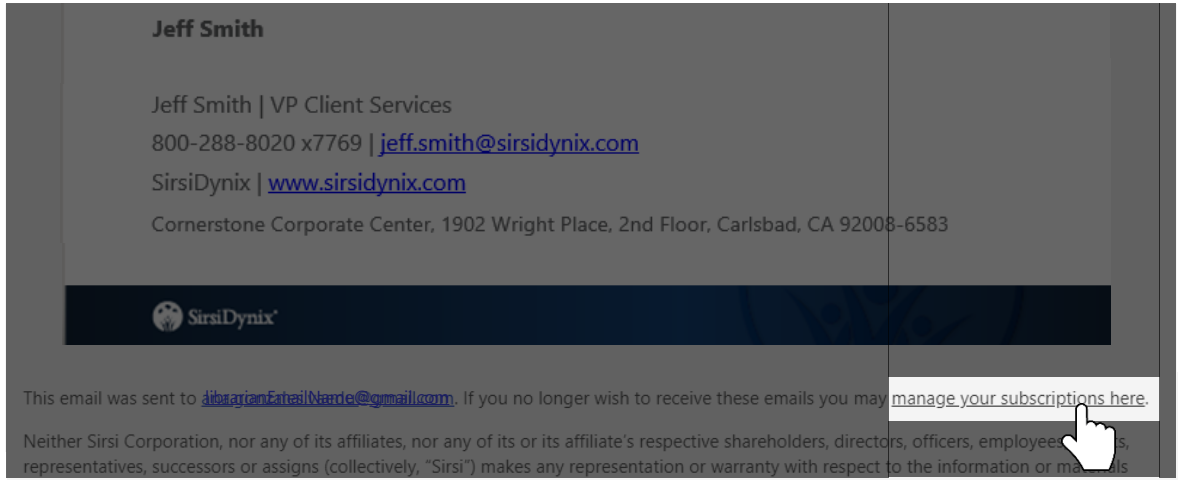
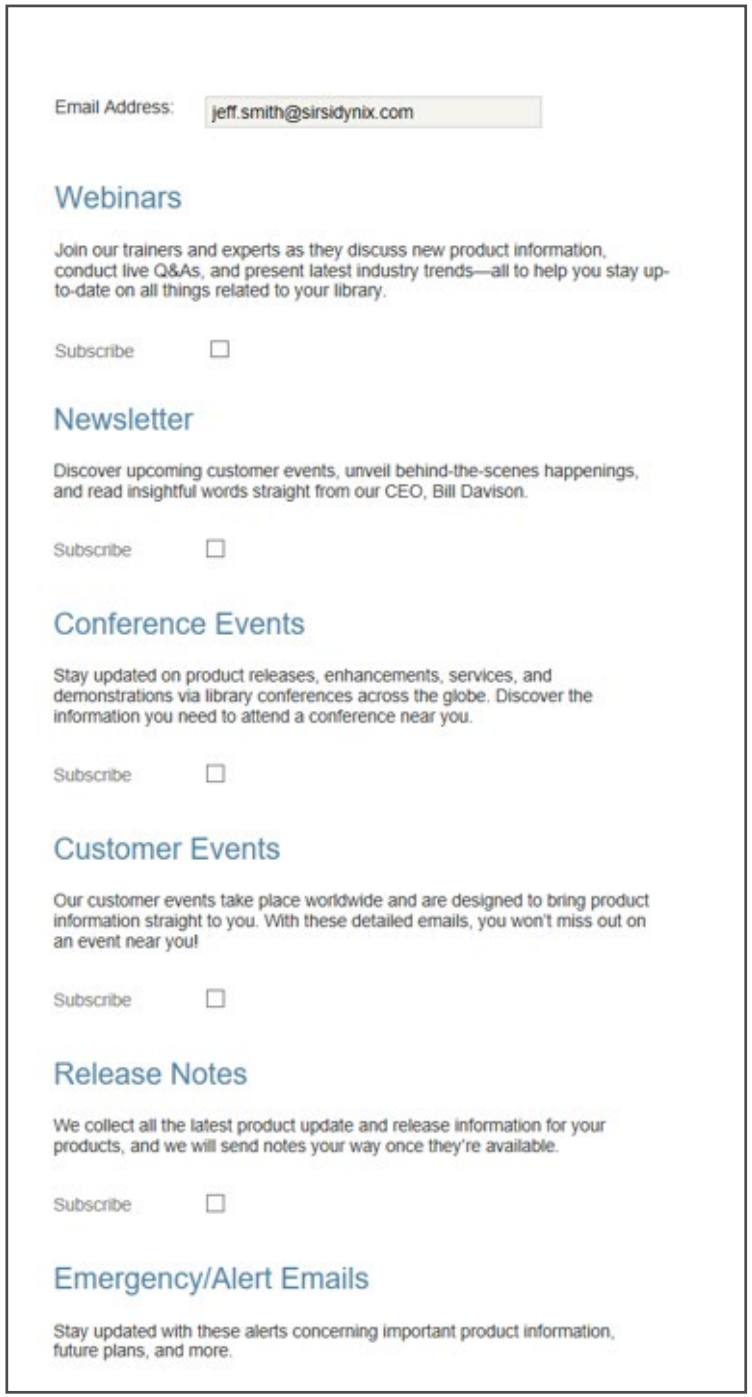
1

Webinars & Events – are you connected?

Update your Preferences





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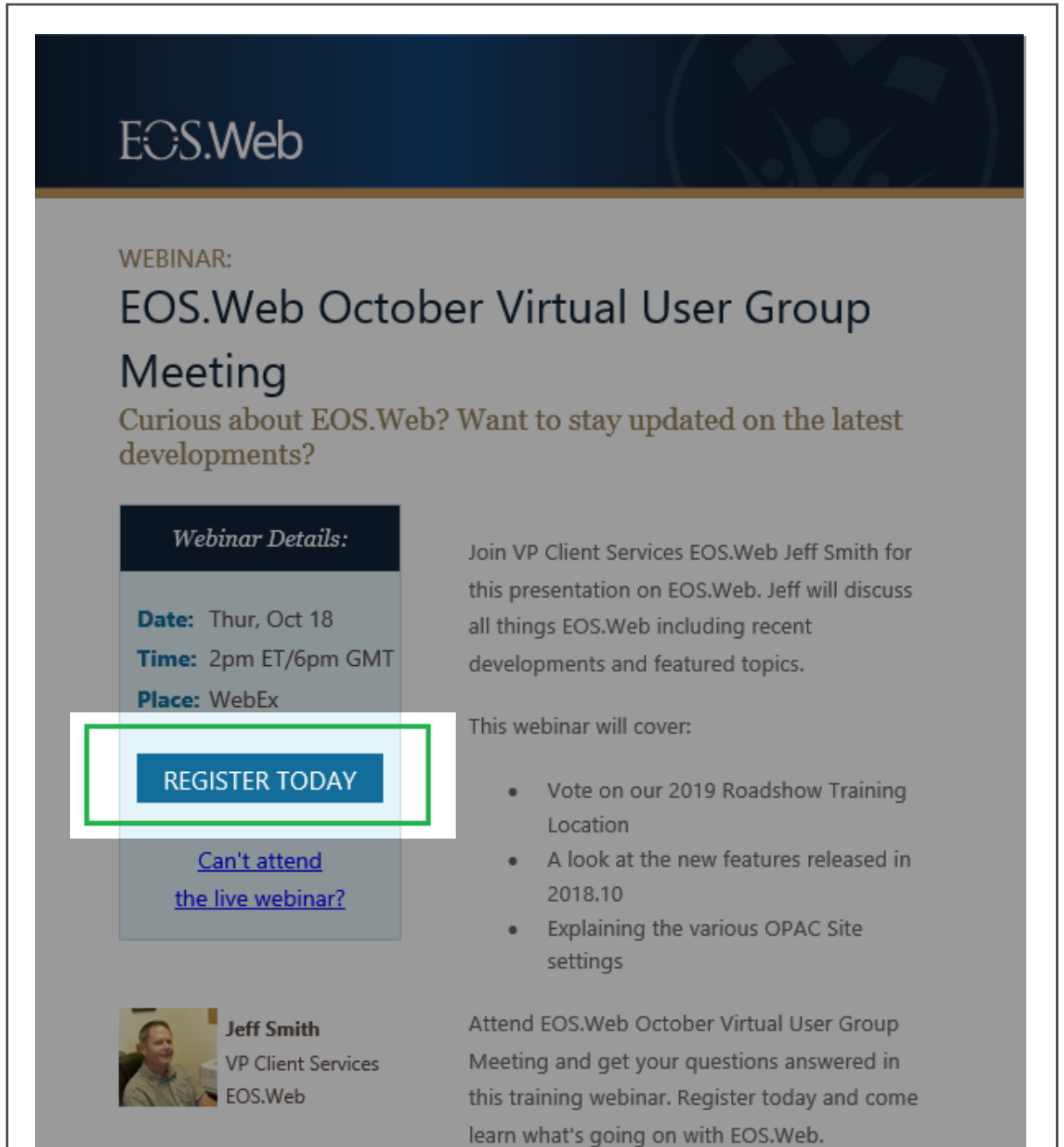
1

Webinars & Events – are you connected?

Unable to attend live?

No Problem!

