

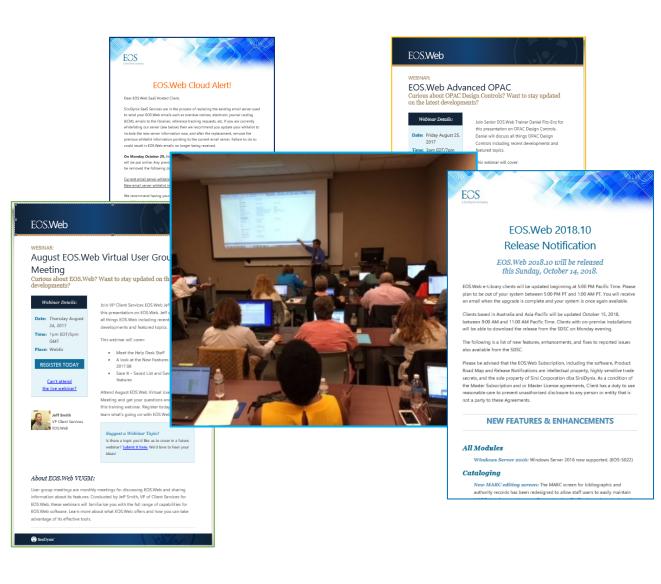
5 Things You Didn't Know EOS Could Do for You Jeff Smith | VP Client Services



Webinars & Events – are you connected?

Are you receiving invitations for:

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





Webinars & Events – are you connected?

Update your Preferences

Jeff Smith

Jeff Smith | VP Client Services 800-288-8020 x7769 | jeff.smith@sirsidynix.com SirsiDynix | www.sirsidynix.com

Cornerstone Corporate Center, 1902 Wright Place, 2nd Floor, Carlsbad, CA 92008-6583

🍘 SirsiDynix*

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Webinars	
conduct live Q&As	nd experts as they discuss new product information, s, and present latest industry trends—all to help you stay u gs related to your library.
Subscribe	
Newsletter	
	g customer events, unveil behind-the-scenes happenings, words straight from our CEO, Bill Davison.
Subscribe	
Conference	e Events
demonstrations via	roduct releases, enhancements, services, and library conferences across the globe. Discover the ed to attend a conference near you.
Subscribe	
Customer I	Events
	nts take place worldwide and are designed to bring product t to you. With these detailed emails, you won't miss out on
Subscribe	
Release No	otes
	atest product update and release information for your vill send notes your way once they're available.
Subscribe	
Emergency	//Alert Emails

Webinars & Events – are you connected?

Unable to attend live?

No Problem!

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

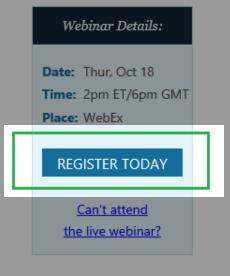


WEBINAR:

EOS.Web October Virtual User Group

Meeting

Curious about EOS.Web? Want to stay updated on the latest developments?





Join VP Client Services EOS.Web Jeff Smith for this presentation on EOS.Web. Jeff will discuss all things EOS.Web including recent developments and featured topics.

This webinar will cover:

- Vote on our 2019 Roadshow Training Location
- A look at the new features released in 2018.10
- Explaining the various OPAC Site settings

Attend EOS.Web October Virtual User Group Meeting and get your questions answered in this training webinar. Register today and come learn what's going on with EOS.Web.



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

Meeting Curious about EOS.Web? Want to stay updated on the latest developments?

Webinar Details:

Date: Thur. Oct 18 Time: 2pm ET/6pm GMT Place: WebEx

REGISTER TODAY

Can't attend the live webinar?



Join VP Client Services EOS.Web Jeff Smith for this presentation on EOS.Web. Jeff will discuss all things EOS.Web including recent developments and featured topics.

