



TAKING OUR LIBRARY SERVICE TO A HIGHER LEVEL **POLARIS**

News

POLARIS TRAINING A SUCCESS!

Thank you to each person who took part in the basic Polaris training, which is now complete. Without your help and support, implementation of this exciting new computer system could not become a reality. YRL Training and Systems librarians offered training at YRL headquarters and two area libraries using 44 short videos created and narrated by Technology Services librarian Linda McClure. 125 local library staff were trained in twelve sessions.

Local library staff who took part in the training sessions were excited by the positive changes made possible by the new Windows-based Integrated Library system (ILS). Exclamations of "wow!", "Cool!", "This is great!", "I can hardly wait to use Polaris!" were heard often.

YOUR FEEDBACK IS NEEDED

We would like your feedback to the Polaris training session you attended. Please go to <http://www.yrl.ab.ca/uccass/survey.php?sid=31> and complete the short online survey. Thank you for your response!

BEFORE YOU GO LIVE ON POLARIS...

Switching library systems is like moving into a new house while the finishing is being done. There is more work to do!

With this in mind, after Polaris goes live on January 8, 2009 only the Circulation (Polaris Staff Client) and PAC modules will be in use.

- You can use the Request Manager to run Holds reports.
- Cataloguing, ordering (acquisitions) and reporting will be the next activities to be brought online.
- Special reports you have requested will not be available immediately.
- TRAC Teams will perform further functionality tests in consultation with libraries. Problems will be diagnosed and fixed. Adjustments will be made as needed.

PATRON DATA CLEANUP

Inconsistencies in the way in which patron names and phone numbers were entered in Dynix over the years will cause problems when performing patron searches in Polaris. For example, a name entered like this: **John Doe** (in Dynix) will be difficult to find in Polaris because Polaris will be looking for **Doe, John**. Similarly, if you do a phone number search, Polaris will look for a phone number in this format, **780-123-4567**, and will therefore not find **(780) 123-4567**.

To prevent future patron search problems in Polaris, please review your patron data and correct it. All changes you make to patron records prior to 6:00 pm on December 30, 2008 will migrate to Polaris.

The correct format to use is given below:

Names: last, first middle (last name comma space first name space middle name) E.g. Doe, John Richard

Phone Numbers: 780-123-4567 (numbers and dashes starting with the area code. No brackets please!)

A report called *Patron Cleanup for Migration* was added to your library's miscellaneous reports which you can use to correct any inconsistencies in your library's patron data.

LEARNING MORE ABOUT POLARIS

The next steps after basic training to help you get to know Polaris better are to review the videos and directions, and to practice using the new software. Training videos and directions for your review are available at: <http://www.yrl.ab.ca/PolarisTraining/>

Polaris Project Manager Margaret Harris recommends that library staff spend ½ hour per day practicing Polaris. To practice, log on to the Polaris Practice Database using the Remote Desktop you used during your training session. Instructions are available at: <http://www.yrl.ab.ca/PolarisTraining/LogInOut/LogIn.pdf>

To practice the patron Public Access Catalogue (PAC), go to the online Pac practice database at:

<http://polarispac.tracpac.ab.ca/polaris/search/>

Because the Public Access Catalogue is undergoing development, there may be some differences in the live Polaris TRACpac.

YEAR END REPORTS

System year end reports this year will be done differently due to the migration to Polaris. **Please run your reports near the end of December no later than 6:00 pm on December 30.** For example, if your library is closed between Christmas and New Year, you should run your reports before Christmas.

The reports you need to run are listed at: <http://www.yrl.ab.ca/toolkit/arprepare.html>

HOW WILL POLARIS AFFECT YOUR LIBRARY?

How you did your library work in Dynix and how Polaris ILS functions will likely create changes in your library's internal workflow, especially with regard to holds (requests). After training, your library's staff might want to plan time to discuss any possible changes to your internal workflow.