- Register to attend live
- Automatically receive recording
- Same registration for both



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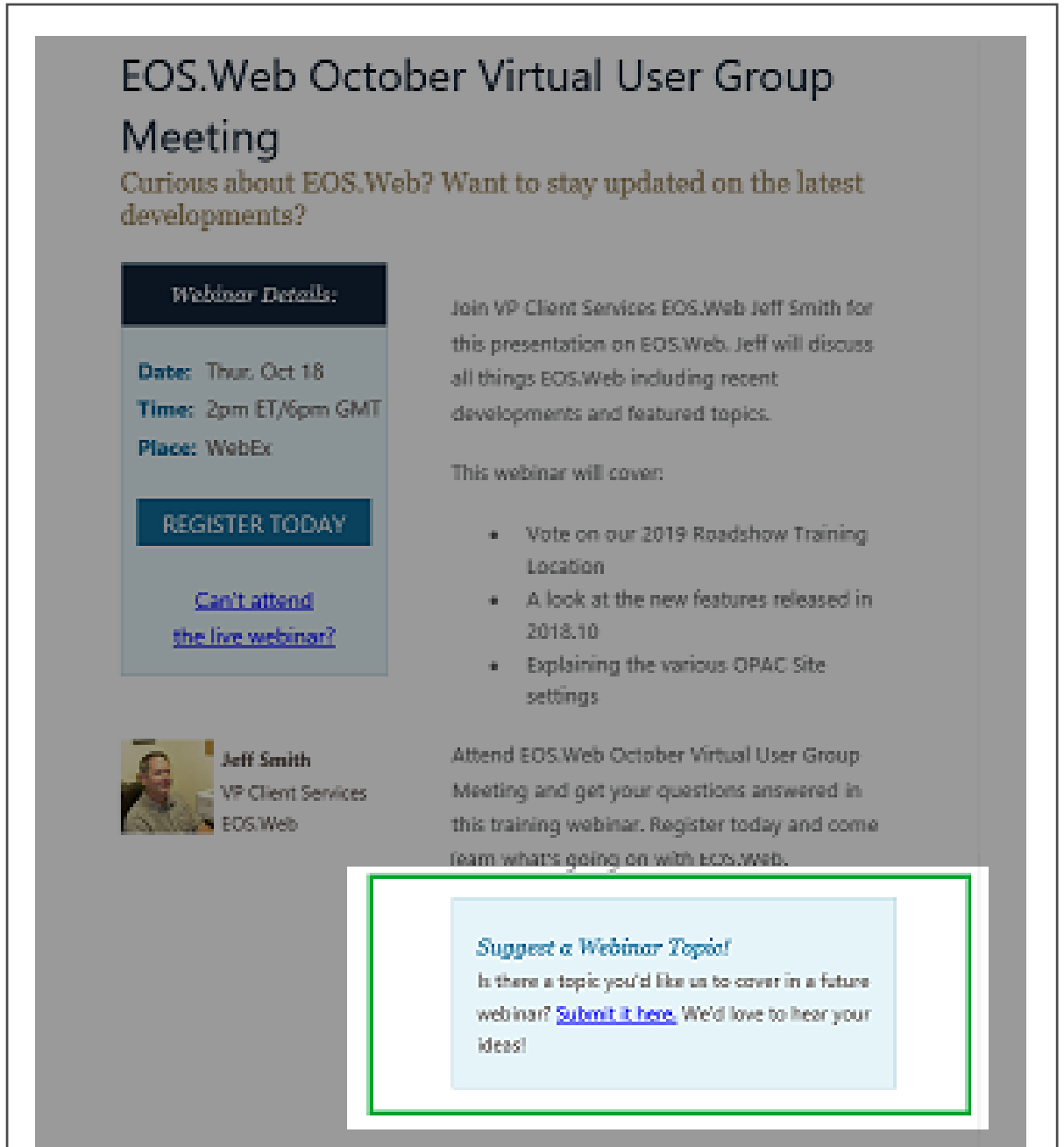
1

Webinars & Events – are you connected?

Not the Topics you Need?

No Problem!

- Submit a topic
- Describe what you want covered
- Watch for webinar within 2 months



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2

Do you have a Special Collection?

KnowledgeBuilder classifies information that is not a good fit for a typical bibliographic record.

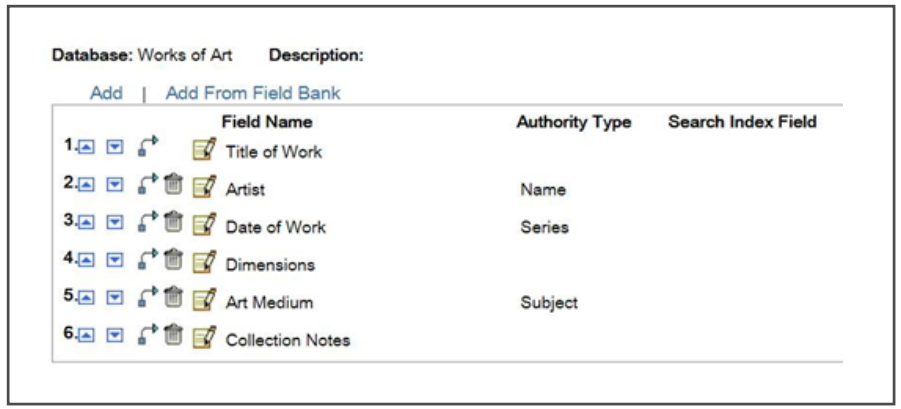
- Legal work products
- Internal documents
- Competitor Intelligence
- Archives
- Photo Collections

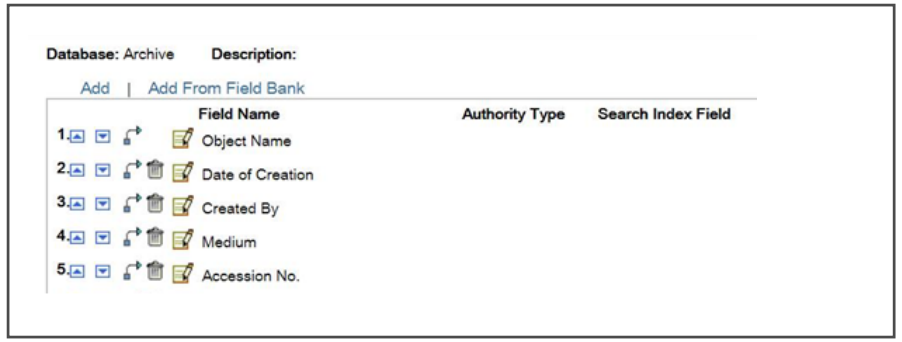
2

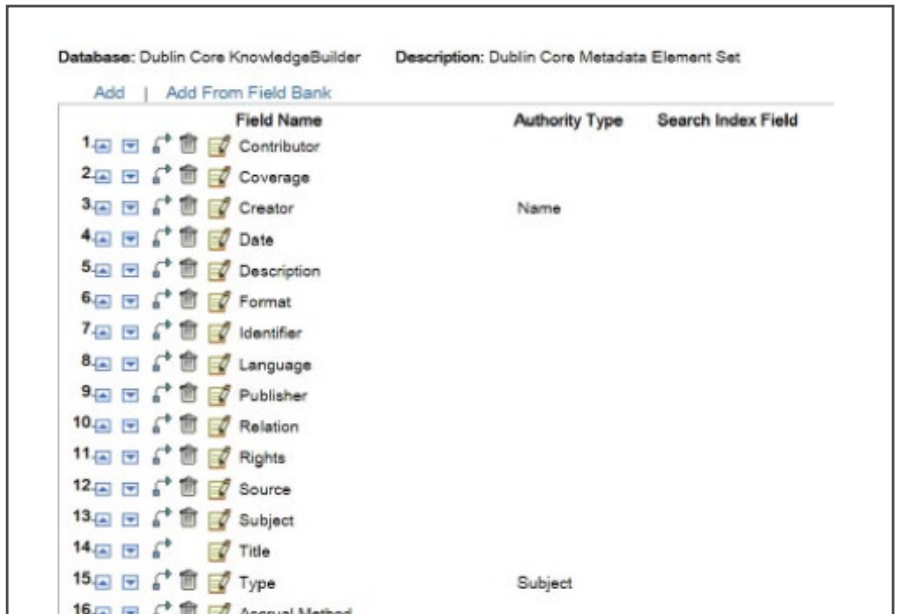
Do you have a Special Collection?

Fully customize your database your way

- Create & name fields
- Define field properties (type, length)
- Specify if searchable
- Build as authorities
- Control field order







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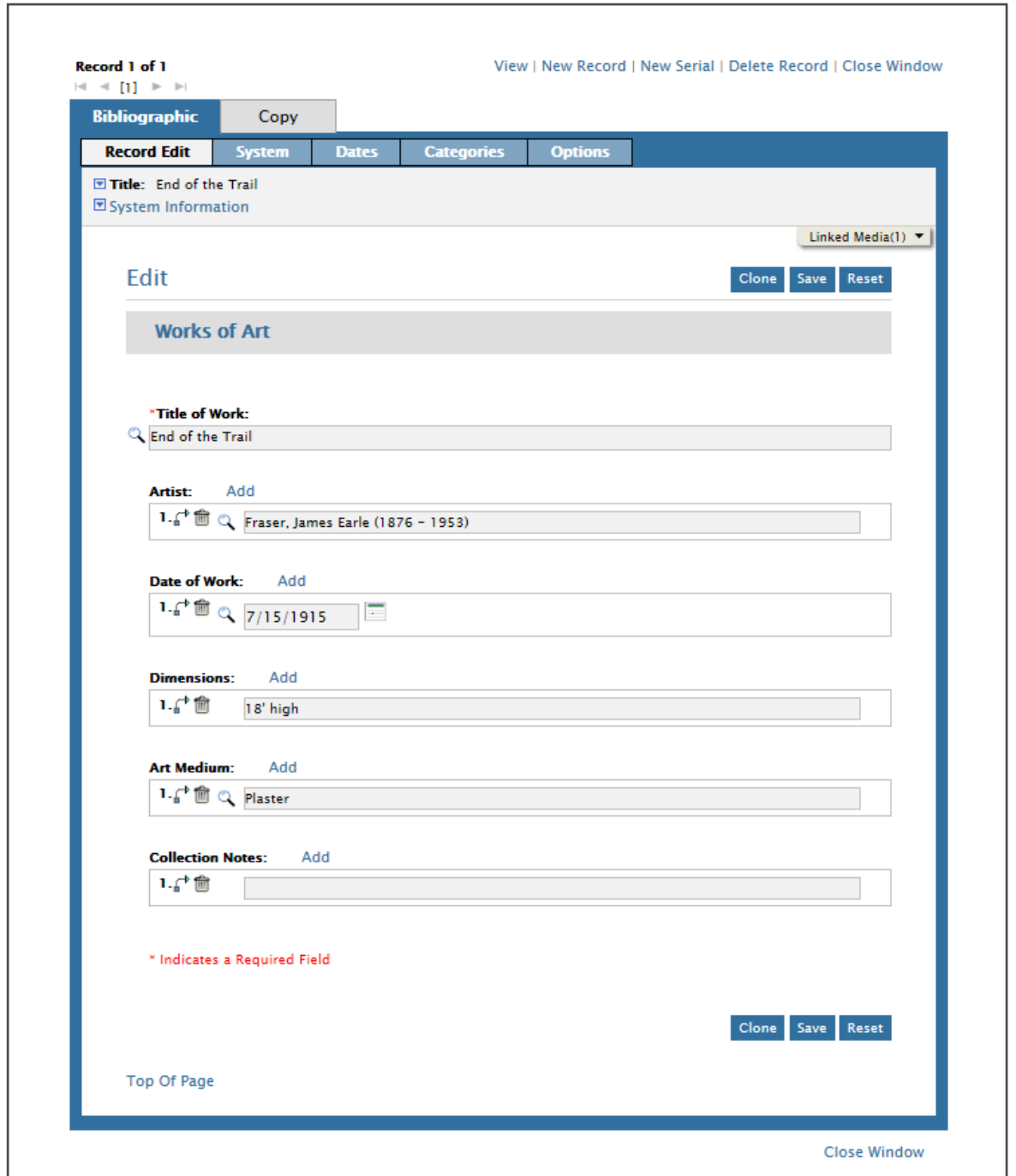
2

Do you have a Special Collection?

