



Visualizing ILS Data with Kibana

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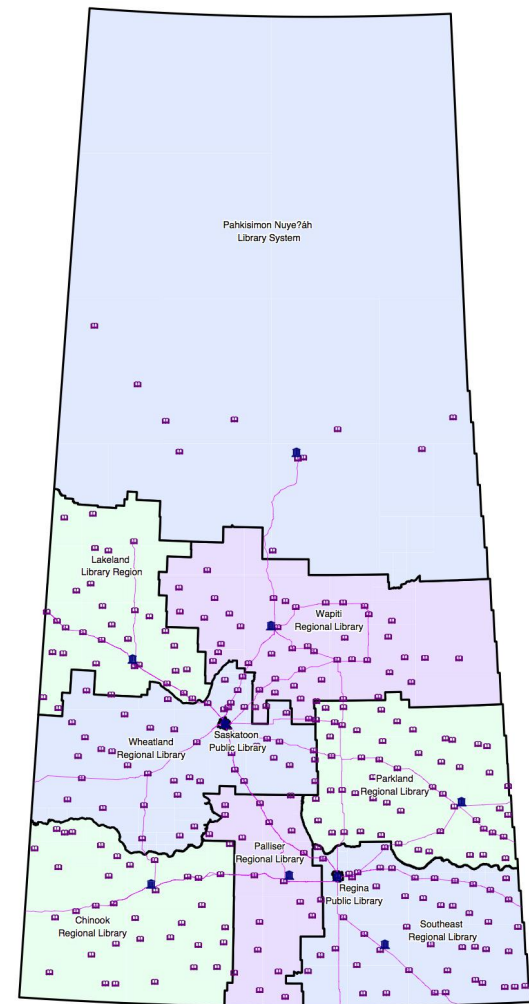


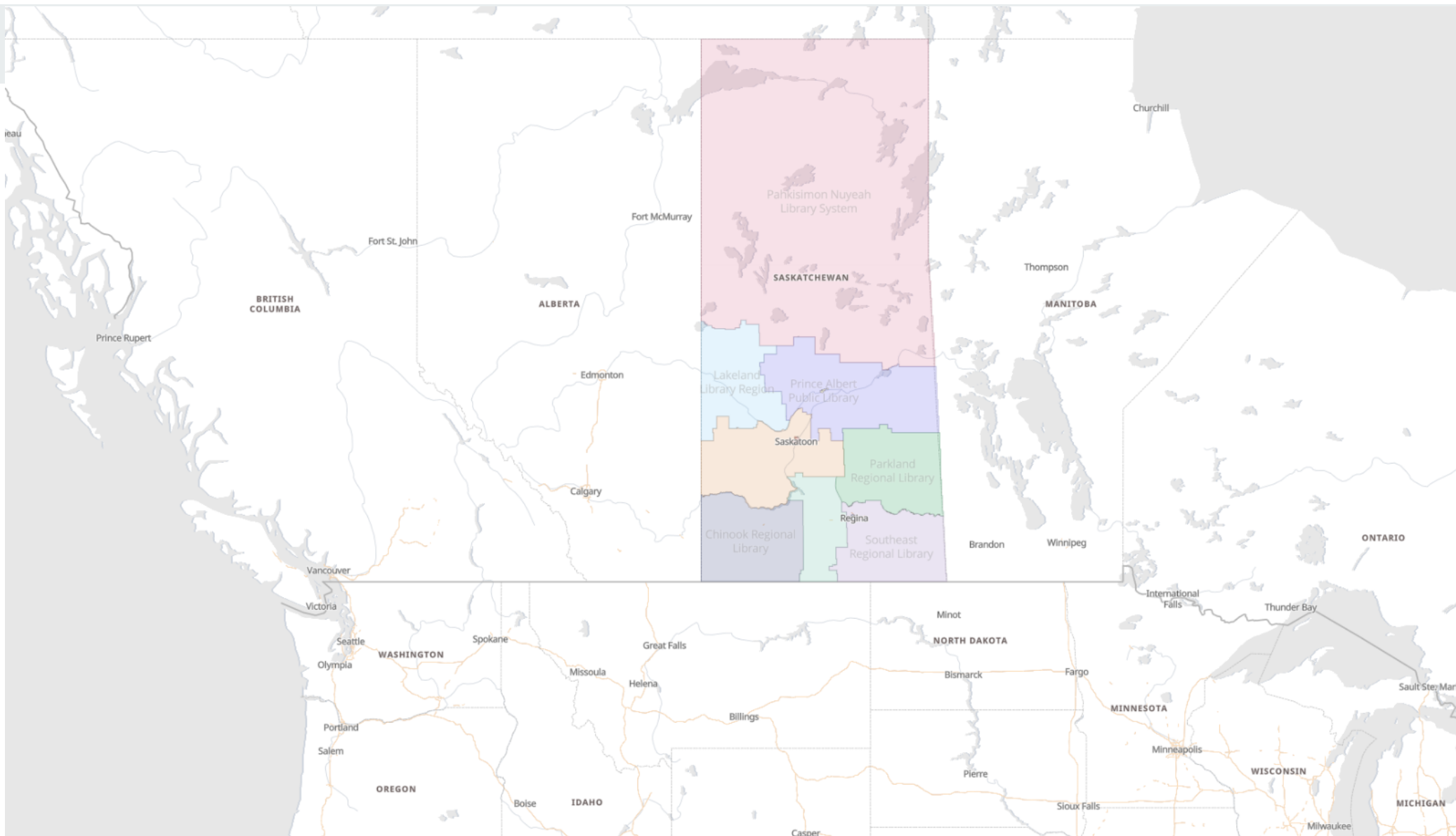
Topics

- What is Kibana?
- Why SILS selected Kibana
- Linking Polaris and Elastic
- Creating Visualizations and Dashboards
- Top 5 ILS data dashboards
- Top 3 IT related dashboards
- Elastic for Cybersecurity
- Conclusion: Benefits, Challenges, Cost
- Questions

About SILS

- One Province, One Library Card
- 7 regional library system
- 3 urban public libraries
- 1 northern library system
- 1 provincial library
- 306 branches
- 6.5 million physical circ (2024)
- 2 million e-book/e-audio circ (2024)







What is Kibana?

- A tool for searching and visualizing data stored in Elasticsearch
- It's a web app, like Leap
- Using Kibana you can:
 - create individual visualizations
 - group multiple visualizations together on one page (a dashboard)
 - easily share or embed visualizations and dashboards



Kibana, in context!

Kibana is part of an *open source distributed* toolset developed by a company called **Elastic**.

Kibana works alongside two other open source tools - Logstash and Elasticsearch.

Combined, these are commonly known as ELK Stack or Elastic Stack.

1 - **Logstash**: a data broker

- it gathers data from **sources** and sends data to **destinations**
- collect, parse, ship/load data from sources

2 - **Elasticsearch**: database for storing and searching; it's a search engine.

3 - **Kibana**: the visual 'front-end'

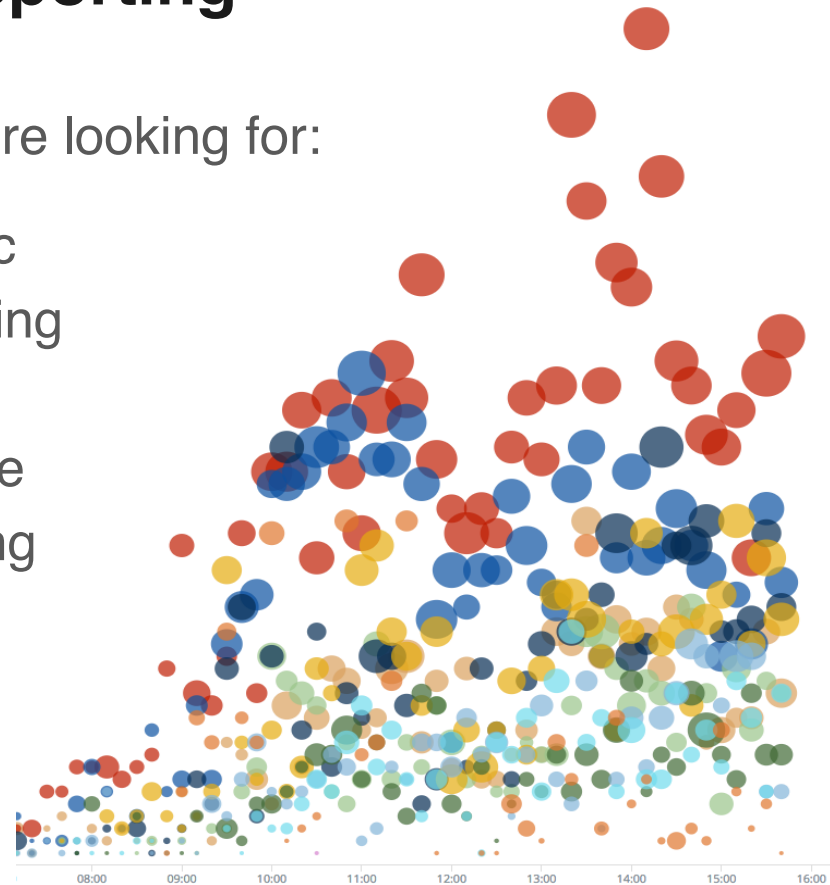
Why we chose to pursue visual reporting

Traditional ILS reporting
is useful! But, it is...

- static
- number-heavy
- a little bit boring

What we were looking for:

- dynamic
- interesting
- visual
- real-time
- engaging





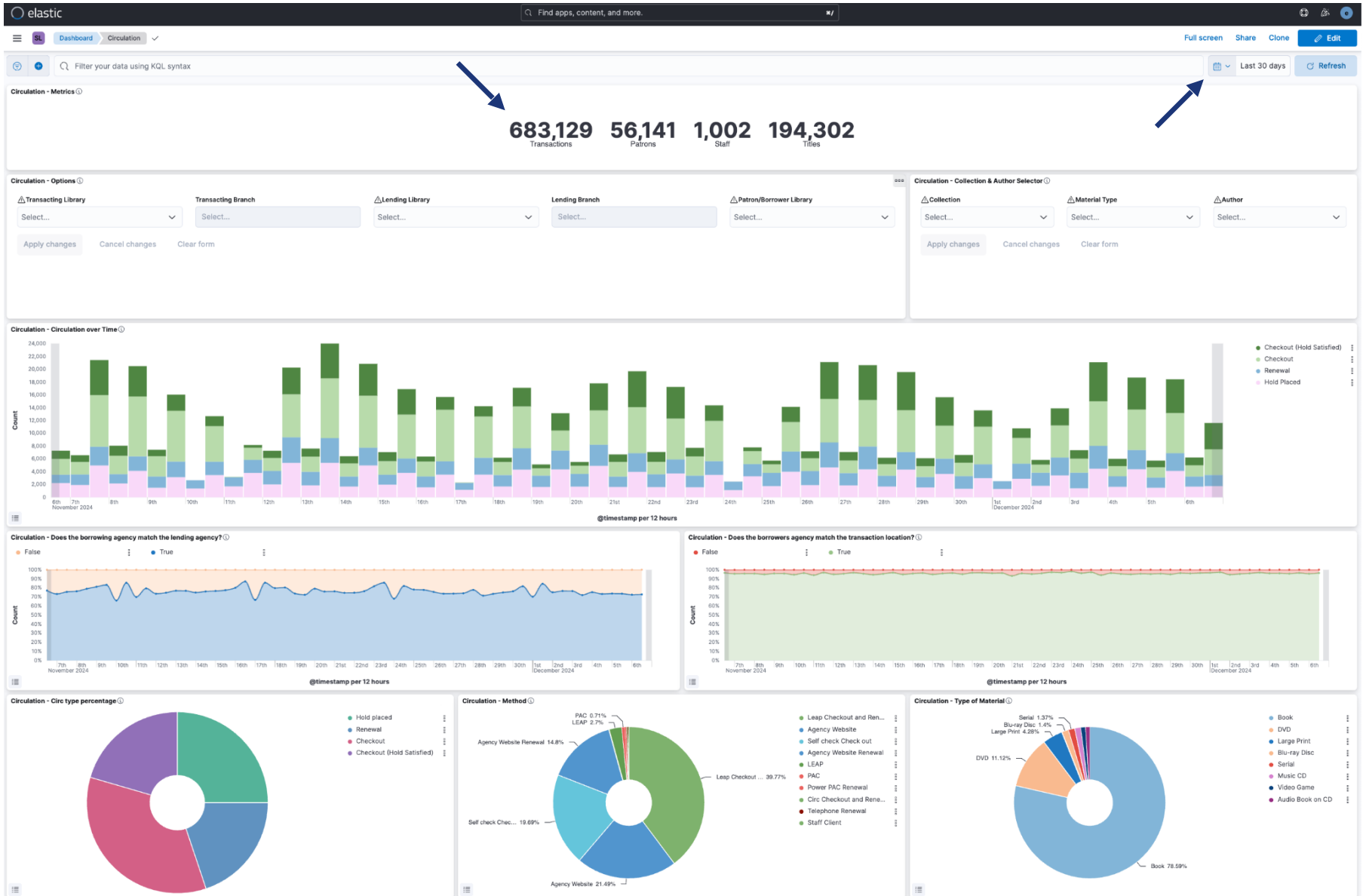
Why we selected Kibana

- originally, because we could install it for free
- low barrier to entry (other than skills)
- kibana is a very nice tool - this alone was reason enough
- full text search
- Elastic is used by all sorts of industry, for all sorts of interesting tasks (Airbnb, Yelp, NYT, Uber, Walmart, etc.). So we're in good company!



A few alternatives

- Tableau
- Google Data Studio
- Amazon Quicksight
- Power BI
- and more!



Linking Polaris and Elastic

Getting data from Polaris into Kibana

Choosing which data to send



Getting data from Polaris into Kibana

Logstash asks the Polaris database for data we specify and then “stashes” it in Elasticsearch:

- 1 - Extract: kicks off a SQL query to retrieve data from Polaris
- 2 - Transform: formats it for export
- 3 - Load: sends it to Elasticsearch

Extract Frequency: depends on the type of data and how we consume it

- circulation data: 1 minute interval
- notification data: 60 minute interval



What data do we visualize?

The same ILS data used to generate most of the reports we are already using.

This includes transactions that are written to the PolarisTransactions database (checkouts, renewals, holds placed, etc.)

And all of the data we can gather relating to a 'transaction' at the moment it occurred, including:

- when + where the transaction occurred
- details about who made the transaction (patron anonymized)
- details about the material that was transacted



What data do we NOT visualize?

Patron data (exception: postal code)

- patron ID is hashed when ingested into Elasticsearch

Creating Dashboards

Step 1 - Discover

Step 2 - Visualize

Step 3 - Dashboard (combine visualizations into dashboards)

Creating Dashboards: Step 1, Discover

This is an expanded view of a ‘document’.