NEW ADDRESS FOR REMOTE DESKTOP LOGIN

The new address for the Remote Desktop login is: polarisclient.tracpac.ab.ca This is for EVERYONE and it no longer matters whether you're connected to the YRL VPN or not.

Screenshot:





TELL YOUR PATRONS ABOUT POLARIS!

In order to help you promote Polaris and to tell your patrons about the changes in the new TRACpac, Yellowhead Regional Library has prepared a marketing package to provide you with some tools. Poster, bookmarks, a news release, event ideas, etc. are available for download and printing at:

<http://www.yrl.ab.ca/PolarisTraining/>

Feel free to customize them for your library!

TRACPAC NOTICE FOR YOUR PATRONS

Booklists and other content that your patrons may have placed in the "My List" part of their patron accounts in the current TRACpac WILL NOT migrate to Polaris TRACpac. If patrons wish to keep this information, they should print it out before 6:00 p.m. on December 30, 2008.

RECEIPT PRINTERS

If you wish to purchase a new receipt printer, the final recommendation is the *Star TSP100*, which is available from Legacy Library Services. Call Sandy Tough at 780-459-3577 for more information.

FURTHER POLARIS TRAINING...

Since the Polaris training that was offered was basic, further training on the Polaris Integrated Library Systems will be needed. Future training sessions are being planned with your questions, concerns and needs in mind. More training information will be provided in the New Year.

LIBRARY CIRCULATION DURING THE OFFLINE PERIOD

The final export of records from Dynix to Polaris will take place at the end of December 2008 and take approximately one week. Neither Dynix nor Polaris will be available from December 30, 2008 at 6:00 p.m. to January 7, 2009.

Libraries that remain open will be using an Excel **Offline Circulation Spreadsheet** to check out library materials. For downloads and how-to directions, please go to: <http://www.yrl.ab.ca/PolarisTraining/> and page down to the "Documents" section.

ONLINE DATABASES CAN BE USED DURING OFFLINE CIRCULATION

You and your patrons will have access to the Online Databases including *Novelist* and *Tell Me More*, the language learning software. You will need to access the databases through a direct link to TAL (The Alberta Library). You can do this at: <http://www.yrl.ab.ca/search/databases.html>



FAQS

To answer some of your questions about Polaris, see *Frequently Asked Questions* from the Polaris training sessions at:

http://www.yrl.ab.ca/PolarisTraining/FAQ_YRL.pdf

IMPORTANT POLARIS DATES

Note: Unanticipated events may change the schedule.

December 15, 2008

- In preparation for the migration to Polaris, any outstanding orders on Dynix will be cancelled. Cancellation notices will be sent to you if applicable.

Before your last open library day in December, 2008

- Dynix reports must be printed out before the end of 2008, in preparation for the Annual Report for the Province of Alberta.

December 30, 2008 at 6:00 p.m. to January 1, 2009

- Data will be moved to the new Polaris system and use of the old Dynix system will cease. During this time there will be no online service at all.

January 2 – 7, 2009

- TRACpac and Dynix will not be available during the time while data is being transferred. Member libraries that stay open will use an Excel Offline Circulation Spreadsheet to check out library materials. Some member libraries will choose to close.
- There is no van delivery during this time.

January 8, 2009 Polaris goes live!

- The January “go-live” milestone will mark the start of the final phase of implementation of TRAC’s new computer system, Polaris. From that date on, the remainder of the implementation will be done in the new system. Patrons will search using the new TRACpac. Libraries will circulate material using Polaris.
- TRAC’s system implementation process is expected to be completed by the end of March 2009.

The NEW TRACpac will let you:

- ✓ **Find books easier**
- ✓ **Keep track of what you have read**
- ✓ **Keep a list of future reads**
- ✓ **See bestsellers & other lists to help you find good books**

Anyone with a computer and access to the internet can use TRACpac to search a combined catalogue of over 150 member libraries with holdings of nearly three million books, DVDs and other materials.

YELLOWHEAD REGIONAL LIBRARY

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