Example of a record

- Customize field names & order
- Supports:
  - Alphanumeric
  - Numeric
  - Date
  - HTML
  - Linked Record



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2

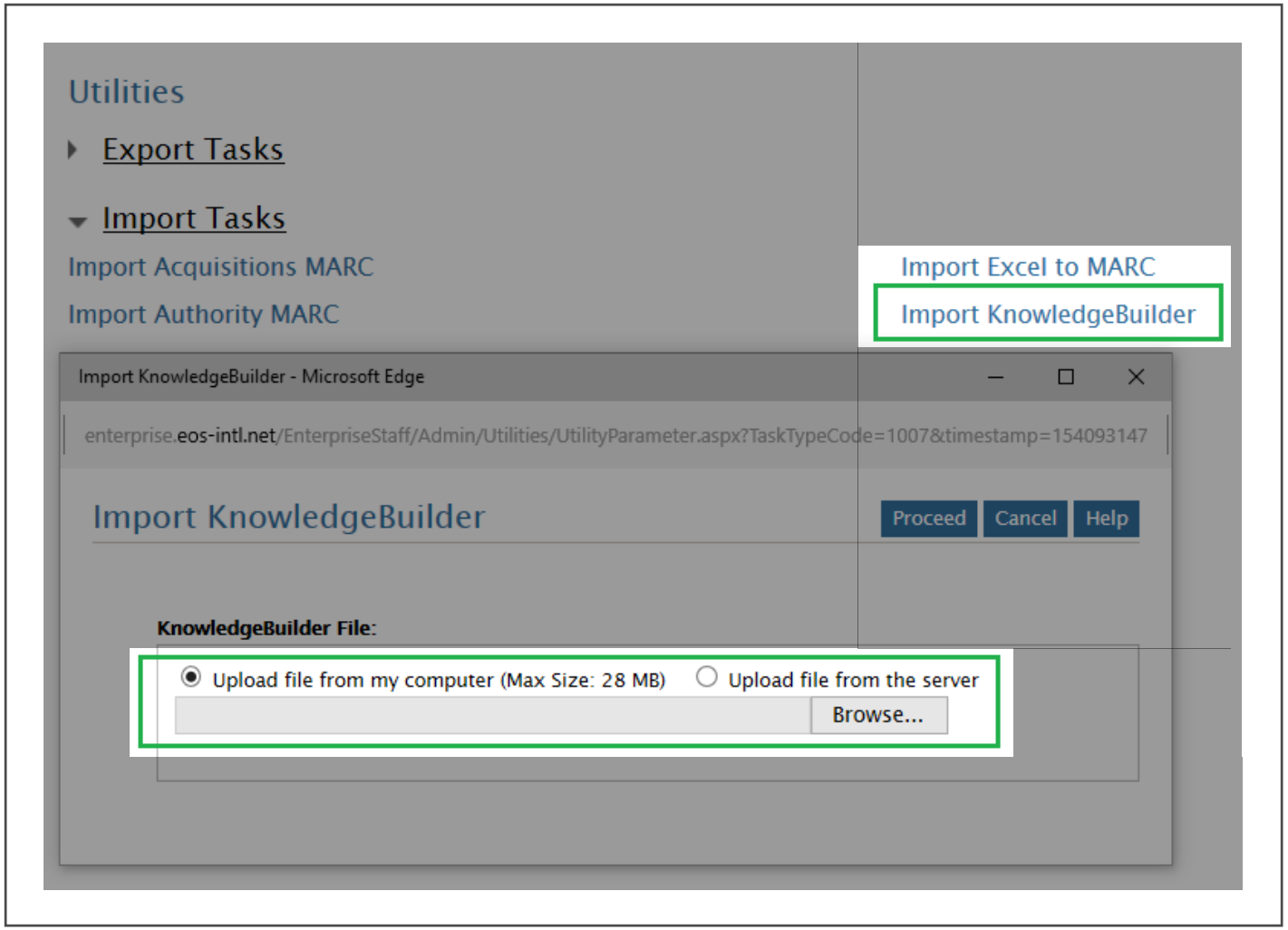
Do you have a Special Collection?

Import Task

Use to populate your collection database

Supports import of:

- XML records
- CSV records
- Customized import service



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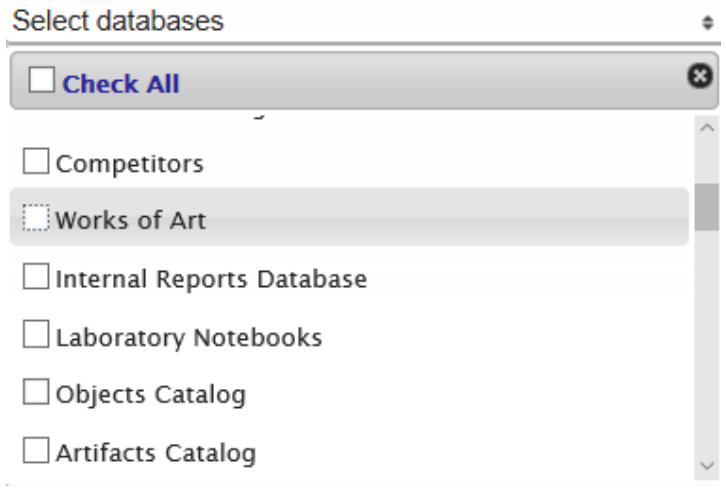
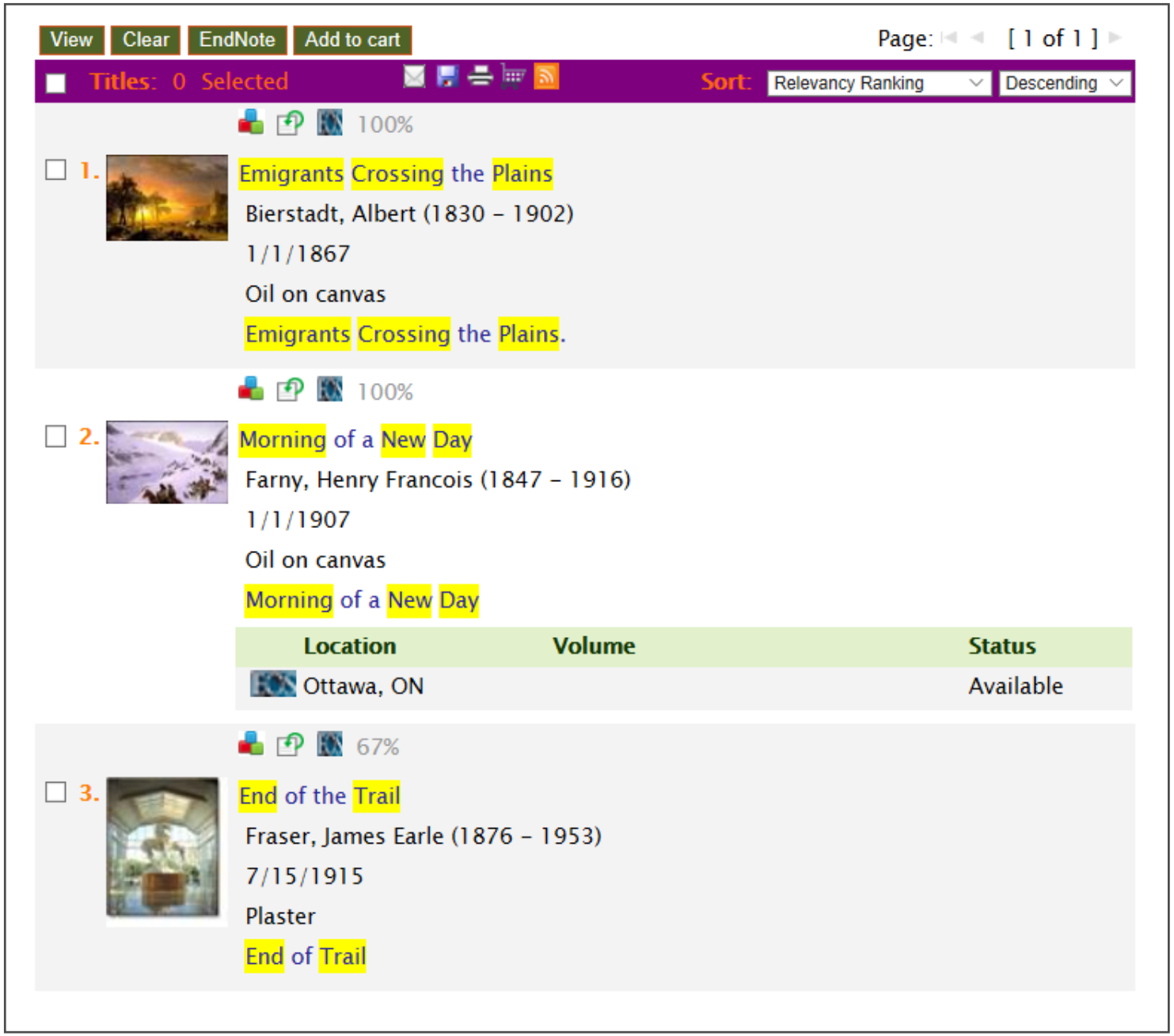
2

Do you have a Special Collection?

Search against a specific collection (database)





