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Innovative Updates

IUG EaST A Regional Group of Innovative Users Group

Jessica Moss, Digital Sales Manager

Maria Laude, Sr. Technical Solution Consultant

Maisam Nouh, Technical Solution Consultant

November 15, 2022

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Agenda

- Clarivate and Innovative Corporate Overview
- Innovative Product Updates
  - LX Starter
  - Polaris
  - Sierra
  - Vega Library Experience
- Q&A

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Clarivate™

Innovative is a business unit within Clarivate

Global network of experts 60 countries worldwide

11,500 employees

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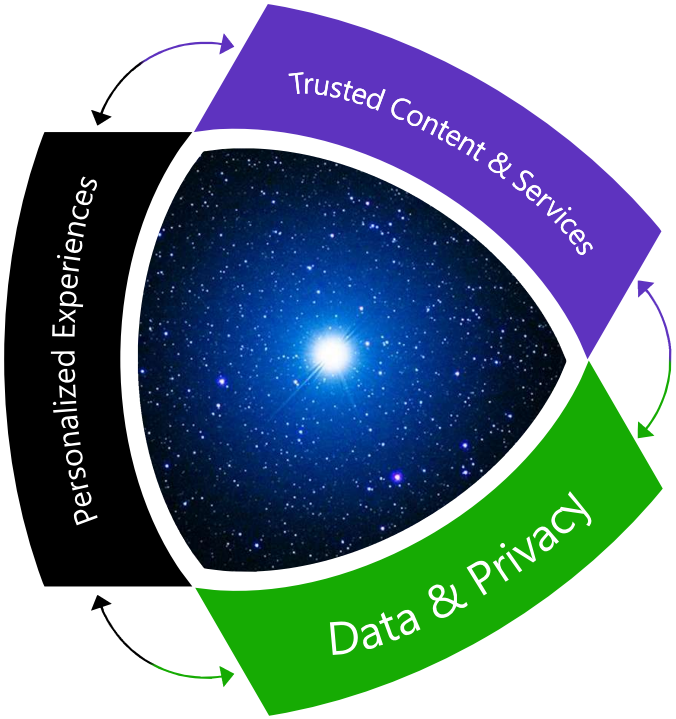
Our Shared Values



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Customer Delight

A Clarivate commitment

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Your feedback is very clear:

The ILS remains a critical tool

And it needs to continue to evolve and provide significant additional value at *no additional cost*.

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Announcing

For **ALL** Polaris & Sierra Customers **LX Starter is *included*** in Your ILS Maintenance Subscription

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LX Starter: 2 Delivery Phases

Phase 1

- Patron Notices via Email
- Email Design Tool

Phase 2

- Registration & Welcome Journey
- Email Templates
- Automated Renewal Journey
- Syndetics Cover Art
- Anniversary Journey
- Engagement Metrics

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For all Polaris & Sierra Customers, Included with ILS maintenance or subscription

A minimum release version will be required

Notice Type	Polaris	Sierra
Overdue	• 1st Overdue • 2nd Overdue • 3rd Overdue	• Odue (level 1) • Odue (level 2) • Odue (level 3) • Odue (level 4) • Odue (level 5) • Odue (level 6)
Courtesy	• Almost overdue/Auto-renew reminder • Inactive Reminder • Expiration Reminder	• overdueReminder
Holds	• Hold (Pickup) • 2nd Hold (Pickup)	• pickup
Fine	• Bill ("4th Overdue" - Charge to replace item) • Fine (Total charges exceed configured amount)	• bill

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Phased Implementation

The availability of LX Starter will be implemented for customers in waves

Wave 1

- Select Development Partners to provide feedback and refine our processes before GA
- Low-Medium volume
- Will run from July through September 2022

Wave 2

- Available to libraries that schedule a release upgrade to Sierra 5.5 or Polaris 7.3
- Low-Medium volume
- English-only notifications*
- Starting in November 2022

Wave 3

- Focus on performance scaling for our largest libraries and consortia
- High volume notices
- Require multi-language notifications
- Starting in 1H 2023
- Libraries will need to schedule a Sierra / Polaris release upgrade

Wave 4

- Libraries that want to go at their own pace and wait for later releases
- Libraries that may require more planning for upgrades or training

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Pop Quiz: Name that Library!

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Can you name this library?

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Can you name this library?

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idealab.iii.com

idea Lab

Go to Inbox Search

Home Pairwise How It Works Ideas

Polaris - Analyze This!

This challenge is for ideas that will improve functionality and introduce new features to support reporting for your library. Submit ideas about SimplyReports, improvements/additions to canned rep data elements that would help with reporting or anything else that would enable you to gather data your library.

Sierra - Academically Speaking

This challenge is for ideas that will improve functionality and introduce new features to support academic libraries and, more broadly, workflows in all types of libraries. Submit ideas about link checking, course reserves, system integrations, or anything else that would help library staff provide exceptional service to library users.

For this Challenge, Innovative is setting aside a certain amount of time in their 2023-2024 releases to work on winners of the Challenge.

They have correlated this time to a point value: 40 pts.

Vote on as many sets as you wish. The system will offer you voting until you have seen every possible combination of ideas.

You may stop at any time and pick up where you left off later.

In this challenge there are 15 total pairs, do not feel that you need to vote on them all (though it is certainly appreciated if you choose to anyway). This software works best if a large number of users each vote on 40% of the pairings

Pairwise ends **in about 5 days**

Ability to query notes fields from bibliographic records in Simply Reports - S (20 pts)

VS

Record sets from saved and scheduled reports in Simply Reports - M (30 pts)

SimplyReports should have the capability

OAI-PMH Usage Statistics - M (30 pts)

At the moment there are no capabilities to monitor OAI-PMH usage because the key page is an xml page not html.

VS

Allow searching by item information in course reserves module - M (30 pts)

Add search functions of "title" and "barcode" to course reserves. (Brought in from Always Open Space, where it is currently a future possibility.)

idea Lab

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idea Lab

Home | Challenges | Meet the Team | Selected Ideas

Sierra Ideas

Idea	Submitter	Release	Challenge
Separate permissions for new INN-Reach Borrowed report	Sheryl VanderWagen	Sierra 5.4	Always Open
Batch Extend for Items on Hold Shelf	Shawn Farrell	Sierra 5.4	Always Open
Use Time to Holdshelf to delay Hold Pickup notice	April Coulter	Sierra 5.4	Always Open
Provide option for Auto Notices to observe Days Closed table	Renee Brumett	Sierra 5.4	Always Open
Inventory and updating records in the stacks using Mobile Worklists	Eeva Stierwalt	Mobile Worklists 3.2 - 4.2	Always Open
Preview number of items paged in each location in Mobile Worklists	Renee Brumett	Mobile Worklists 4.1	Always Open
Multiple courtesy notices in Sierra	Chris Jasztrab	Sierra 5.5	I Want to Do It Myself
Customize description used for each specific block	Tracy Babiasz	Sierra 5.4	I Want to Do It Myself

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idea Lab

Home | Challenges | Meet the Team | Selected Ideas

Polaris Ideas

Idea	Submitter	Release	Challenge
Make MARC Import default view for cataloging processing	Jamie King	Polaris 7.4	Always Open
Improved known issues documentation	Jason Tenter	N/A	Always Open
Leap: link to items list from invoice	Eleanor Crumblehulme	Polaris 7.3	Always Open
Combine details and controls view of item records in Leap	Jamie King	Polaris 7.3	*It Bugs Me Challenge
Designate "Borrow by Mail" in LEAP Hold Request	Tyler Whitten	Polaris 7.3	*Always Open
Allow customers to use longer/complex passwords	Bob Kuntz	Polaris 7.3	*Always Open
Allow pasting of passwords in the My Account>My Record>Change Logon fields	Rex Helwig	Polaris 7.3	Always Open
Patrons can cancel held items / Ability for customer to cancel held items / The Ability to cancel holds in held status	Cecilia Smiley, Carl Ratz & Allison Scheuering	Polaris 7.3	I Want to Do It Myself! / Always Open / Lions, Tigers and Holds, Oh My!
Customize Wording in PAC-My Account: Held Items to Reflect Actual	Robert Harvey	Polaris 7.2	It Bugs Me Challenge

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LX Starter

Intuitive, web-based email communication

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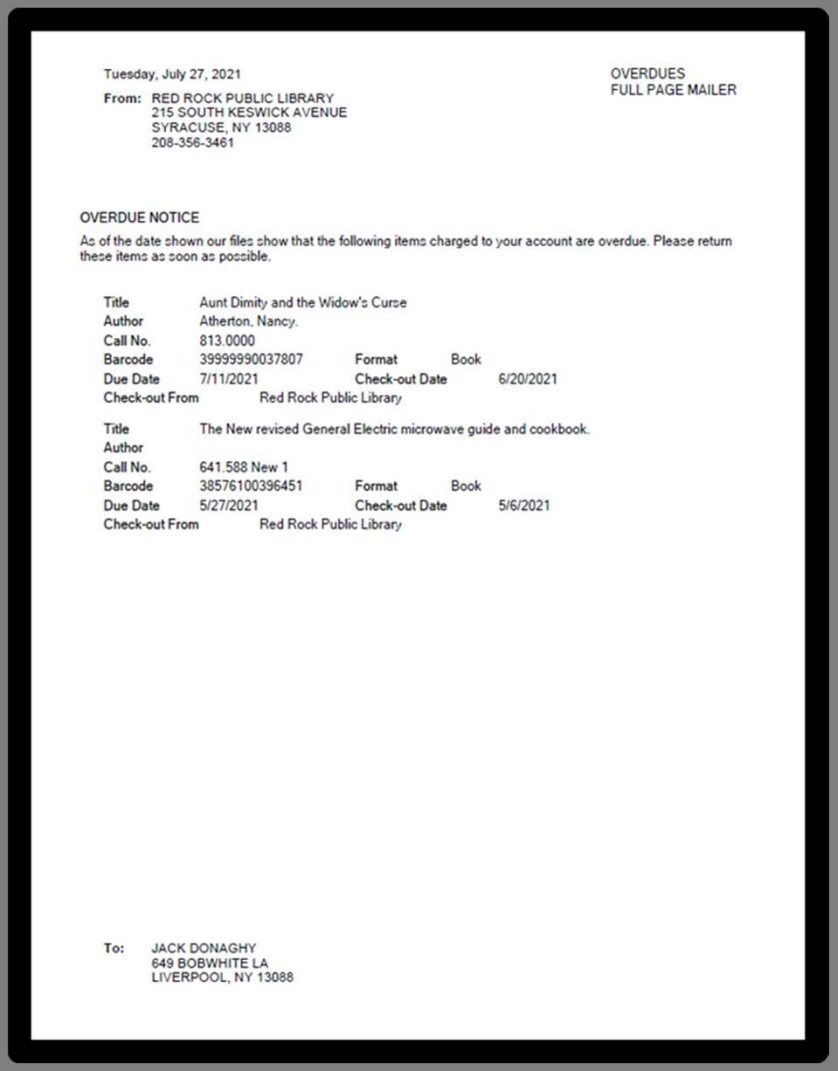

Tuesday, July 27, 2021

OVERDUES
FULL PAGE MAILER

From: RED ROCK PUBLIC LIBRARY
215 SOUTH KESWICK AVENUE
SYRACUSE, NY 13088
208-356-3461

OVERDUE NOTICE

As of the date shown our files show that the following items charged to your account are overdue. Please return these items as soon as possible.

Title	Aunt Dimity and the Widow's Curse			
Author	Atherton, Nancy.			
Call No.	813.0000			
Barcode	39999990037807	Format	Book	
Due Date	7/11/2021	Check-out Date		6/20/2021
Check-out From	Red Rock Public Library			

Title	The New revised General Electric microwave guide and cookbook.			
Author				
Call No.	641.588 New 1			
Barcode	38576100396451	Format	Book	
Due Date	5/27/2021	Check-out Date		5/6/2021
Check-out From	Red Rock Public Library			

To: JACK DONAGHY
649 BOBWHITE LA
LIVERPOOL, NY 13088

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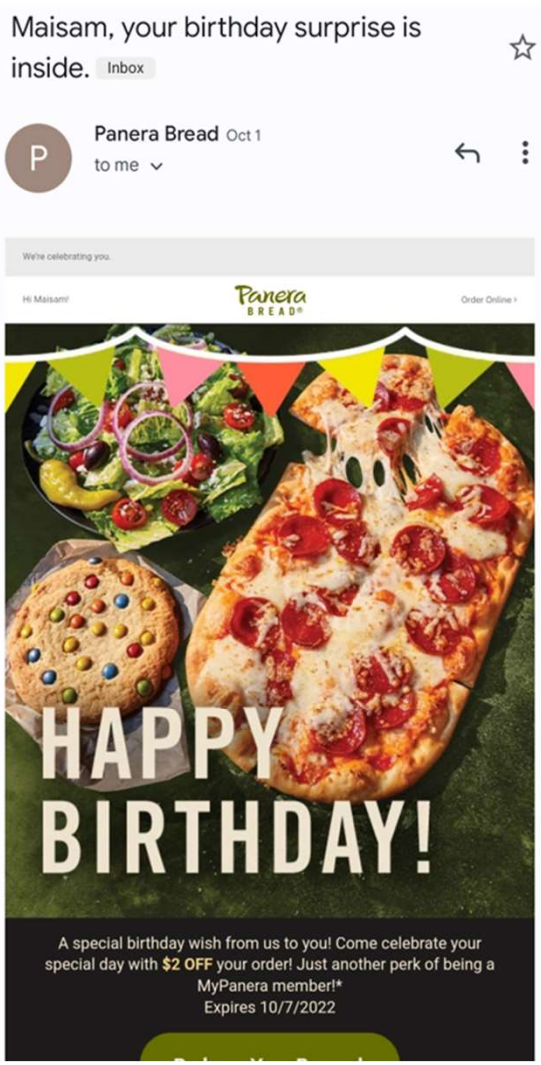

