# ILS Migration – IUG 2025 Panel Outline

## Months before

* **Suggested book read:** Managing transitions : making the most of change [**https://search.worldcat.org/title/961035058**](https://search.worldcat.org/title/961035058)
* Don’t make material due for N+3 days before/after the migration in the **old system.**
  + **Dan –** And when you’re doing your initial checkins to clear the backlog, use the free dates feature of Polaris.
* The most difficult migration we ever did was a Polaris to Polaris one.
  + **Dan –** Polaris to Polaris migrations sound easy until you get down into the nitty gritty of the details. Polaris is a friendly front-end to SQL Server and if everything changes during your migration then you are basically migrating to a brand-new ILS that just so happens to have the same name.
* **Dan** – Now is a really good time to have amnesty return days where, if you’re charging overdue fines, you *stop* charging overdue fines. As much as possible, try to get your long overdue, billed, and otherwise missing items back into the library so you have proof of their existence.
* **Dan** – To go with this, as you get started with the overall migration process, if you can do any cleanup on your previous system, now is a great time for that. Purge any patrons who’ve not used their accounts in X days. Delete old items, bibs, authorities that don’t need to be there anymore. If you’ve been thinking about weeding a section because reasons, now’s a good time for that. If you can possibly help it, do not bring dead data over to your new ILS.
* **Dan –** If you can get a training and testing server set up with semi-real starter data, do so. You need to start training your staff on the new system at least a few weeks before everything hits. How you want to do that is up to you. You can have classes, online and in-person. You can create videos, both long form and quickies, to teach and explain concepts. You can have traveling trainers who go from branch to branch. However you do it, your goal is not to have experts on day one, but rather staff members should not be looking at anything they’ve never seen before. Everything should at least be familiar.
  + <https://www.ccslib.org/online-courses> <<< use these, they are awesome!
* **Dan –** To carry on the training thing, you will want a few people to be trained to a higher level than everyone else. These people will be your experts, and they should be trained on things that can (and will) likely happen. How to handle an overdue, or what to do if you check out an item and there’s a problem with it, or how to handle new cards, and all of that. These people need to be around on day one and preferably week one to offer higher level assistance on the edge cases that will inevitably pop up.
* **Dan –** Be prepared for push-back. There will be some people who do not greet this change with open arms. Be as gentle and as diplomatic as possible to introduce these changes to all staff, explaining how things are different without getting bogged down in whether or not they’re better than what came before. “Better” is subjective, “different” is objective. And, if needed, you may need to remind the holdouts that the change is coming, whether this is their preference or not. I’ve literally had people tell me that I’d have to pry the old ILS out of their hands, to which I responded that I don’t need to do anything like that. I can simply cut off access to the old servers. ¯\\_(ツ)\_/¯
  + **MANAGING TRANSFORMATIONS LINK**
* If migrating into an existing consortium, consider pre-warning current staff & patrons that **auto-renew** won’t be running during migration and that notices will be batched up.
* If you are going to have a test/dev system, make sure it 100% matches production down to the patch level.
* **Moving to a consortium?** Start looking for item and more importantly patron barcode collisions TODAY

## 3rd party integration

* Get a list of vendors that interact with the system. From Overdrive to summer reading.
* Consider how you’ll do patron authentication during the migration.
* Start these conversations EARLY 3rd parties can take a long time to get back with you.
* Check SIP logs or firewall/web logs to help find “hidden” 3rd party services.
* If you use Overdrive with patron ids, you may have to provide them with a mapping table.
* Bibliocommons will be its own separate migration and may take longer than the ILS migration. They’ll need mapping for your patron ids & your bib ids.

## Permission setup

* Always, always, always use permission groups even if it is one person.
* Make sure to train people to give you screenshots for permission issues.
* If you haven’t been using individual staff accounts, now is the time to do it.
* Consider limiting System Admin & Postal Code table access/changes.

## Alerting patrons

* If you don’t already have one, consider getting a marketing platform for patrons to push out updates to them.
* See if you can put a banner on your current PAC/website.
* Put it on the notices that are going out.
* PINs will probably need to change, typically last 4 of phone number.

## System profiling (Polaris)

* ILS rules CAN & WILL be changed down the road, most profiling decisions aren’t life or death.
* Gather feedback on preferences but set a deadline & pick a default for things. If we don’t hear back from you on NNNN date, we will be going with this option.