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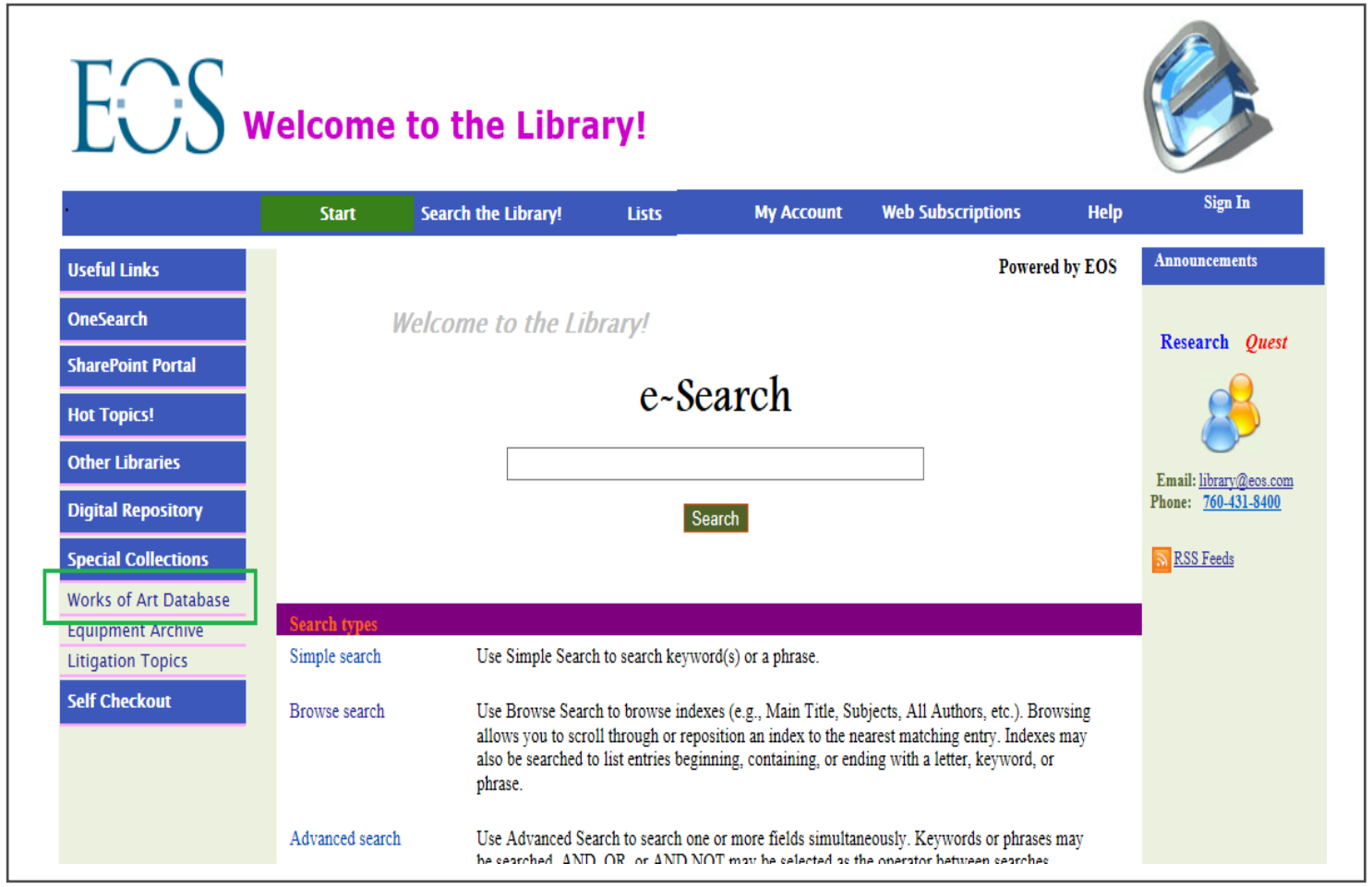
2

Do you have a Special Collection?

Drive users to your KnowledgeBuilder databases

- Create a Useful Link to the collection
- Limit searches to the collection
- Use Sites feature for collection-specific OPAC results lists



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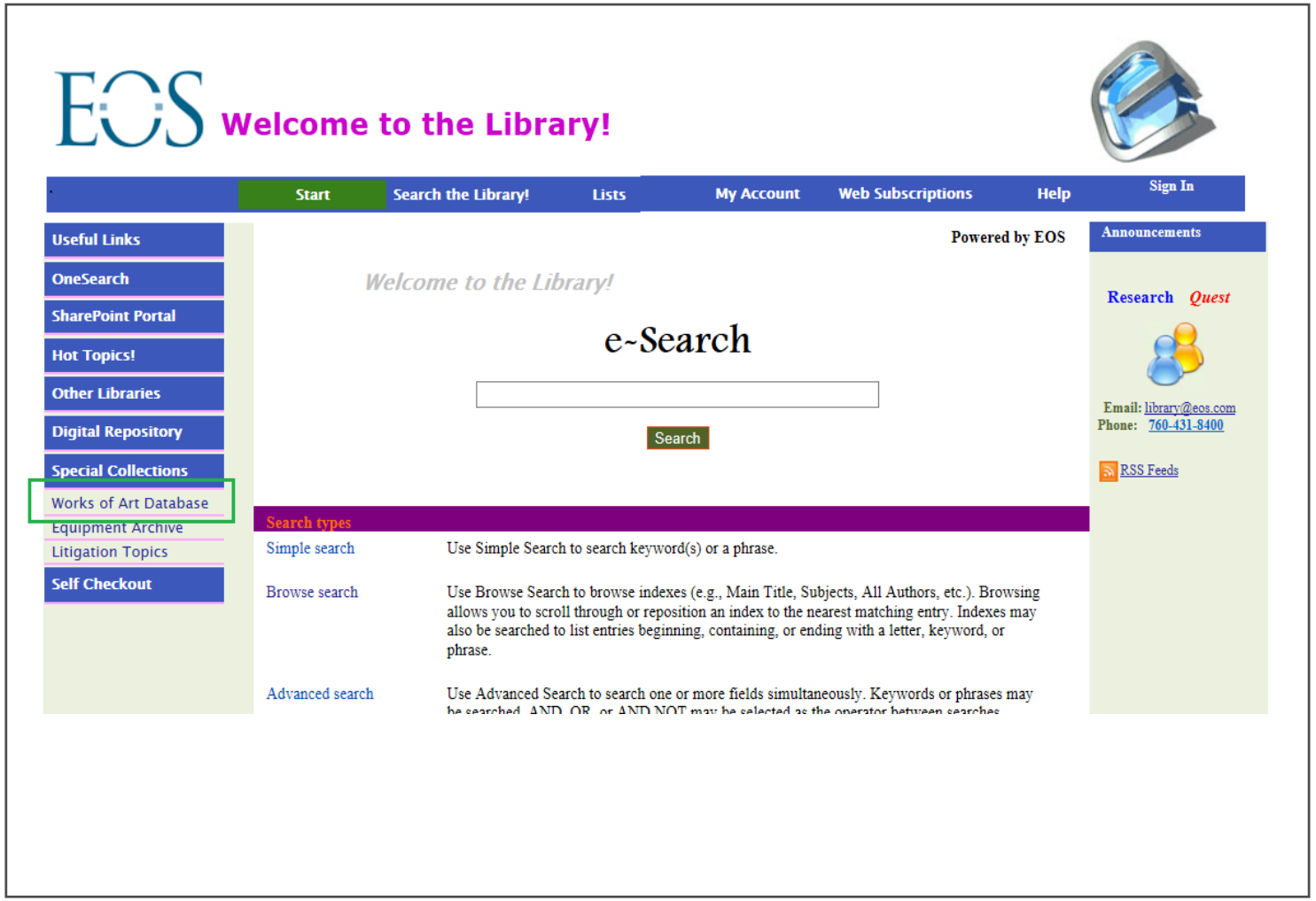

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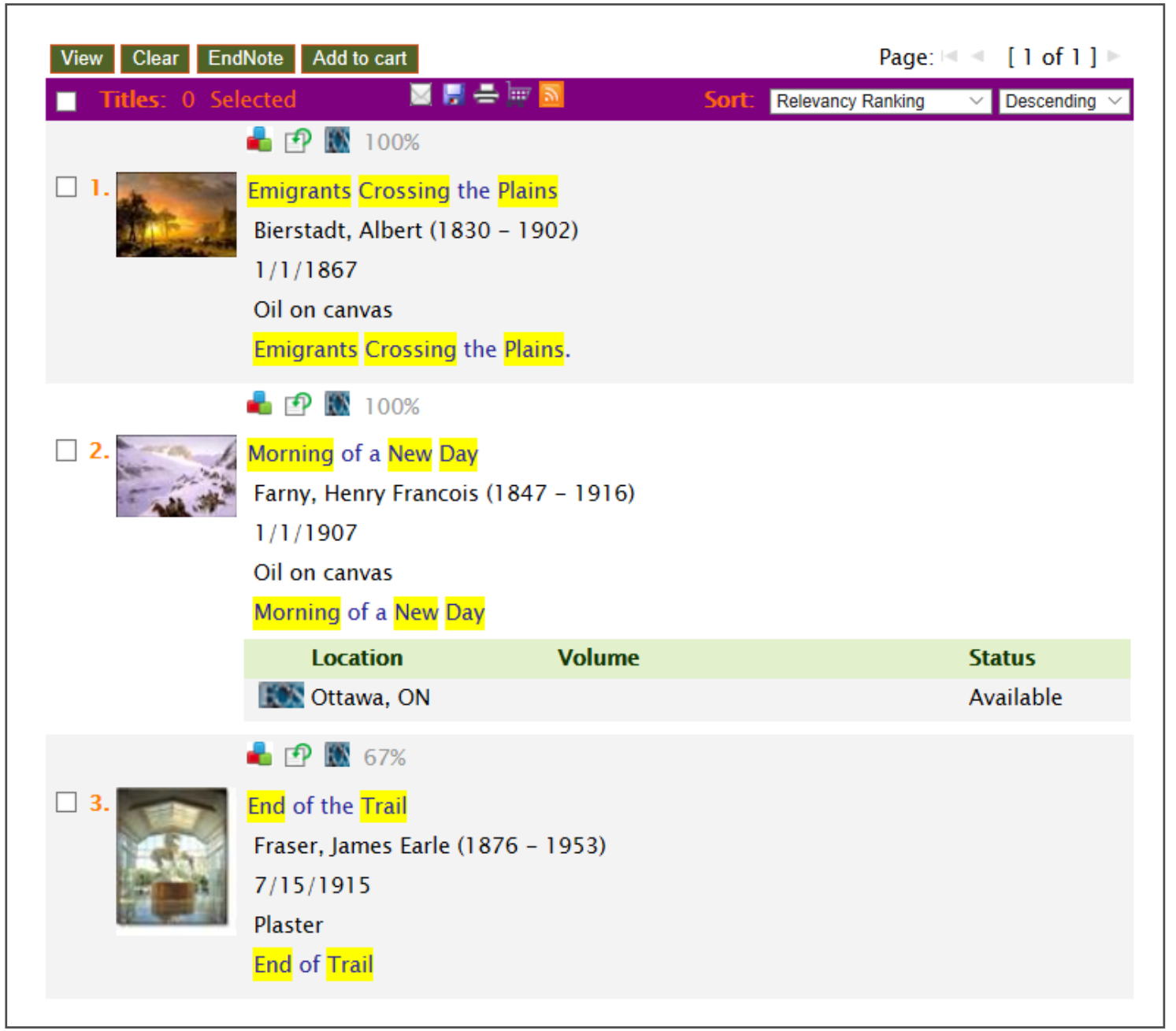