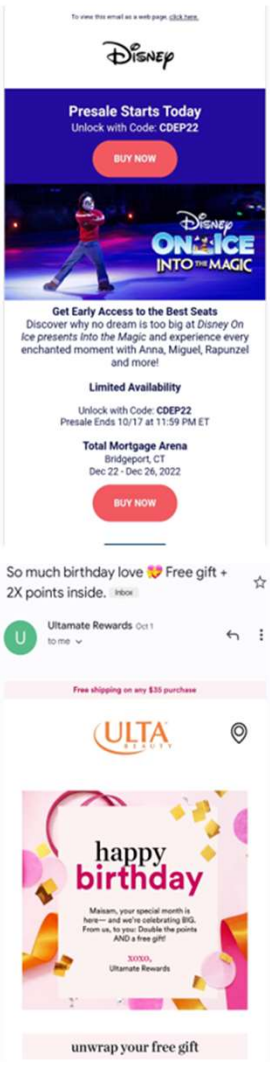

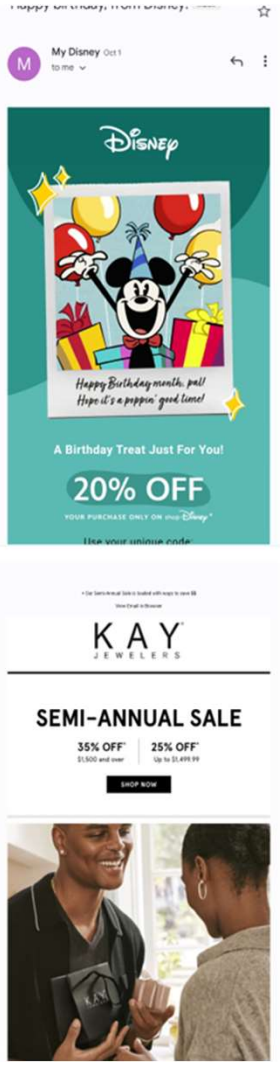

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LX Starter

Intuitive, web-based email communication

Integrated circulation email notifications

User-friendly email templates

Web-based analytics portal for library staff

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Example Emails with Auto-populated Content

Included with your ILS

MIDPOINTE LIBRARY SYSTEM

Hi Abby,
Your holds are ready for pickup!

Pickup at Midpointe Library Middletown

Once inside the library, go to the front desk. Show your library card to the librarian on duty & request your items. The branch's address is 125 South Broad Street, Middletown, OH 45044

Address & Hours

Raceless: In Search of Family, Identity, and the Truth About Where I Belong ...
by Steven Schnur
Paperback Book

Call No. J SCHNUR
Branch Middletown
Pickup by Oct 20, 2021

Harry Potter and the half-blood prince
DVD

Call No. J SCHNUR
Branch Middletown
Pickup by Oct 20, 2021

Potter and the Goblet of Fire
ling, J. K.
bbook

Call No. J SCHNUR
Branch Middletown
Pickup by Oct 20, 2021

© MidPointe Library, 2021
23 East Street, Fort Edward, NY 12828

MIDPOINTE LIBRARY SYSTEM

Your items are overdue. Return them soon to avoid fines

For each day that these items aren't returned, **a fee of $0.15 will be charged to your account.** View Your Account

Return to any library location by Nov 31, 2021

All of our locations have book dropboxes. Please return any items that aren't a book to the front desk.

Find a Location

Raceless: In Search of Family, Identity, and the Truth About Where I Belong ...
by Steven Schnur
Paperback Book

Overdue
Since Nov 31, 2021

Harry Potter and the half-blood prince
DVD

Overdue
Since Nov 31, 2021

Harry Potter and the Goblet of Fire
by Rowling, J. K.
Audiobook

Overdue
Since Nov 31, 2021

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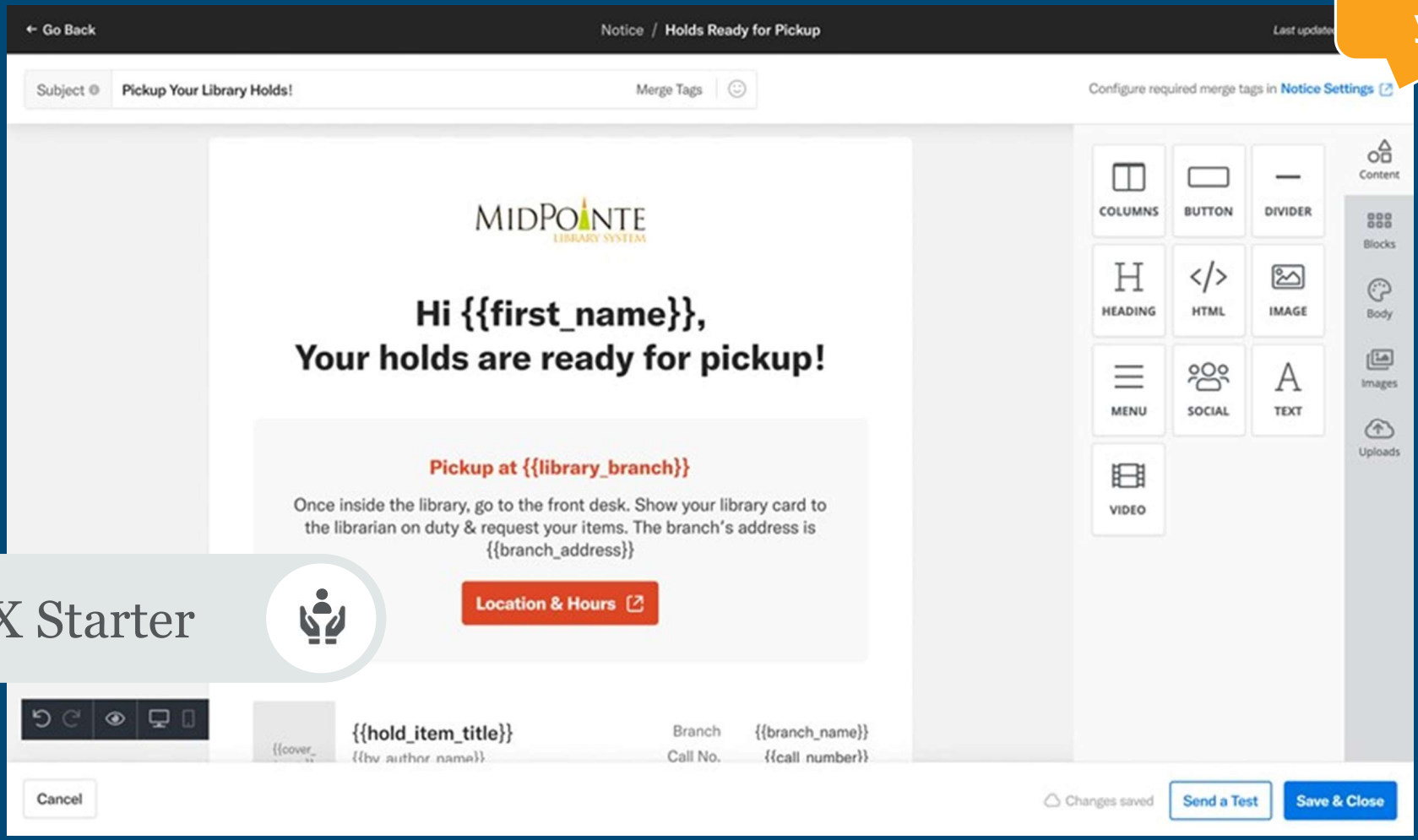
23 East Street, Fort Edward, NY 12828

LX Starter

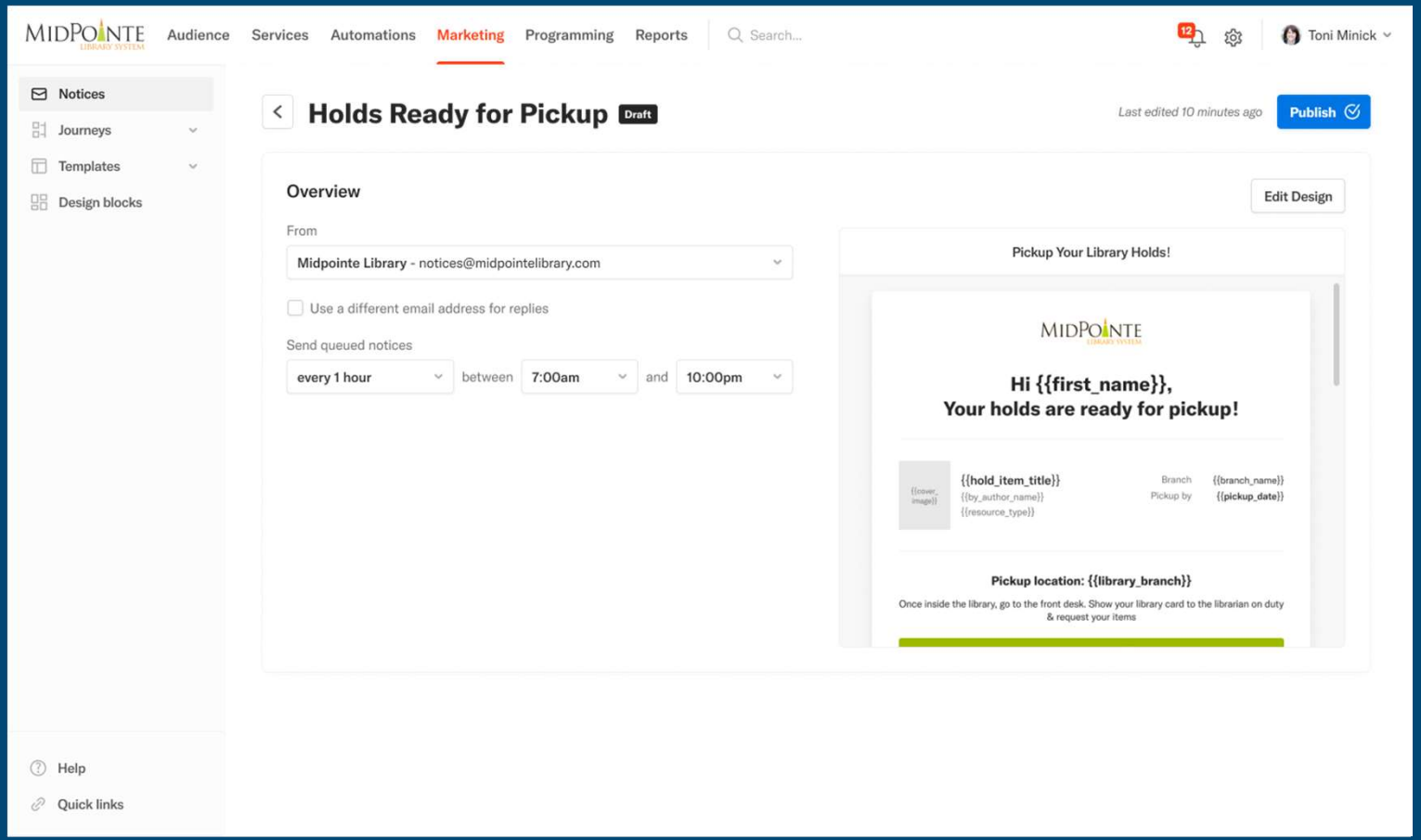
Web-based Staff Experience: Email Templates & Editor

Included with your ILS



LX Starter

Web-based Staff Experience: Managing Notices



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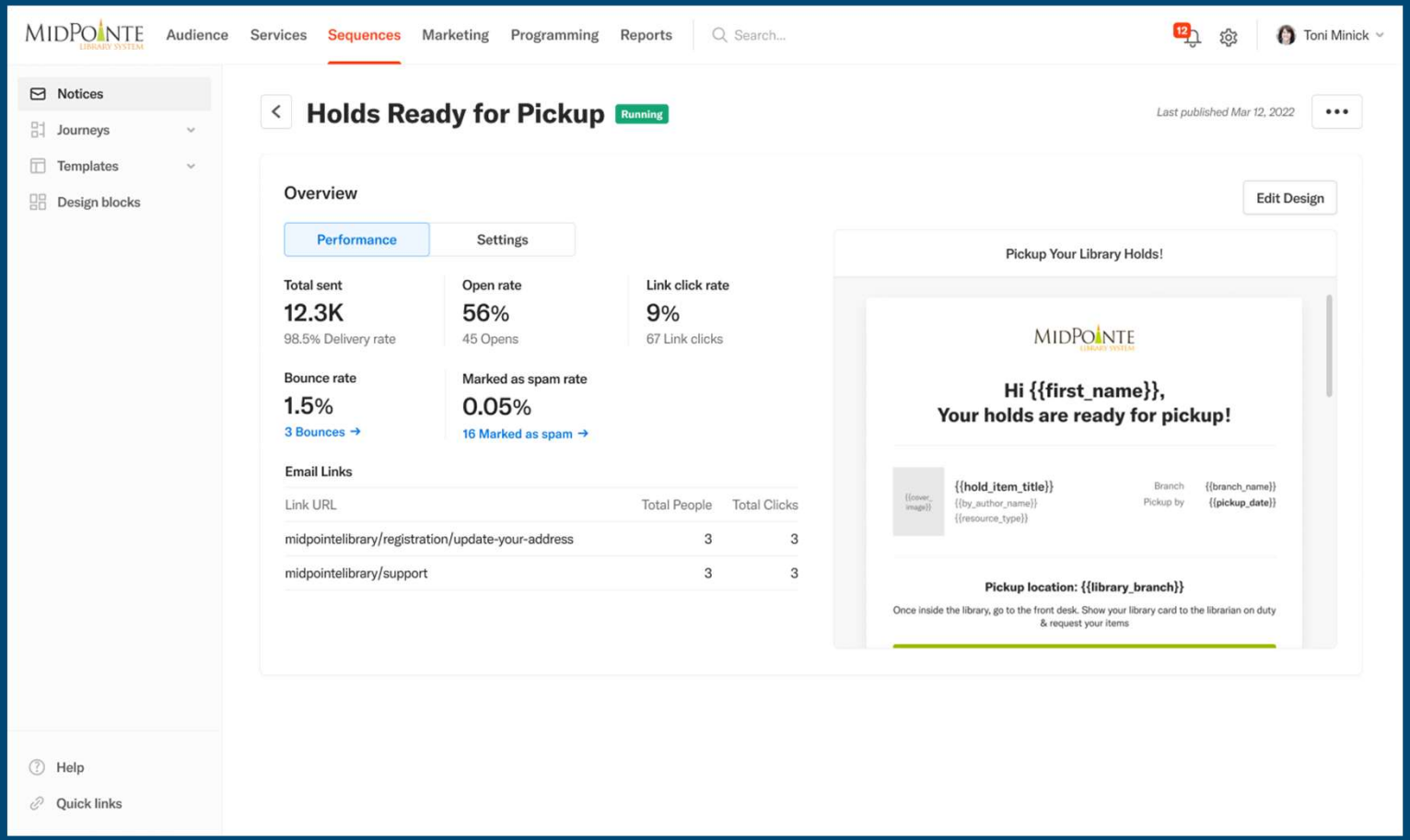
Engagement Metrics for Email Notices



