



***Support Insights: 3 quick tutorials***

*Questions and best practices around Backups, opening tickets with Customer Support, and Authority Control projects*

Matthew Aldrich, Wayne DeCarr, Martha Rice Sanders

1

***Backup Best Practices to protect your data and why it is important***

Matthew Aldrich

 #IUG2023



2

## Agenda

- Performing and Storing backups
- Side effects of bad backups
- Sierra Approved backup methods
- Polaris Recommended backup methods
- Additional Information

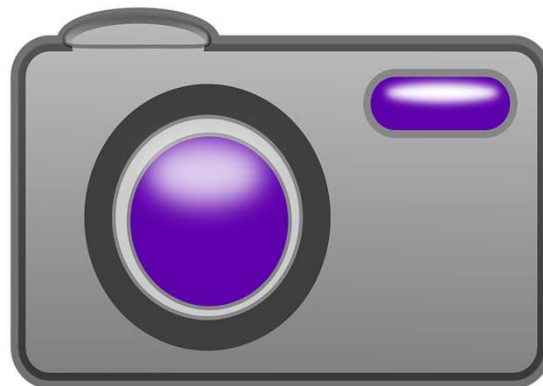
#IUG2023

IUG<sup>20</sup><sub>23</sub>


3

## Server backups and Database backups

- VM Snapshots do not guarantee good database files
- Best practice for performing a snapshot with SQL Server
- Storing your backed up data
- Save multiple days worth of backups



4



## Side Effects of bad backups


- How are we defining bad backups
- No recovery in a disaster situation
- Backups not stored off server/ off network

IUG<sup>20</sup><sub>23</sub>

5

## Sierra approved backup methods

- Enterprise Backup
- Amanda Backup
- Cloud Backup
- III Native Backup



This Photo by Unknown Author is licensed under CC BY-NC-ND

#IUG2023

IUG<sup>20</sup><sub>23</sub>

6

## Polaris Backup information



- SQL job to perform database dumps
- A good backup to restore system
- Polaris preference is to store at least 7 days of rolling backups

This Photo by Unknown Author is licensed under [CC BY-NC-ND](#)

#IUG2023

**IUG**<sup>20</sup><sub>23</sub>

7

## Additional Information

- Sierra Software Only backup options
  - <https://iii.rightanswers.com/portal/app/portlets/results/viewolution.jsp?solutionid=200616102355323&page=1&position=1&q=200616102355323>
- Sierra Enterprise Backup technical documentation
  - [https://techdocs.iii.com/sierra\\_entback\\_api.php](https://techdocs.iii.com/sierra_entback_api.php)
- Sierra Enterprise Backup FAQ
  - <https://csdirect.iii.com/documentation/enterprise.php>
- You can always open a ticket in Supportal if you have questions

#IUG2023

**IUG**<sup>20</sup><sub>23</sub>

8

# *Supportal Tips and Best Practices for speedy ticket resolution*

Wayne DeCarr

 #IUG2023

IUG<sup>20</sup><sub>23</sub>

9

## Agenda

- Objectives
- Creating a New Ticket vs. Reopening an Existing Ticket
- Crafting Your Ticket
- Classifying Urgency
- After-Hours Support
- Q&A

#IUG2023

IUG<sup>20</sup><sub>23</sub>

10

## Objectives









- Learn best practices
- Decrease ticket turnaround time
- Choose the appropriate priority based on impact

#IUG2023

IUG<sup>20</sup><sub>23</sub>

11

## Creating a New Ticket vs Reopening an Existing Ticket

- Is this an update to an ongoing issue?  **YES?**  **REOPEN**
- Are you providing another example of an occurrence?  **YES?**  **REOPEN**
- Has this problem happened before?  **YES?**  **CREATE**
- Does another ticket contain pertinent information to the current problem?  **YES?**  **CREATE**

#IUG2023

IUG<sup>20</sup><sub>23</sub>

12

## Crafting Your Ticket

- Things to Include:
  - Workstation Name
  - Application User Name
  - Terminal Server User Name
  - Recent Changes to Environment
    - Locally or on Server
  - System-Wide or Individual Users?
    - Commonalities between affected Users?
  - Time the Behavior Occurred
  - One Time Issue or Recurring?
    - Persistent or Intermittent?
  - What You Were Doing When the Behavior Occurred (workflow)
  - Full Error Message
    - With Screenshots if you're able