For SILS, each document in Elasticsearch is a record of a single Polaris transaction.

A document is a collection of fields and values.

All documents can be searched in their entirety, or by field.

Expanded document

View: [Single document](#) [Surrounding documents](#)

< 1 of 500 >

Table JSON

Search field names

Actions	Field	Value
	_id	1185868218
	_index	sil_s_lib_circulation-100008
	_score	-
	@timestamp	Dec 6, 2024 @ 15:57:59.847
	@version	1
	bibid	3,299,021
	callnumber	DVD SIL
	circ_type	hold
	circulation	true
	collection	DVD Fiction
	fingerprint	3df4cb93d5399dae94f8a6af5123df9464ddf943
	firstavailabledate	Feb 20, 2024 @ 14:01:41.267
	holdid	16,221,397
	itemassignedagency	Parkland Regional Library
	itemassignedagency_latlon	POINT (-103.276551 51.481022)
	itemassignedbranch	Parkland - Yorkton Public Library
	itemassignedbranch_latlon	POINT (-102.469179 51.210798)
	itemid	9,631,514
	location	POINT (-106.79583 52.925512)
	materialtype	DVD - 14A
	medium	DVD
	method	Leap Checkout and Renewal
	organizationid	265
	patron_home_matches_item_owner	false
	patron_home_matches_transaction_agency	true

Rows per page: 25

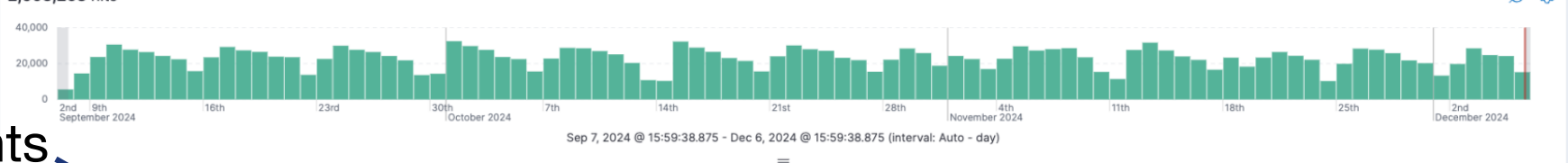
< 1 2 >

Refresh

index

44

docume



- t circ_type
- t circulation
- t hold_placed
- # holdid
- # itemid
- t patronagency
- # transactionid
- D _id
- D _index
- # _score
- k @version
- t author
- t callnumber
- t collection
- t fingerprint
- firstavailabledate
- t itemassignedagency
- D itemassignedagency_lation
- t itemassignedbranch
- D itemassignedbranch_lation
- D location
- t materialtype
- t medium
- t method

Documents		Field statistics	BETA
1 field sorted			
	↓ @timestamp	Document	
✓	Dec 6, 2024 @ 15:57:59.847	@timestamp Dec 6, 2024 @ 15:57:59.847 @version 1 bibid 3,299,021 callnumber DVD SIL circ_type hold circulation true collection DVD Fiction fingerprint 3df4cb93d5399dae94f08a6af5123df9464ddf943 firstavailabledate Feb 20, 2024 @ 14:01:41.267 holdid 16,221,397 itemassignedagency Parkland Regional Library itemassignedagency_latlon POINT (-103.276551 51.481022) itemassignedbranch Parkland - Yorkton Public Library itemassignedbranch_latlon POINT (-102.469179 51.210798) itemid 9,631,514 location...	
✓	Dec 6, 2024 @ 15:57:59.780	@timestamp Dec 6, 2024 @ 15:57:59.780 @version 1 author Modesitt, L. E., Jr., 1943- author. bibid 59,364 callnumber APB SF MOD REC 5 circ_type hold circulation true collection Paperback Fantasy fingerprint 2d76c4a06bb43e5adf083bd54fb5b64a5a9de6a firstavailabledate Jun 21, 2019 @ 00:00:00.000 holdid 16,186,762 itemassignedagency Lakeland Library Region itemassignedagency_latlon POINT (-109.077422 53.577203) itemassignedbranch Lakeland - Lloydminster Public Library itemassignedbranch_latlon POINT (-110.007349 53.282625) itemid 8,907,644 location...	
✓	Dec 6, 2024 @ 15:57:55.187	@timestamp Dec 6, 2024 @ 15:57:55.187 @version 1 author Rinker, Sherri Duskey, author. bibid 2,774,561 callnumber E RIN circ_type hold circulation true collection Juvenile Picture Book fingerprint a3e593371fb9b8d446e402e7165fab43f4793cfb firstavailabledate Mar 10, 2021 @ 15:02:56.587 holdid 16,240,306 itemassignedagency Wapiti Regional Library itemassignedagency_latlon POINT (-104.252721 53.317313) itemassignedbranch Wapiti - Humboldt - Reid-Thompson Public Library itemassignedbranch_latlon POINT (-105.123137 52.200854) itemid 8,532,503 location...	
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✓	Dec 6, 2024 @ 15:57:48.733	@timestamp Dec 6, 2024 @ 15:57:48.733 @version 1 bibid 3,334,423 callnumber J DVD INSI circ_type hold circulation true collection Juvenile DVD Fiction fingerprint 220b18e1dcf4aad2c9a8408344bc7de3fcd5fe7 firstavailabledate Sep 24, 2024 @ 15:21:38.040 holdid 15,909,527 itemassignedagency Saskatoon Public Library itemassignedagency_latlon POINT (-106.641666 52.143975) itemassignedbranch SPL - Round Prairie Branch itemassignedbranch_latlon POINT (-106.620796 52.085449) itemid 9,812,276 location POINT (-106.337996 52.662537).	
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✓	Dec 6, 2024 @ 15:57:44.000	@timestamp Dec 6, 2024 @ 15:57:44.000 @version 1 author Reid, Taylor Jenkins, author. bibid 2,247,376 callnumber LP REID circ_type hold circulation true collection Large Print Fiction fingerprint ec791b5a02c8e249ec7e1b24429f7e684ef54bb6 firstavailabledate Apr 28, 2023 @ 15:26:03.399 holdid 16,260,895 itemassignedagency Saskatoon Public Library itemassignedagency_latlon POINT (-106.641666 52.143975) itemassignedbranch SPL - Cliff Wright Branch itemassignedbranch_latlon POINT (-106.585543 52.105332) itemid 9,326,134 location POINT (-106.626496 52.187866)...	
✓	Dec 6, 2024 @ 15:57:44.000	@timestamp Dec 6, 2024 @ 15:57:44.000 @version 1 author Roberts, Nora. bibid 1,651,955 callnumber ROB circ_type hold circulation true collection Fiction fingerprint 010a75e93fb8caadbffdd79c5972f4a4fee3db24 firstavailabledate Oct 19, 2009 @ 00:00:00.000 holdid 16,147,063 itemassignedagency Wapiti Regional Library itemassignedagency_latlon POINT (-104.252721 53.317313) itemassignedbranch Wapiti - Star City Public Library itemassignedbranch_latlon POINT (-104.332835 52.060156) itemid 830,517 location...	
✓	Dec 6, 2024 @ 15:57:44.000	@timestamp Dec 6, 2024 @ 15:57:44.000 @version 1 author Hannah, Kristin, author. bibid 1,061,948 callnumber F HANN circ_type hold circulation true collection Fiction fingerprint	

Creating Dashboards: Step 2, Visualize

Choose the visualization that will best illustrate your data.

Kibana has lots of great options that convey data clearly.

Create visualizations with care!

New visualization

[Select a different visualization](#)

Filter



Area

Emphasize the data between an axis and a line.



Data table

Display data in rows and columns.



Gauge

Show the status of a metric.



Goal

Track how a metric progresses to a goal.



Heat map

Display values as colors in a matrix.



Horizontal bar

Present data in horizontal bars on an axis.



Line

Display data as a series of points.



Metric

Show a calculation as a single number.



Pie

Compare data in proportion to a whole.



Tag cloud

Display word frequency with font size.



Timelion


Show time series data on a graph.



Vertical bar


Present data in vertical bars on an axis.

Welcome home




Enterprise Search

Create search experiences with a refined set of APIs and tools.



Security

Prevent, collect, detect, and respond to threats for unified protection across your infrastructure.



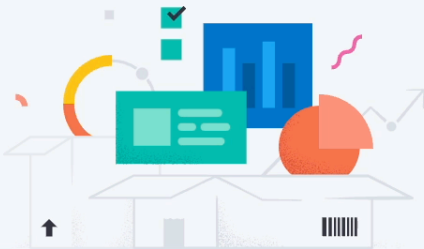
Analytics

Explore, visualize, and analyze your data using a powerful suite of analytical tools and applications.

Get started by adding integrations


To start working with your data, use one of our many ingest options. Collect data from an app or service, or upload a file. If you're not ready to use your own data, add a sample data set.

-  Add integrations
-  Try sample data
-  Upload a file




Management

[Stack Management](#)




Manage permissions

Control who has access and what tasks they can perform.



Back up and restore

Save snapshots to a backup repository, and restore to recover index and cluster state.



Manage index lifecycles

Define lifecycle policies to automatically perform operations as an index ages.



Creating Dashboards: Step 3, Dashboarding!

Combine multiple visualizations in a meaningful way that tells a story!

A few things to keep in mind:

- Set reasonable default timeframes for faster load times.
- Set consortia level default views.
- Start off with high-level information and get more specific at the end.

Top 5 ILS data dashboards

Circulation

Branch Activity

Holds

Overdrive

Maps

Dashboard 1: Circulation


main go-to dashboard

loaded with basic/general info

designed for use with any library / timeframe




Welcome home




Enterprise Search

Create search experiences with a refined set of APIs and tools.



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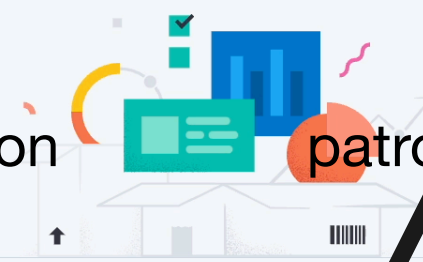
Analytics

Explore, visualize, and analyze your data using a powerful suite of analytical tools and applications.


Get started by adding integrations

To start working with your data, use one of our many ingest options. Collect data from an app or service, or upload a file. If you're not ready to use your own data, add sample data to get started.

[Add integrations](#) [Try sample data](#) [Upload a file](#)




Management




Manage permissions

Control who has access and what tasks they can perform.



Back up and restore

Save snapshots to a backup repository, and restore to recover index and cluster state.



Manage index lifecycles

Define lifecycle policies to automatically perform operations as an index ages.

transacting location



storing location



patron home library



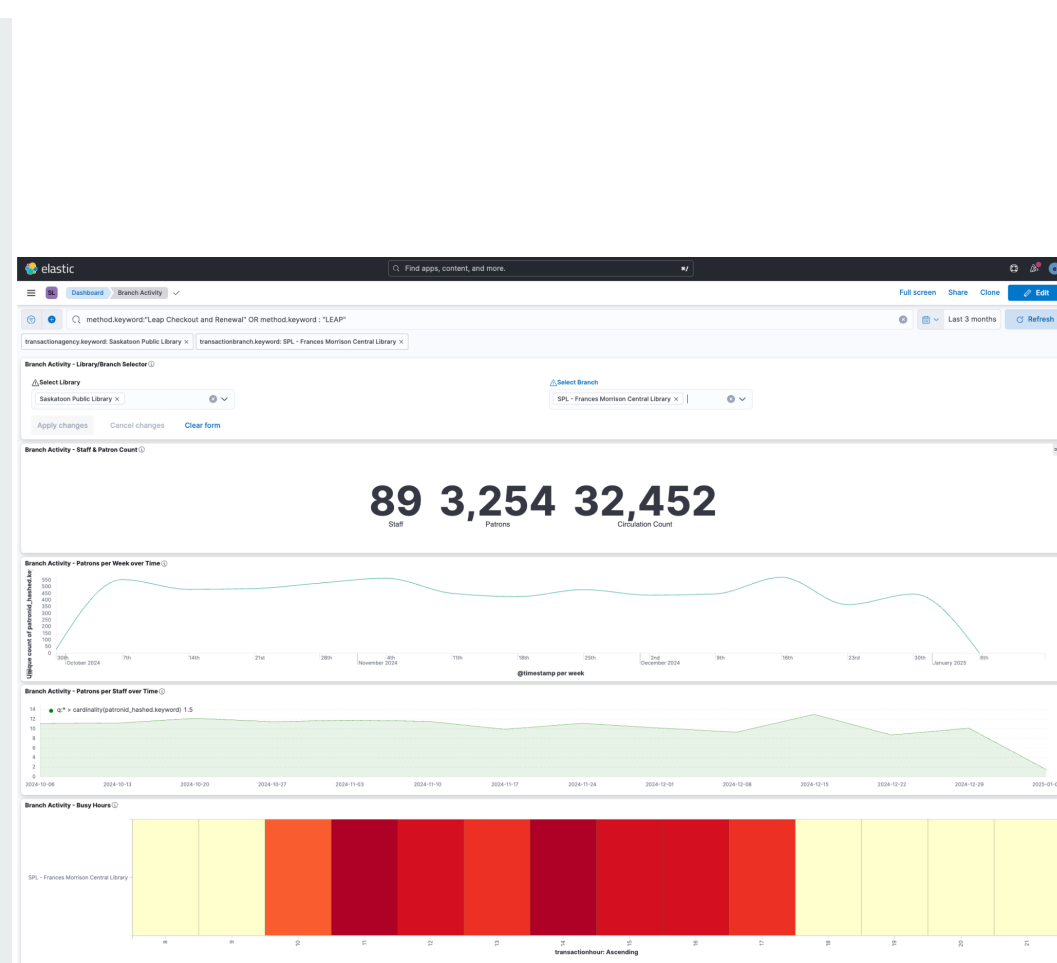
Dashboard 2: Branch Activity



number of staff, patrons, total circulation

busiest hour and day


patron code by hour of day

view as consortium, library, or branch



method.keyword:"Leap Checkout and Renewal" OR method.keyword : "LEAP"

transactionagency.keyword: Saskatoon Public Library ×transactionbranch.keyword: SPL - Frances Morrison Central Library ×