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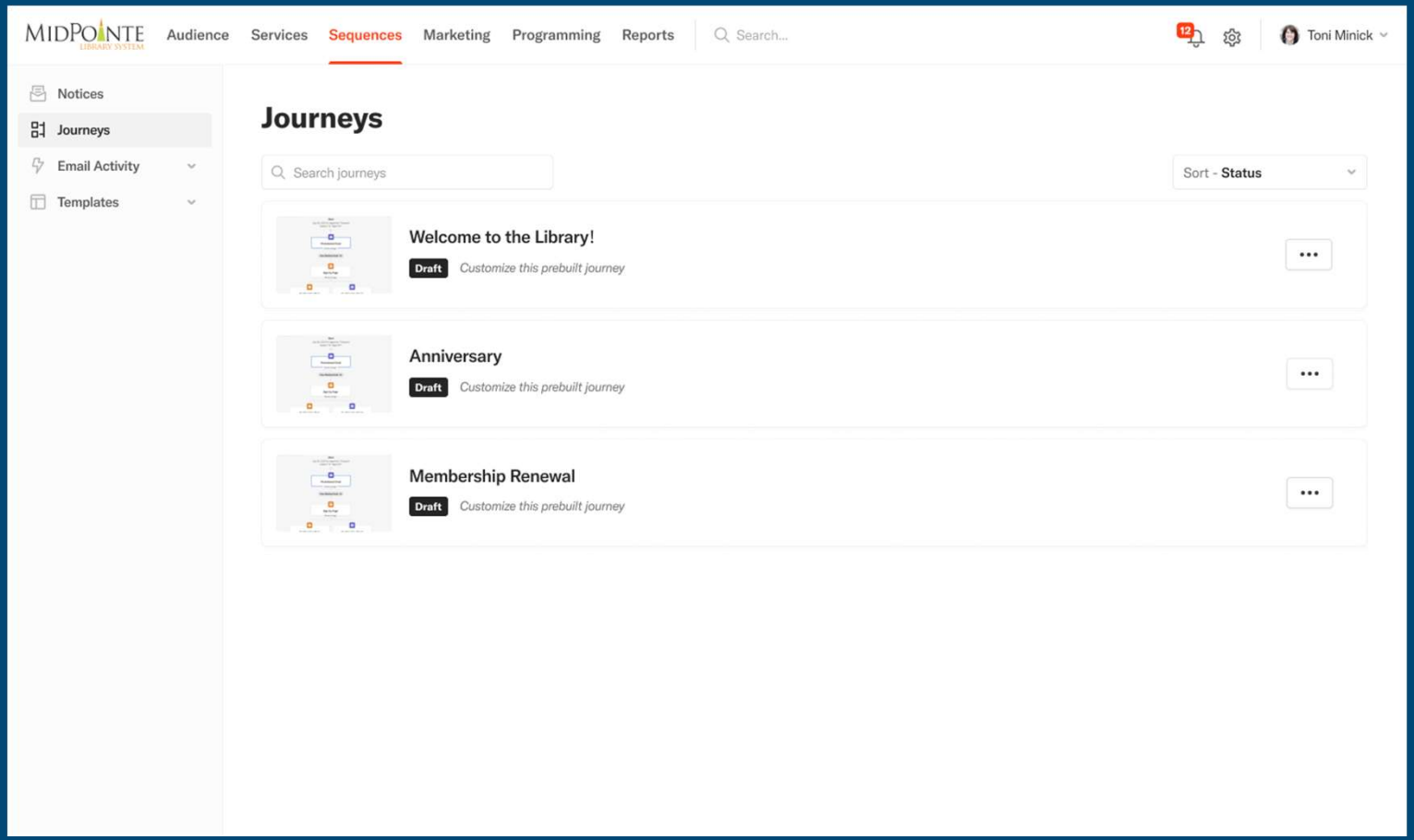
Web-based Staff Experience: Managing Journeys



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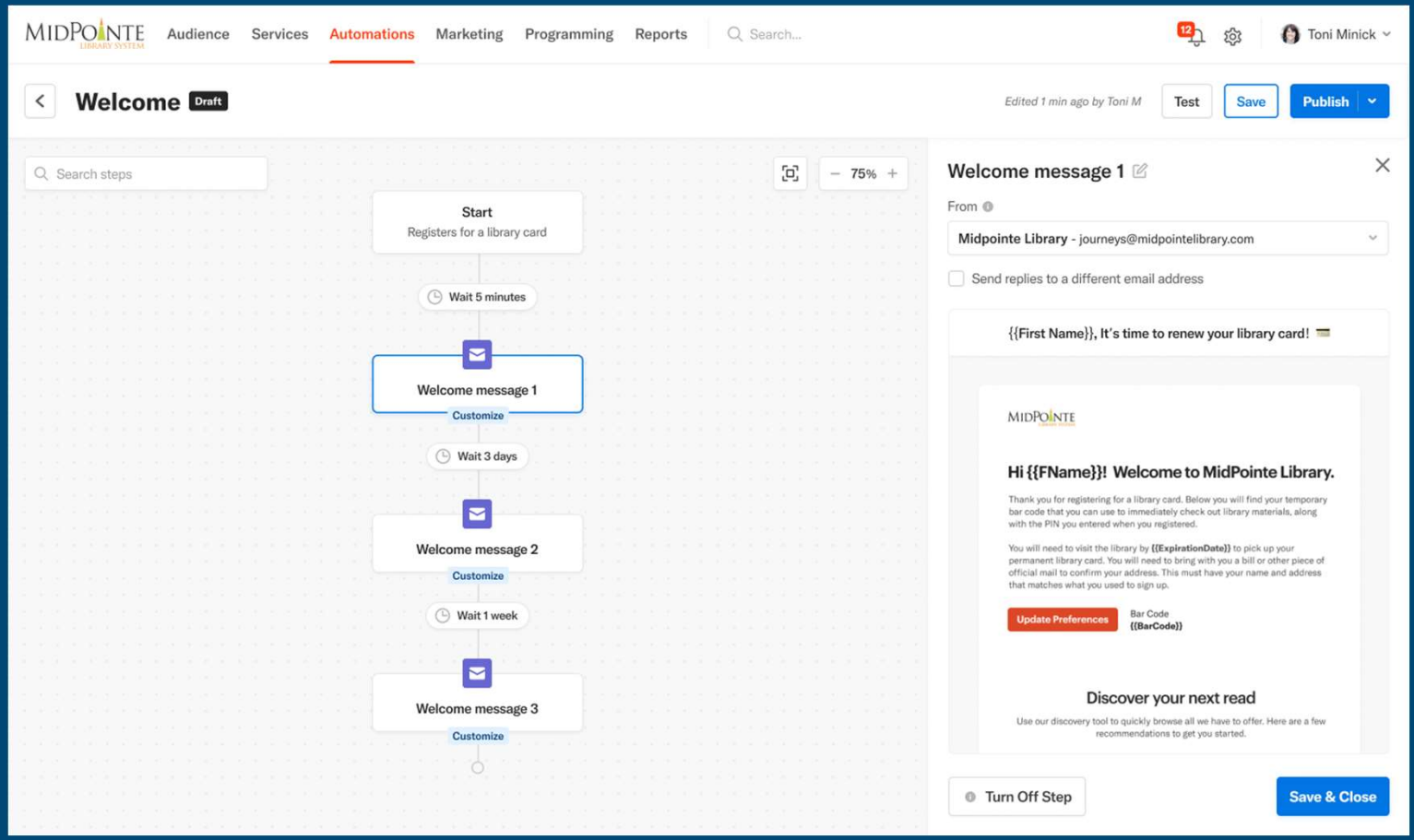
Web-based Staff Experience: Managing Journeys



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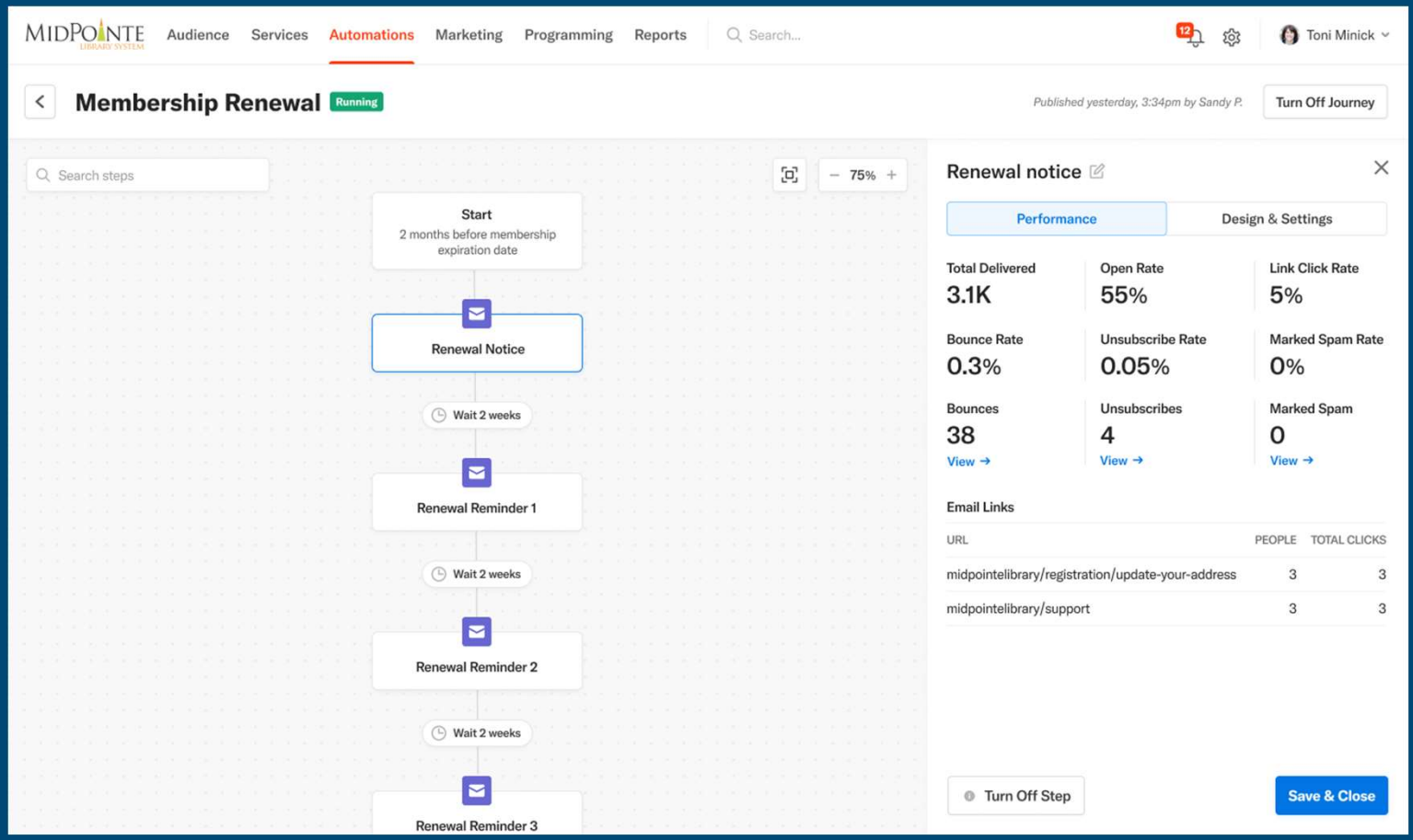
Engagement Metrics for Journeys



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Let's Take a Look....

