Polaris Workstation Follow-Up

Introduction

Please read through the August 24th How To Prepare post on the Migration Portal and complete the Polaris Workstation Follow-Up survey by Friday, September 1st.

Name:

Email:

Library:

Polaris Workstation Follow-Up

Self-Check Workstations

Earlier in the migration, we asked libraries for self-check information such as number of current units, number of anticipated new self-check units to be added through April 2018, vendor, etc. We want to verify the amounts collected and give libraries the opportunity to make any adjustments to the number of anticipated self-check additions through April 2018.

We also need to know which workstations are to be used with self-checks, both current and anticipated. When answering the following questions, use the Workstation Follow-Up spreadsheet for reference.

Are the numbers for current and anticipated self-checks listed in thePolaris Workstation Follow-Up spreadsheet accurate for your library?

- ◯ Yes, the numbers listed in the spreadsheet for both current and anticipated self-check units are accurate.
- ◯ My library needs to change the amount of current self-checks and/or anticipated self-checks. Please see below for details:

Using the list of workstation names in thespreadsheet, which workstation names are to be used with your current self-checks?

- ◯ My library does not have self-checks.
- ◯ The following workstation names will be used with my library's current self-checks:

Using the list of workstation names from the spreadsheet, which workstations will be used with new self-checks your library will acquire between now and April 2018?

- ◯ My library does not anticipate getting new self-checks through 2018 OR we do not have self-checks.
- ◯ My library will be adding new self-checks by April 2018. These will be the workstations associated with the new self-checks:

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Staff Client Workstations

We also need to know which workstations will need to access the staff client. To help libraries determine which workstations will need the staff client, here is a brief outline of functions that can be performed in LEAP vs functions that can be performed in the staff client:

LEAP

- **Public service desk functions (circulation, searching, placing holds)**
- **Basic editing of bibliographic information**
- **Adding single item records**
- **Deleting single item records**

Staff Client

- **Setup for outreach and Books by Mail services (circulation functions related to these features can be performed in LEAP)**
- **Transferring holds from one record to a second**
- **Offline mode**
- **eCommerce**
- **Majority of technical services functions including:**
  - **Bulk editing of bibliographic information**
  - **Adding or deleting items in bulk**

A note about training: The main purpose of designating workstations that will have access to the staff client is to help streamline the login process after the migration. Please report workstations that need access to the staff client post-go-live in the survey.

During the training phase of the migration, staff will likely be training on computers that may not need to access the staff client after we are live on Polaris. Libraries may set up the staff client on as many computers as needed during the training phase, and simultaneous connections will be limited to the number of licenses each library has.

Using the list of workstation names in the spreadsheet, which workstations will need to access the staff client?