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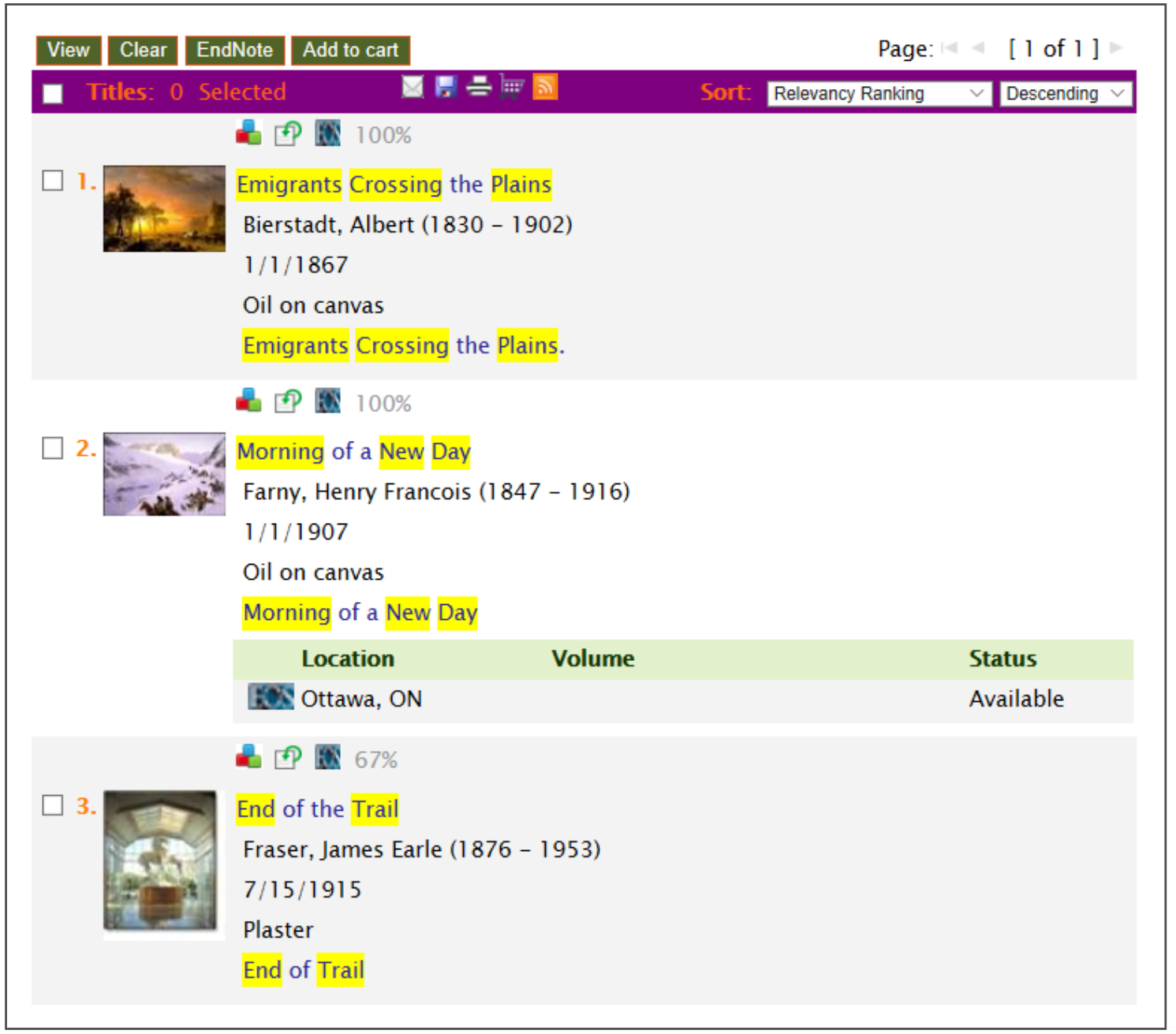

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3

SAML and Security – our latest features

Are you aware of our latest Security Enhancements?

Do you know where to find our Security Hardening documentation?

Does your organization use SAML?

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3

SAML and Security – our latest features

EOS.Web supports SAML!

- SP-Initiated
- IdP-Initiated
- EOS Project Managers available to integrate SAML with you!
- Nightly automated patron file upload utility (keep EOS.Web in sync with your HR system)

3

SAML and Security – our latest features

EOS.Web Security Hardening documentation

Found on SirsiDynix Support Center

Related Content

- EOS.Web® Online Help
- GDPR Compliancy in EOS.Web
- EOS.Web Security Hardening Measures
- EOS Security White Paper

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EOS.Web Security Hardening Measures

Know the full range of EOS.Web security features available to your library. The following is a list and brief description of available features. To learn more about an individual feature and how to implement it, log into the EOS.Web help portal and search the enhancement number (with quotations) or, when listed, follow the path directions. Note: Most features are available by default, but not implemented by default.

Password

Auto-update patron password when barcode changes: Any change to the patron barcode field in the patron record will update the patron password to match. (EOS-3830)

Manage patron password length and expiration: Determine the minimum length for patron passwords and the maximum age which indicates when passwords expire. (EOS-3160, EOS-3164)

Enable Save Password: An option is available to disable the ability for the user to have their password automatically saved when logging into the OPAC. (Maintenance / OPAC Preferences / Enable Save Password)

Set max. age and min. length for staff passwords: Enable global password defaults for staff users. The two settings available determine the minimum length for a password and the maximum age which indicates when the password would expire. (EOS-3103, EOS-3104)

Simple and advanced options for Enforce Complex Password: Enable simple or advanced complex passwords. Separate controls are available for library staff login to EOS.Web and for patron login to OPAC. (EOS-3105, EOS-3346)

SirsiDynix

Author: SirsiDynix is based in Lehi, Utah, and provides software to approximately 23,000 libraries worldwide.

**Denotes a feature offered as part of NIST 800-53 accreditation. Learn more about NIST.*

3

SAML and Security – our latest features

38 security features documented for your convenience

Includes:

- Authentication & password controls
- System administration
- Web services

***Failed login account lock for staff and patrons:** A setup option can be enabled for staff login (EOS.Web) and/or patron login (OPAC Discovery) to lock a user or patron out of the login screen for a library-defined period of time and after a library-defined number of login attempts. (EOS-843, EOS-441N)

***Enforce entry of complex passwords for EOS.Web and OPAC Discovery:** A setup option can be enabled for staff login (EOS.Web) and/or patron login (OPAC Discovery) to enforce a complex password whenever the Change Password option is used to enter a new password. Requirements for a complex password are the password must contain at least 1 character from at least 3 of the following classes: lower case, upper case, 0-9, or !@#$%^&*(). (EOS-218N)

***Change password on first login for staff and patrons:** A setup option can be enabled for staff login (EOS.Web) and/or patron login (OPAC Discovery) to force a password change. Once enabled, this option affects all users and patrons. (EOS-844, EOS-440N)

***Library-defined user session timeout:** A setup option is available to set the period of inactivity before a staff user is logged out of EOS.Web (session timeout). When a session timeout occurs, EOS.Web returns the user to the sign in screen on their next action after the period of inactivity has passed. By default, the period of inactivity is set

Track login attempts: An Admin report is available to report on OPAC Login Attempts that are both Successful and Unsuccessful. (Maintenance / Admin Reports / OPAC Login Attempts)

Staff user and patron account lockout based on period of disuse: Library administrators may choose to lock-out staff users or patrons based on disuse, no sign in for a library-defined period of time. Separate controls are available for library staff login to EOS.Web and for patron login to OPAC. Once locked out, the staff user or patron must contact the library and have the lock manually disabled in their user/patron record to be able to sign in again. (EOS-3217)

4

Annual Training Event

Have you attended one of our 3-day training events?

- 2018 – Denver, CO
- 2017 – Washington DC
- 2016 – San Diego, CA
- 2019 - ?

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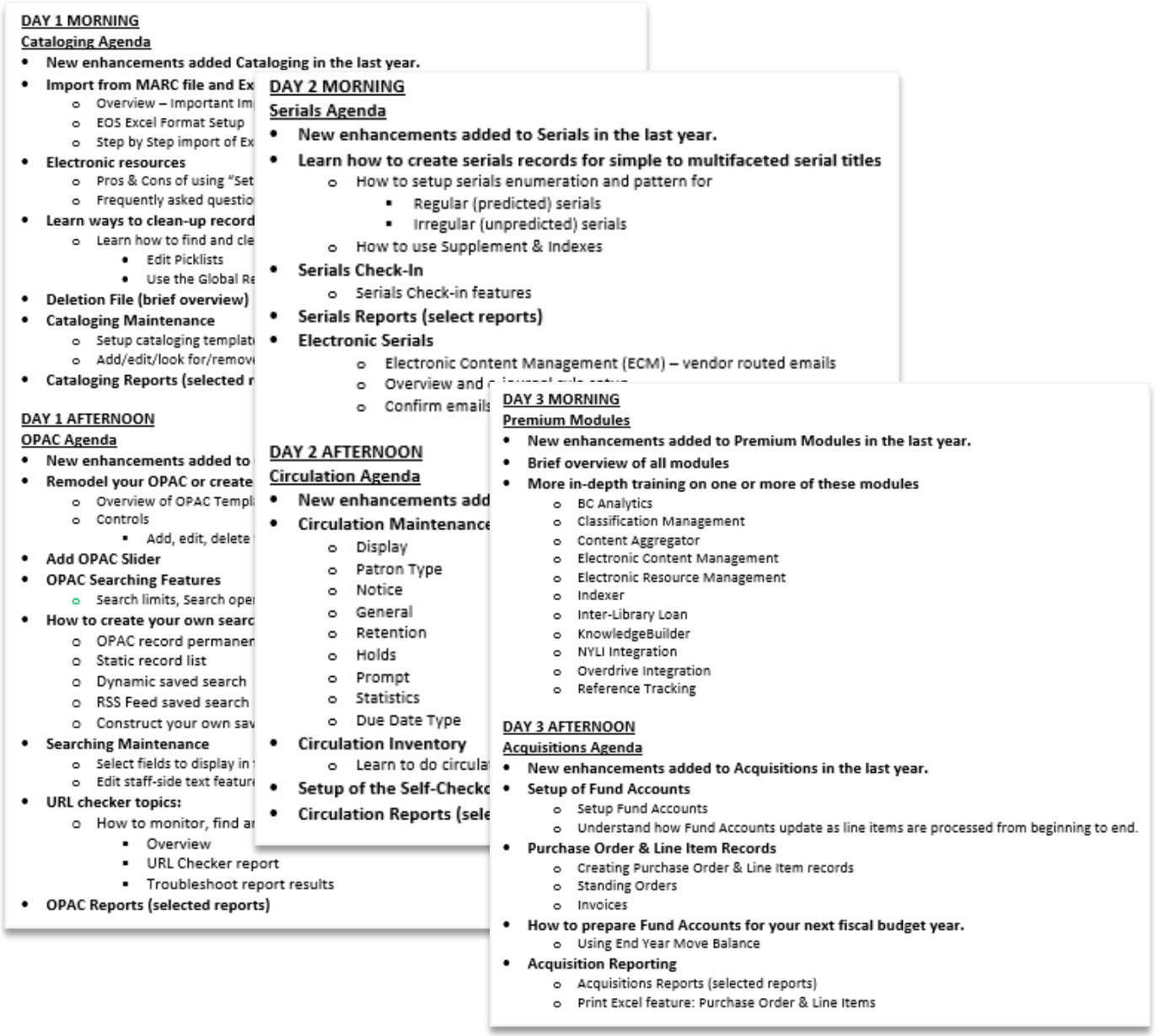
4