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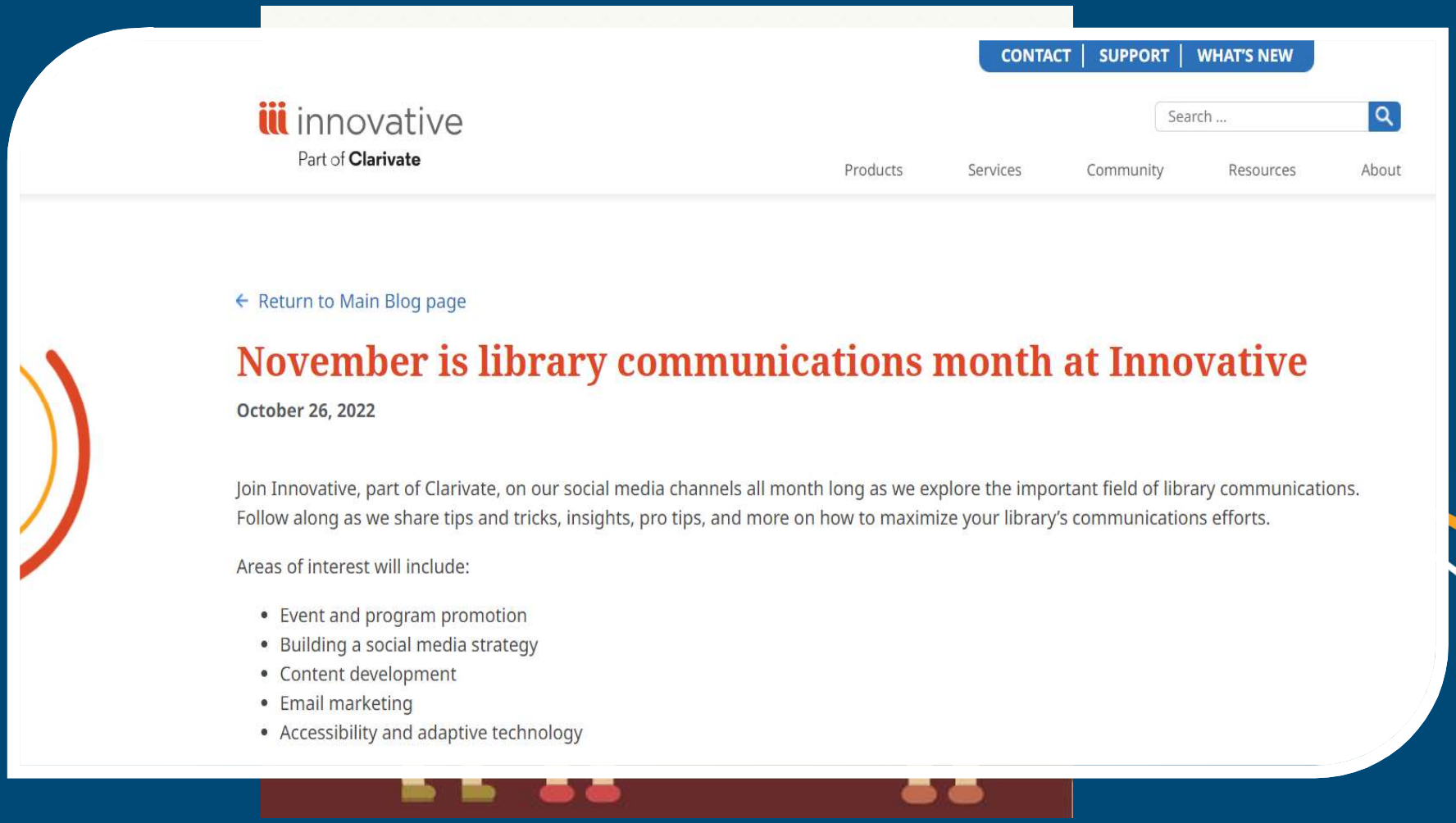

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Vega LX
Library Experience Management

Unified Library Solutions in One Product Ecosystem

The Vega LX Platform At a Glance

- Integrates seamlessly with your ILS
- Deepens community engagement
- Ensures patron privacy

DISCOVER	A user-friendly, discovery experience with modern features
INTERACT	Two-way messaging via SMS, or chatbot, or digital assistants
PROMOTE	Digital marketing, website building, & fundraising tools
PROGRAM	Integrates, manages and creates library e
ANALYZE	Uses key data to quantify your library's R

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Sierra

What's New in Sierra

+ 220 Sierra upgrades so far in 2022

Sierra 5.5 Release

- Enhanced Apple MacOS Monterey, Windows 11 support
- Holdshelf management improvements
- Funds Management Enhancements

LX Starter

- Integrated circulation email notifications
- User-friendly email templates
- Contact record management

IPA (Innovative Phone Alerts)

- Automated phone notification & renewal system for inbound & outbound calls.
- Web-based analytics portal for library staff

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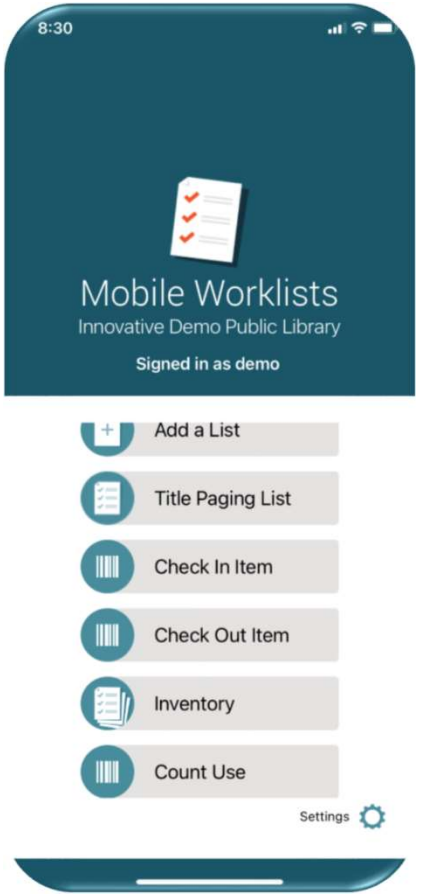
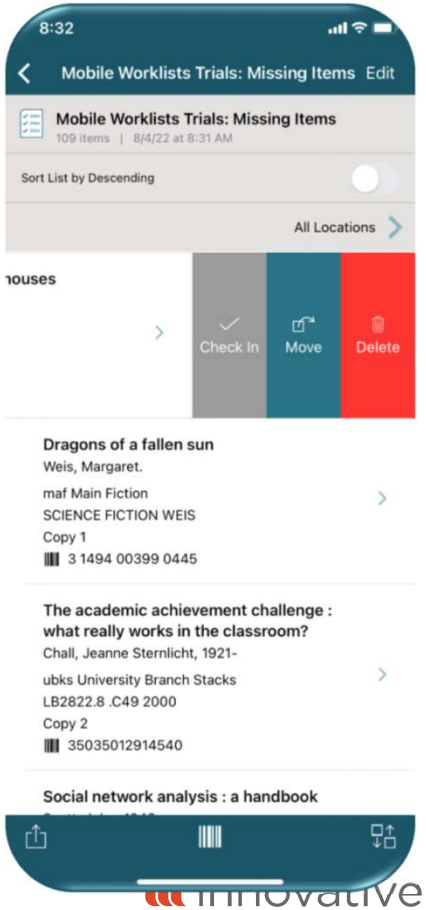
Recent Developments: Sierra Mobile Worklists

- Backdate Check-ins
- Count Internal Use
- Update Item Details
- Check Out Item
- Personalized Home Screen





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Polaris

What's New in Polaris

Polaris Leap

160 Polaris upgrades so far in 2022

Polaris 7.2 released in May

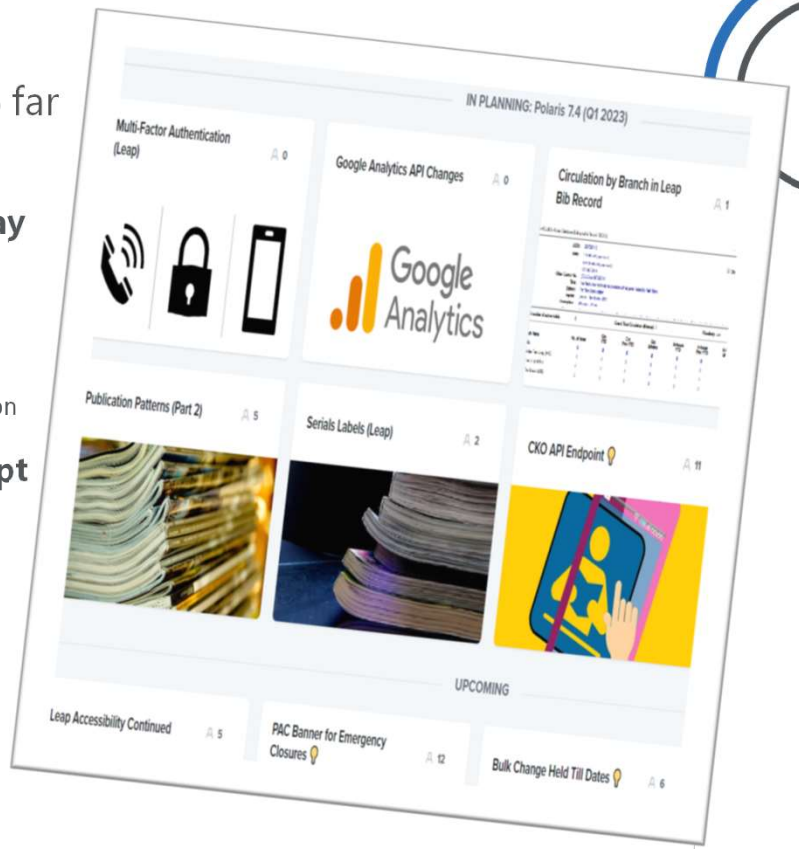
- SSO in Leap
- Create Serial Holdings Records (Leap)
- Improved System Administration

Polaris 7.3 released in Sept

- Manual Acq in Leap
- Authority records in Leap

LX Starter

- Integrated circulation email notifications
- User-friendly email templates



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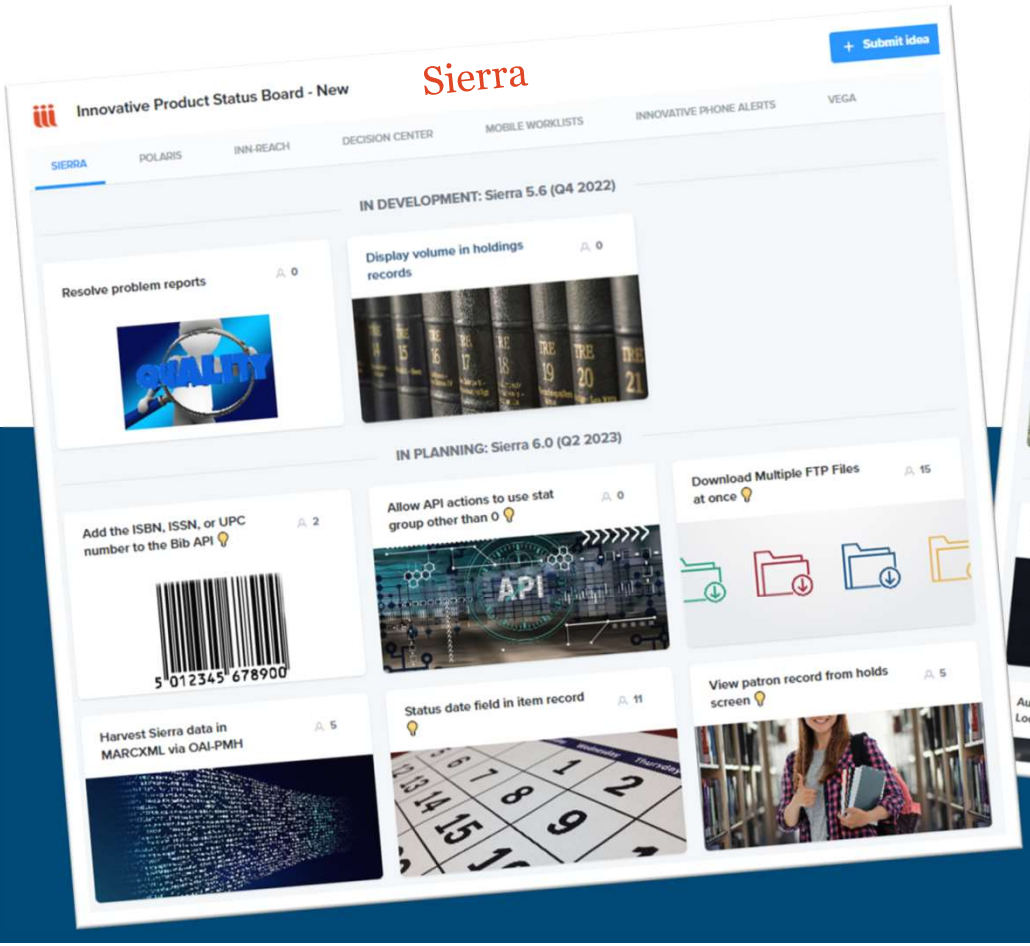
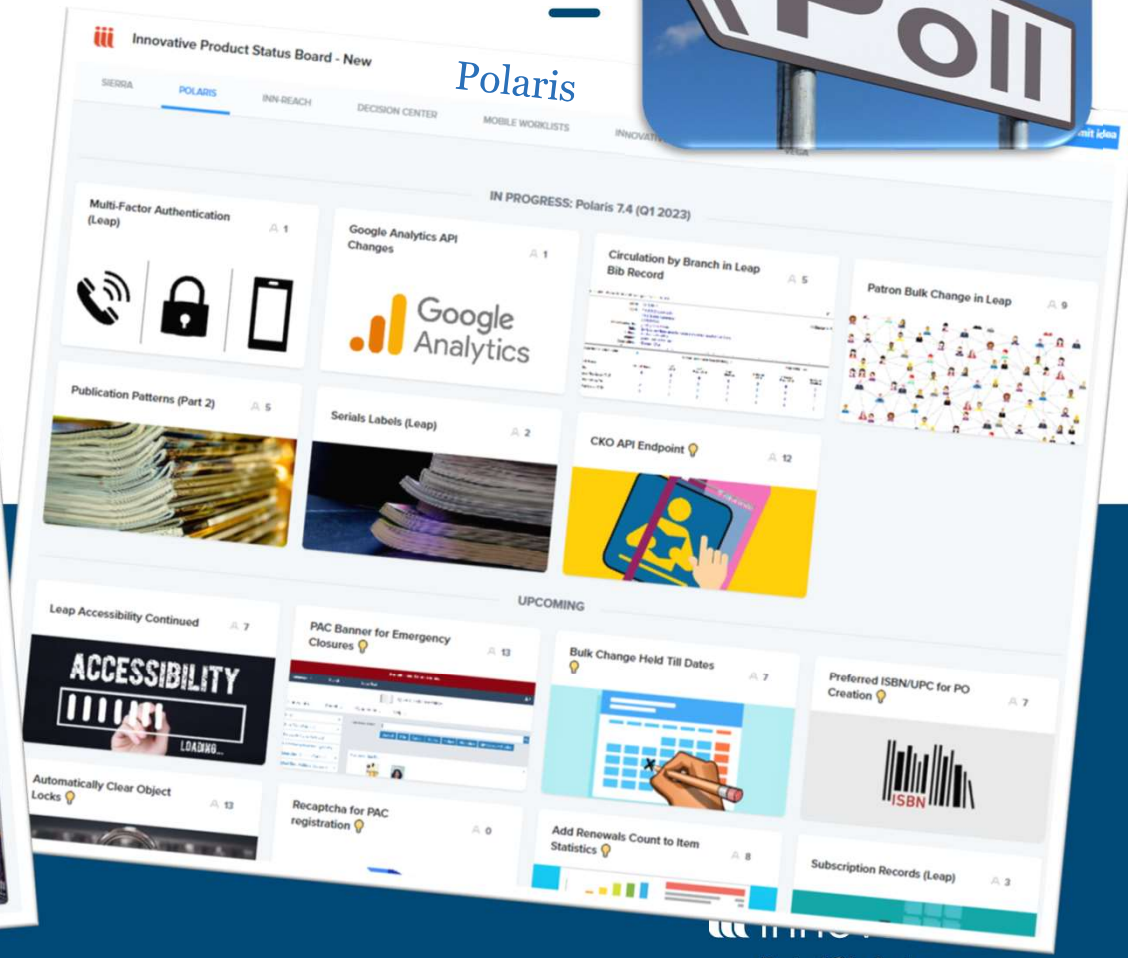
Public Roadmaps - www.iii.com/products





