



MIGRATION UPDATE

FEBRUARY 28, 2018

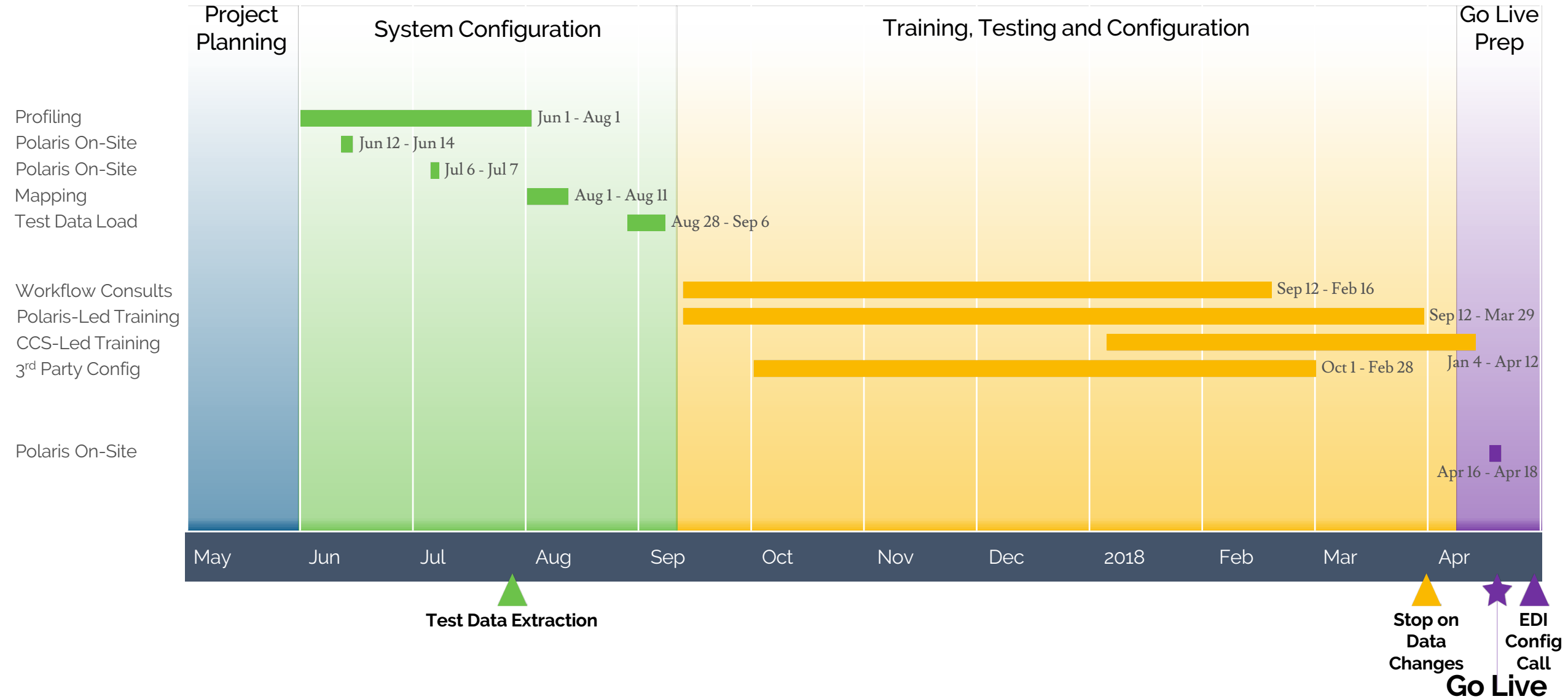


AGENDA

- Remaining Configuration
- Documentation Expectations
- Go Live Schedule
- After April 17

- Offline Circulation Demo

PROJECT PHASES



CONFIGURATION

- Permissions – test and troubleshoot
- Notices – Configure revised text and test
- PowerPAC Payments
- eContent Configuration
 - Integrated
 - Non-integrated
- Publish reports

CONFIGURATION

- CollectionHQ
- Receipts and Labels
- PAC Customization
 - StackMap
- Acquisitions
- SIP and API

ADDITIONAL PROJECTS

- Call Number Split
- Community Profiles and Feature It
- Web Reports

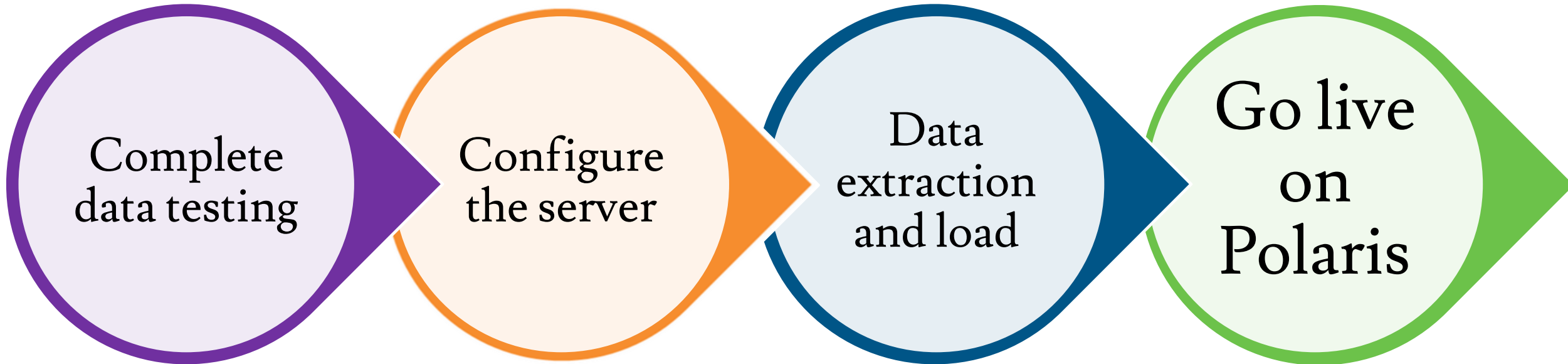
| | | |
|--|---------------------------------------|--|
| Call Number Scheme * <input type="text" value="Other"/> | Cutter <input type="text"/> | Volume <input type="text"/> |
| Prefix <input type="text"/> | Suffix <input type="text"/> | Copy <input type="text"/> |
| Classification <input type="text" value="YA PAPERBACK ASH"/> | | Name of Piece <input type="text"/> |