3-Day Annual Training Event

½ day sessions on core modules

½ day session on premium modules

Come for 1, 2, or all 3 days



DAY 1 MORNING

Cataloging Agenda

- New enhancements added Cataloging in the last year.
- Import from MARC file and Ex
  - Overview – Important Im
  - EOS Excel Format Setup
  - Step by Step import of Ex
- Electronic resources
  - Pros & Cons of using "Set
  - Frequently asked questio
- Learn ways to clean-up record
  - Learn how to find and cle
    - Edit Picklists
    - Use the Global Re
- Deletion File (brief overview)
- Cataloging Maintenance
  - Setup cataloging templat
  - Add/edit/look for/remov
- Cataloging Reports (selected r

DAY 1 AFTERNOON

OPAC Agenda

- New enhancements added to
- Remodel your OPAC or create
  - Overview of OPAC Templ
  - Controls
    - Add, edit, delete
- Add OPAC Slider
- OPAC Searching Features
  - Search limits, Search ope
- How to create your own searc
  - OPAC record permaner
  - Static record list
  - Dynamic saved search
  - RSS Feed saved search
  - Construct your own sav
- Searching Maintenance
  - Select fields to display in
  - Edit staff-side text featur
- URL checker topics:
  - How to monitor, find a
    - Overview
    - URL Checker report
    - Troubleshoot report results
- OPAC Reports (selected reports)

DAY 2 MORNING

Serials Agenda

- New enhancements added to Serials in the last year.
- Learn how to create serials records for simple to multifaceted serial titles
  - How to setup serials enumeration and pattern for
    - Regular (predicted) serials
    - Irregular (unpredicted) serials
  - How to use Supplement & Indexes
- Serials Check-In
  - Serials Check-in features
- Serials Reports (select reports)
- Electronic Serials
  - Electronic Content Management (ECM) – vendor routed emails
  - Overview and
  - Confirm emails

DAY 2 AFTERNOON

Circulation Agenda

- New enhancements add
- Circulation Maintenance
  - Display
  - Patron Type
  - Notice
  - General
  - Retention
  - Holds
  - Prompt
  - Statistics
  - Due Date Type
- Circulation Inventory
  - Learn to do circula
- Setup of the Self-Check
- Circulation Reports (sele

DAY 3 MORNING

Premium Modules

- New enhancements added to Premium Modules in the last year.
- Brief overview of all modules
- More in-depth training on one or more of these modules
  - BC Analytics
  - Classification Management
  - Content Aggregator
  - Electronic Content Management
  - Electronic Resource Management
  - Indexer
  - Inter-Library Loan
  - KnowledgeBuilder
  - NYLI Integration
  - Overdrive Integration
  - Reference Tracking

DAY 3 AFTERNOON

Acquisitions Agenda

- New enhancements added to Acquisitions in the last year.
- Setup of Fund Accounts
  - Setup Fund Accounts
  - Understand how Fund Accounts update as line items are processed from beginning to end.
- Purchase Order & Line Item Records
  - Creating Purchase Order & Line Item records
  - Standing Orders
  - Invoices
- How to prepare Fund Accounts for your next fiscal budget year.
  - Using End Year Move Balance
- Acquisition Reporting
  - Acquisitions Reports (selected reports)
  - Print Excel feature: Purchase Order & Line Items

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4

3-Day Annual Training Event

Affordably priced at $169 pp/pd

Includes catered lunch

Get to know other EOS.Web users!

Discuss common challenges & opportunities!

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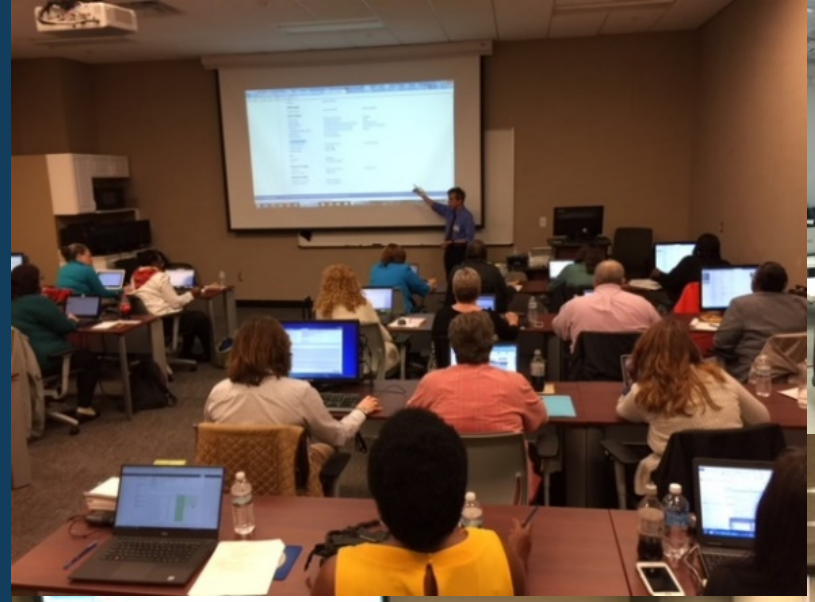
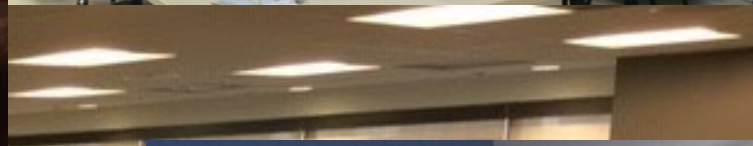
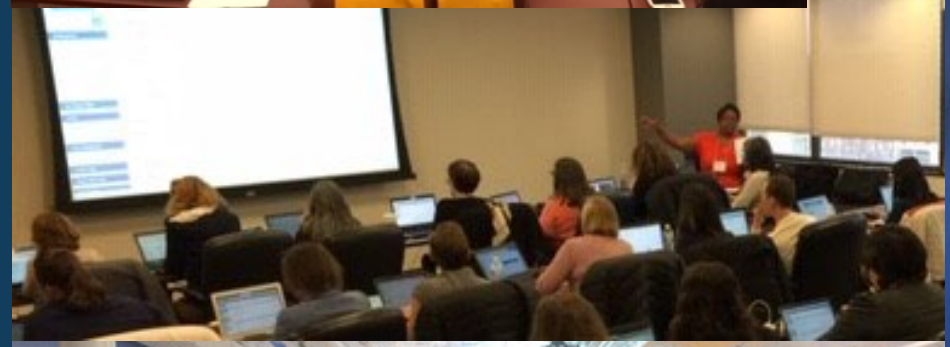






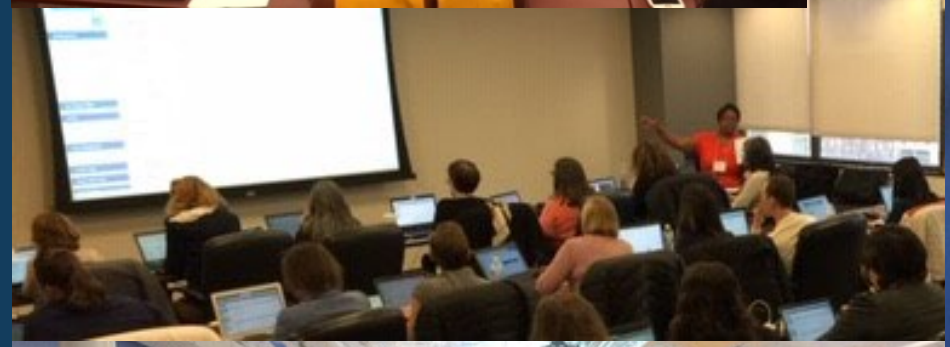
4

3-Day Annual Training Event

Take our annual training survey

Help us plan dates & location

Consider being a host site



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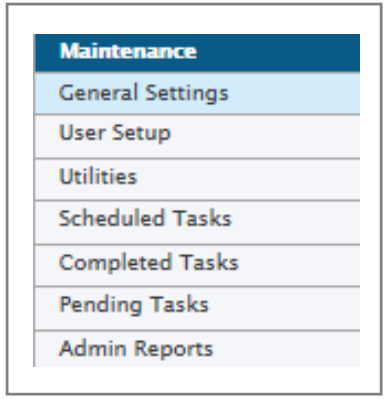
4

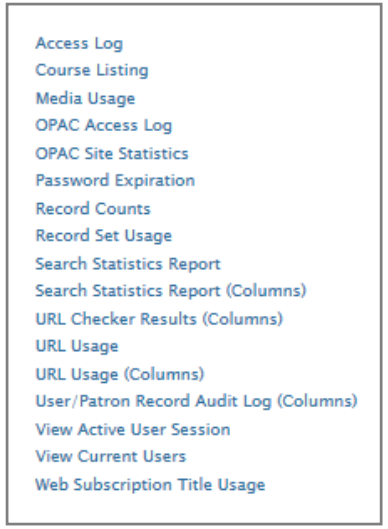
New Administrator Training Event

Coming Soon –

2-day Administrator training

Covering the **hundreds** of settings, features, and controls of EOS.Web





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5

SirsiDynix Support Center (SDSC)

Are you online with SDSC?

We have our next generation Help Portal waiting for you!

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5

SirsiDynix Support Center (SDSC)

Click the Help icon (?) in EOS.Web

-or-

Navigate to support.sirsidynix.com

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5

SirsiDynix Support Center (SDSC)