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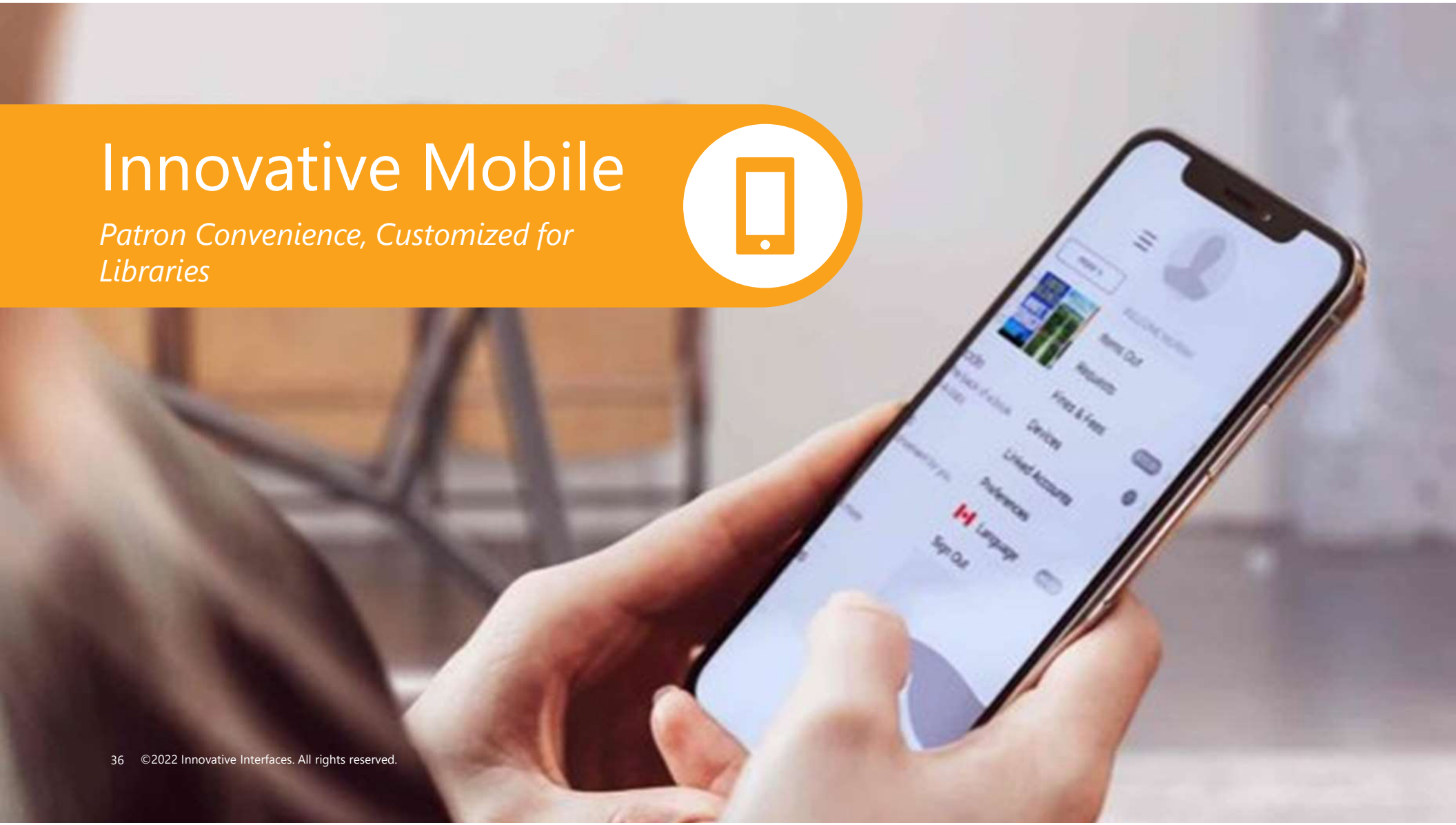
Innovative Mobile

Patron Convenience, Customized for Libraries



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Innovative Mobile

Patron Convenience, Customized for Libraries

Fast implementation

Easy customization

Powerful patron services

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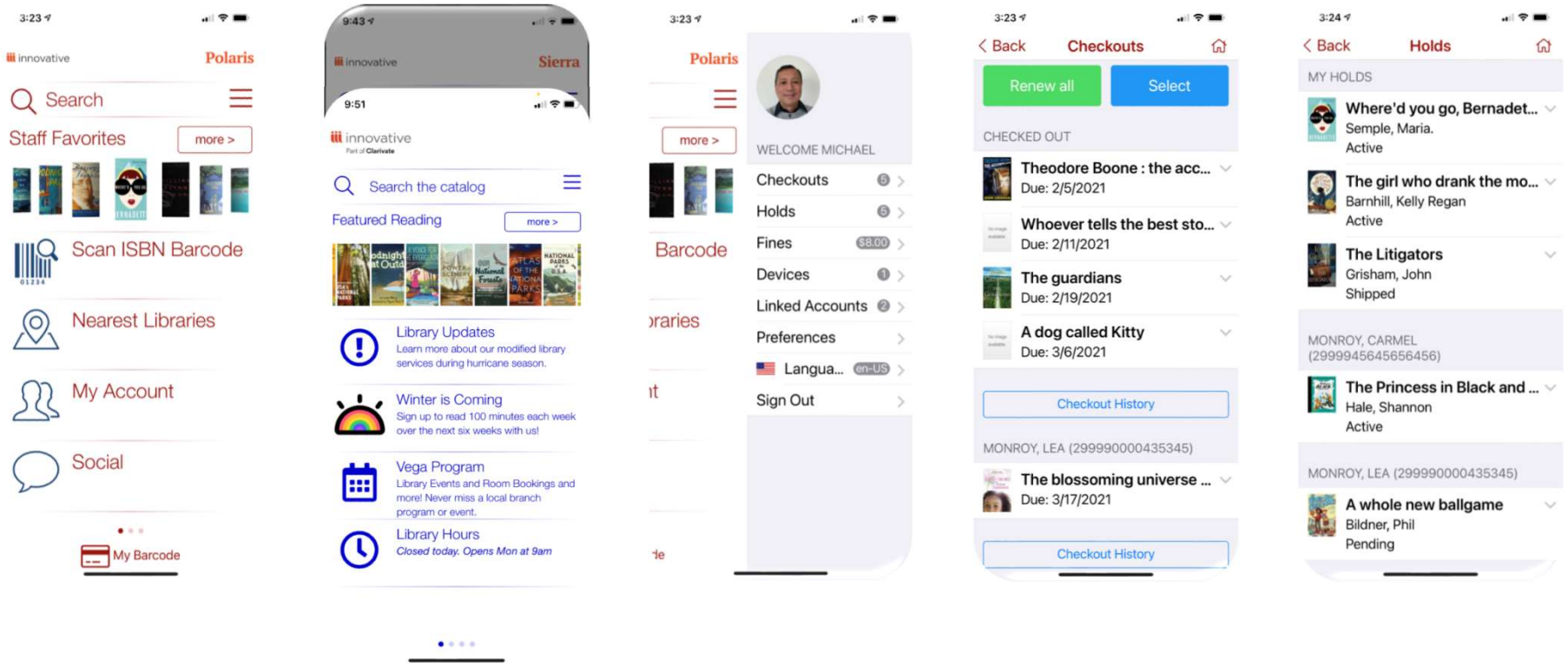
Innovative Mobile – Linked Patron Accounts and more!



Innovative Mobile

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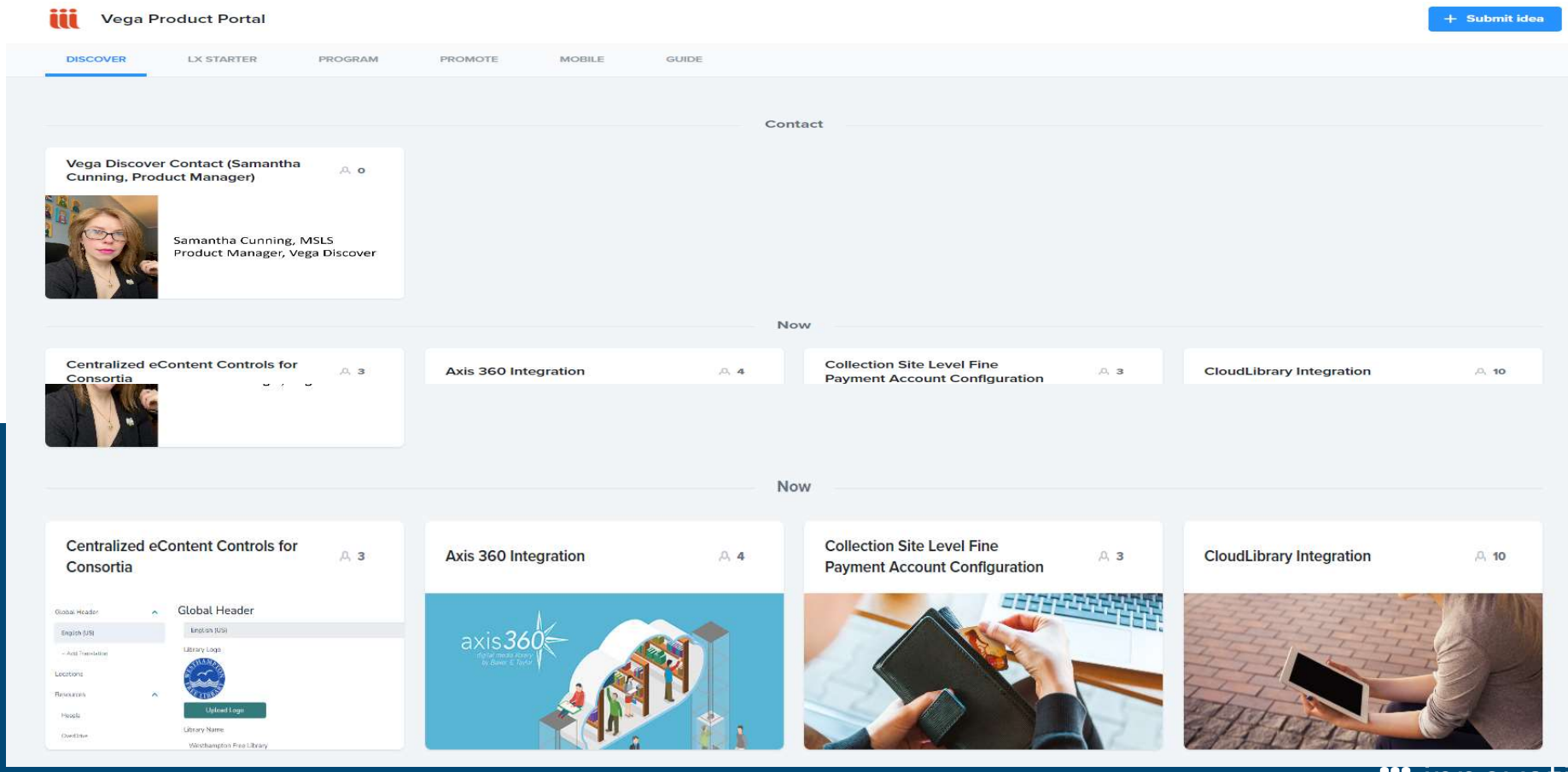
Vega Suite Roadmaps - www.iii.com/products