This webinar will cover:

EOS.Web October Virtual User Group

- Vote on our 2019 Roadshow Training Location
- A look at the new features released in 2018.10
- Explaining the various OPAC Site settings

Attend EOS.Web October Virtual User Group Meeting and get your questions answered in this training webinar. Register today and come feam what's going on with ECS.Web.

Support a Webinar Topial Is there a topic you'd like us to cover in a future webinar? Submit it here, We'd love to hear your ideas!



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





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



Add Add From Field Bank	
Field Name	Authority Type Search Index Field
1. 🖃 💣 📝 Title of Work	
2. 🖃 💣 💼 📝 Artist	Name
3.🛋 💌 💣 💼 🛃 Date of Work	Series
4.🛋 💌 💣 💼 📝 Dimensions	
5. 🖂 💌 💣 💼 📝 Art Medium	Subject
6 🖂 💌 💣 💼 📝 Collection Notes	

tabase: Archive Description:		
Add Add From Field Bank		
Field Name	Authority Type	Search Index Field
🔺 🖻 💣 🚺 Object Name		
🔺 💌 🖆 📝 Date of Creation		
🔺 💌 💣 💼 📝 Created By		
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🔺 🖃 💣 🗑 📝 Accession No.		

Add	Add	From Field Bank			
	1 100	Field Name	Au	thority Type	Search Index Field
1 💌	4 1	Contributor			
2.	10	Coverage			
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5.	10	2 Description			
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7.	10	dentifier			
8.	10	📝 Language			
9.	10	Publisher			
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		Rights			
		Source			
		Subject			
		📝 Title			
		📝 Туре	S	ubject	
16.0.0	10	Account Mather		1000	

Do you have a Special Collection?

Example of a record

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



Lange Lange		_			New Serial Delete Record Close
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·-1 @ 0	Plaster				
		ł			
Collection	Notes: Adu				
Collection	Notes: Add				

Do you have a Special Collection?

Import Task

Use to populate your collection database

Supports import of:

- XML records
- CSV records
- Customized import service

Utilities	
Export Tasks	
 Import Tasks 	
Import Acquisitions MARC	Import Excel to MARC
Import Authority MARC	Import KnowledgeBuilder
Import KnowledgeBuilder - Microsoft Edge	– 🗆 X
enterprise. eos-intl.net /EnterpriseStaff/Admin/Utilities/UtilityParameter.aspx?TaskTypeCoc	le=1007×tamp=154093147
	le=1007×tamp=154093147 Proceed Cancel Help
enterprise.eos-intl.net/EnterpriseStaff/Admin/Utilities/UtilityParameter.aspx?TaskTypeCod Import KnowledgeBuilder KnowledgeBuilder File:	Proceed Cancel Help
enterprise.eos-intl.net/EnterpriseStaff/Admin/Utilities/UtilityParameter.aspx?TaskTypeCod Import KnowledgeBuilder KnowledgeBuilder File:	Proceed Cancel Help



2 o vou have d

Do you have a Special Collection?

Search against a specific collection (database)

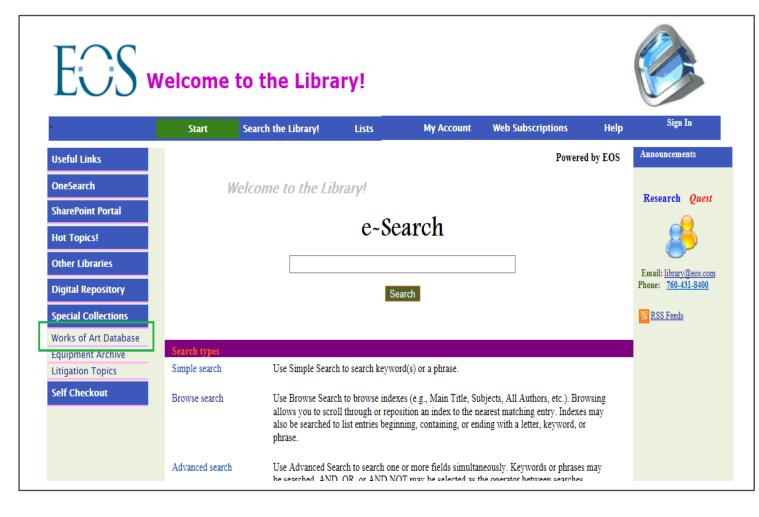
Select databases	0
Check All	0
 Competitors	^
Works of Art	_
Internal Reports Database	
Laboratory Notebooks	
Objects Catalog	
Artifacts Catalog	~