Last 3 monthsRefresh

Branch Activity - Library/Branch Selector

Select Library

Saskatoon Public Library ×

Apply changesCancel changesClear form

Select Branch

SPL - Frances Morrison Central Library ×

Branch Activity - Staff & Patron Count

89

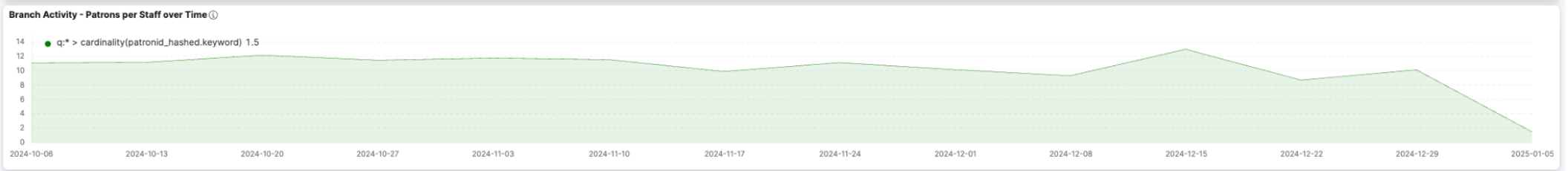
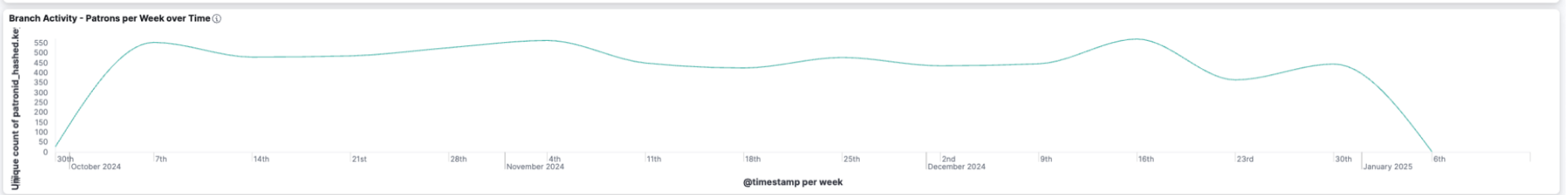
Staff

3,254

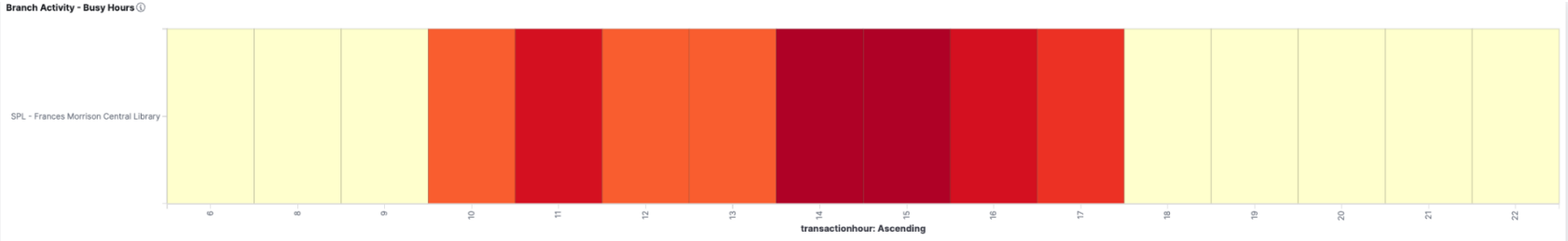
Patrons

32,452

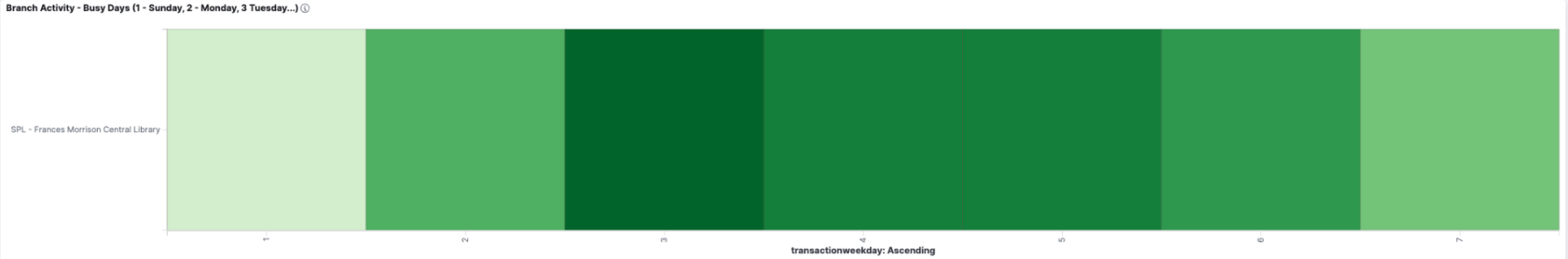
Circulation Count



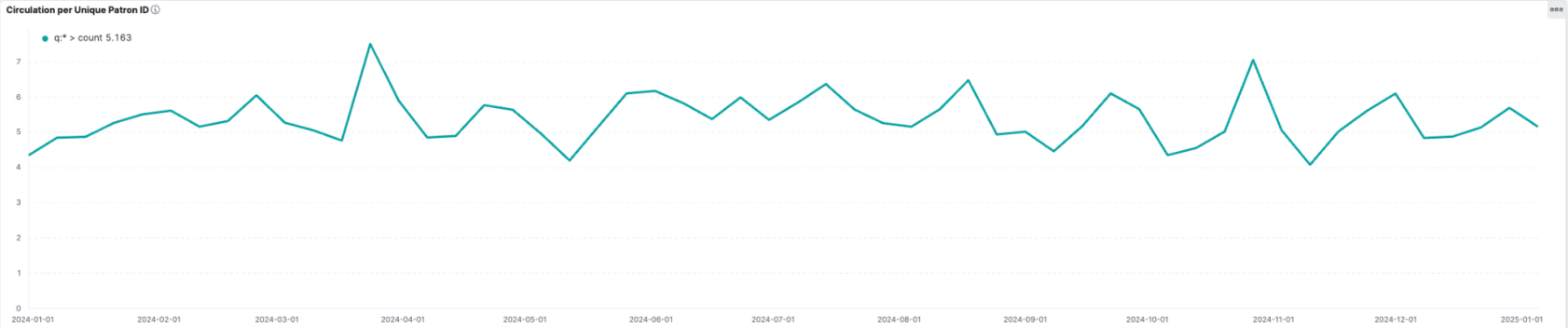
busy hours →



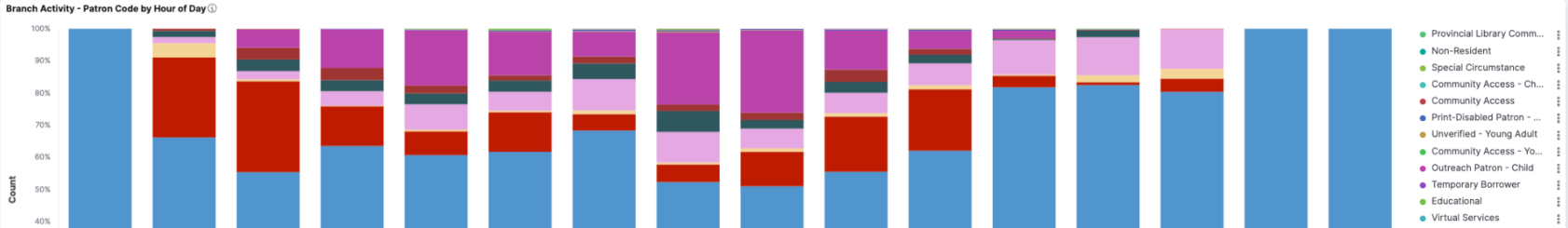
busy days →



circ per patron →



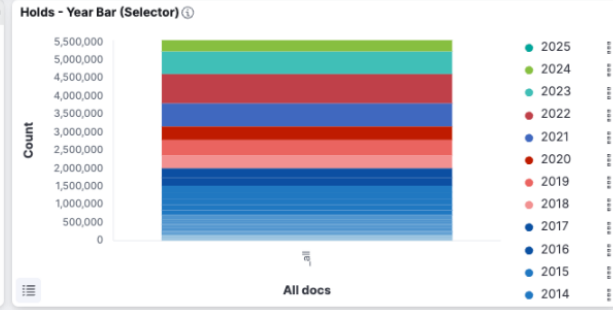
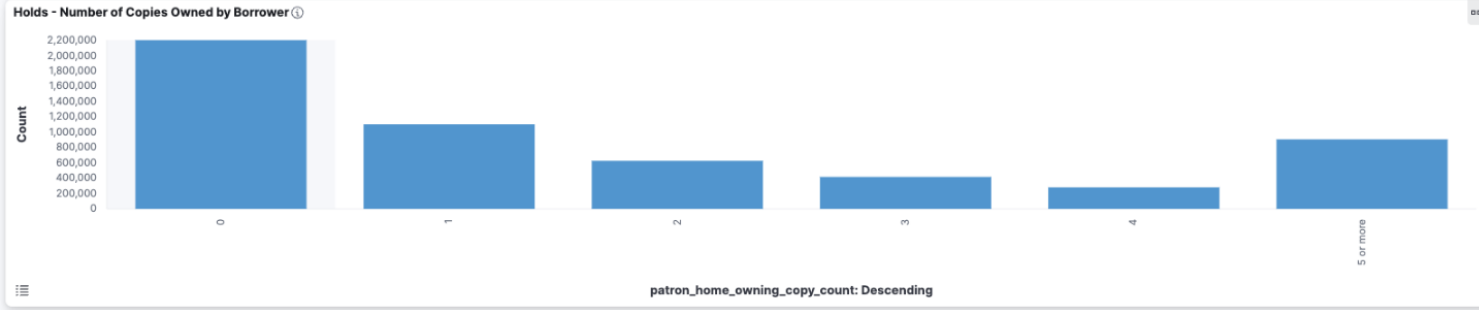
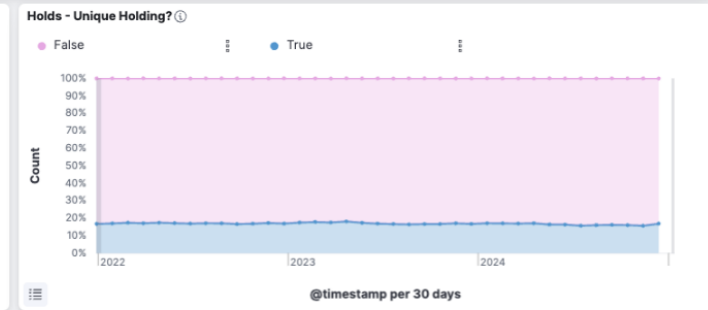
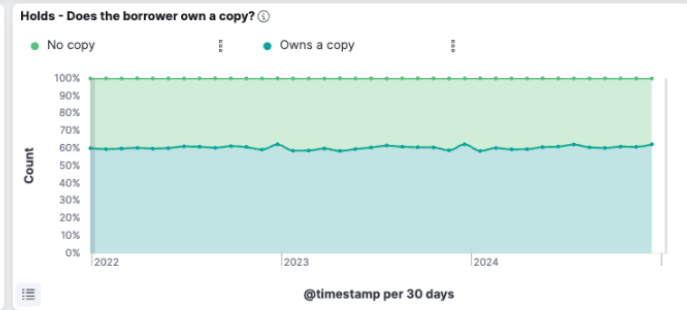
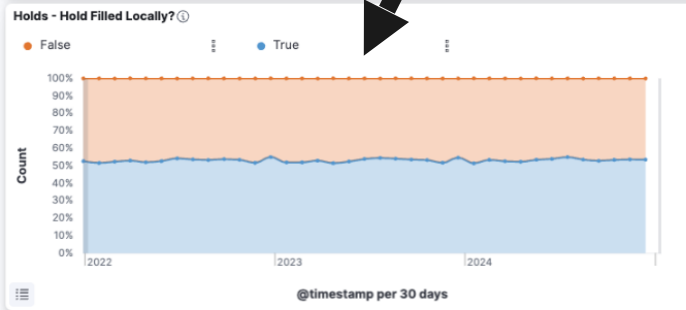
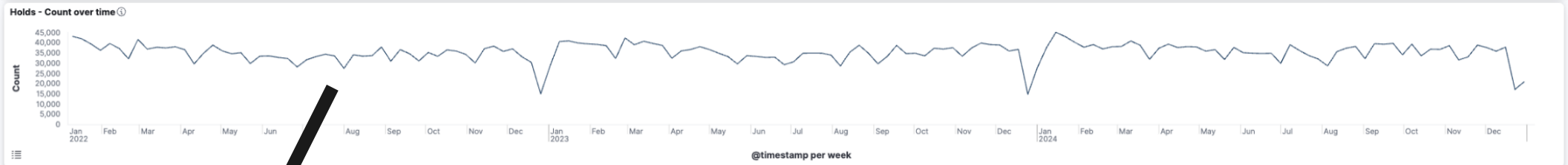
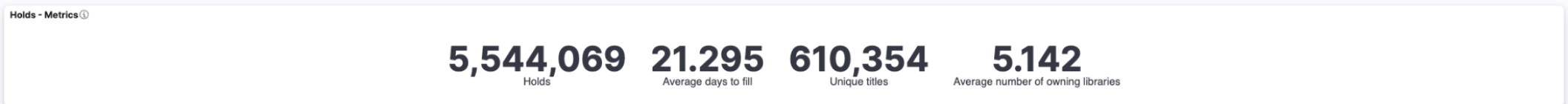
patron code by hour →



Dashboard 3: Holds

Used frequently to gauge consortia sharing.





False ×

Holds - Metrics

2,601,831

Holds

24.607

Average days to fill

534,172

Unique titles

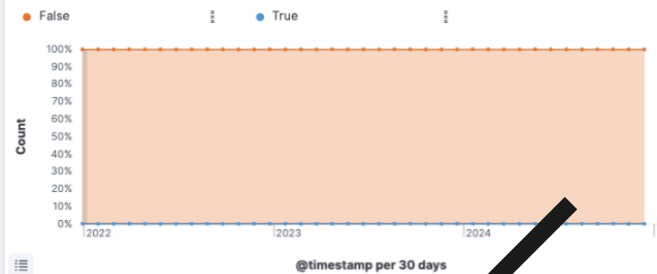
3.671

Average number of owning libraries

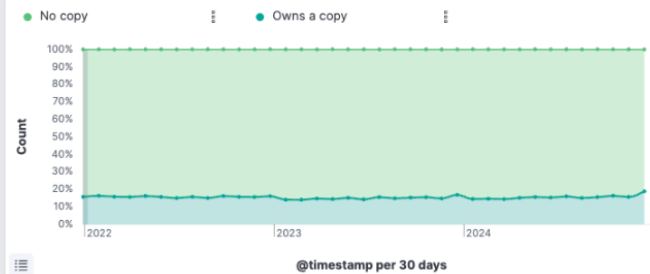
Holds - Count over time



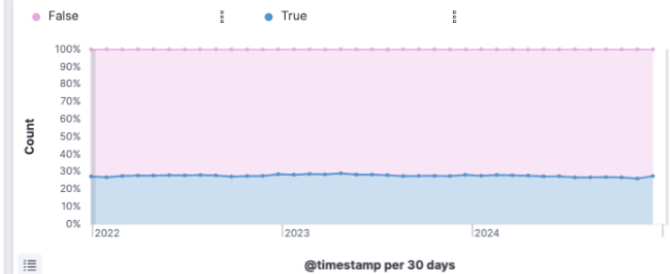
Holds - Hold Filled Locally?