#IUG2023

IUG<sup>20</sup><sub>23</sub>

13

## Classifying Urgency

### Basic Guidelines:

#### System Down

- ◆ One or more critical subsystems are unavailable
- ◆ Library has one workstation and it is down

#### Critical

- ◆ One or more major component are not working

#### High

- ◆ System is not working as expected

#### Medium

- ◆ Functionality question

#### Low

- ◆ Request for information

#### Urgency

Medium	▼
System Down	
Critical	
High	
Medium	
Low	

#IUG2023

IUG<sup>20</sup><sub>23</sub>

14

## After-Hours Support

- Polaris business hours are 8 AM-8 PM Eastern Monday through Friday
- For any issue other than a Site Down, submit a ticket through the Supportal and Staff will address during business hours
- Call the After-Hours Line for Site Down situations outside of normal business hours
  - 877-857-1978
- **Phone:** +1-510-450-6344 (U.S. International)
- **Additional Phone Numbers for Sierra, Millennium, and Discovery Customers**
  - 1-800-444-2344 (North America)\*
  - +1-510-450-6344 (U.S. International)
  - +353 16722300 (Ireland International)
  - 1-800-143-893 (Australia)
  - 0800 995100 (New Zealand)
  - 00801147001 (Taiwan)
- 1-800-819-866 (Malaysia)
- 108007130796 (Northern China)  
108001301109 (Southern China)
- \*24-hour technical support.  
(Application support available 8am-8pm Monday-Friday Eastern Time)

#IUG2023

IUG<sup>20</sup><sub>23</sub>

15

## *Authority Control with a Vendor: tips for success*

Martha Rice Sanders

 #IUG2023

IUG<sup>20</sup><sub>23</sub>

16



## Start with a plan



What do you want to accomplish?

One time or ongoing?

Whole collection or subset?

How much can you spend?

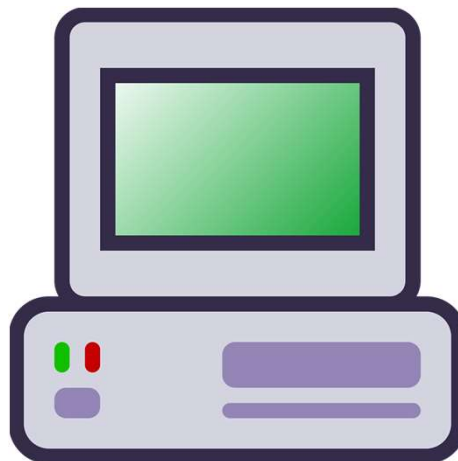
#IUG2023

IUG<sup>20</sup><sub>23</sub>

17

## Know your system

- MARC validity tables
- Indexes and index rules
- Load tables
  - Out / In
  - Bibliographic
  - Authority



#IUG2023

IUG<sup>20</sup><sub>23</sub>

18

## Know your metadata

- What to send?
- What **not** to send?
  - Suppressed bibs
  - Brief bibs
- What about bib records for e-resource collections?



#IUG2023

IUG<sup>20</sup><sub>23</sub>

19

## Services to consider

- Fix issues throughout the bibliographic record
  - Or just indexed fields
- Add RDA elements?
- Table of contents?
- Add genre / FAST / MeSH / other vocabularies?
- Changed authority record service?

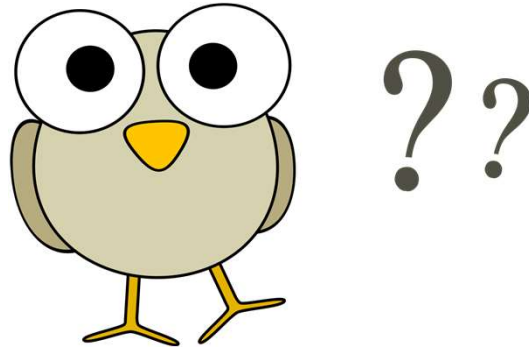
#IUG2023

IUG<sup>20</sup><sub>23</sub>

20

## Vendor Profile

- Read the instructions
- ASK QUESTIONS
- Fill out the profile



#IUG2023

IUG<sup>20</sup><sub>23</sub>

21

## From the vendor's perspective

- We are your partner – it's your project, you don't cede control
- We love to collaborate – what do you need us to know? What do we need you to know?
- We want you to be 100% comfortable with the process
- We are on your schedule - take as long as you need to review the profile, ask questions, and review samples.