View Clear End				Page:	< < [1 of 1] ►
Titles: 0 Sel	ected 🛛 🖂 🖃	🖶 🔤 🔂	Sort:	Relevancy Ranking	\sim Descending \sim
	📥 🕑 퉶 100%				
1.	Emigrants Crossing th Bierstadt, Albert (183 1/1/1867 Oil on canvas Emigrants Crossing t	30 - 1902)			
2.	 Morning of a New Day Farny, Henry Francois 1/1/1907 Oil on canvas Morning of a New Day 	s (1847 – 1916)			
	Location	Volume			Status
	🔝 Ottawa, ON				Available
□ 3.	 P M 67% End of the Trail Fraser, James Earle (17) 7/15/1915 Plaster End of Trail 	876 – 1953)			

Do you have a Special Collection?

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





Do you have a Special Collection?

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

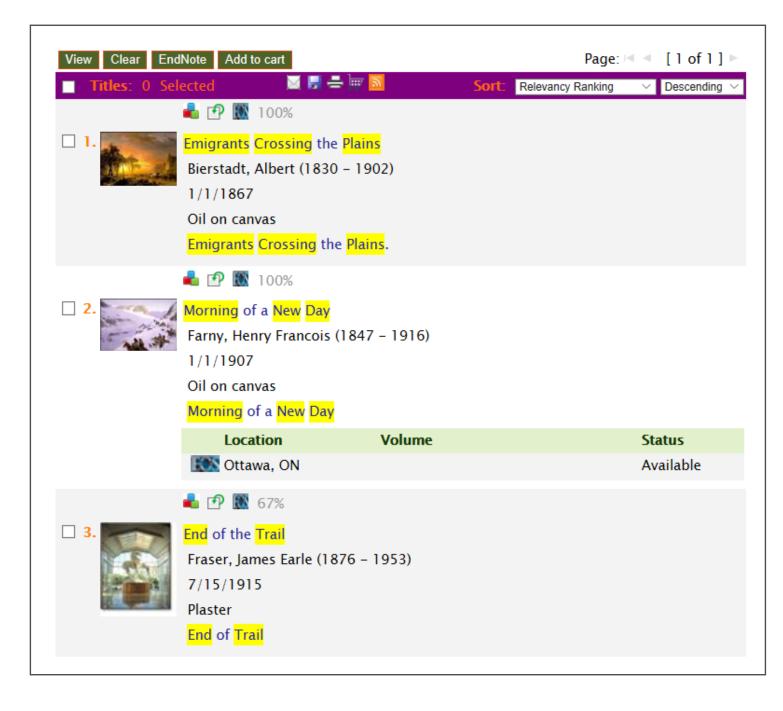


ECS	Velcome	to the Libra	ary!				
·	Start	Search the Library!	Lists	My Account	Web Subscriptions	Help	Sign In
Useful Links					Power	ed by EOS	Announcements
OneSearch		Welcome to the Lil	brary!				Research Quest
SharePoint Portal			- C	<i>u</i> - 1 -			
Hot Topics!			e~3	earch			2
Other Libraries							Email: library@eos.com
Digital Repository			5	earch			Phone: 760-431-8400
Special Collections							S RSS Feeds
Works of Art Database	Search types						
Litigation Topics	Simple search	Use Simple Searc	h to search keyw	rord(s) or a phrase.			
Self Checkout	Browse search	allows you to scro	oll through or rep	osition an index to the ne	bjects, All Authors, etc.). Br arest matching entry. Index ling with a letter, keyword, o	es may	
	Advanced search				eously. Keywords or phrase be operator between searche		

(2) Do you have a Special Collection?