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Vega Program

A Captivating Event Experience, from beginning to end

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Vega Program

A captivating event experience, from beginning to end

Empower users and patrons with self-service

Entrust staff with advanced settings

Elevate programming with easy automations

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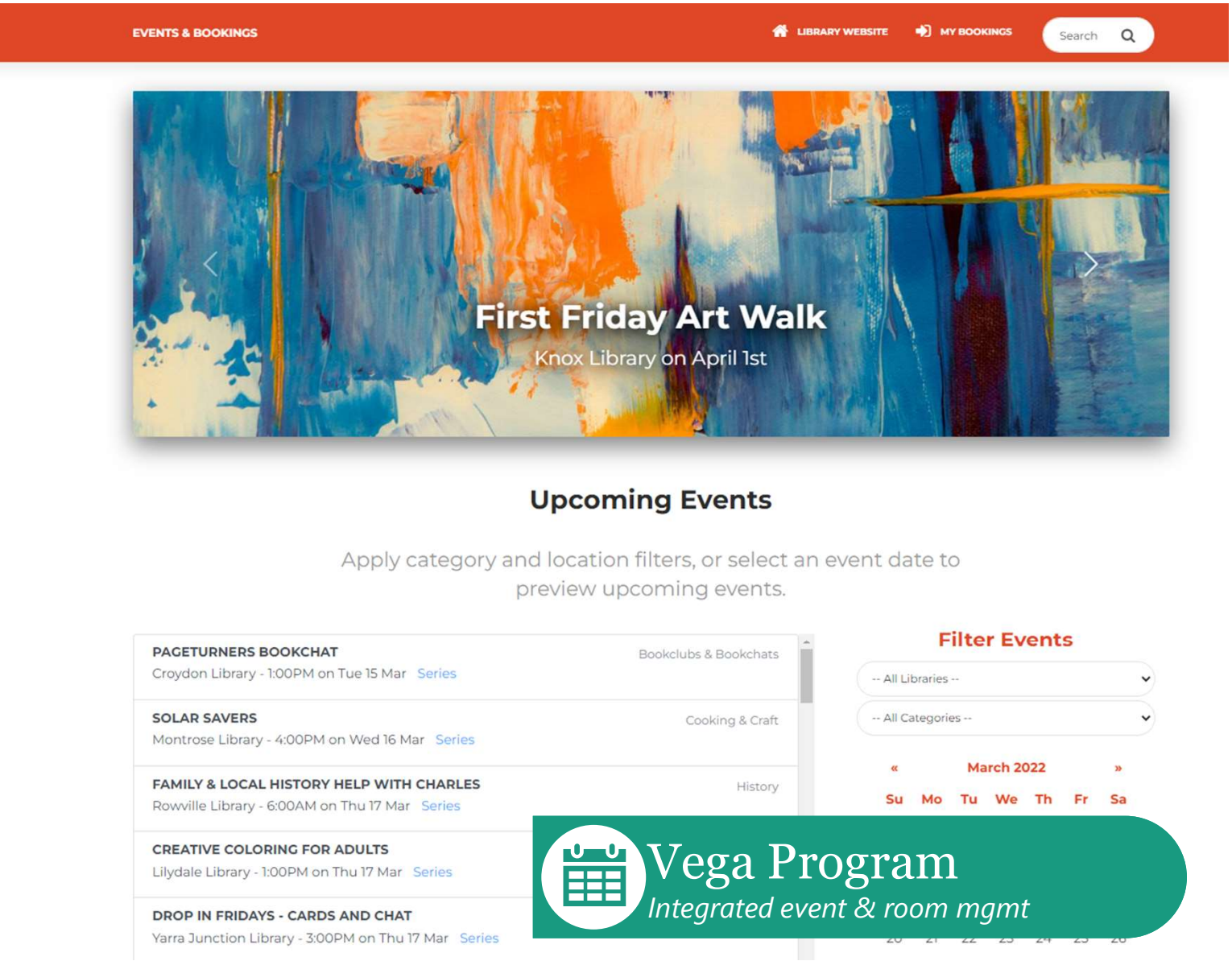
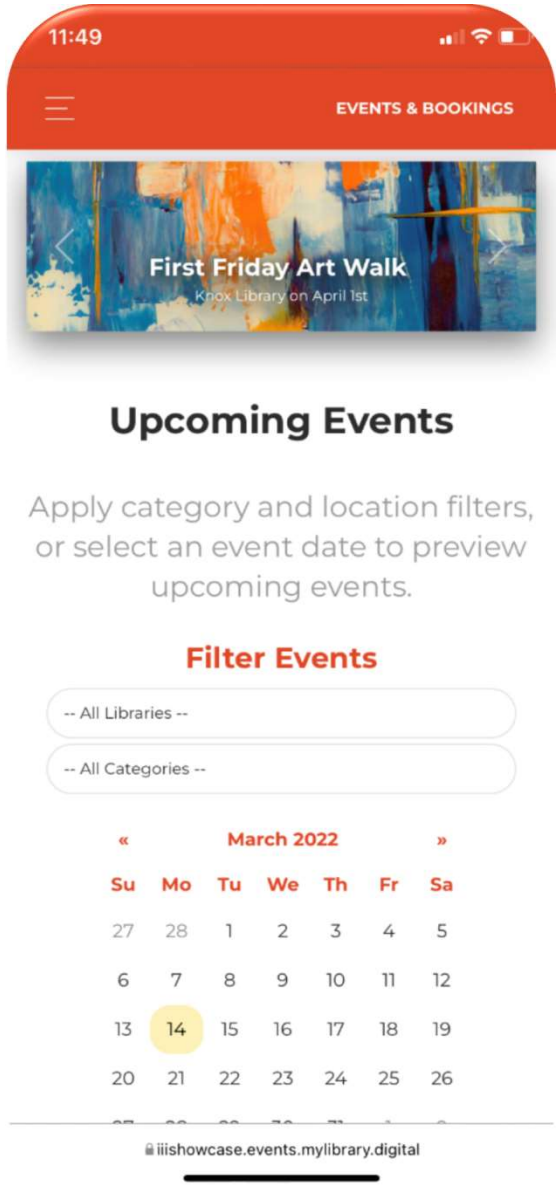
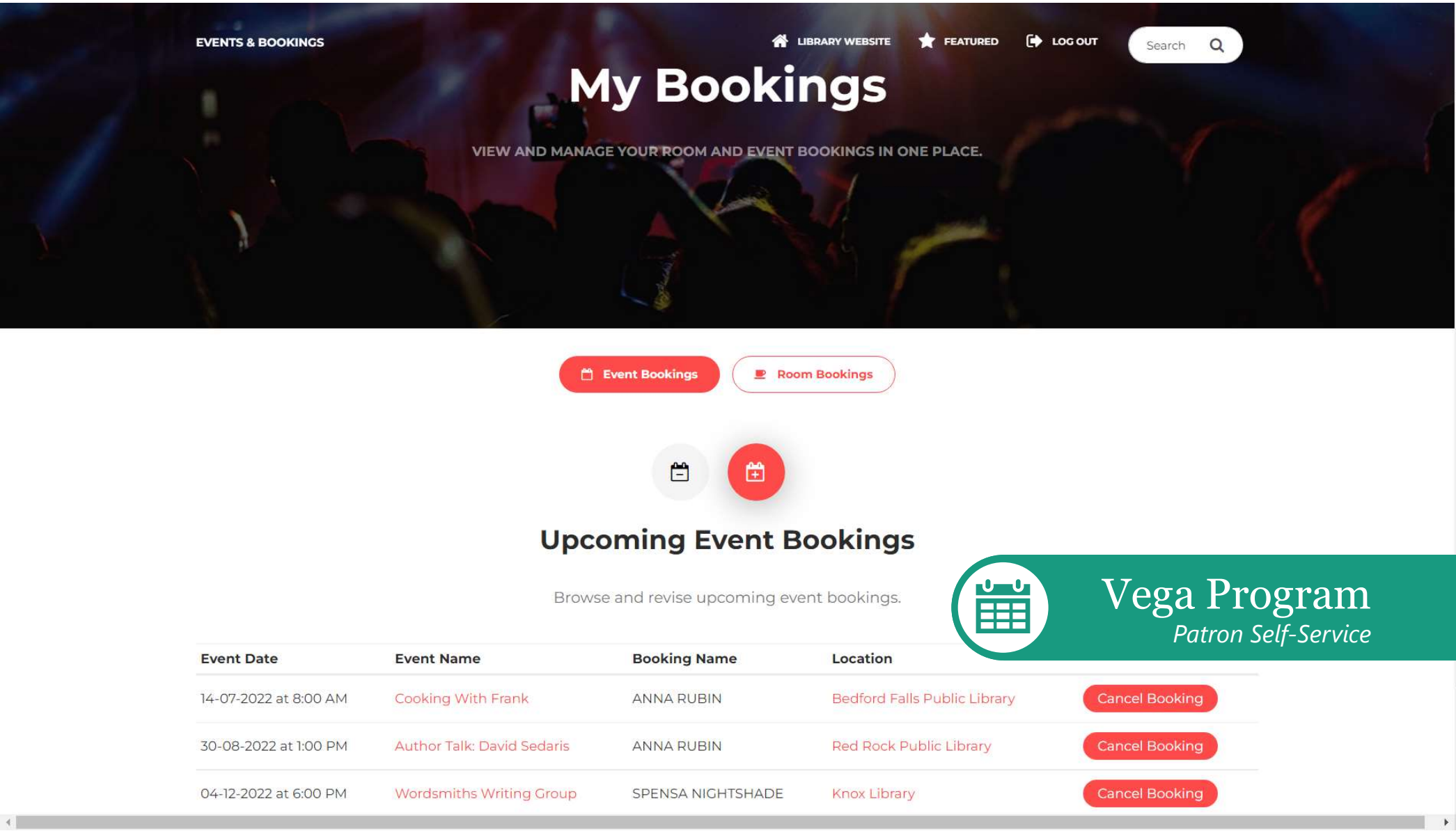




Vega Program

Integrated event & room mgmt


EVENTS & BOOKINGS
LIBRARY WEBSITE
FEATURED
LOG OUT
Search
My Bookings
VIEW AND MANAGE YOUR ROOM AND EVENT BOOKINGS IN ONE PLACE.
Event Bookings
Room Bookings
Upcoming Event Bookings
Browse and revise upcoming event bookings.
Vega Program
Patron Self-Service
Event Date
Event Name
Booking Name
Location
14-07-2022 at 8:00 AM
Cooking With Frank
ANNA RUBIN
Bedford Falls Public Library
Cancel Booking
30-08-2022 at 1:00 PM
Author Talk: David Sedaris
ANNA RUBIN
Red Rock Public Library
Cancel Booking
04-12-2022 at 6:00 PM
Wordsmiths Writing Group
SPENSA NIGHTSHADE
Knox Library
Cancel Booking

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MAKE EVENT BOOKINGS
Book your place using our website.
iilshowcase.events.mylibrary.digital

GET IN TOUCH
You can also speak to us on the phone.
1300737277

151 LIBRARY EVENTS

Date Range
01-03-2022 - 31-08-2022

Locations
All Locations

Categories
All Categories

Tue March 1, 2022

Pageturners Bookchat
Croydon Library
:00pm - 3:00pm
Read something amazing and just need to share it? Join us for an informal discussion about books that you've recently read.
Bookclubs & Bookch · All Ages · Free

Creative Coloring For Adults
Lilydale Library
1:00pm - 2:00pm
Join us for inspirational ideas to channel your inner coloring genius.Relax and unwind with our creative colouring group for adults.BYO mate...
BOOKINGS REQUIRED
Cooking & Craft · All Ages · Free

Fri March 4, 2022

Mario Maker For Kids!
Online Event
5:00pm - 7:00pm
Create a level in Mario Maker with others and then compete with them in this curated online session.
BOOKINGS REQUIRED
Kids · Ages 7-15 · Free

Wed March 2, 2022

Solar Savers
Montrose Library
:00pm - 5:00pm
The Solar Savers program helps you reduce your energy bills and future-proof your household against increasing energy costs whilst also redu...
BOOKINGS REQUIRED
Cooking & Craft · All Ages · Free

Drop In Fridays - Cards And Chat
Yarra Junction Library
3:00pm - 5:00pm
Come along to Yarra Junction Library to play cards or feel free to just have some coffee. Everyone is welcome!
BOOKINGS REQUIRED
Fun & Friendship · All Ages · Free

Sun March 6, 2022

Family & Local History Help With Charles
Rowville Library
11:00pm - 1:00am
Make an appointment with our specialised staff & receive help with local or family history research, newspaper articles, library databases a...
BOOKINGS REQUIRED
History · All Ages · Free

Thu March 3, 2022

Family & Local History Help With Charles
Rowville Library

Family & Local History Help With Charles
Rowville Library
11:00pm - 1:00am

Mon March 7, 2022

something
with our resident
eLearner!We can assist you with:- ...
BOOKINGS REQUIRED
Technology · All Ages · Free