#IUG2023

IUG<sup>20</sup><sub>23</sub>

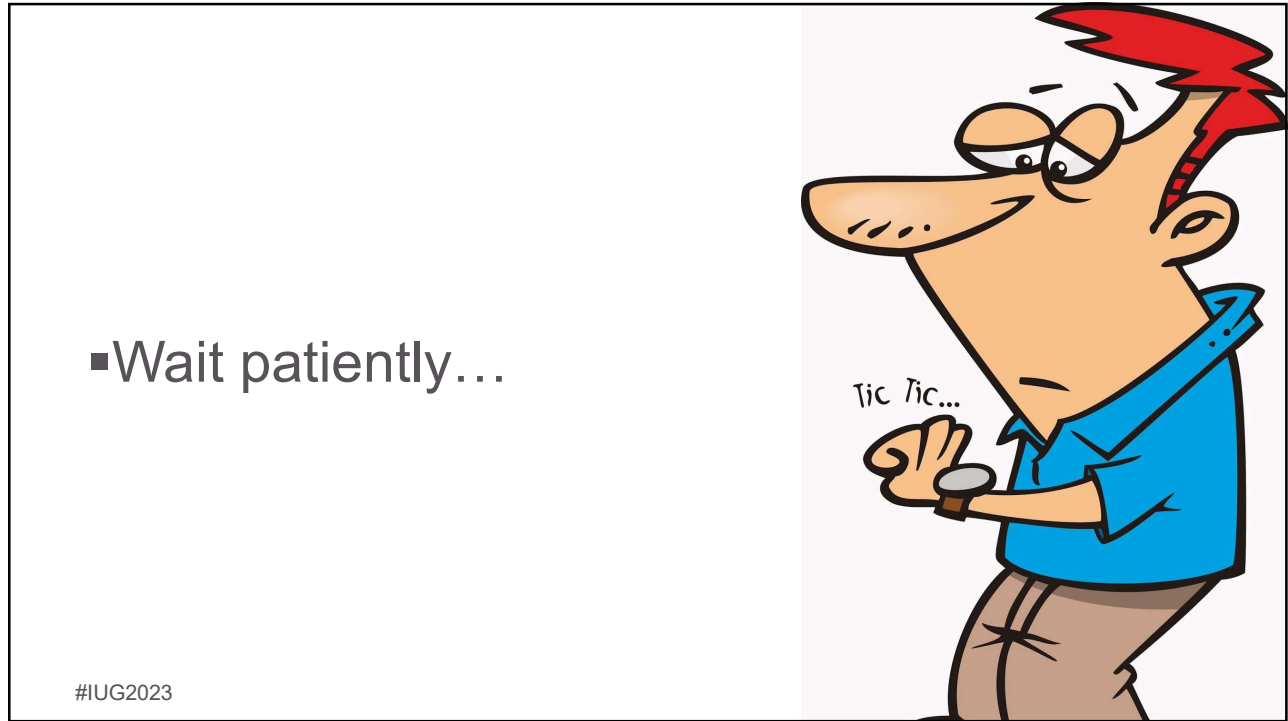
22



23



24

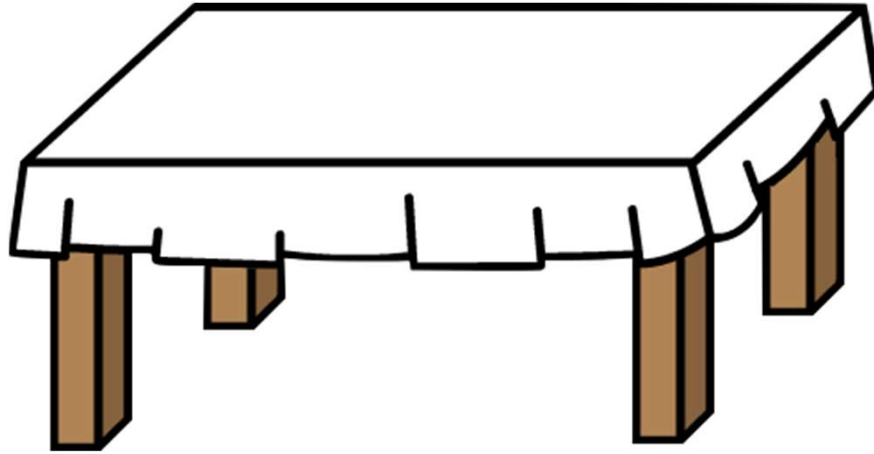


25



26

## Authority records—overlay or delete?



#IUG2023

IUG<sup>20</sup><sub>23</sub>

27

## Review reports from vendor



#IUG2023

IUG<sup>20</sup><sub>23</sub>

28



29

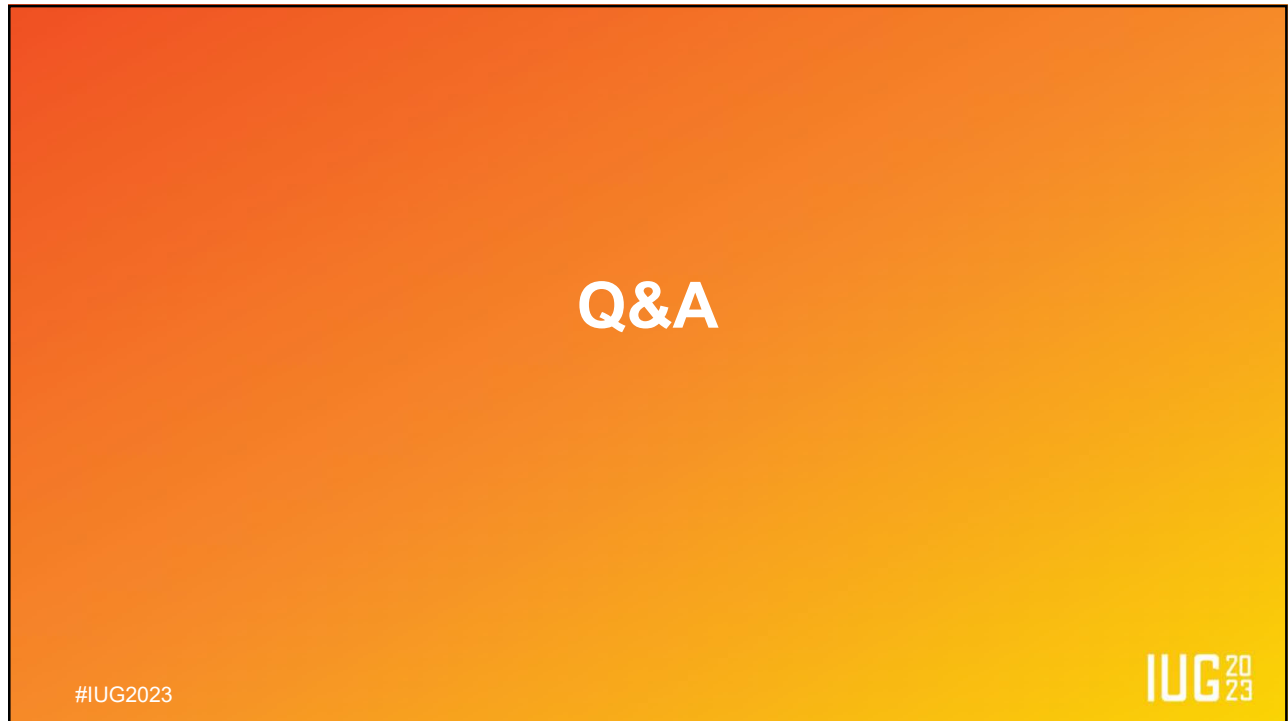
## Supportal Solutions

- **Starting authority control with an outside vendor**
  - Solution ID 160718145740608
- **Ongoing authority control with a vendor**
  - Solution ID 160822155518196
- **Describe the workflow for an authority control project**
  - Solution ID 160411182801550

#IUG2023

IUG<sup>20</sup><sub>23</sub>

30



31



32