## Data migration

* Ask about getting access to or knowing that CNV tables with original system data are there for future reference on your Polaris system. The CNV tables are your safety net, even after the old system is gone.
* When possible do NOT use Shelf Locations in Polaris. The way they are structured in Polaris is terrible and although they might work fine at first, they’ll end up eventually causing you problems when you try to add/remove them or run reports on them. Collection Codes are a much saner way of handling finding aids.
* **Acquisitions & Serials probably isn’t going to migrate**. Consider how you mightgive yourself time in the new system to set those up. For example, not having any big orders “in flight” or trying to arrange migration date around big subscription renewal periods.
* **Dan -** Databases are *weird*. And you might be thinking things like “Oh! MARC is standard, that’ll be easy to migrate.” No... no it isn’t. I can’t speak for other ILS databases, but no ILS I know of has integrated MARC into the database the way that Polaris has. That makes Polaris incredibly innovative (pardon the pun) but it also means that *nothing else works like the Polaris database.*
* **Dan –** If you’re lucky, you get SQL to SQL database transfers. If you’re not, you’re looking at flat file insanity with XML exports (if you’re lucky) and writing transforms to pull data from one system to another through temporary migration databases. (Looking at *you,* Apollo.)
* **Patron saved/reading lists probably won’t migrate:** See if you can export or print them for those who really want them.
* Reporting, figure out how to save that data somewhere.

## Physical Space Planning

Typically, you don’t have material due during the migration days, but people will still return things. Since you don’t typically want to check-in anything during offline, you want to figure out your space planning.

* Where will you store returns?
* Consider pre-sorting returned material, so after check-in, it is shelf-ready.

## Holds

* Did your current system have any special hold “statuses” for example vacation or frozen holds?
* Could you clear all your hold shelf items off before the migration?

*Carrie will likely have much to say about holds but for now...*

## During downtime

* Don’t check-**in** anything. Determine how you’re going to keep offline files backed up.
  + **Dan-** I cannot stress this enough. You are going have a backlog of items that haven’t been checked in. Yes, that will be stressful to look at, but don’t worry about it. Once you come up and you’re live, you can start checking in at multiple stations, even those that don’t normally do check in. You can clear a multi-day backlog in hours. It’s not as bad as it seems. No the thing you should be worried about is *shelving* all of that stuff.

## First day(s) on new system

* Process all offline files FIRST **BEFORE** doing any check-ins.
* Don’t run: Overdue notices, Collection Agency submissions (maybe run updates)
* **Dan –** Have a single person who’s giving go/no-go calls. In other words, as things come online and staff can start logging in to do things, designate one person who will be communicating that information with the staff and it’s on their word and their word alone as to whether or not something is ready. Make sure the staff knows who this person is and that they should expect to hear from them.
* **Dan –** I previously mentioned staff trained to a higher level and these people need to be around at any point where the public interacts with the ILS. You should have one at your circ locations at all times, and reference, and children’s, and wherever else your patrons contact the ILS.
* **Dan –** Ya know, there’s nothing wrong with being closed on the day you go live. It’ll give you time to test, finalize training, finish any dangling tasks, and you can deal with backlogs and such. And, if you open the next day, you’re going to be in a clearer headspace to deal with the patrons.

## Terminology Changes

Some specific terminology changes from Sierra -> Polaris

|  |  |
| --- | --- |
| **Sierra** | **Polaris** |
| Pull List | RTF, Holds, Picklist, etc. |
| Create List | Record Set + Bulk Change |
|  |  |

## Moving from implementation to support

* Support and implementation are typically two different teams
* You may need to reiterate yourself or open new tickets
* Ask for a handoff meeting

## Communication, Communication, Communication

* Long lists of full details **PLUS** Smaller chunks of just-in-time information
* Don’t silo information in emails – have open channels or boards where information can be posted and then email notifications pushed out.
* Use the 3 x 3 rule. Important information is posted 3 times via 3 different communication methods (written, in-person, phone calls, message boards, etc.).
* In working with implementation team, use the one issue per subject/post system. Don’t start one long change with “all” the issues in it, break them down so they’re more trackable.

# Confusing things about Polaris for new members or new staff

This article is a good starting point to help demystifying some of Polaris’ more confusing workflows or settings. These are the questions that CLC commonly get asked after performing a Polaris migration.