The Dashboard page

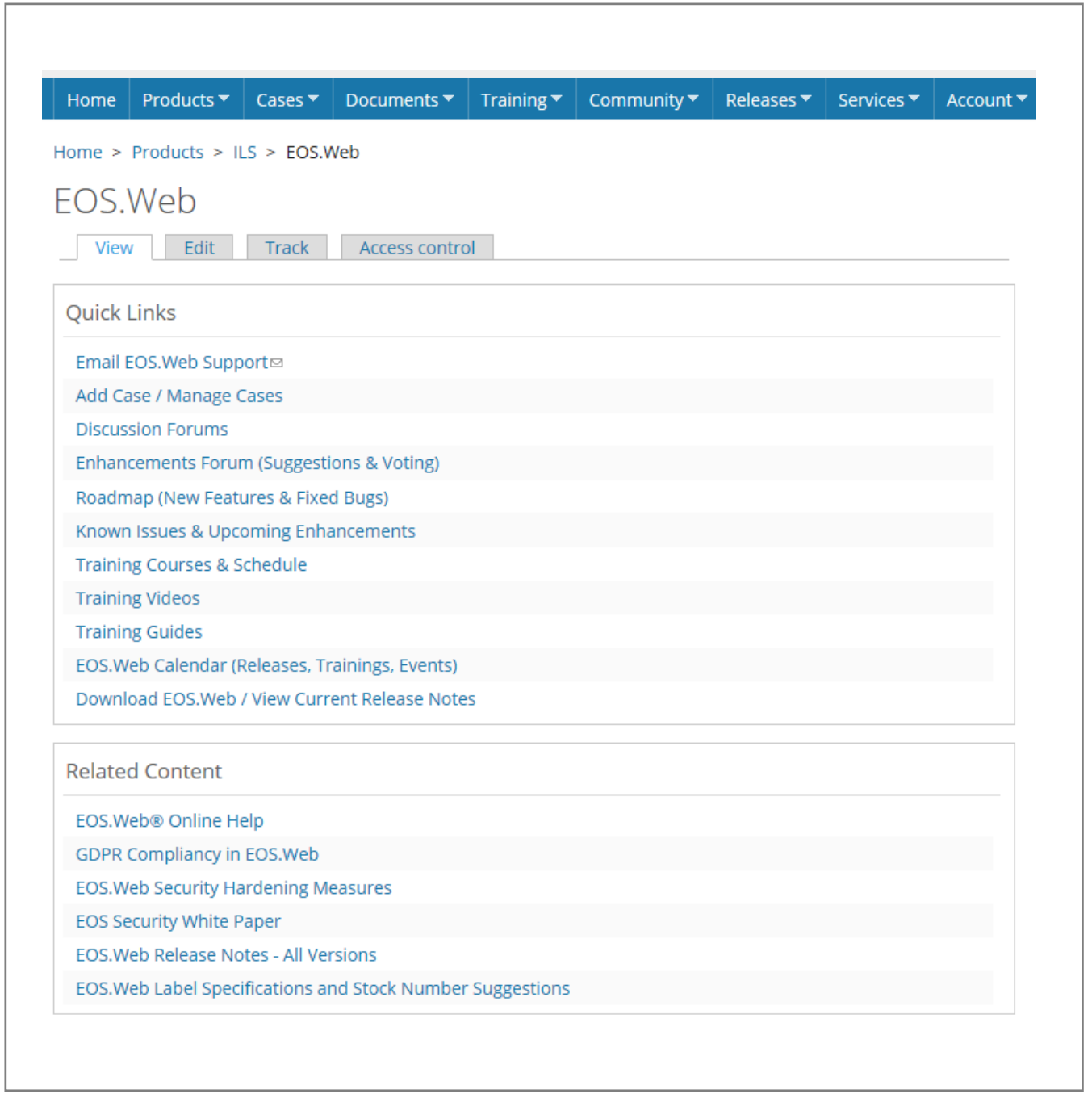
(Products / ILS / EOS.Web)

All of your EOS.Web help topics

All on one page

Bookmark the Dashboard Page as:

https://support.sirsidynix.com/products/eos-web



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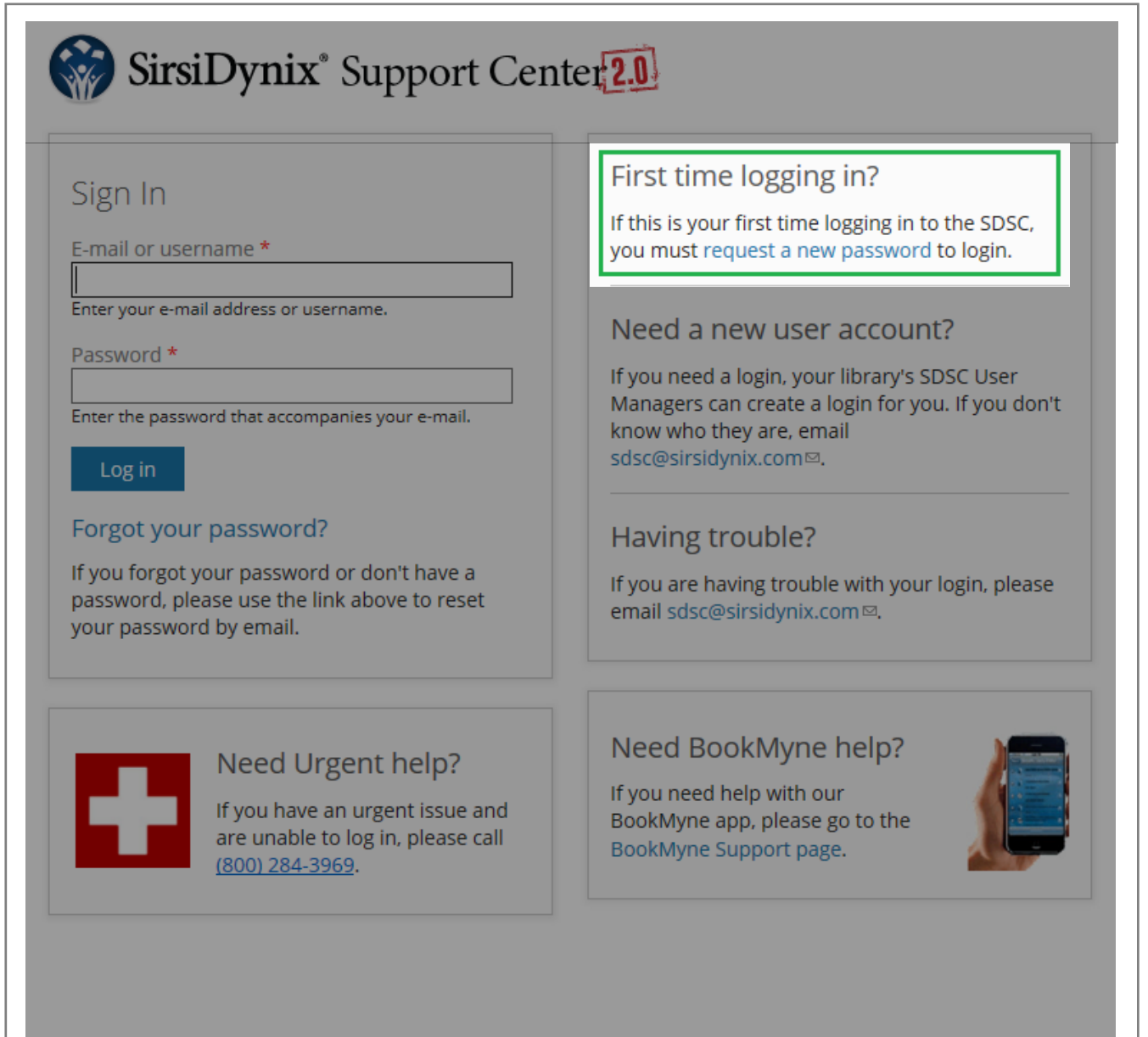
5

SirsiDynix Support Center (SDSC)

No Account? - No Problem!

- Request a Password
- We will be in touch shortly
- Your SDSC Administrator can also activate your account for you



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5

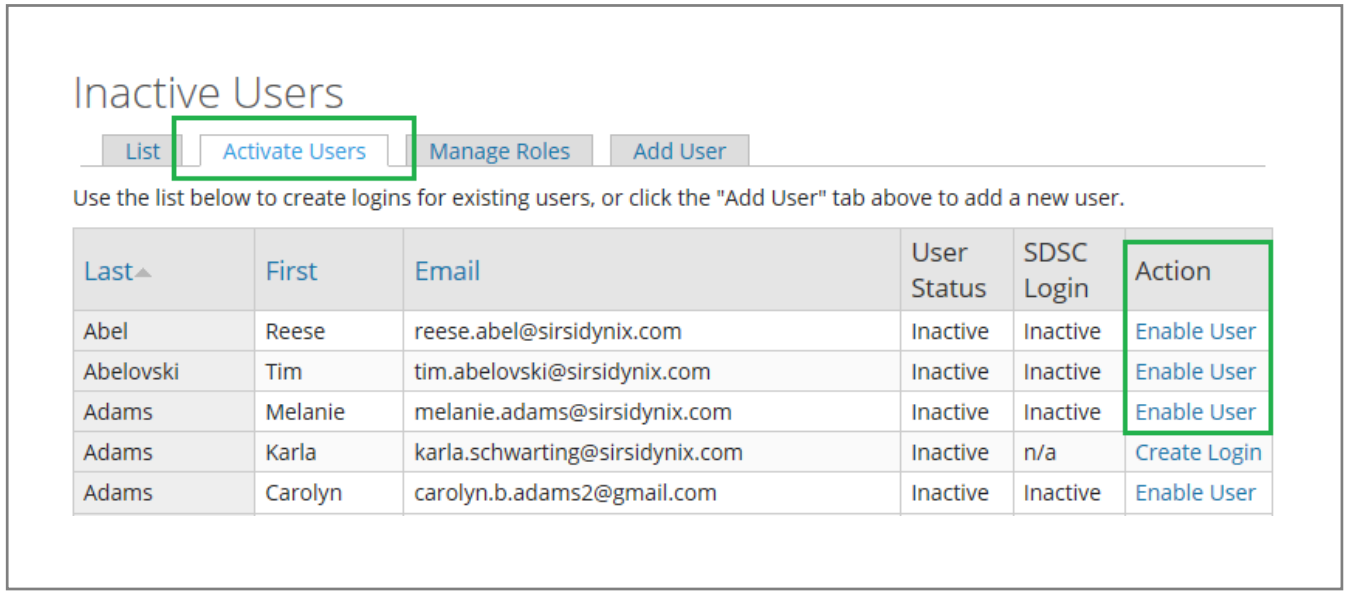
SirsiDynix Support Center (SDSC)

Administrators control User Management
(Account / User Management)

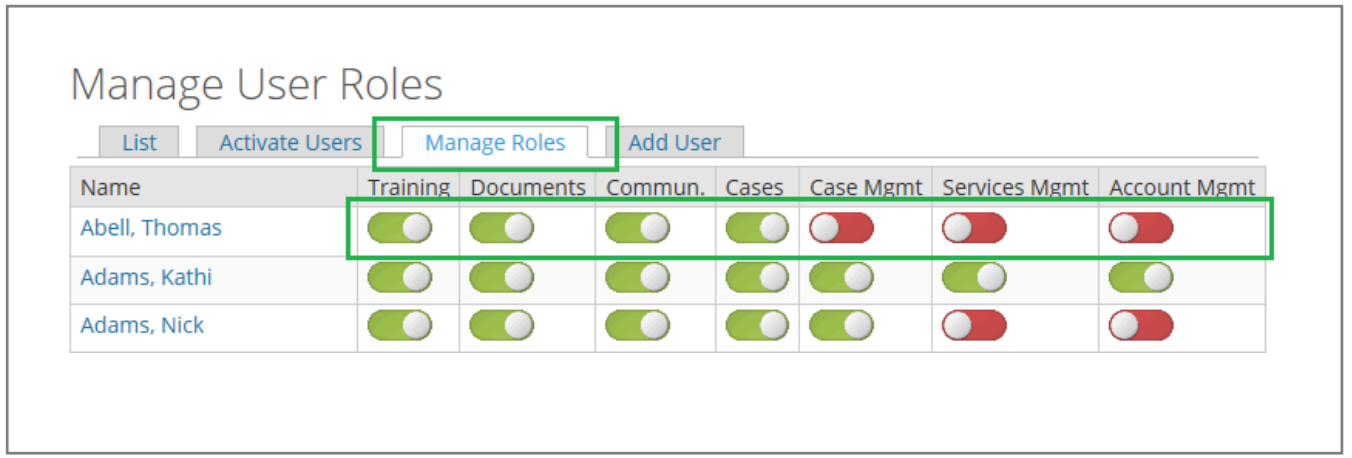
Activate (or Add) Users at your library

Manage their Roles (permissions)