DOCUMENTATION

- Offline Mode
- Circulation procedures
- Notices
- Patron Entry Standards
- ILL procedures
- Technical Services procedures
- Managing eContent
- Fixed Field usage
- Authorities in Polaris
- TOM usage
- Withdrawal procedures
- Creating labels
- Adding staff users
- Understanding permissions
- Adding new hardware

<https://www.learning.ccslib.org/public-services-1>

GO LIVE SCHEDULE





GO LIVE

**Complete
data testing**

Friday, February 2

Last day to request new policies like shelf locations

Thursday, March 15

Last day to submit data or configuration issues to CCS

Friday, March 30

CCS and Polaris sign off on Polaris database



GO LIVE

Configure
the server

Thursday, April 5, 5:00 PM

Last day to make changes to the Polaris training database

- Settings
- Templates
- Import Profiles
- PAC Customization

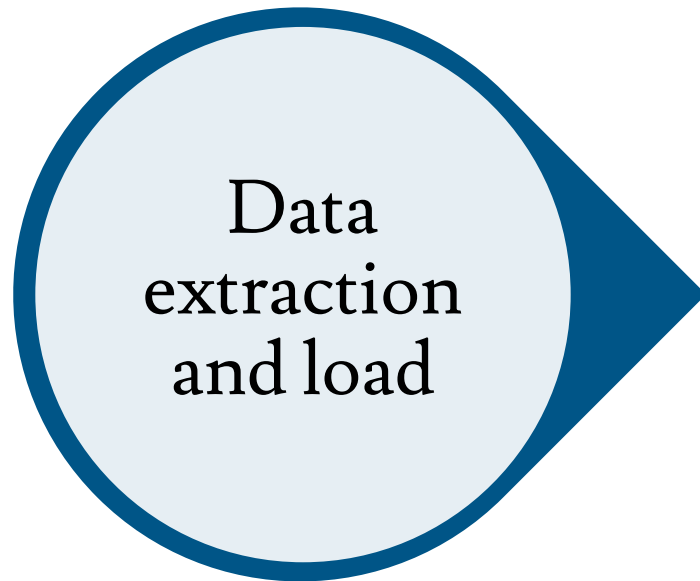
Friday, April 6, 7:00 AM until notified

Polaris test database down for up to ½ day

Copy Polaris Test to Polaris Production



GO LIVE



**Data
extraction
and load**

Sunday, April 8, 5:00 PM

Extraction of bib, item, and authority records from Symphony

Technical Services downtime begins

Friday, April 13, 9:00 PM

Extraction of circulation and patron data

Begin using Polaris Offline



GO LIVE: POLARIS OFFLINE

Offline
on
Polaris

Available Services

- Check out materials
- Patron registration (optional)
- Hourly material check-in (optional)
- Available holds pickup
- Enterprise search functions
- Symphony patron lookup
- Database/SIP Authentication
- Polaris test database

Unavailable Services

- Patron Account Access
 - Placing holds
 - Paying fines
 - Modify patron records
- Processing Holds
 - Running the picklist
 - Receiving delivery
 - Checking in expired holds
- Materials check-in
- Symphony write access



GO LIVE: APRIL 17 TARGETS

6:00 AM

- CCS and Polaris staff in office
- Monitor processing of offline files
- Begin testing connections
- Database QA
- Cut over key SIP tools

7:00 AM

- CCS notifies all libraries that Polaris is available
- Libraries test connections
- Libraries configure printers
- Libraries begin material check-in

8:00 AM

- Libraries clear expired holds
- Libraries review offline reports
- Libraries update catalog URLs
- Cut over SIP tools

9:00 AM

- Libraries open to the public
- CCS and Polaris staff available for support and troubleshooting
- Libraries run Polaris pick list

And beyond

Times are targets and may change due to load progress. CCS will send updates throughout the load with anticipated changes.



AFTER GO LIVE

- Library Visits
- Additional PAC Customization
- Web Reports
- Community Profiles and Feature It

AFTER GO LIVE: TRAINING

Public Services

- Circulation (4 sessions)
 - Searching tips (patrons)
 - Record sets
 - Statistics/counts
 - Holds
 - PAC
 - Procedures
- PAS (4 sessions)
 - Searching tips (items/bibs)
 - Record sets, bulk editing
 - Selector reports
 - Holds
 - PAC

Reports

- Statistical Reports (2 sessions)
- Working with Polaris fields

Other

- Follow-up PAC customization webinar
- Power Searching and SQL Basics
- Community Profiles and Feature It (2 sessions)

AFTER GO LIVE: TRAINING

Technical Services

- Technical services (3 sessions)
 - Find tool
 - Record Sets
 - SQL searches
 - Power Searches
 - Polaris Label Manager
 - Cataloging: (3 sessions)
 - Merging records
 - Import Profiles
 - Electronic resources loading
 - Authorities
- Acquisitions Meeting
- Acquisitions Startup (as needed)

OFFLINE DEMO