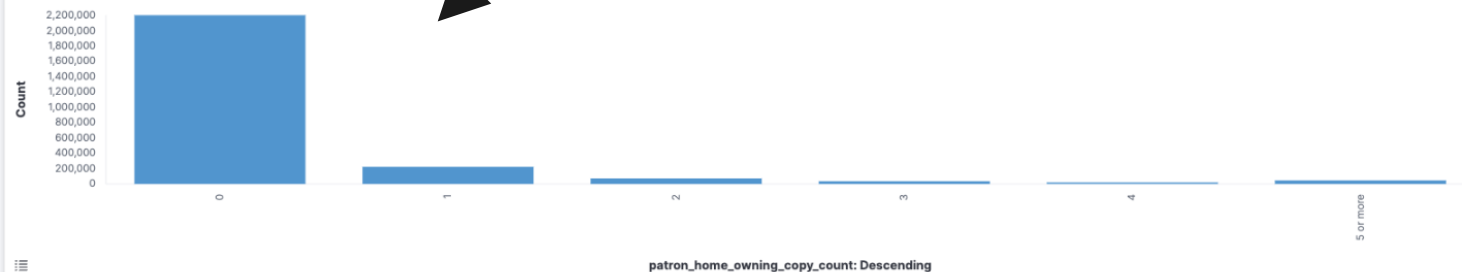
Holds - Does the borrower own a copy?



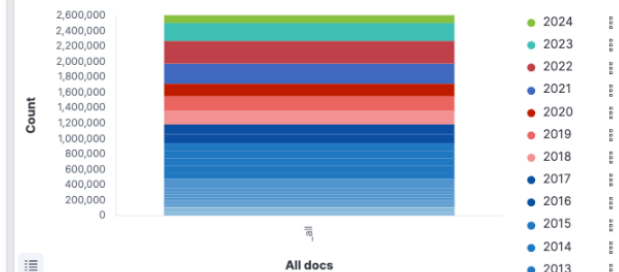
Holds - Unique Holding?



Holds - Number of Copies Owned by Borrower



Holds - Year Bar (Selector)



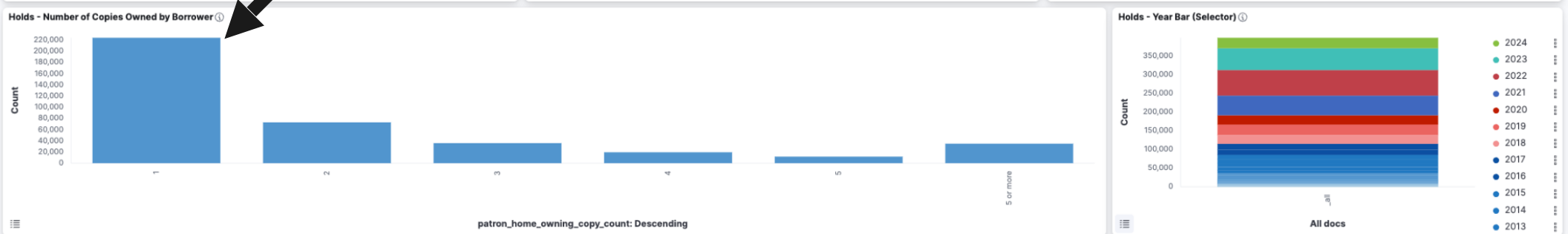
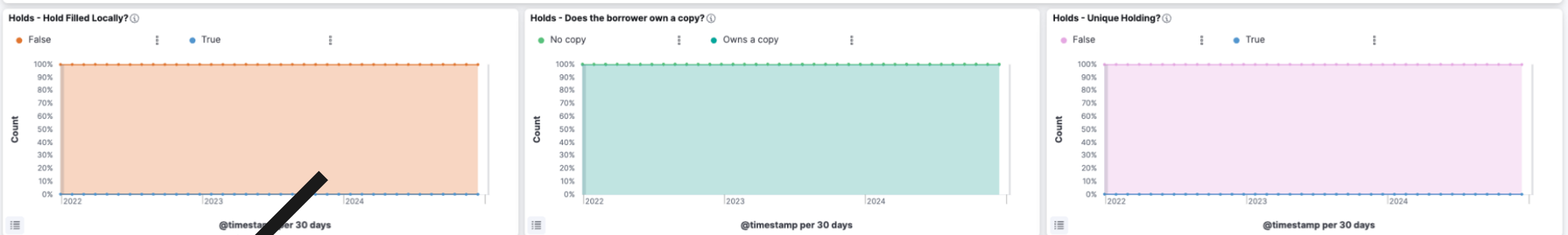
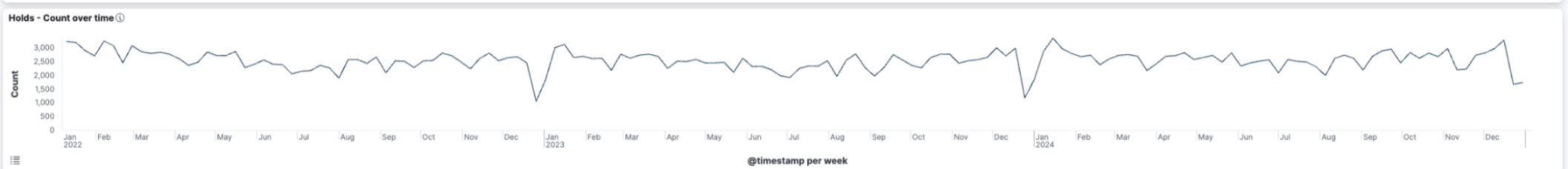
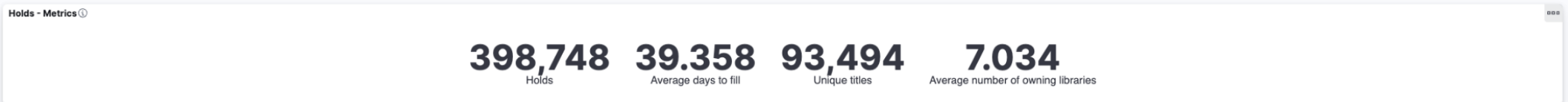
Holds - Item First Available Dates

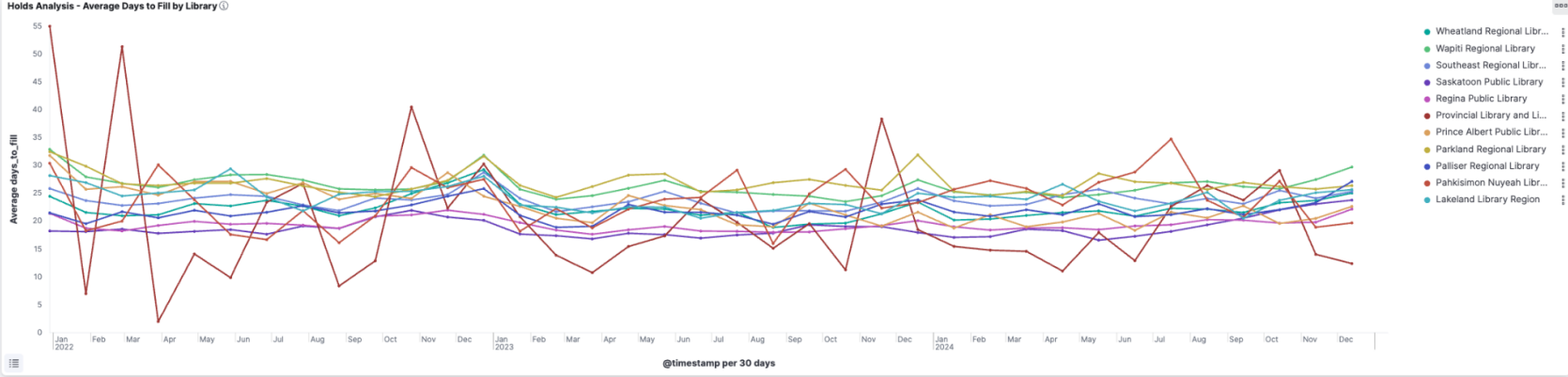
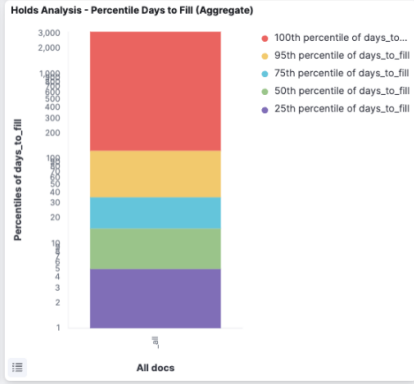
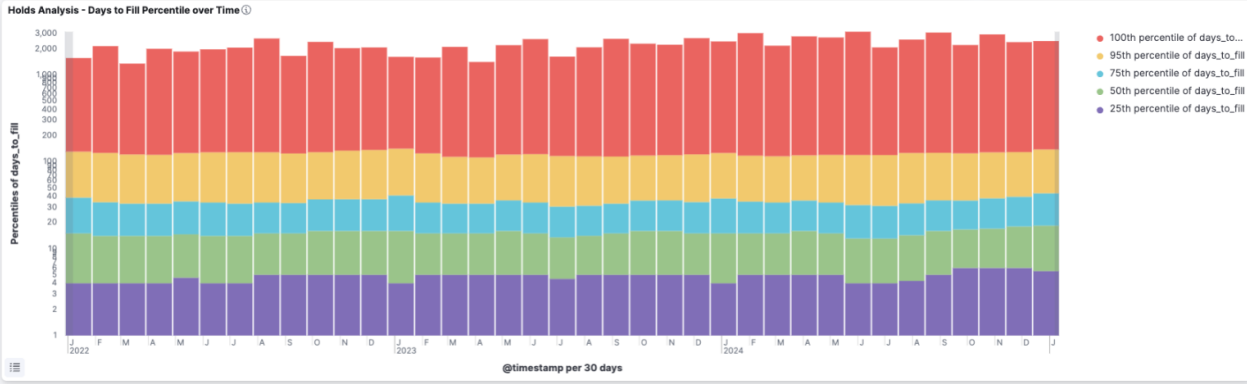
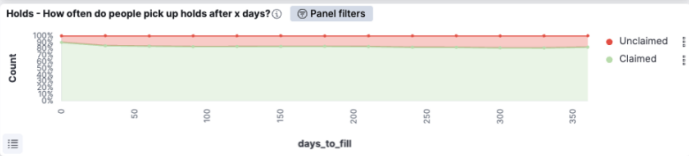
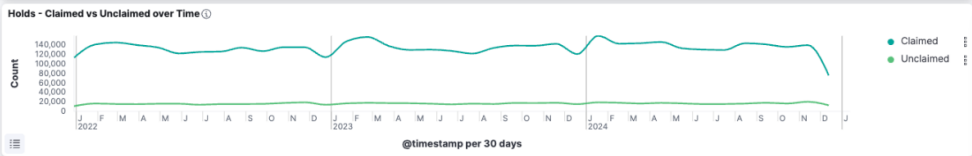
Holds - Unique Holdings Percentage by Collection

+

Filter your data using KQL syntax

False xNOT patron_home_owning_copy_count: 0 x





Holds - Library Selector

Transacting Library:

Borrowing Library:

Lending Library:

Holds - Transacting Library ⓘ

Export

Transacting Library	Count
Saskatoon Public Library	1,697,704
Regina Public Library	1,088,825
Wheatland Regional Library	599,674
Southeast Regional Library	540,596
Wapiti Regional Library	354,414
Parkland Regional Library	346,008
Lakeland Library Region	304,715
Chinook Regional Library	269,544
Palliser Regional Library	244,518
Prince Albert Public Library	80,436
Pahkisimon Nuyeah Library System	16,831
Provincial Library and Literacy Office	935

Holds - Transacting Branch ⓘ

Export

Transacting Branch	Count
SPL - Alice Turner Branch	327,925
SPL - Cliff Wright Branch	294,438
SPL - J.S. Wood Branch	261,720
Regina - George Bothwell Branch	240,089
SPL - Rusty Macdonald Branch	233,398
Regina - Sunrise Branch	233,146
Regina - Sherwood Village Branch	215,365
SPL - Round Prairie Branch	185,431
SPL - Frances Morrison Central Library	168,802
Palliser - Moose Jaw Public Library	117,688

< 1 2 3 4 5 ... 33 >

Holds - Borrowing Library ⓘ

Export

Borrowing Library	Count
Saskatoon Public Library	1,640,173
Regina Public Library	1,059,276
Wheatland Regional Library	651,704
Southeast Regional Library	561,875
Wapiti Regional Library	372,549
Parkland Regional Library	350,145
Lakeland Library Region	308,760
Chinook Regional Library	268,867
Palliser Regional Library	249,147
Prince Albert Public Library	64,326
Pahkisimon Nuyeah Library System	16,614
Provincial Library and Literacy Office	764

Holds - Borrowing Branches ⓘ

Export

Borrowing Branch	Count
SPL - Alice Turner Branch	313,285
SPL - Cliff Wright Branch	295,818
SPL - Frances Morrison Central Library	272,587
SPL - J.S. Wood Branch	250,880
Regina - George Bothwell Branch	215,913
Regina - Sunrise Branch	209,444
SPL - Rusty Macdonald Branch	206,820
Regina - Sherwood Village Branch	200,635
Regina - Central Adult Branch	143,471
Palliser - Moose Jaw Public Library	121,106
SPL - Round Prairie Branch	120,895
SPL - Rusty Macdonald Branch	87,188

< 1 2 3 4 5 ... 28 >

Holds - Lending Library ⓘ

Export

Lending Library	Count
Saskatoon Public Library	1,512,859
Regina Public Library	1,032,903
Wheatland Regional Library	515,508
Southeast Regional Library	489,810
Lakeland Library Region	415,048
Palliser Regional Library	363,735
Wapiti Regional Library	333,102
Parkland Regional Library	287,390
Chinook Regional Library	260,486
Prince Albert Public Library	175,754
Pahkisimon Nuyeah Library System	129,145
Provincial Library and Literacy Office	28,460