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

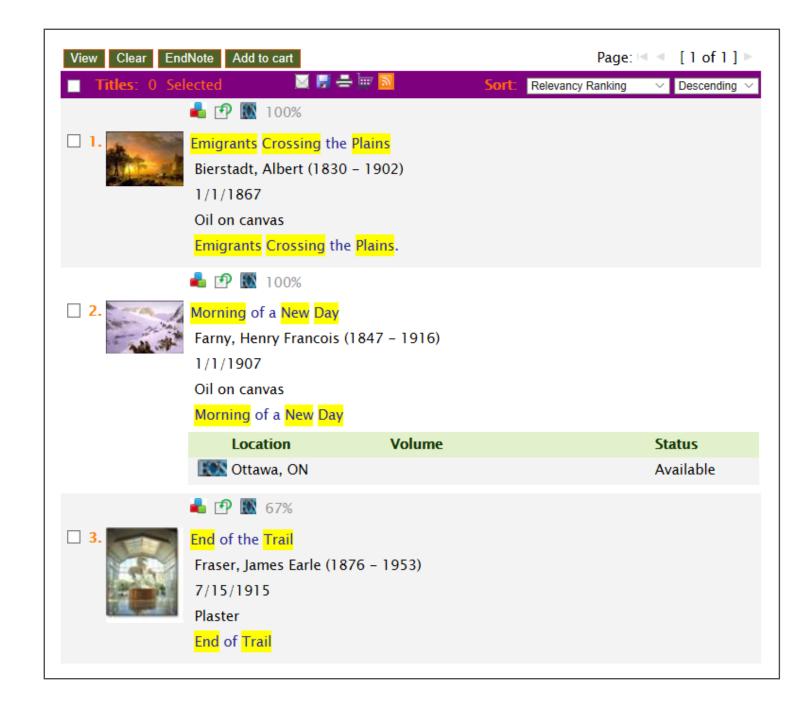




2 Do you have a Special Collection?

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





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?







SAML and Security – our latest features

EOS.Web supports SAML!

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



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





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)



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.

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)

Annual Training Event

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





• 2018 – Denver, CO

• 2017 – Washington DC

• 2016 – San Diego, CA





• 2019 - ?