CLC has [a series of Overview/Housekeeping documents](https://housekeeping.clcohio.org/) that are a good starting point for understanding Polaris and CLC’s specific configuration choices

Most circulation policies are controlled by the **patron** code and the **item’s material type, fine code and loan period code**

The **item’s collection code** does NOT control any circulation policies - although it DOES influence floating behavior

When and item has fulfilled a hold request, it is possible to [**have a different status on the Hold Record than the associated Item record**](https://discourse.clcohio.org/t/correlation-between-hold-request-status-and-item-record-status/6832)

For example, an unclaimed item on the hold shelf (patron did not pick-up) would have a Hold request status of *Unclaimed* HOWEVER, the item record CIRCULATION status will still show as Held until the item is checked in

Excluding patrons from overdues means, they won’t get billed and items won’t go to lost

[**How can I keep a patron from receiving notices, but ensure items go to Lost (using a fake email address)?**](https://discourse.clcohio.org/t/how-can-i-keep-a-patron-from-receiving-notices-but-ensure-items-go-to-lost/2836)

Circulation rules are governed by the CKO location

For example, fines calculated from the original checkout (or latest renewal branch), NOT where the item is returned

However, number of allowed renewals is **always controlled by owning library**

If a item is owned by the library and their patron has a request on the item, that request will jump to the top of the queue

However, [**if the item has already been earmarked for someone else**,](https://discourse.clcohio.org/t/how-can-i-tell-if-an-item-has-been-earmarked-already-to-fill-a-hold-request/3075) then they WON’T trap to fill the local hold

It is not always possible to FORCE an item status change by only editing the item record

For example, you can’t force edit the item status from Out to In, you must FIRST CKI the item record through the normal check-in procedures

[**Why are two different bibs causing a duplicate hold error for a patron?**](https://discourse.clcohio.org/t/why-are-two-different-bibs-causing-a-duplicate-hold-error-for-a-patron/2176)

Polaris has a method of controlling editing of records by more than one person at the same time: [**When I try to access a record in Polaris, I receive the following message: This record is being modified by Username.**](https://discourse.clcohio.org/t/when-i-try-to-access-a-record-in-polaris-i-receive-the-following-message-this-record-is-being-modified-by-username/2216)

Members should always post their bills even if they don’t intend to print them. To post a bill, simply access the bill from a Polaris Desktop client and then when prompted if you’d like to post the bills to the database, say yes. Posting the bills helps transition the items to lost and avoids situations where text messages get stuck: [**Repeated Add'l Text Messages for Fines**](https://discourse.clcohio.org/t/repeated-addl-text-messages-for-fines/5699)

Additional Text messages are not logged in the patron account history: [**Polaris Notices Overview**](https://discourse.clcohio.org/t/polaris-notices-overview/3368#heading--text-and-sms)

[**Westerville Migration FAQ**](https://discourse.clcohio.org/t/westerville-migration-faq/9925)

[**clc-general-info**](https://discourse.clcohio.org/tag/clc-general-info)

[**kburkett**](https://discourse.clcohio.org/u/kburkett) (Kalee Burkett) 1 March 14, 2024, 7:53pm

**When will Westerville officially be part of CLC?**

Starting on Jan. 1st, 2024 Westerville became a voting member of the CLC. Our “Go-Live” date for their data appearing in Polaris is **November 18, 2024**. You may start to see their location appear in Polaris before that date as part of the setup process. If your patrons have any questions, you can direct them to [**our official announcement**](https://clcohio.org/2024/03/13/westerville-public-library-to-join-the-central-library-consortium/).

**Visual timeline of the process**

This PDF is a visual overview of the major milestones for this project: [**migration-timeline-10-212024.pdf**](https://discourse.clcohio.org/uploads/short-url/7wT8FpguxdICAiy58wl3QeDzKg9.pdf) (57.0 KB)

**When will Staff first see Westerville in Polaris?**

Staff may begin to see Westerville locations in Polaris as early as 5/24/2024. **These locations will not be visible for patrons.** Having Westerville locations in Polaris will help CLC and Innovative with test migrations and Westerville with training.

Staff will begin to see Westerville items and patrons show up in the Polaris Development (Purple) environment starting in July 2024.