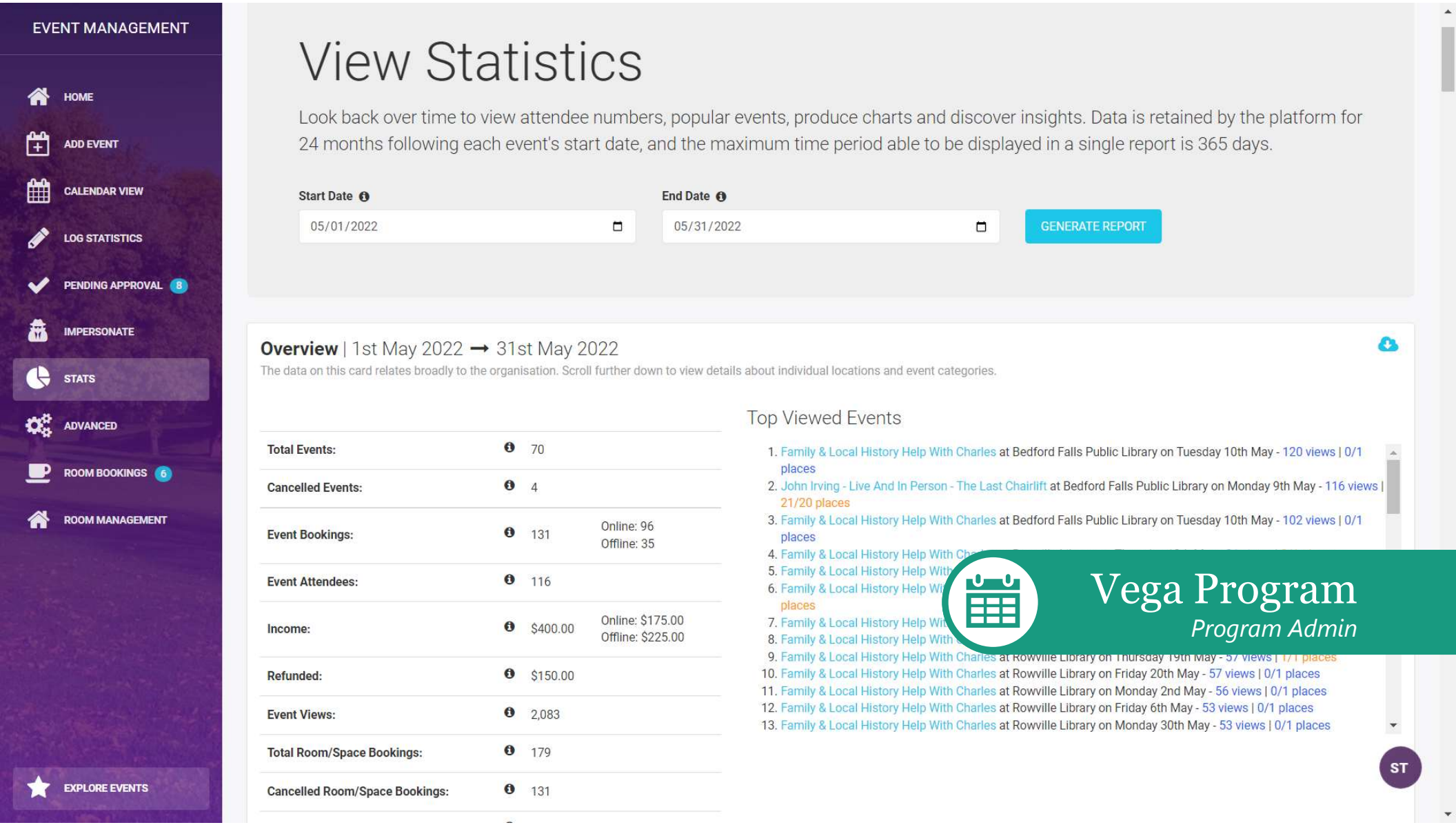
Vega Program

Images & automated materials

Pexels

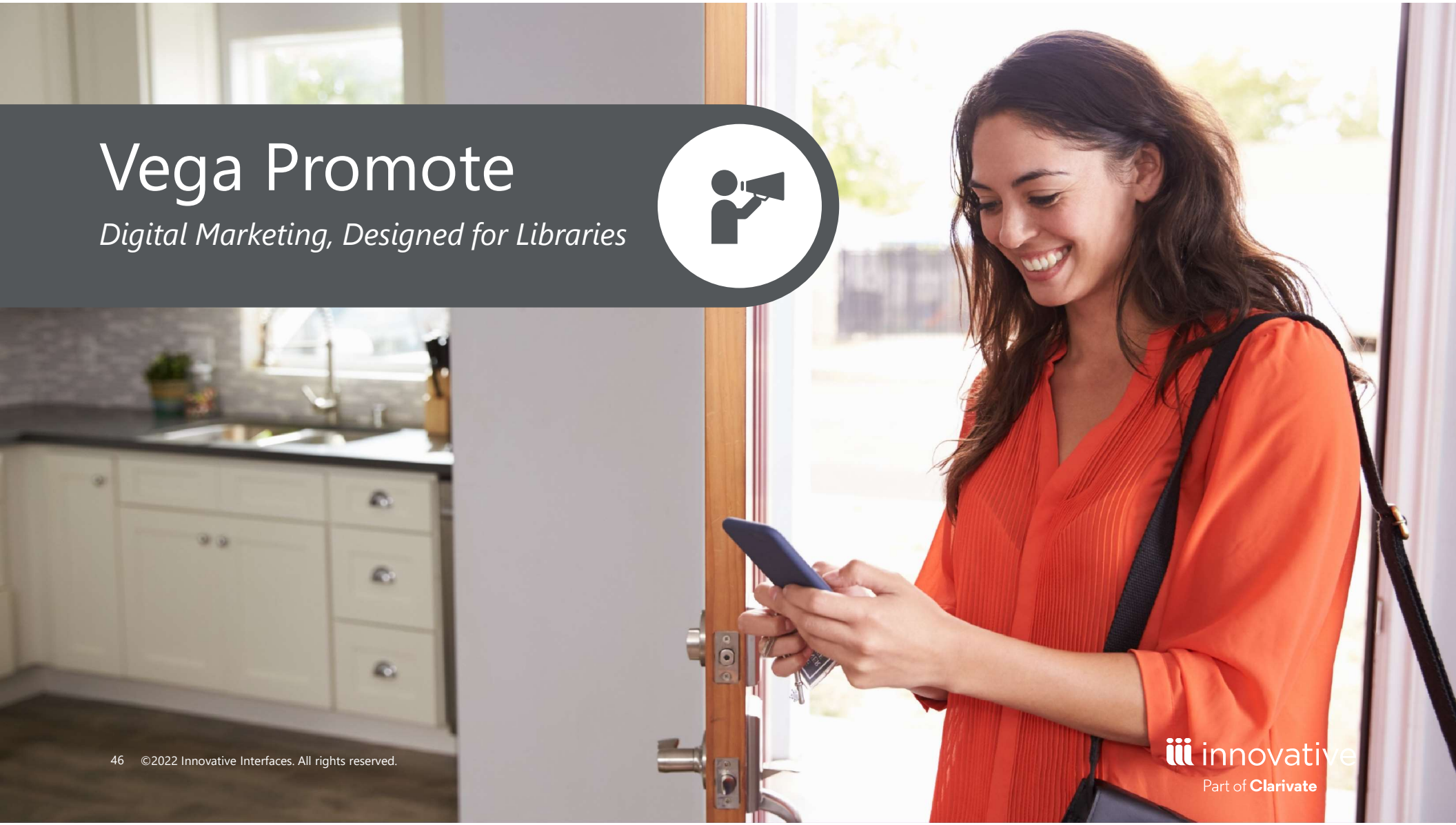
library

Photos 3.8K Videos 1.3K Users 54


EVENT MANAGEMENT
HOME
ADD EVENT
CALENDAR VIEW
LOG STATISTICS
PENDING APPROVAL 8
IMPERSONATE
STATS
ADVANCED
ROOM BOOKINGS 6
ROOM MANAGEMENT
EXPLORE EVENTS
View Statistics
Look back over time to view attendee numbers, popular events, produce charts and discover insights. Data is retained by the platform for 24 months following each event's start date, and the maximum time period able to be displayed in a single report is 365 days.
Start Date
05/01/2022
End Date
05/31/2022
GENERATE REPORT
Overview | 1st May 2022 → 31st May 2022
The data on this card relates broadly to the organisation. Scroll further down to view details about individual locations and event categories.
Total Events: 70
Cancelled Events: 4
Event Bookings: 131 Online: 96 Offline: 35
Event Attendees: 116
Income: $400.00 Online: $175.00 Offline: $225.00
Refunded: $150.00
Event Views: 2,083
Total Room/Space Bookings: 179
Cancelled Room/Space Bookings: 131
Top Viewed Events
1. Family & Local History Help With Charles at Bedford Falls Public Library on Tuesday 10th May - 120 views | 0/1 places
2. John Irving - Live And In Person - The Last Chairlift at Bedford Falls Public Library on Monday 9th May - 116 views | 21/20 places
3. Family & Local History Help With Charles at Bedford Falls Public Library on Tuesday 10th May - 102 views | 0/1 places
10. Family & Local History Help With Charles at Rowville Library on Friday 20th May - 57 views | 0/1 places
11. Family & Local History Help With Charles at Rowville Library on Monday 2nd May - 56 views | 0/1 places
12. Family & Local History Help With Charles at Rowville Library on Friday 6th May - 53 views | 0/1 places
13. Family & Local History Help With Charles at Rowville Library on Monday 30th May - 53 views | 0/1 places
ST
Vega Program
Program Admin

Vega Promote

Digital Marketing, Designed for Libraries



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Vega Promote

Digital Marketing, Designed for Libraries

Streamline with ILS & Vega LX integrations

Reach targeted segments with relevant content

Launch quickly with templates & images

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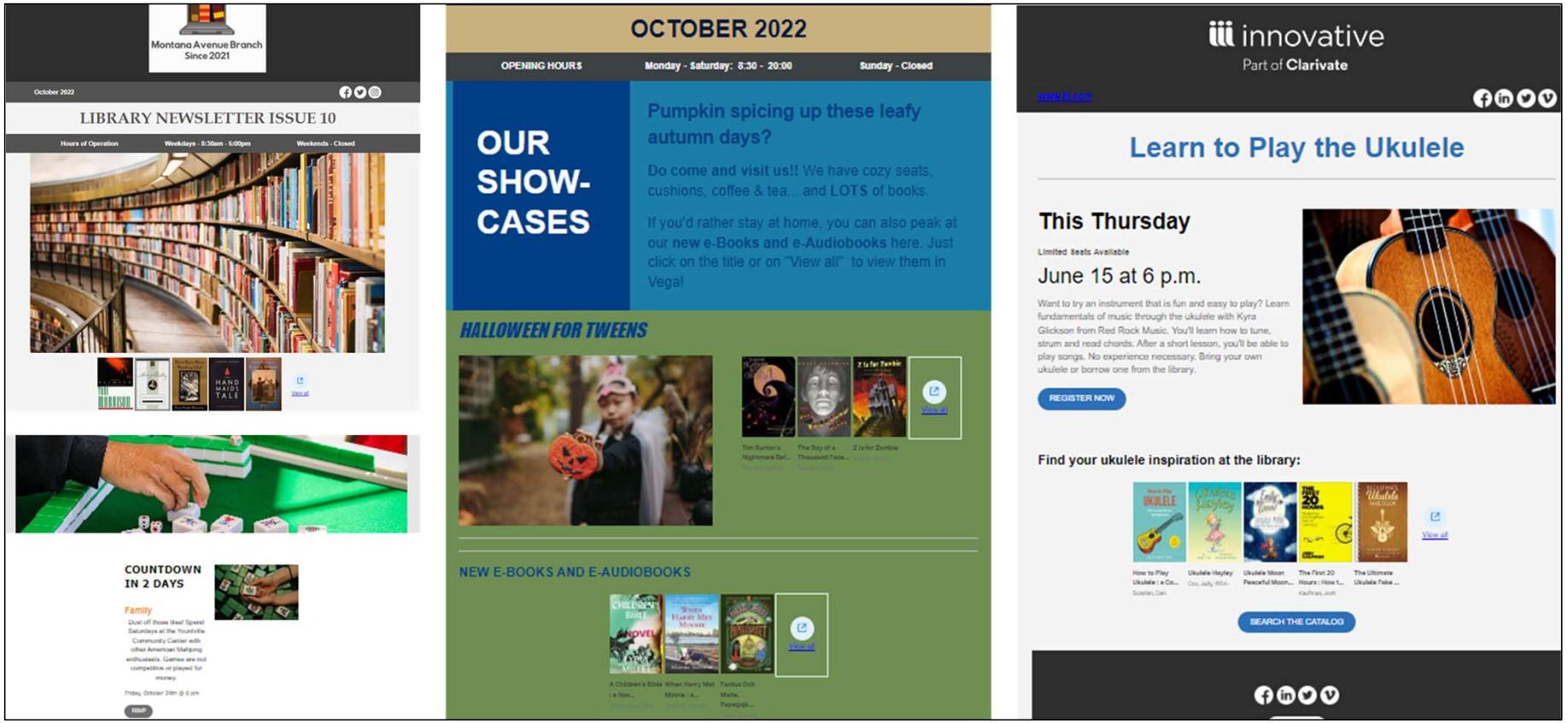
Library Email Marketing with Vega Promote



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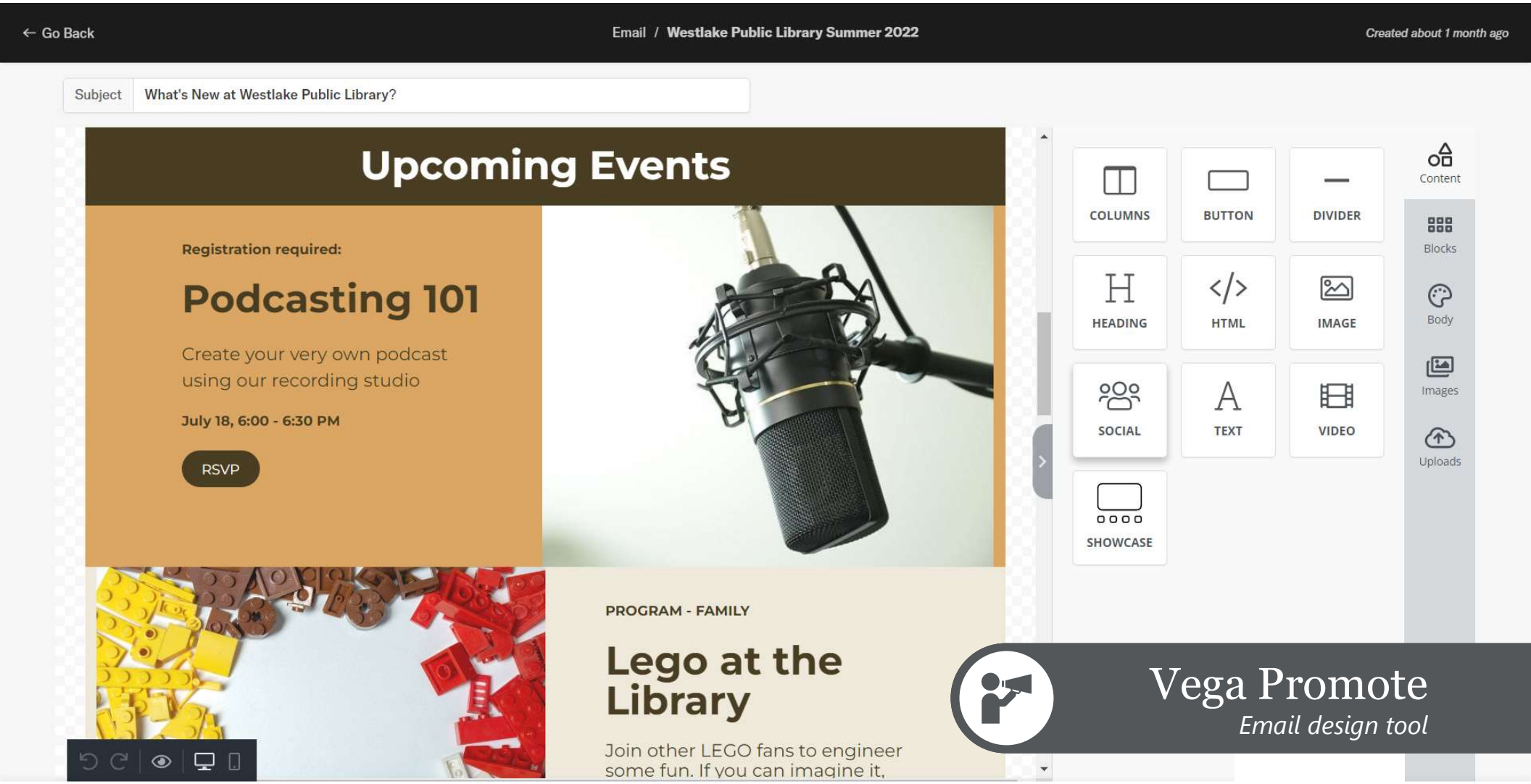