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





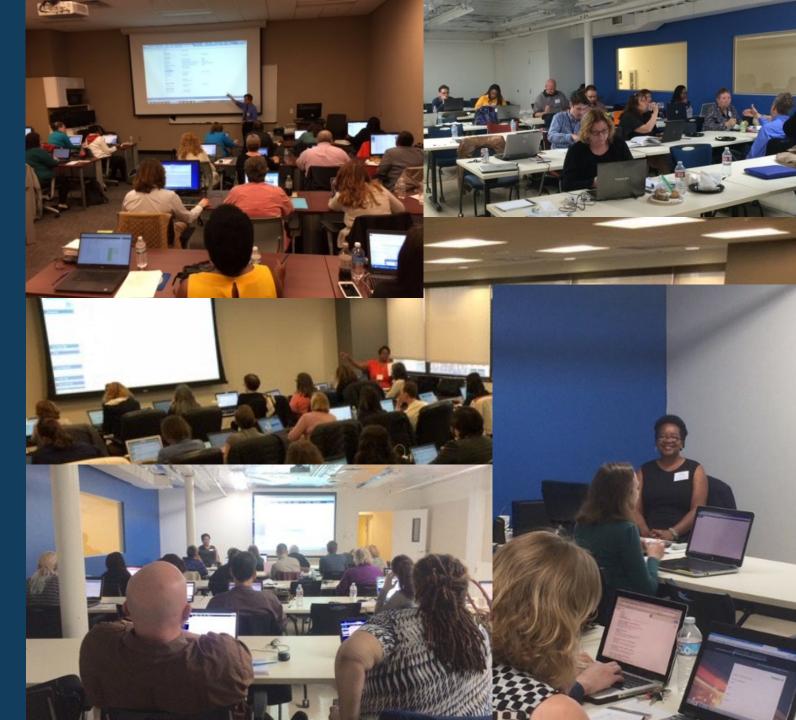
DAY 1 MORNING Cataloging Agenda New enhancements added Cata Import from MARC file and Ex Overview – Important Im	DAY 2 MORNING	
 EOS Excel Format Setup 	Serials Agenda	la dia Casiala in dia kaoka man
 Step by Step import of Ex 		ed to Serials in the last year.
Electronic resources Pros & Cons of using "Set Frequently asked questio Learn ways to clean-up record Learn how to find and cle Edit Picklists Use the Global Re	 How to setup seria Regular (principal) 	ials records for simple to multifaceted serial titles Is enumeration and pattern for redicted) serials unpredicted) serials ment & Indexes
Deletion File (brief overview)	 Serials Check-in fea 	atures
Cataloging Maintenance	Serials Reports (select re	eports)
 Setup cataloging template 	Electronic Serials	
 Add/edit/look for/remove 		tent Management (ECM) – vendor routed emails
 Cataloging Reports (selected r 	 Overview and 	
DAY 1 AFTERNOON	 Confirm emails 	DAY 3 MORNING Premium Modules
OPAC Agenda		New enhancements added to Premium Modules in the last year.
New enhancements added to	DAY 2 AFTERNOON	Brief overview of all modules
Remodel your OPAC or create	Circulation Agenda	More in-depth training on one or more of these modules
 Overview of OPAC Templi 	 New enhancements add 	
o Controls	Circulation Maintenance	 Classification Management
 Add, edit, delete 	o Display	o Content Aggregator
Add OPAC Slider OPAC Searching Features	 Patron Type 	 Electronic Content Management Electronic Resource Management
 Search limits, Search oper 	o Notice	o Indexer
How to create your own searc	o General	o Inter-Library Loan
 OPAC record permaner 	o Retention	o KnowledgeBuilder
o Static record list	o Holds	NYLI Integration
o Dynamic saved search	o Prompt	 Overdrive Integration Reference Tracking
 RSS Feed saved search 	o Statistics	
 Construct your own sav 	 Due Date Type 	DAY 3 AFTERNOON
 Searching Maintenance 	 Circulation Inventory 	Acquisitions Agenda
 Select fields to display in Edit staff-side text feature 	 Learn to do circula 	· New emancements added to Acquisitions in the last year.
URL checker topics:	 Setup of the Self-Checko 	•
 OKE CHECKER COPICS. O How to monitor, find ar 	 Circulation Reports (sele 	 Setup Fund Accounts
 Overview 		 Understand how Fund Accounts update as line items are processed from beginning to e Purchase Order & Line Item Records
 URL Checker repo 	rt	Creating Purchase Order & Line Item records Creating Purchase Order & Line Item records
 Troubleshoot rep 	ort results	 Standing Orders
 OPAC Reports (selected reports))	o Invoices
		 How to prepare Fund Accounts for your next fiscal budget year.
		Using End Year Move Balance
		 Acquisition Reporting
		 Acquisitions Reports (selected reports)

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!