Holds - Lending Branches ⓘ

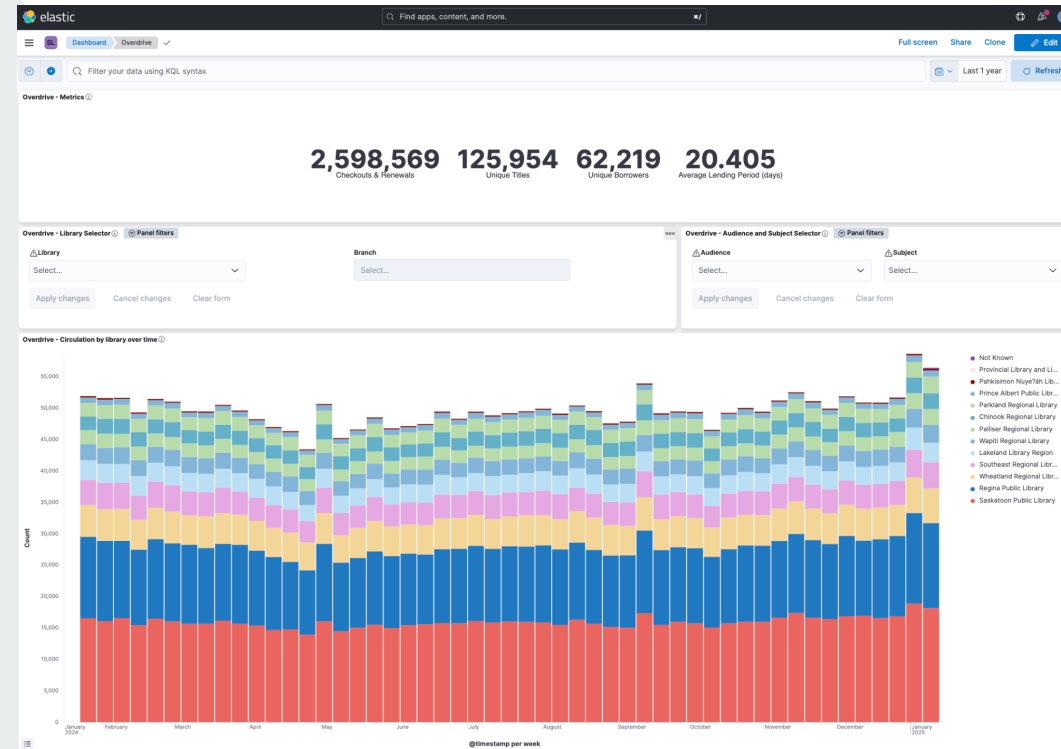
Export

Lending Branch	Count
SPL - Frances Morrison Central Library	568,423
Regina - Central Adult Branch	324,201
SPL - Alice Turner Branch	219,730
SPL - Cliff Wright Branch	210,875
Palliser - Moose Jaw Public Library	198,986
Prince Albert - John M. Cuelenaere	175,703
SPL - Rusty Macdonald Branch	148,626
Regina - Sherwood Village Branch	137,626
Regina - Sunrise Branch	130,575
Regina - George Bothwell Branch	110,628
Lakeland - North Battleford Public Library	109,363
SPL - J.S. Wood Branch	104,488

< 1 2 3 4 5 ... 27 >

Dashboard 4: Overdrive

Displays everything provided by the Overdrive API



Overdrive - Metrics

2,598,569 125,954 62,219 20.405

Checkouts & Renewals Unique Titles Unique Borrowers Average Lending Period (days)

Overdrive - Library Selector



Library

Select...

Apply changes

Cancel changes

Clear form

Branch

Select...

Overdrive - Audience and Subject Selector



Audience

Select...

Apply changes

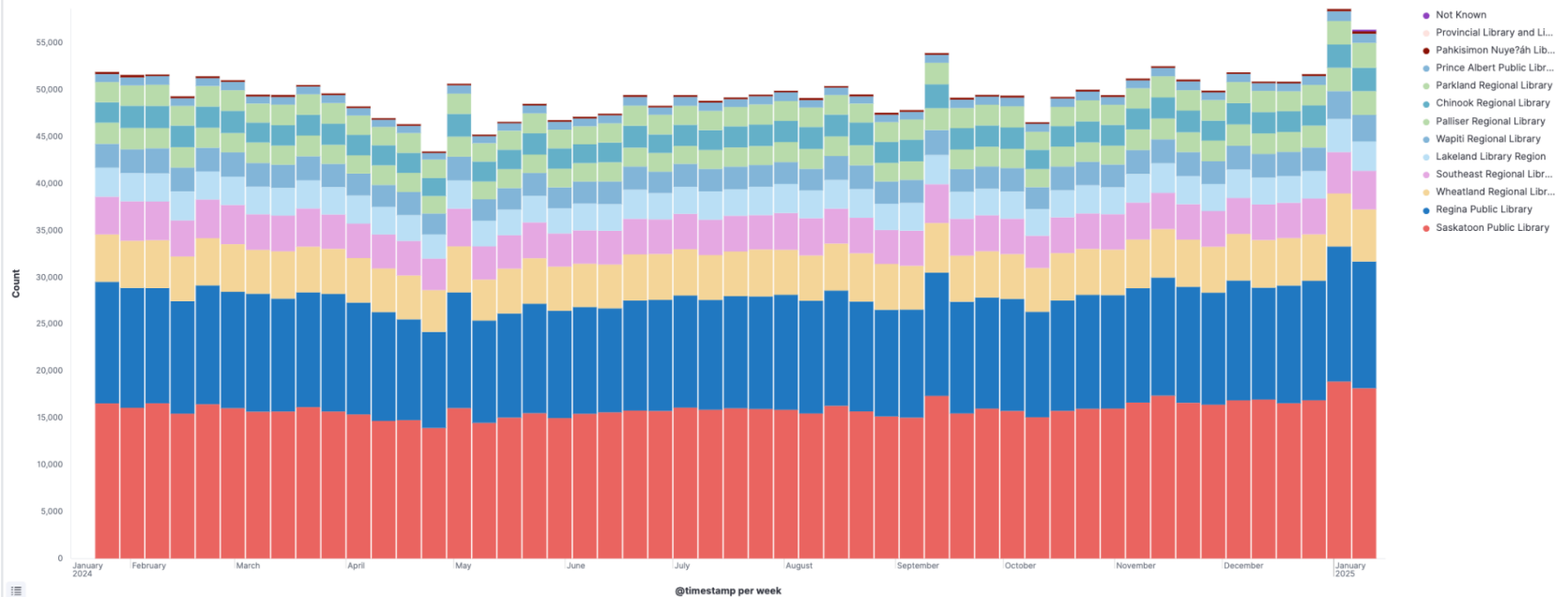
Cancel changes

Clear form

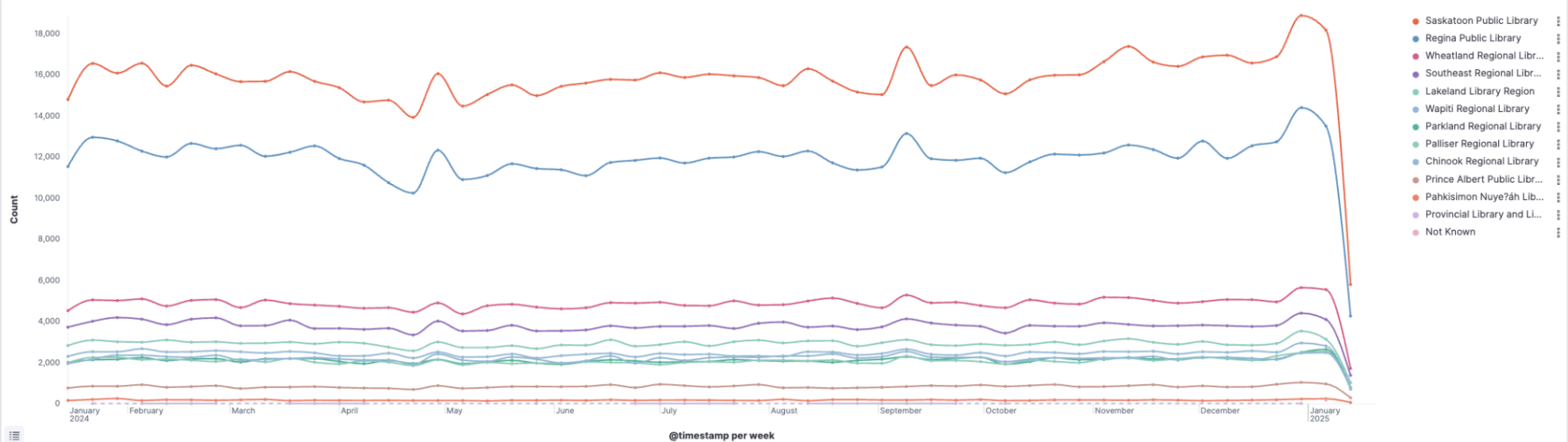
Subject

Select...

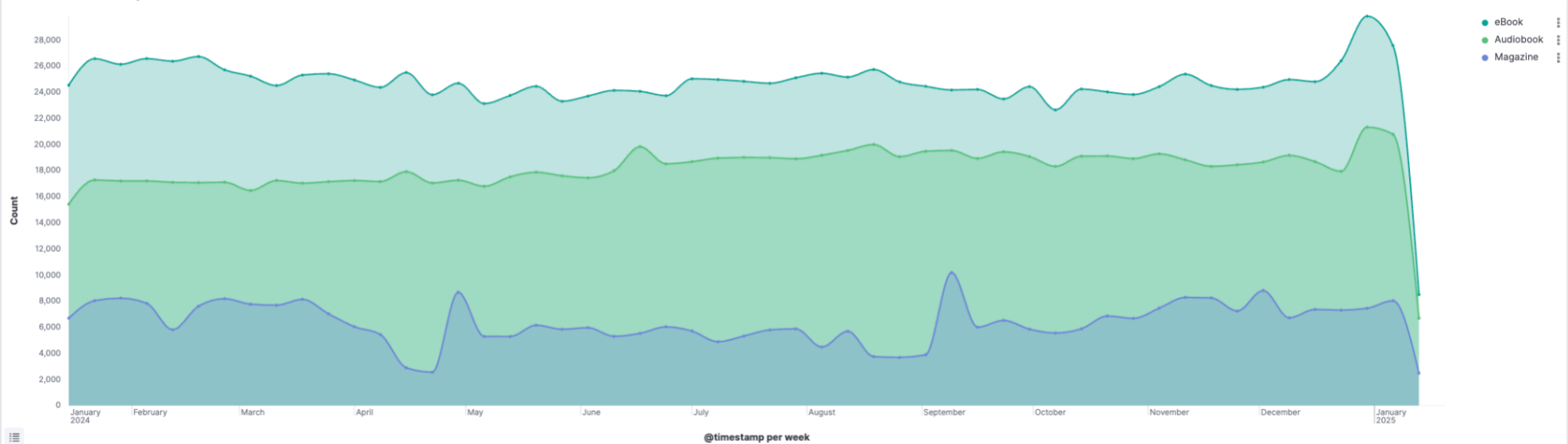
Overdrive - Circulation by library over time