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Audience | Marketing

Lauren

Email Templates

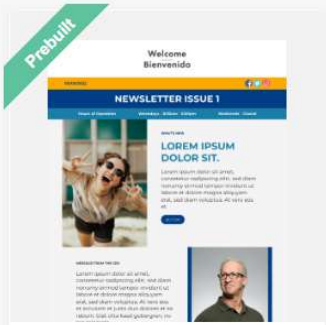
View Design Blocks

All | Custom | **Prebuilt**

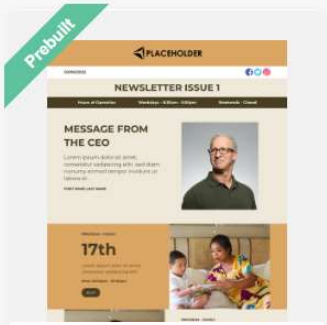
Search

Sort - **Last Edited**

Newsletter 3
Duplicate to edit

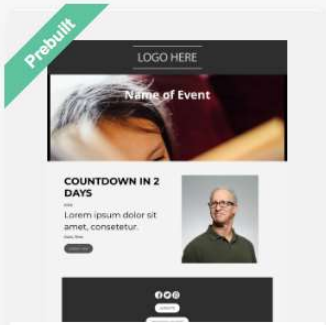


Newsletter 2
Duplicate to edit

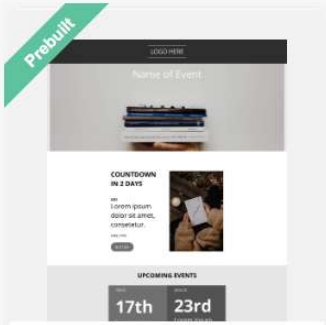


Newsletter 1
Duplicate to edit

General Announcements
Duplicate to edit



Single Event
Duplicate to edit

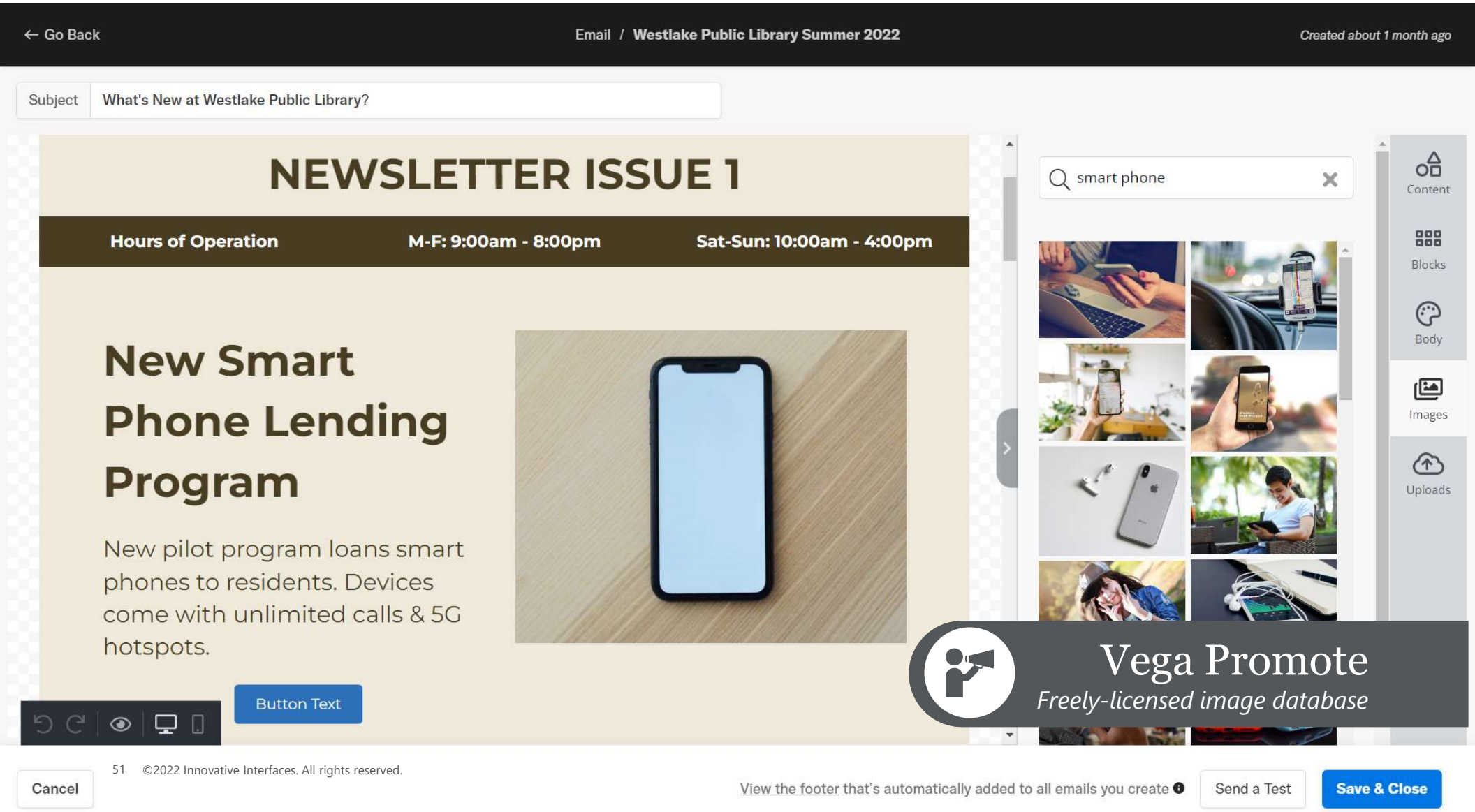


Events 2

Fundraiser

Events Template

Vega Promote
Prebuilt & custom templates



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Audience | Marketing

Lauren

Audience

View Import History | Import CSV of People

People 0
Both cardholders & noncardholders

Segments 31
Lists of people who share certain criteria

Search

Add Segment +

SEGMENT NAME	PEOPLE	CAMPAIGNS	DATE CREATED	
Lost Architecture of Syracuse	136	0	May 27, 2022, 2:09 pm	
Author Drop By	1	2	May 25, 2022, 1:59 pm	
Author Talk Event Fans	4	1	May 17, 2022, 7:21 pm	New Campaign
Library Staff	3	1	May 16, 2022, 2:33 pm	
Discover Your Best Life	2	2	May 16, 2022, 12:09 pm	
Discover Your Best Life	136	0	May 16, 2022, 12:05 pm	
Library News	38	5	May 3, 2022, 7:33 pm	
Vega Public Library News	3	0		
Shakespeare events	4	1		
Comic Con 2021 Sign Ups	3	2		

1 2 3 4 Viewing 1 - 10 of 31

Show 10 per Page

Vega Promote
Contact list segmentation

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Vega LX Library Experience Management

Unified Library Solutions in One Product Ecosystem

The Vega LX Platform At a Glance

- Integrates seamlessly with your ILS
- Deepens community engagement
- Ensures patron privacy

DISCOVER	A user-friendly, discovery experience with modern features
INTERACT	Two-way messaging via SMS, or chatbot, or digital assistants
PROMOTE	Digital marketing, website building, & fundraising tools
PROGRAM	Integrates, manages and creates library events & room reservations
ANALYZE	Uses key data to quantify your library's ROI

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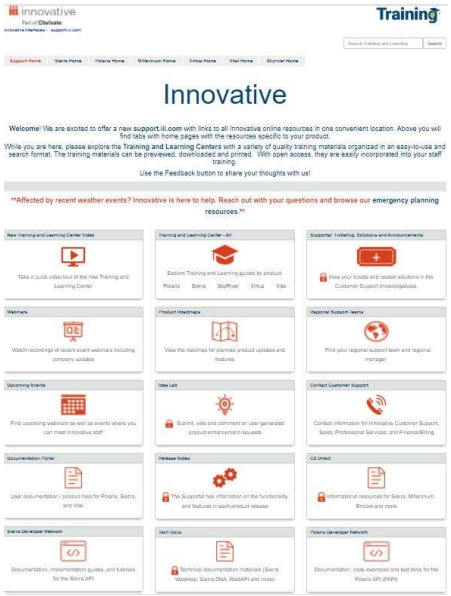
Additional Resources

Training



CUSTOMER RELATIONSHIP CENTER (CRC)

510-619-3566
sales@iii.com

SERVICES

SMALLER PRODUCTS

TRAINING

Post new ideas for enhancements to our ILS products in the Always Open Space.

www.iii.com/community/the-idea-lab/

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UPCOMING **WEBINARS**

Innovative Mobile	Nov 16th
Level Up Your Library's Marketing and Communications	Nov 16th

III.COM/EVENTS/

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Phased Implementation

The availability of LX Starter will be implemented for customers in waves

Wave 1

- Select Development Partners to provide feedback and refine our processes before GA
- Low-Medium volume
- Will run from July through September 2022

Wave 2

- Available to libraries that schedule a release upgrade to Sierra 5.5 or Polaris 7.3
- Low-Medium volume
- English-only notifications*
- Starting in November 2022

Wave 3

- Focus on performance scaling for our largest libraries and consortia
- High volume notices
- Require multi-language notifications
- Starting in 1H 2023
- Libraries will need to schedule a Sierra / Polaris release upgrade

Wave 4

- Libraries that want to go at their own pace and wait for later releases
- Libraries that may require more planning for upgrades or training

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How can my library get Phase 1 of LX Starter?

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LX Starter: 2 Delivery Phases

Phase 1

- Patron Notices via Email
- Email Design Tool

Phase 2

- Registration & Welcome Journey
- Email Templates
- Automated Renewal Journey
- Syndetics Cover Art
- Anniversary Journey
- Engagement Metrics

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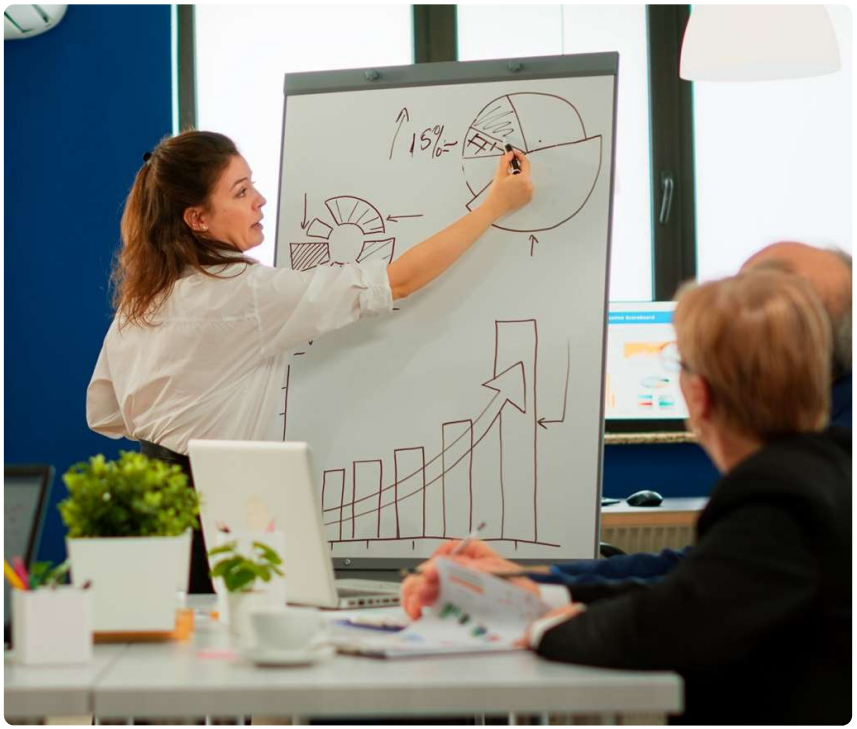
What do you need to do?

- Start to plan and prepare for an upgrade to Sierra 5.5 or Polaris 7.3
- Review follow-up communications to best understand the features, associated training or other preparation steps



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Contact your Account Manager to set up time to discuss your strategic goals and learn more about Vega LX!

Are you satisfied with your current

- Catalog user experience?
- Events calendaring?
- Room bookings & reservations?
- Library emails and newsletters?

Opt-in to our **Vega Insider email newsletter** hear all the latest Vega LX news and announcements in real time!

https://go.iii.com/subscription-center.html

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Thank You!

IUG EaST A Regional Group of Innovative Users Group

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