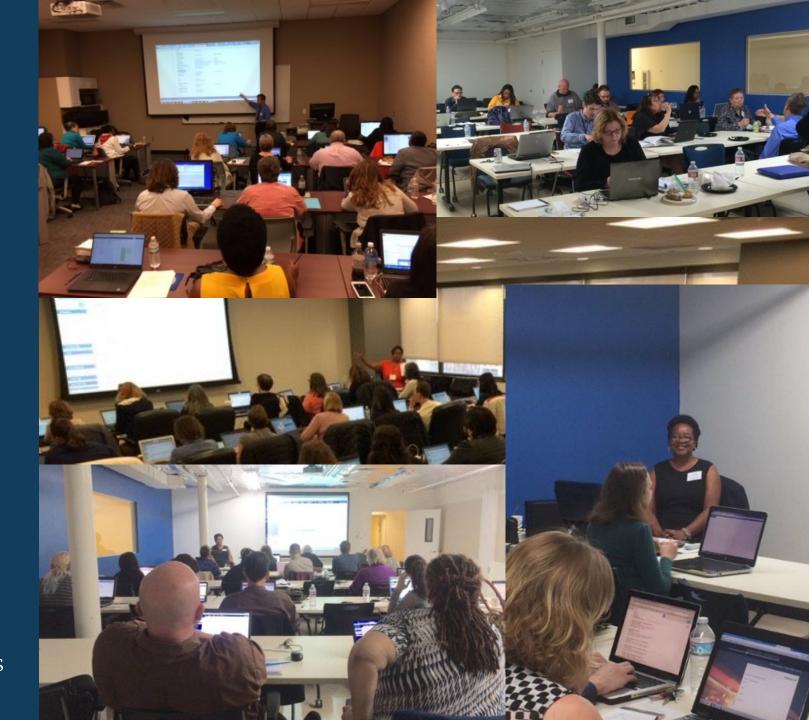






3-Day Annual Training Event

Take our annual training survey Help us plan dates & location Consider being a host site







New Administrator Training Event

Coming Soon –

2-day Administrator training

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





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

Access Log
Course Listing
Media Usage
OPAC Access Log
OPAC Site Statistics
Password Expiration
Record Counts
Record Set Usage
Search Statistics Report
Search Statistics Report (Columns)
URL Checker Results (Columns)
URL Usage
URL Usage (Columns)
User/Patron Record Audit Log (Columns)
View Active User Session
View Current Users
Web Subscription Title Usage

 <u>Cataloging</u> 		
Assign Format	General	Material Format
Call Number Hierarchy	Google Scholar	Media Links Files
Category	Import Handling	RefWorks Format
Course Reserves	KnowledgeBuilder	Security Groups
Display	KnowledgeBuilder Field Bank	Shelf List Report
EasyMARC	Local Holdings	Template
EndNote Format	MARC Rules	
Excel Format	MARC Tags	

Admin Settings	IP Authentication	Picklist Categories
Common Passwords	Label Printing	Product License
Complete Display Page Setup	Library Information	RSS
Currency	Library Schedule	RSS General Setup
Display	Locations	RSS Notice Setup
Edit Staff Side Text	Patron Profile Setup	Title List
Expansion	Patron Settings	Useful Links
ID Number	Picklist	User Settings

Audit	Notice	Retention
Display	Patron Type	Statistics
Due Date	Privacy	Traps
General	Prompt	
Hold	Receipts	

SirsiDynix Support Center (SDSC)

Are you online with SDSC?

We have our next generation Help Portal waiting for you!







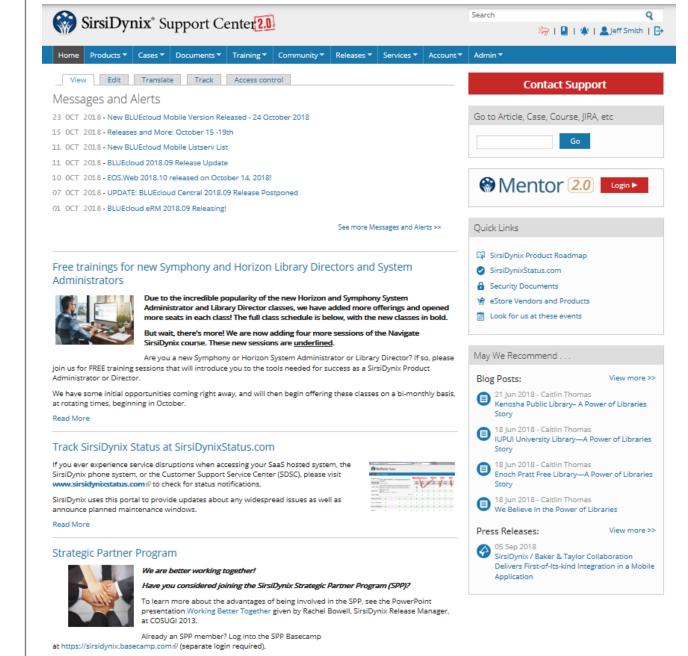
SirsiDynix Support Center (SDSC)