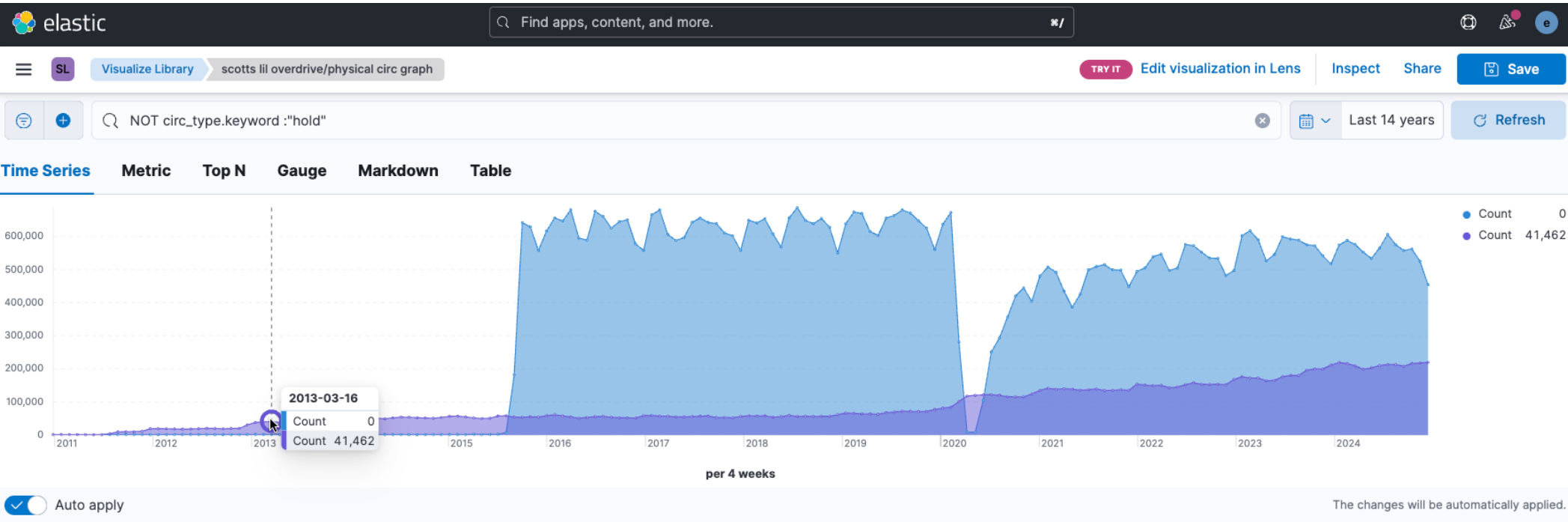


Overdrive - Circ counts over time by library ①

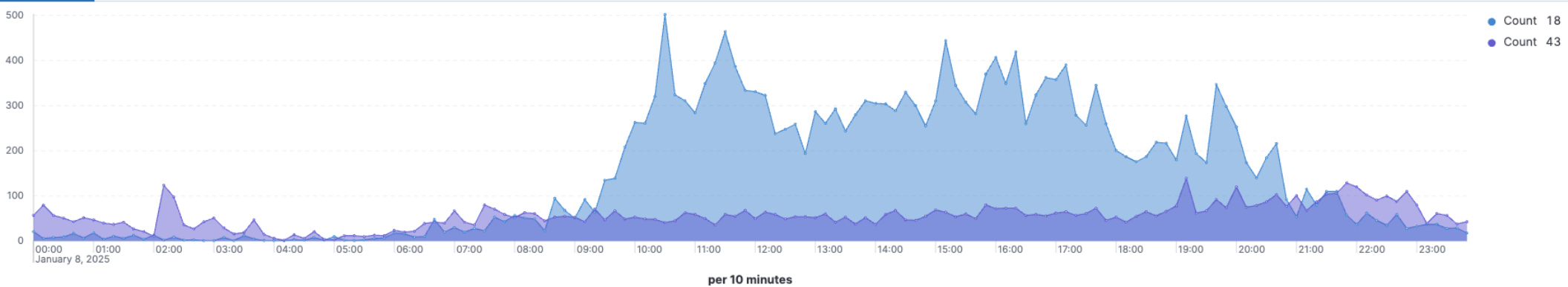


Overdrive - Circ over time by format ①





Time Series Metric Top N Gauge Markdown Table

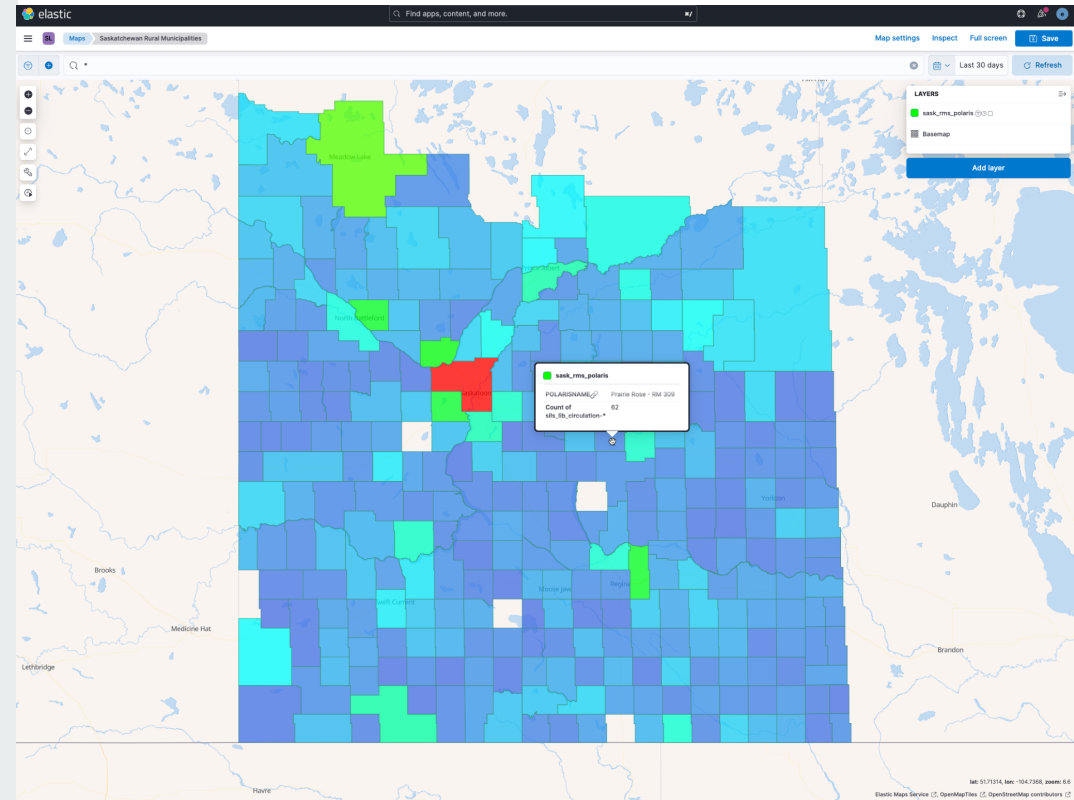


Dashboard 5: Maps

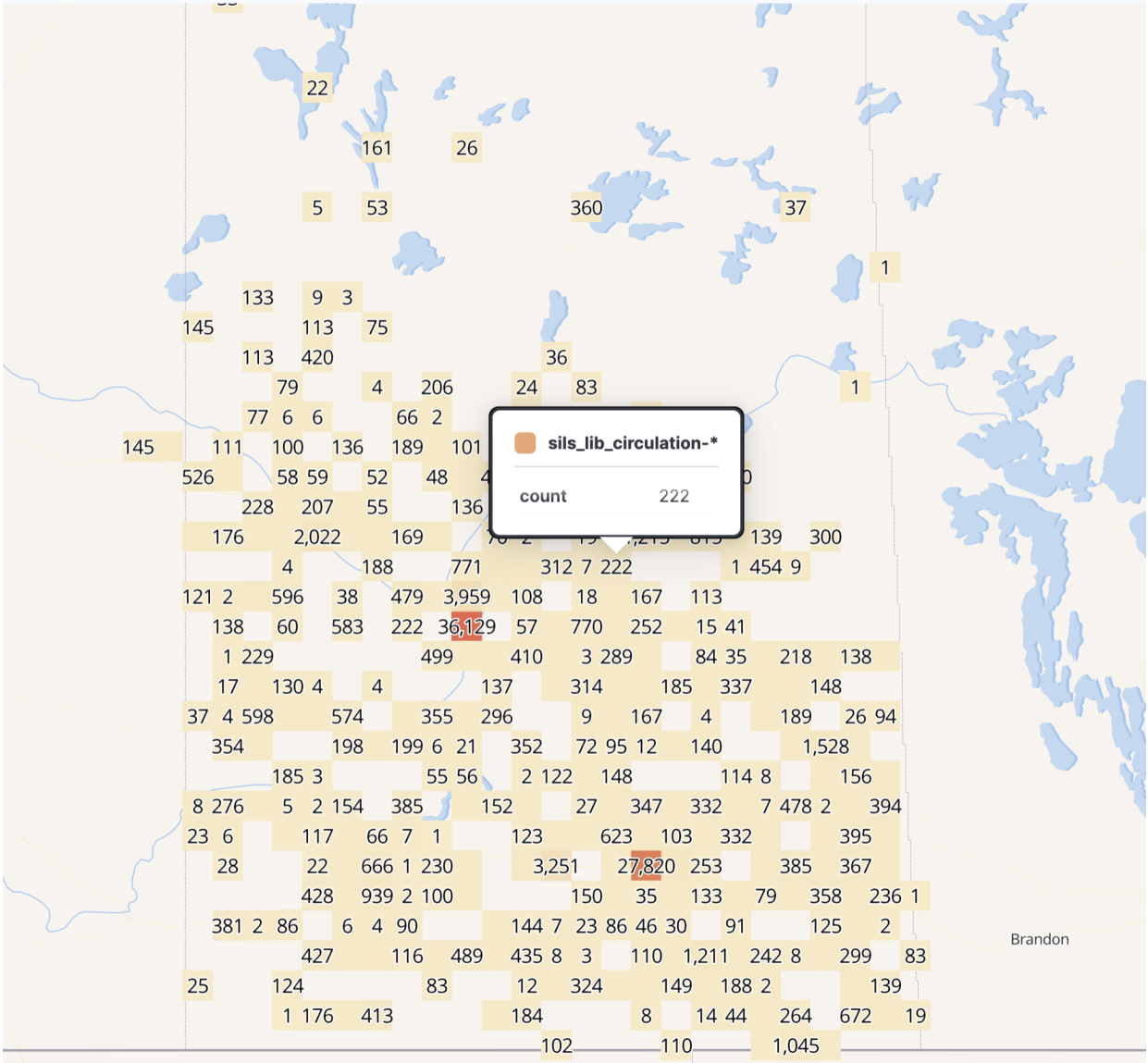
General Circulation

Rural Municipality

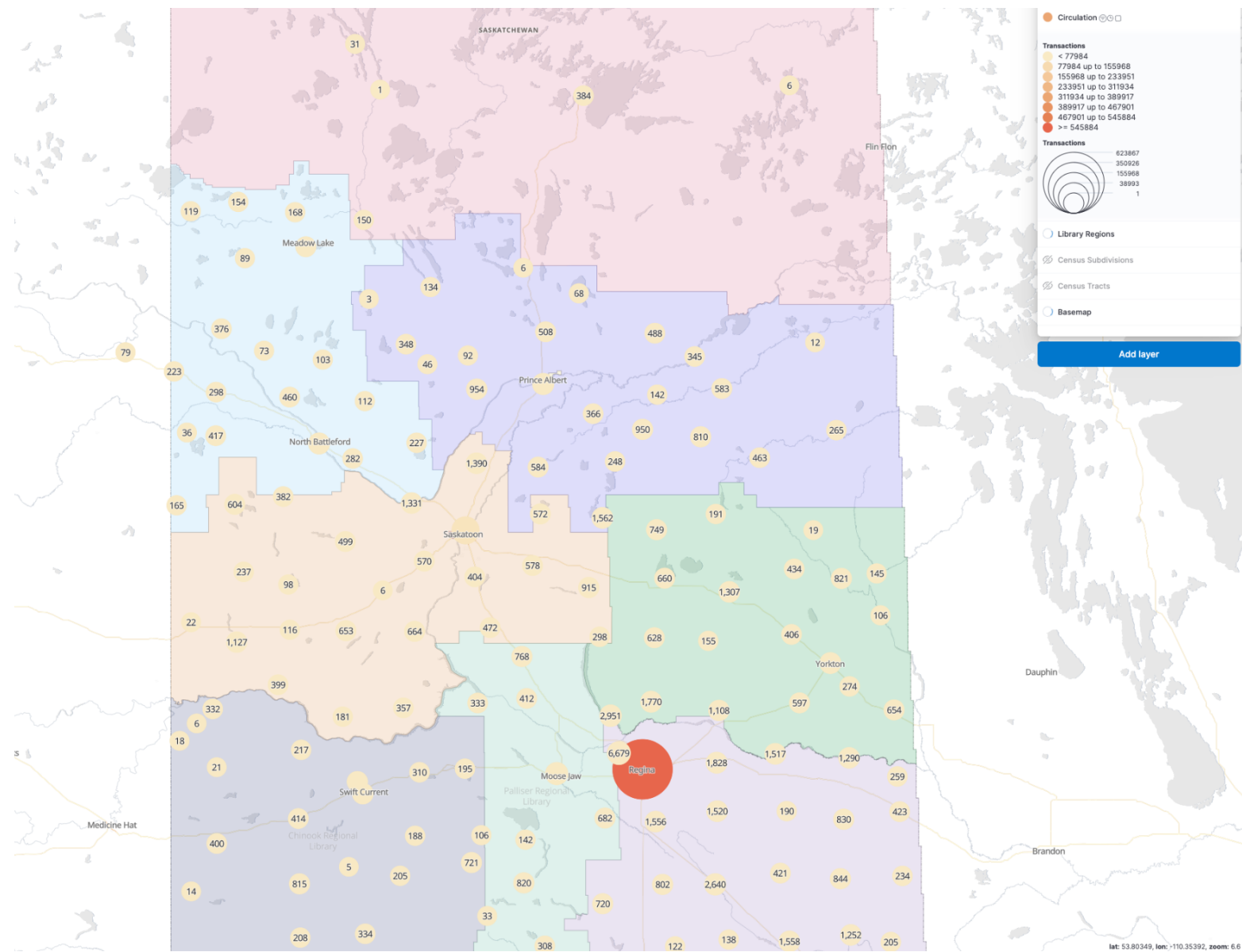
Census Canada



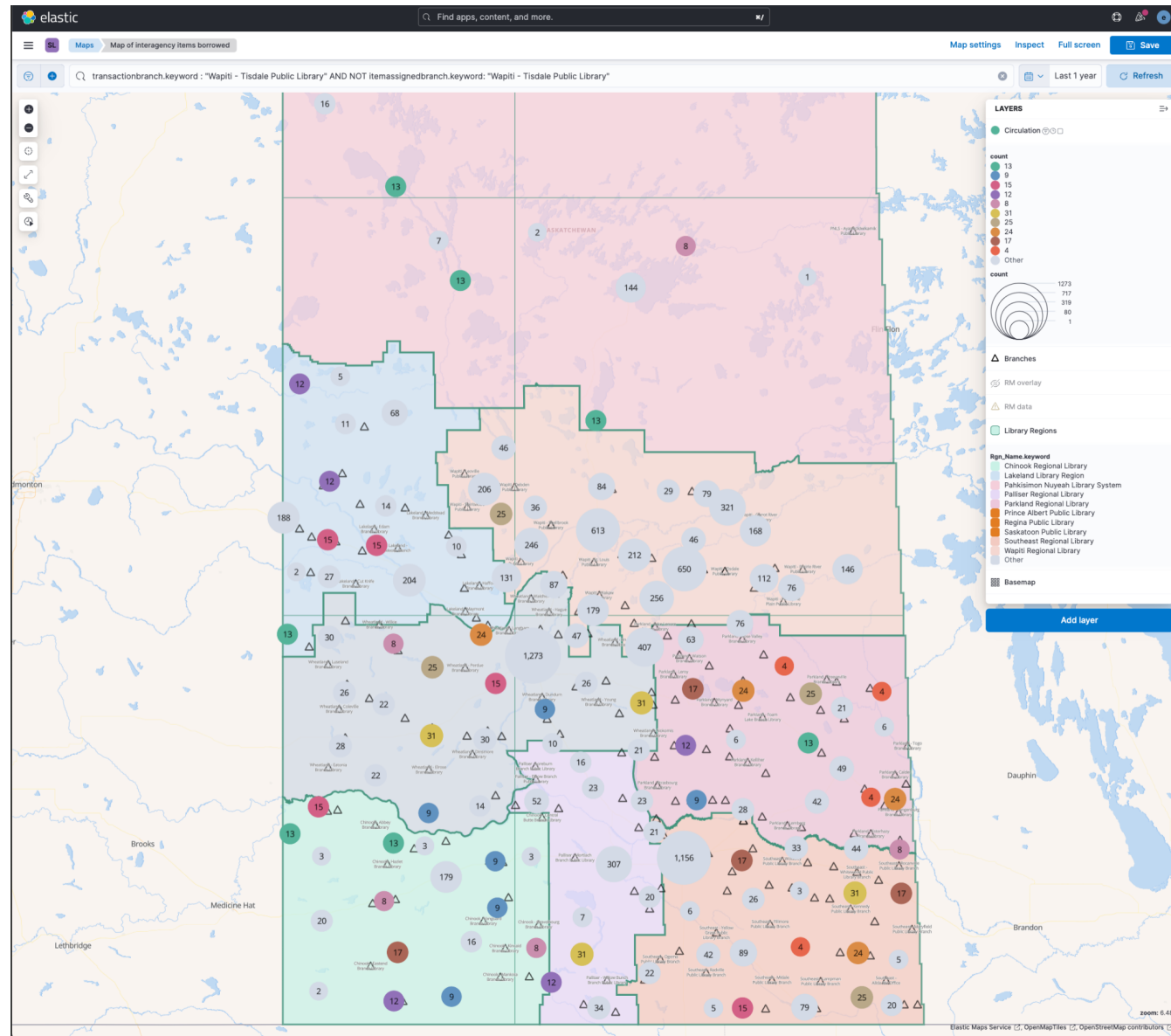
general circulation



RPL materials



source libraries



rural municipalities
(RM's)