**Does Westerville have more the one service point**

Westerville has several service points (lockers, drive-ups, etc.). Please note that their “main” Uptown location is NOT a pickup location, you can find more information about their pickup locations here: [**Westerville Uptown will NOT be a pickup location for holds**](https://discourse.clcohio.org/t/westerville-uptown-will-not-be-a-pickup-location-for-holds/10340/)

**When will current CLC libraries need to be offline for the migration?**

**November 15, 2024 12:01 am** will be the start of offline mode for all CLC libraries. Westerville will be offline even earlier. Plan for the offline period to extend through the early morning of November 18, though CLC hopes to be online again earlier.

**What will happen during the planned offline period?**

CLC will mark all member libraries as closed. No items will be due during the downtime and hold shelf pickup dates will be extended. If your library wishes to have items due as normal or extend due dates, **please open up a Helpdesk ticket**

Members should consider making room for returned items during the offline period. Because no items can be checked **in** during offline, returns will need to be stored in meeting rooms or other storage areas.

**Why do existing CLC members need to be offline for 3 days?**

One of the most important parts of the migration will happen during this time: deduplication of bibliographic records. **In all cases, if a record matches, the existing CLC record will be kept.**

Some manual deduplication will also need to be done afterwards, with a priority focus on titles with holds. CLC has SQL searches to help with this process.

**Will notices be sent during offline?**

Because no items are due, and no items will be checked-in, **notices will NOT be sent**.

We will NOT run the auto-renew & overdue notice process until the backlog of items have been checked-in by libraries. This typically takes two days after the go-live date.

**Will reports run during offline?**

Scheduled reports will NOT run during offline.

CLC will re-run any missed SSRS reports, but the data may not be accurate.

For example, if you normally run the report on a Friday every week, when we rerun the report, it will be using data from the day the report was re-run.

SimplyReports scheduled reports **will need to be run manually**. You can re-run manually by going into your [**Saved Reports**](https://simplyreports.clcohio.org/savedreports.aspx) and re-running or scheduling a one-time run of the report from there.

**How will the offline period impact SearchOhio?**

SearchOhio will also be offline during the planned downtime, however, Westerville will have a longer period of downtime as they will need to rejoin SearchOhio AFTER joining CLC.

There are no changes to SearchOhio administration as part of the Westerville ILS migration. CLC **will not** be administering the SearchOhio project after Westerville joins CLC. CLC **will** continue to facilitate SearchOhio membership on behalf of CLC members.

**What will happen to transportation**

Final pickups and deliveries will be made on Friday, November 15th and will resume the afternoon of Monday, November 18th. Please review this article for important transportation details - including bin limit restrictions: [**Westerville Migration Transportation Schedule and Details**](https://discourse.clcohio.org/t/westerville-migration-transportation-schedule-and-details/10353)

**What are the Do’s and Don’ts of Polaris/Leap offline?**

(*Optional*) DO register new patrons using a **dedicated workstation only for registering new patrons** (available only in the Desktop Client). DO **offline checkout** of items

DO use [**the training system**](https://discourse.clcohio.org/t/accessing-and-connecting-to-the-different-polaris-environments-including-leap-login-urls-blue-pink-purple/1467#p-3299-training-14) for searching

DO set self-check units to offline mode or disable them. **Test any self-check offline mode PRIOR to the migration date.**

This includes lockers that automatically check out materials when opened. Lockers where staff manually check out items can operate as normal.

DO test offline mode BEFORE the offline date of November 15, 2024

DO NOT check-IN items under any circumstances

DO NOT use any sorters during the offline period

**Setting up Offline Mode**

These articles contain information about setting up and using Offline modes.

[**Offline Mode Overview - Staff Desktop Client and ExpressCheck**](https://discourse.clcohio.org/t/offline-mode-overview-staff-desktop-client-and-expresscheck/6972) [**Leap Offline Setup and Use**](https://discourse.clcohio.org/t/draft-leap-offline-setup-and-use-draft/10269)

**What alerts will staff see when checking out items using the desktop client in offline mode?**

Certain blocks will still alert staff if the computer has an up-to-date copy of the offline file:

Library assigned blocks

Free text blocks

System-level blocks, including PAC self-registration blocks, and card expiration blocks

Collection agency blocks

However, **staff will NOT be alerted about the following blocks**:

Long overdue

Patron has exceeded number of overdue items allowed

Patron owes money

Patron has exceeded maximum fines Patron has notes

**Full list of available services during Offline Mode:**

Check out materials

Patron registration (optional)

Available holds pickup

[**Training PowerPAC**](https://discourse.clcohio.org/t/accessing-and-connecting-to-the-different-polaris-environments-including-leap-login-urls-blue-pink-purple/1467#p-3299-training-14) search functions

[**Training Leap**](https://trainleap.clcohio.org/LeapWebApp/login?ReturnUrl=%2FLeapWebApp) search functions

All item records in Training will be set to non-circulating during the offline time period to prevent accidental CKOs in training.