Contact our Help Desk for assistance (eossupport@sirsidynix.com)



Last	First	Email	User Status	SDSC Login	Action
Abel	Reese	reese.abel@sirsidynix.com	Inactive	Inactive	Enable User
Abelovski	Tim	tim.abelovski@sirsidynix.com	Inactive	Inactive	Enable User
Adams	Melanie	melanie.adams@sirsidynix.com	Inactive	Inactive	Enable User
Adams	Karla	karla.schwarting@sirsidynix.com	Inactive	n/a	Create Login
Adams	Carolyn	carolyn.b.adams2@gmail.com	Inactive	Inactive	Enable User



Name	Training	Documents	Commun.	Cases	Case Mgmt	Services Mgmt	Account Mgmt
Abell, Thomas							
Adams, Kathi							
Adams, Nick							

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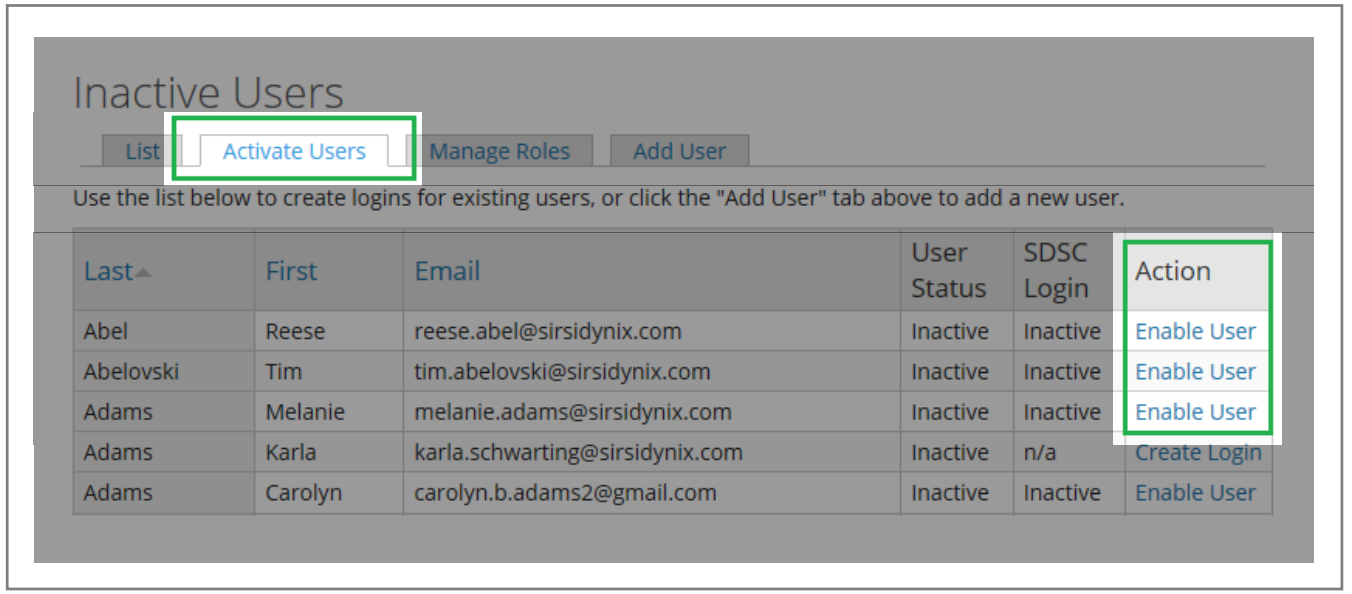

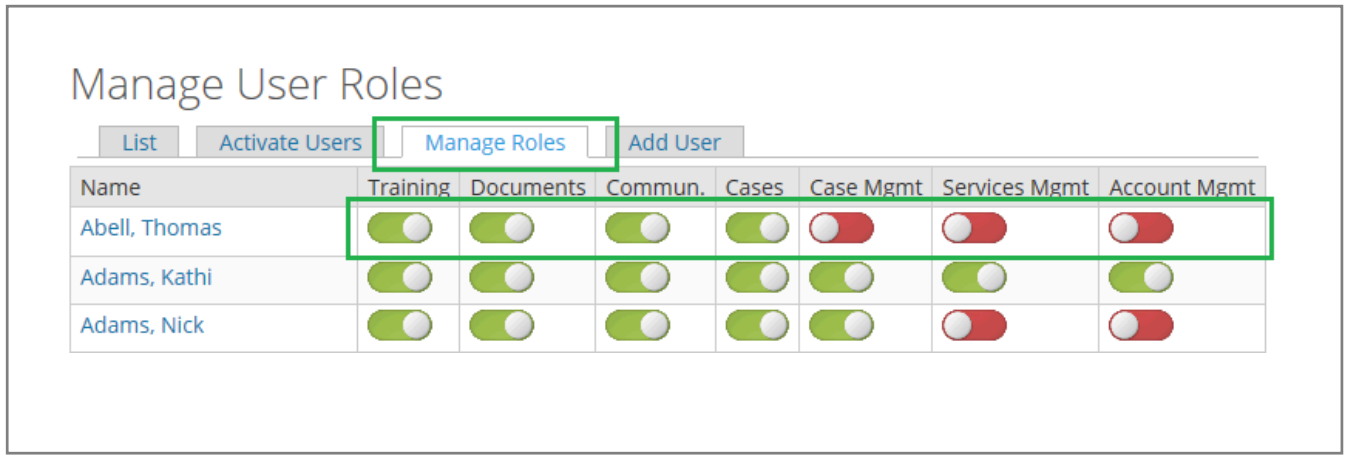

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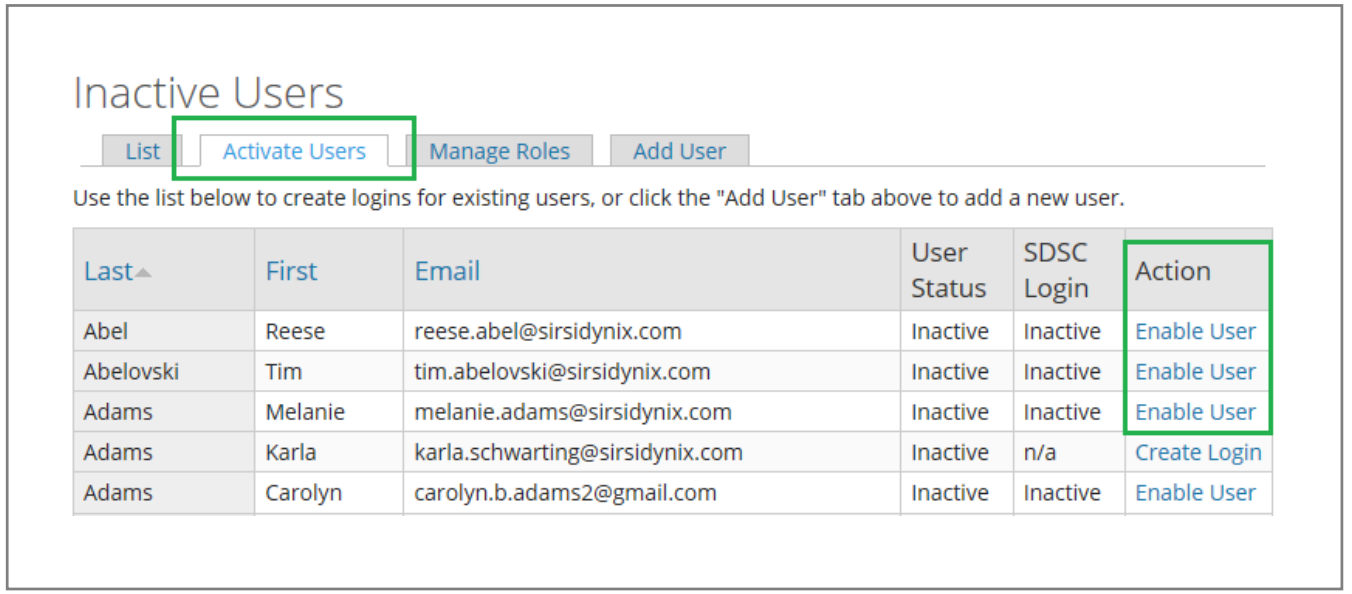

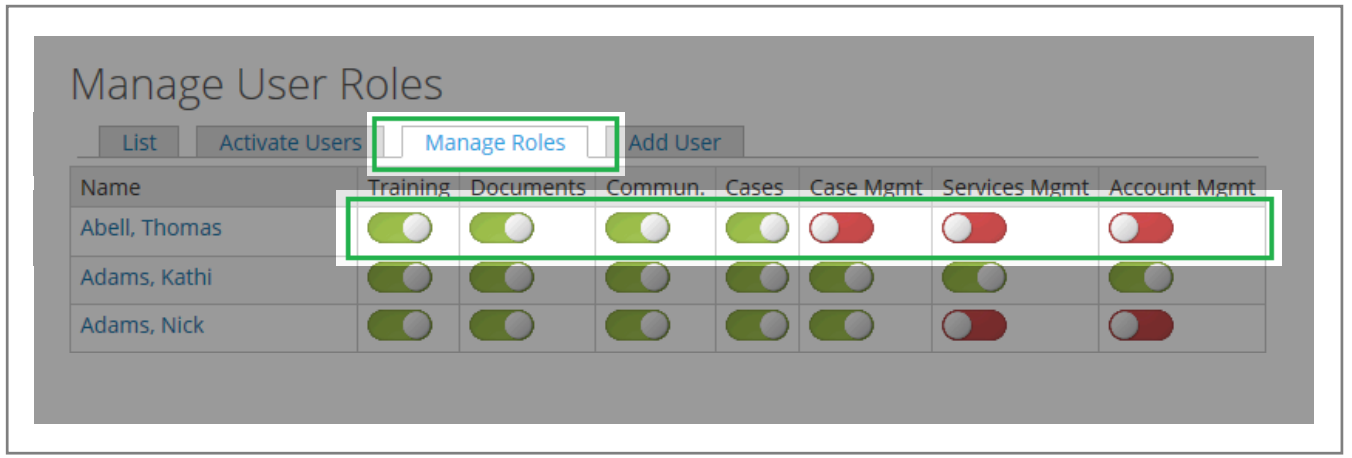

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Thank You!