LAYERS

sask_rms_polaris

Basemap

Add layer

sask_rms_polaris

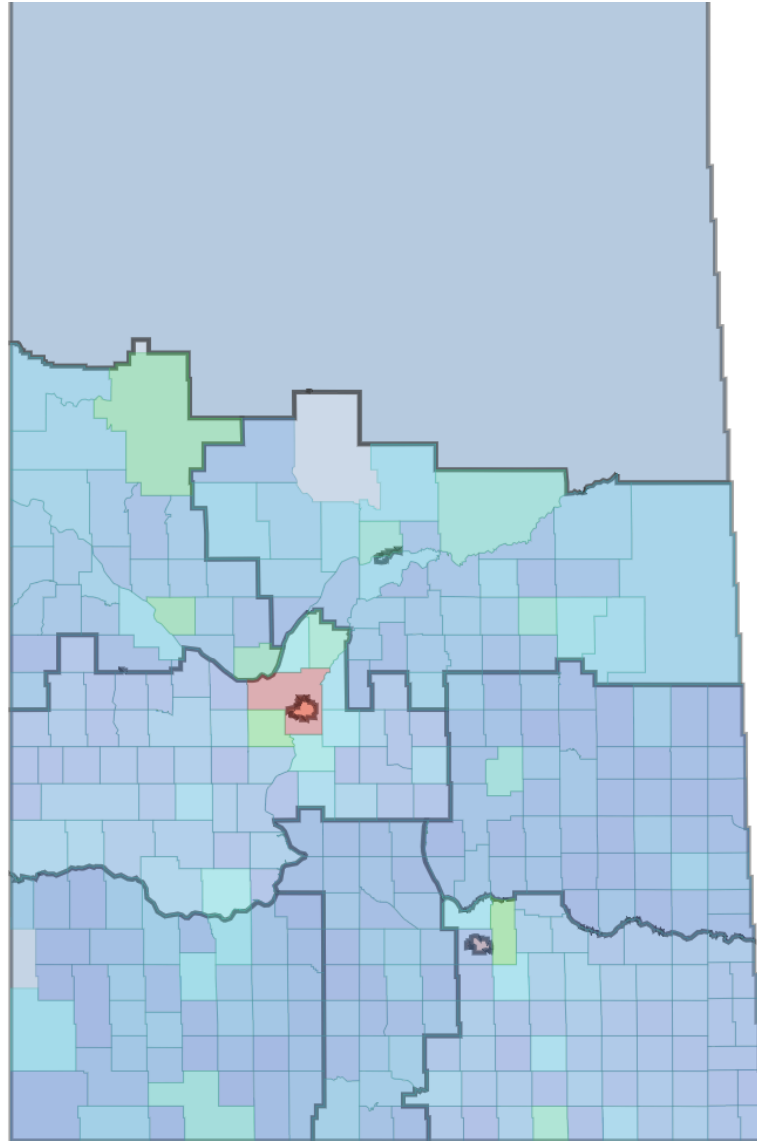
POLARISNAME

Prairie Rose - RM 309

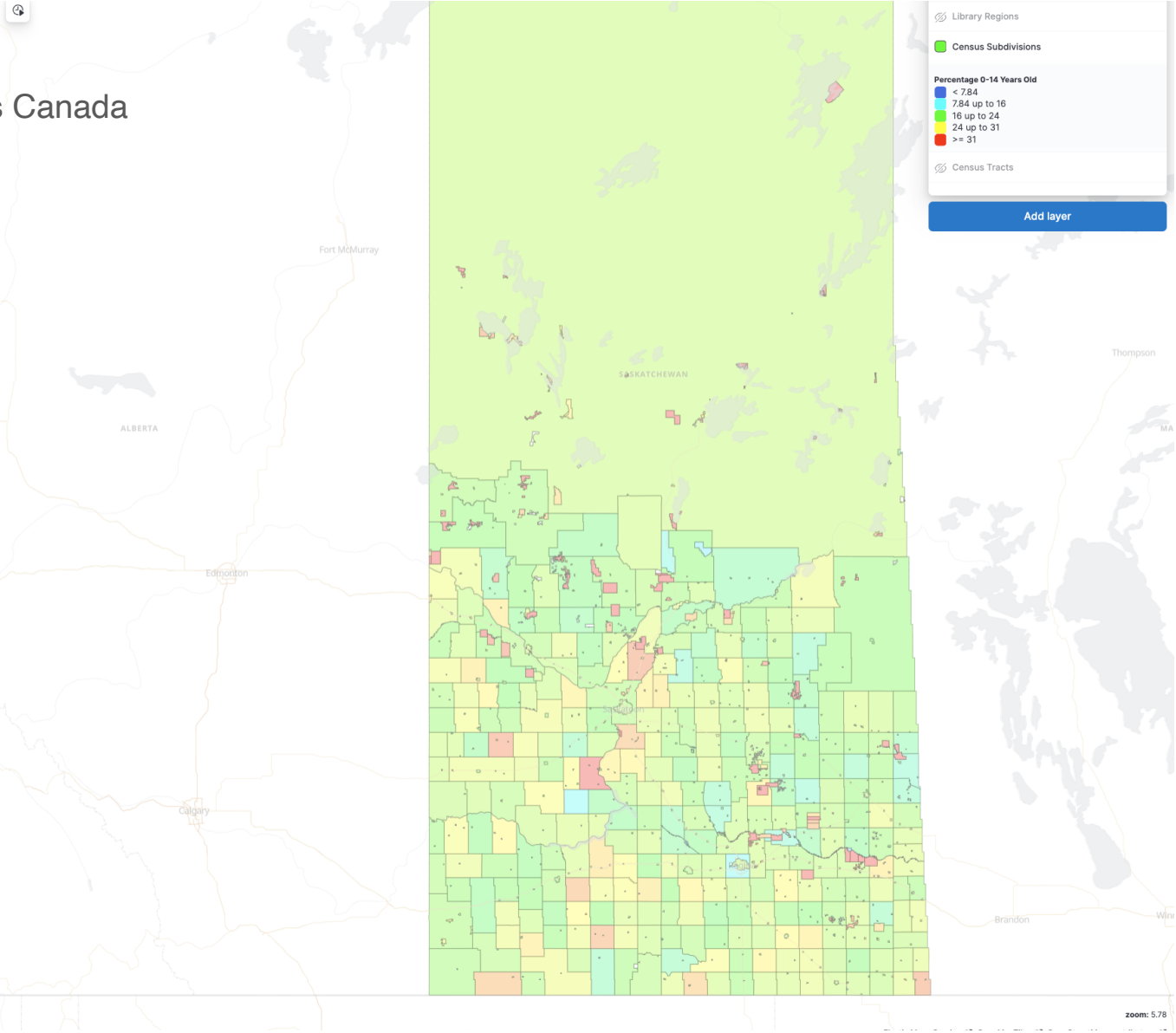
Count of
sils_lib_circulation*

62

library regions +
rural municipalities
(RM's)



Census Canada



Top 3 IT related dashboards

LEAP use and performance

API use and performance

SSRS execution log

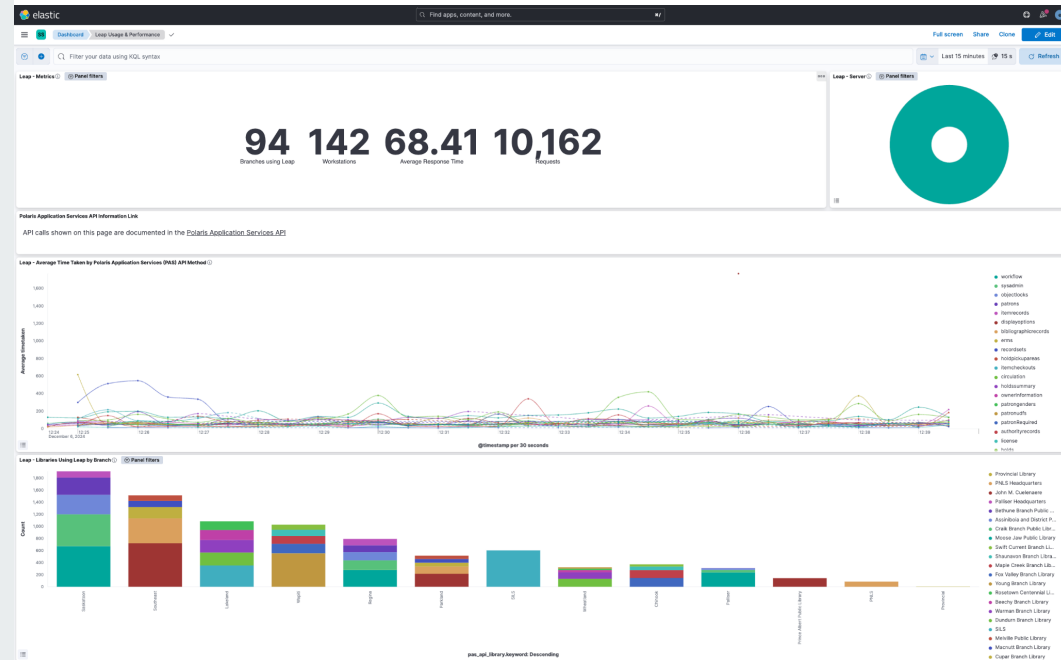
- number of clients in use
- average response time
- clients by library / branch
- clients per server

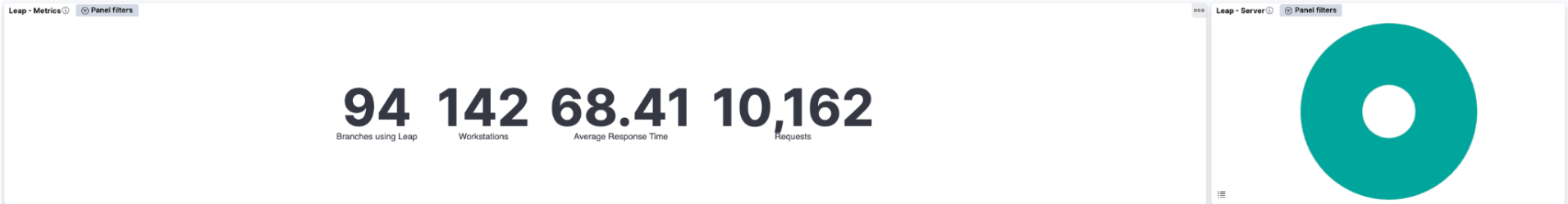
number of clients in use

average response time

clients by library / branch

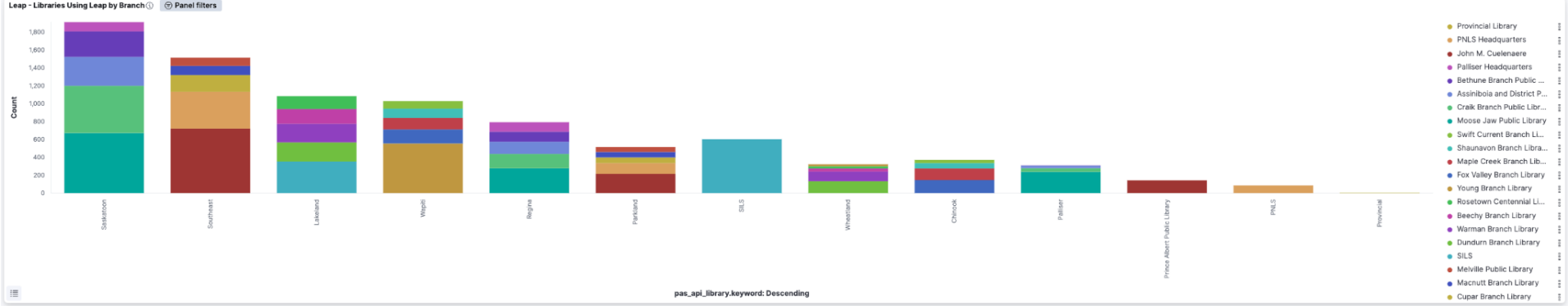
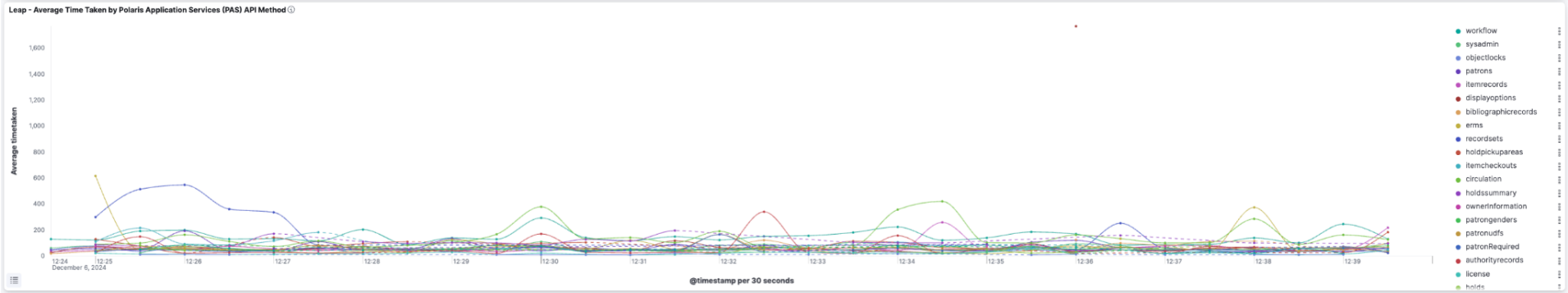
clients per server





Polaris Application Services API Information Link

API calls shown on this page are documented in the [Polaris Application Services API](#)