Click the Help icon (?) in EOS.Web

-or-

Navigate to support.sirsidynix.com







SirsiDynix Support Center (SDSC)

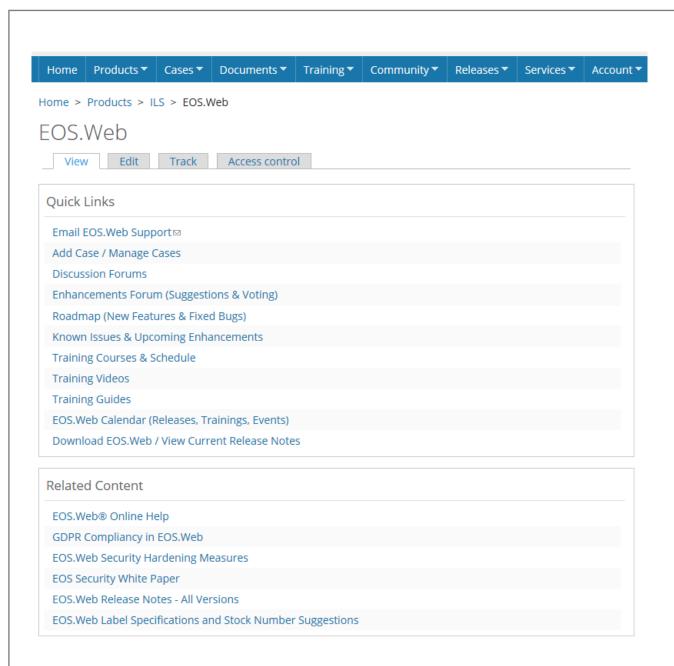
The Dashboard page

(*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





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

Sign In E-mail or username * Enter your e-mail address or username. Password * Enter the password that accompanies your e-mail. Log in Forgot your password? If you forgot your password or don't have a password, please use the link above to reset	First time logging in? If this is your first time logging in to the SDSC, you must request a new password to login. Need a new user account? If you need a login, your library's SDSC User Managers can create a login for you. If you don't know who they are, email sdsc@sirsidynix.com⊠. Having trouble? If you are having trouble with your login, please
Need Urgent help? If you have an urgent issue and are unable to log in, please call (800) 284-3969.	email sdsc@sirsidynix.com⊠. Need BookMyne help? If you need help with our BookMyne app, please go to the BookMyne Support page.



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)

List	Activate Users	Manage Roles Add User			
		ins for existing users, or click the "Add User"	tab above to add	a new user	
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

List Activate User	rs Ma	nage Roles	Add Use	r			
Name	Training	Documents	Commun.	Cases	Case Mgmt	Services Mgmt	Account Mgmt
Abell, Thomas							
Adams, Kathi							
Adams, Nick							



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	Activate Users				
Jse the list bel	ow to create log	gins for existing users, or click the "Add User"	tab above to add	a new user	
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

List Activate Use	rs Ma	nage Roles	Add Use	r			
Name	Training	Documents	Commun.	Cases	Case Mgmt	Services Mgmt	Account Mgmt
Abell, Thomas							
Adams, Kathi							
Adams, Nick							



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nactive List	Activate Users	Manage Roles Add User			
lse the list bel	ow to create log	ins for existing users, or click the "Add User"	tab above to add	a new user	
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







Jeff Smith VP Client Services jeff.smith@sirsidynix.com 800-876-5484 x7769





More Resources

Jeff Smith

EOS.Web Help Desk (eossupport@sirsidynix.com)



Thank You!