[**Links to Training Environment**](https://discourse.clcohio.org/t/accessing-and-connecting-to-the-different-polaris-environments-including-leap-login-urls-blue-pink-purple/1467#p-3299-training-14)

3rd-party apps such as Hoopla, Kanopy, and Libby via training data.

CLC will redirect [**papi-auth-only.clcohio.org**](http://papi-auth-only.clcohio.org/) and all SIP IPs & hostnames to training.

EXCEPT the [**sipselfcko.clcohio.org**](http://sipselfcko.clcohio.org/) hostname, which will point to 127.0.0.1 .

Patron ‘Last Activity Dates’ will not be updated if patrons authenticate during offline. [**Communico Event and Room booking won’t require a barcode and PIN**](https://discourse.clcohio.org/t/communico-changes-during-westerville-migration/10358)

**Full list of unavailable services during Offline Mode:**

Materials check-in

Placing holds

Paying fines

Modify patron records

Processing Holds

Running the picklist

Checking in expired holds

Checking in delivery

Creating ILL or on-the-fly records

Technical Services functions (Adding/editing items, bibs, etc.)

Simply Reports access

API authentication

CLC’s custom patron registration system (redirected to a system down post)

**What is my library’s default offline loan period for offline mode?**

There is no access to the database during offline circulation, so each checkout will use the **Standard Loan Period** setting to calculate the item’s due date. Every library is allowed to set their own standard loan period.

► Standard Loan Periods

Please open a Helpdesk ticket to update your library’s setting.

**Will patrons be able to self-register during the offline period?**

No. During the offline period, all library catalogs will be directed to the [**training PowerPAC**](https://discourse.clcohio.org/t/accessing-and-connecting-to-the-different-polaris-environments-including-leap-login-urls-blue-pink-purple/1467#p-3299-training-14). Selfregistration will not be enabled for this interface. Libraries using CLC’s patron registration system will be redirected to a system down post.

Libraries have the option to register patrons at the staff desk during offline. This should be restricted to one workstation per building.

**I missed CLC’s Offline Office hours, where can I find those resources?**

CLC recorded one of the two sessions. [**Here is a link to the recording**](https://us02web.zoom.us/rec/share/yLrgGT3CxWlbbTGdgiw-8IQexwIV_mL5npexxfx6zhlSpfkLslnrU9jsUmpkCXZf.iFaV5sI3DzfBQnUv) (if asked for a password, it is iiH$$0sQ) and here is the PowerPoint: [**CLC Offline Office Hours Westerville Migration.pptx**](https://discourse.clcohio.org/uploads/short-url/A4pRz3rrwzSHImsTqdDxtFc00GK.pptx) (396.3 KB)

**What will CLC post to the PAC during the offline period?**

See [**PAC Banner Wording for Upcoming Offline for Westerville Migration - Starting Nov. 1st**](https://discourse.clcohio.org/t/pac-banner-wording-for-upcoming-offline-for-westerville-migration-starting-nov-1st/10271) and [**PAC Banner Wording for Westerville Migration - Offline Period**](https://discourse.clcohio.org/t/pac-banner-wording-for-westerville-migration-offline-period/10142) for details about PAC banner wording prior to and during the offline period.

**Going online**

CLC will contact libraries on 11/18 when it is OK to go online for **checkouts and processing offline files ONLY**

CLC will contact libraries on 11/18 when it is OK to begin checking-in material.

Temporary restrictions will be in place on [**deleting bibs with Westerville items or removing 906 fields, see this article for more information**](https://discourse.clcohio.org/t/restrictions-on-deleting-bib-records-or-modifying-906-fields-after-westerville-migration/10391).

Additionally, Westerville patrons accounts will be read only and they will be unable to login anywhere until the Bibliocommons migration is finished.

**Westerville Migration FAQ Update log**

► Summary of FAQ changes