Dashboard 2: API use and performance

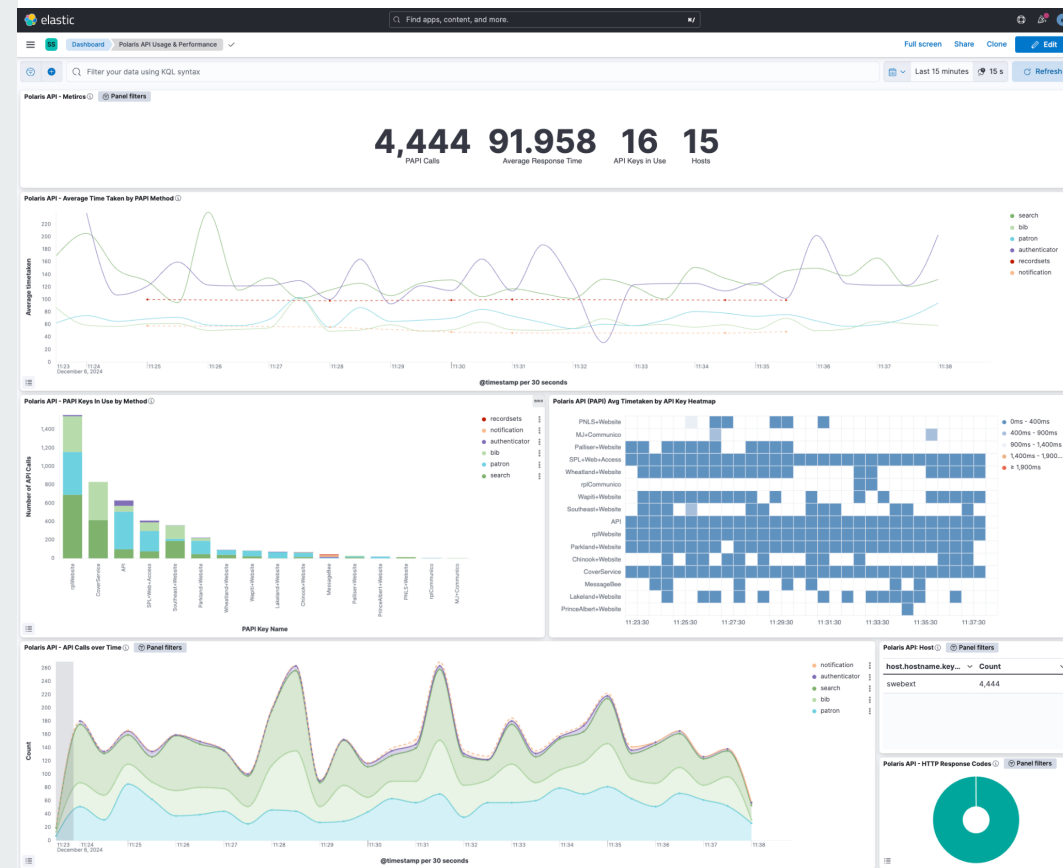
number of API calls / keys

average response time

use by library and branch

use by method

clients per server



4,444

PAPI Calls

91.958

Average Response Time

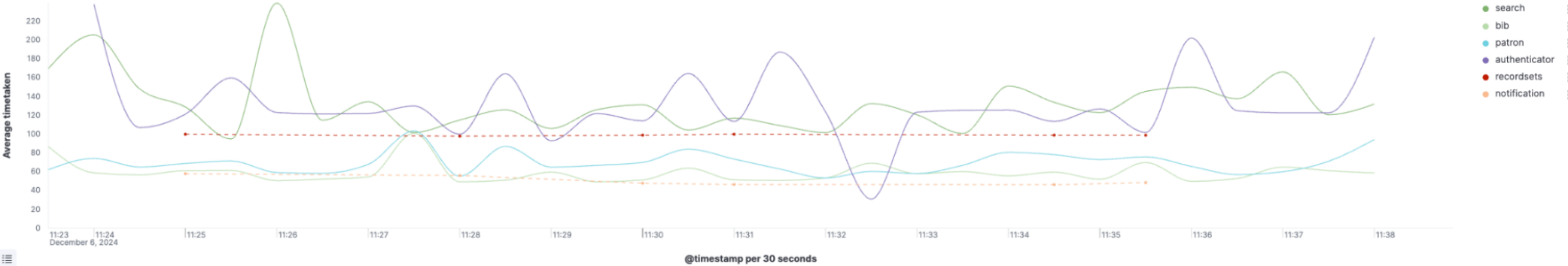
16

API Keys in Use

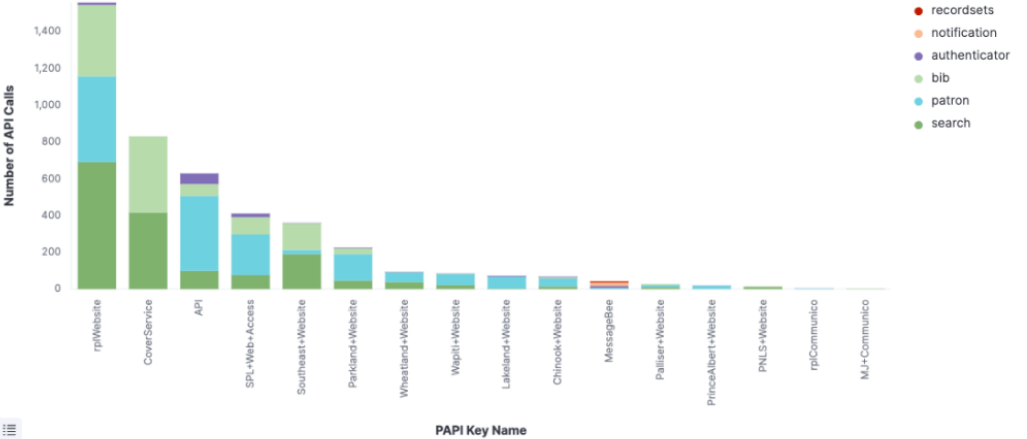
15

Hosts

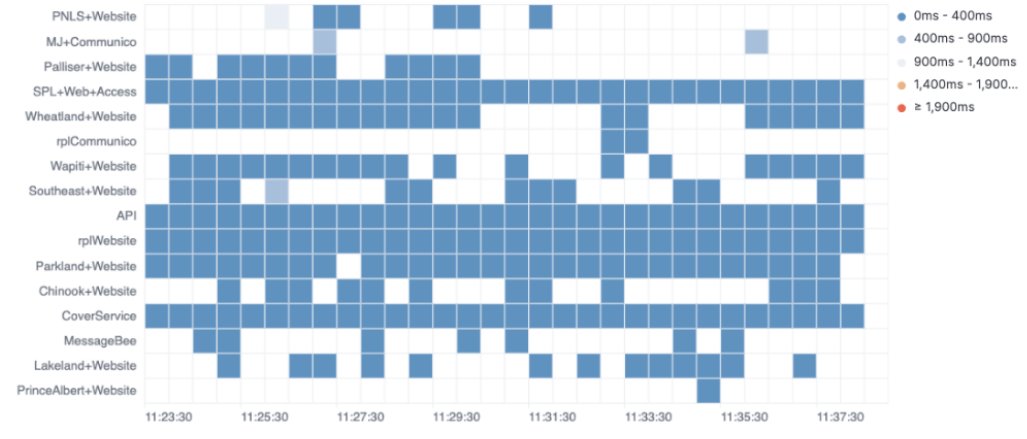
Polaris API - Average Time Taken by PAPI Method



Polaris API - PAPI Keys In Use by Method



Polaris API (PAPI) Avg Timetaken by API Key Heatmap



Polaris API - API Calls over Time Panel filters

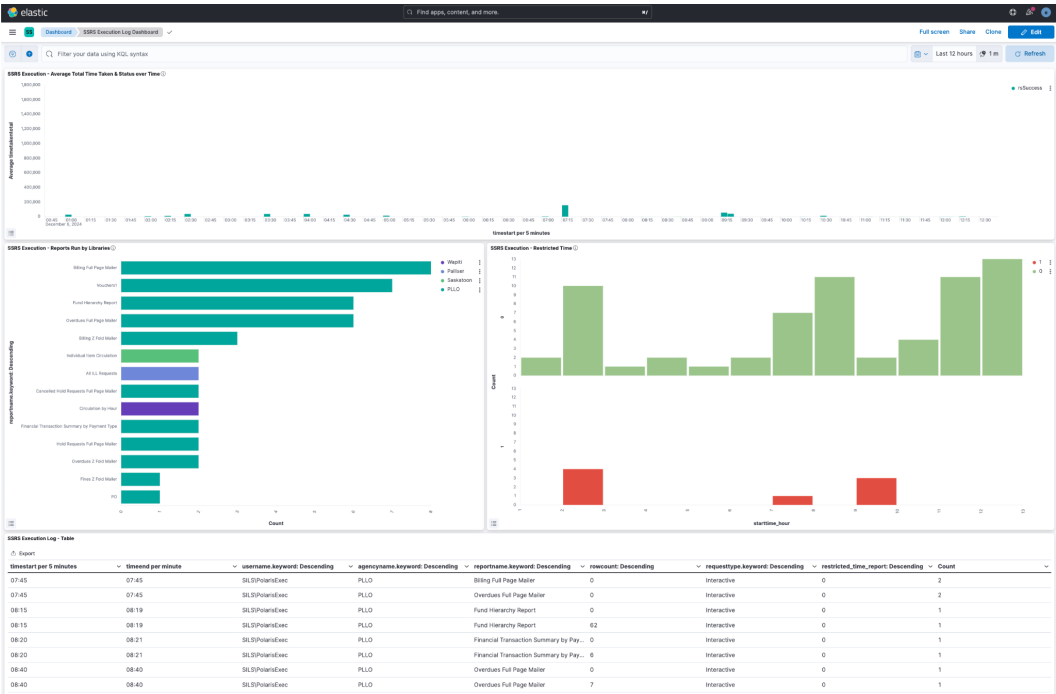


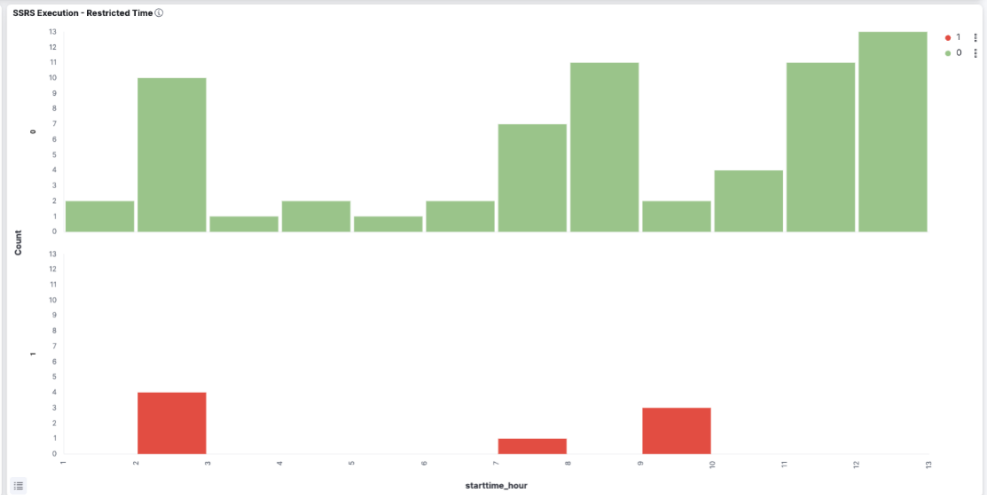
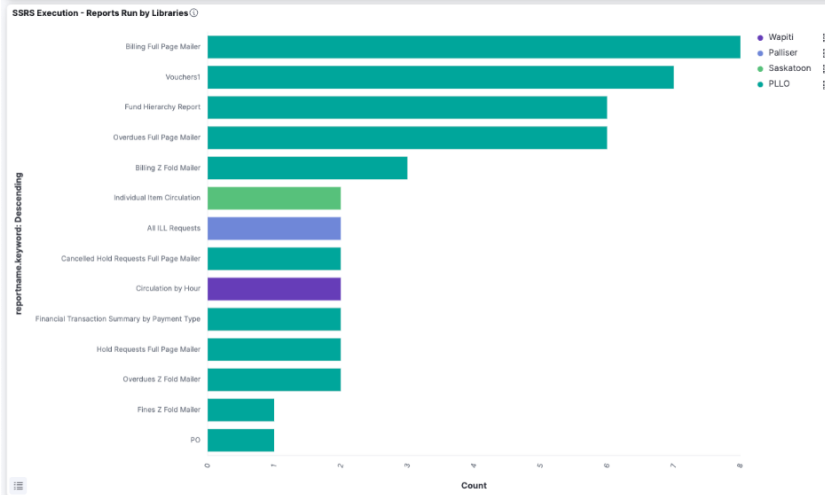
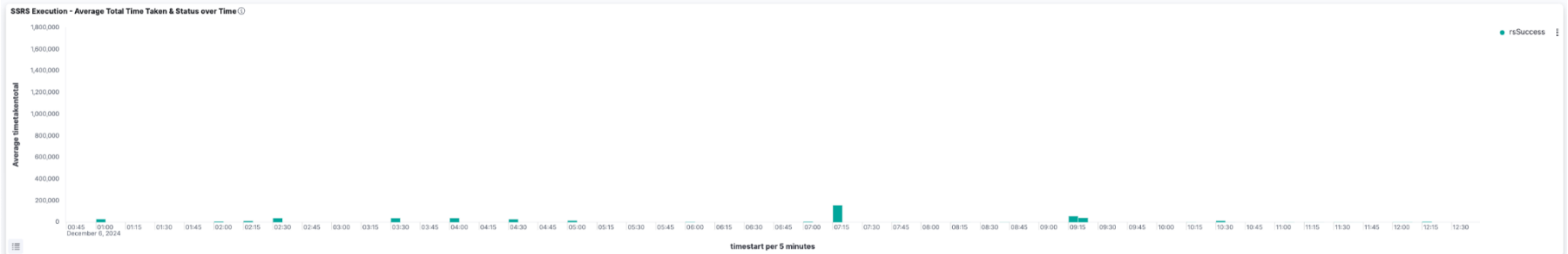
Polaris API: Host Panel filters



Dashboard: SSRS execution log

- time taken
- execution timestamp
- # of reports by library
- # of restricted time reports
- list of all reports run





SSRS Execution Log - Table

Export

timestart per 5 minutes	timeend per minute	username.keyword: Descending	agencyname.keyword: Descending	reportname.keyword: Descending	rowcount: Descending	requesttype.keyword: Descending	restricted_time_report: Descending	Count
07:45	07:45	SILS\PolarisExec	PLLO	Billing Full Page Mailer	0	Interactive	0	2
07:45	07:45	SILS\PolarisExec	PLLO	Overdues Full Page Mailer	0	Interactive	0	2
08:15	08:19	SILS\PolarisExec	PLLO	Fund Hierarchy Report	0	Interactive	0	1
08:15	08:19	SILS\PolarisExec	PLLO	Fund Hierarchy Report	62	Interactive	0	1
08:20	08:21	SILS\PolarisExec	PLLO	Financial Transaction Summary by Pay...	0	Interactive	0	1
08:20	08:21	SILS\PolarisExec	PLLO	Financial Transaction Summary by Pay...	6	Interactive	0	1
08:40	08:40	SILS\PolarisExec	PLLO	Overdues Full Page Mailer	0	Interactive	0	1
08:40	08:40	SILS\PolarisExec	PLLO	Overdues Full Page Mailer	7	Interactive	0	1

Elastic for Cybersecurity

An honourable mention...



SIEM: Security Information + Event Management

...now called XDR: <https://www.elastic.co/security/xdr>

- Endpoint Protection/Security: *behaviour based 'watching'*
- Anomaly Detection: *"is this an unusual hour for this staff person to login?"*
- Alerts: *used for security related info and performance monitoring*
- Automatic Isolation: *limits access if intrusion successful*

Conclusion

Challenges

Cost

Benefits



Challenges

- lack of available member library staff time to engage and create
- not properly resourced at the SILS Office
 - even so, we rely on it more and more
- descriptive language for each visualization



Cost

Elastic Cloud:

- choose from multiple datacenters (Amazon, Azure, Google), or host locally
- datacenter cost is hourly based on resources
- our implementation is roughly \$1300 / month

Elastic Cares

- non-profit designed to help non-profits like all of us
- yearly application for the grant; SILS has been a recipient for the past 3 years
- grant value is now \$10k USD annually
- administered as a bill credit each month



Benefits

- staff engagement
- encourages curiosity
- grasping complex data is easier
- access to information takes less effort and is faster
- sole method of mapping at SILS



Questions?

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eleanor@sasklibraries.ca

andrew@sasklibraries.ca