How DARE She Retire!

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SHARE Manager of Administrative Services
Illinois Heartland Library System

#IUG2019

IUG2019 Phoenix, AZ

Sunday, May 5th | Pre-Conference
Monday, May 6th – Wednesday, May 8th | Main Conference

RETIRED?

She who shall not be named-- the heart (and soul) of SHARE

She worked for the System for 35 years!

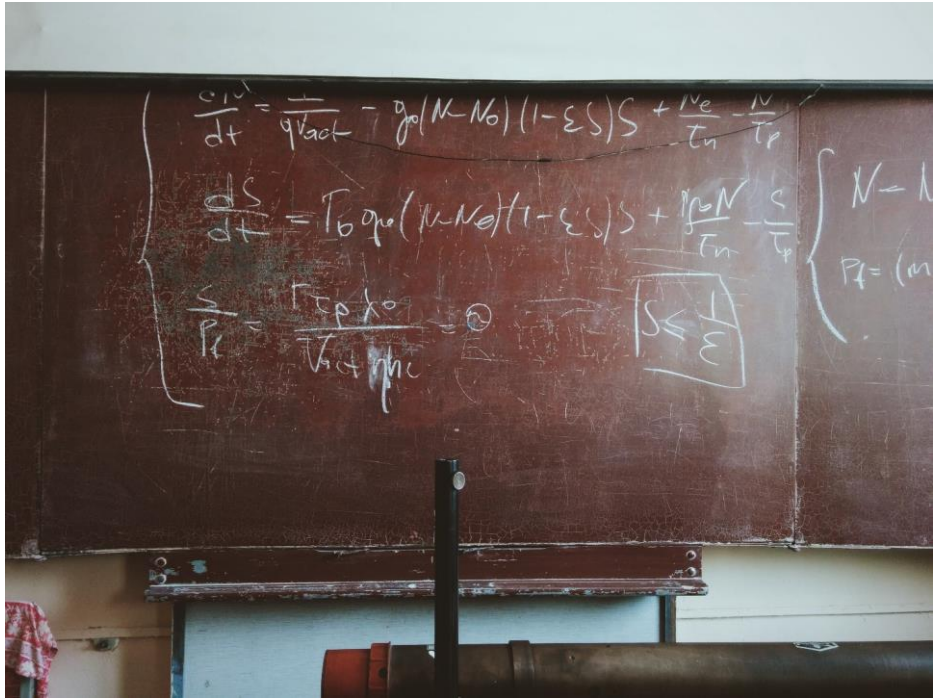
Day we signed the Polaris Contract!

“If the software allows it to be either way and it doesn’t affect any other setting …”

“If the software allows it to be either way and it doesn’t affect any other setting …”

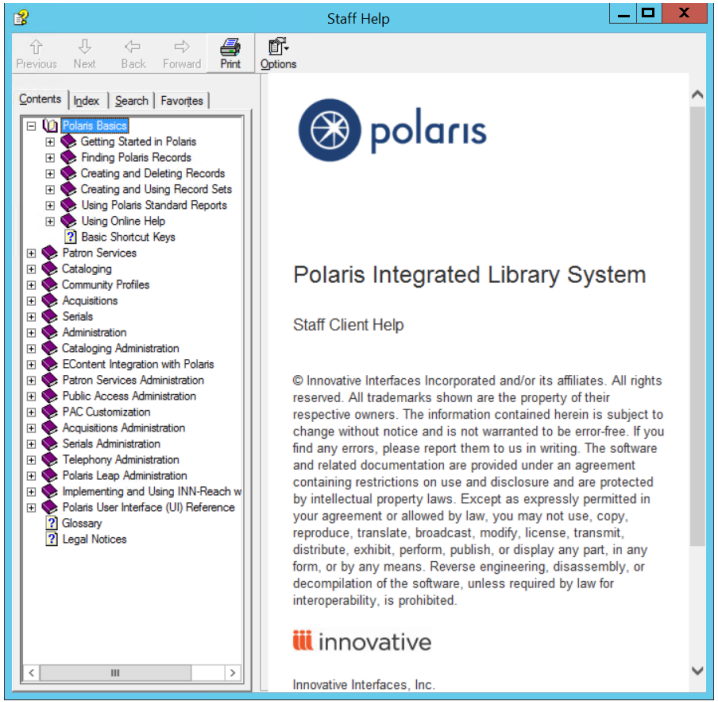
- Very Logical
- Great Customer service – really cared about libraries she served
- If she hesitated about something, WE SHOULD LISTEN!

HOW DO YOU LEARN?



HOW DO YOU LEARN?

- READ, READ, READ Polaris Help

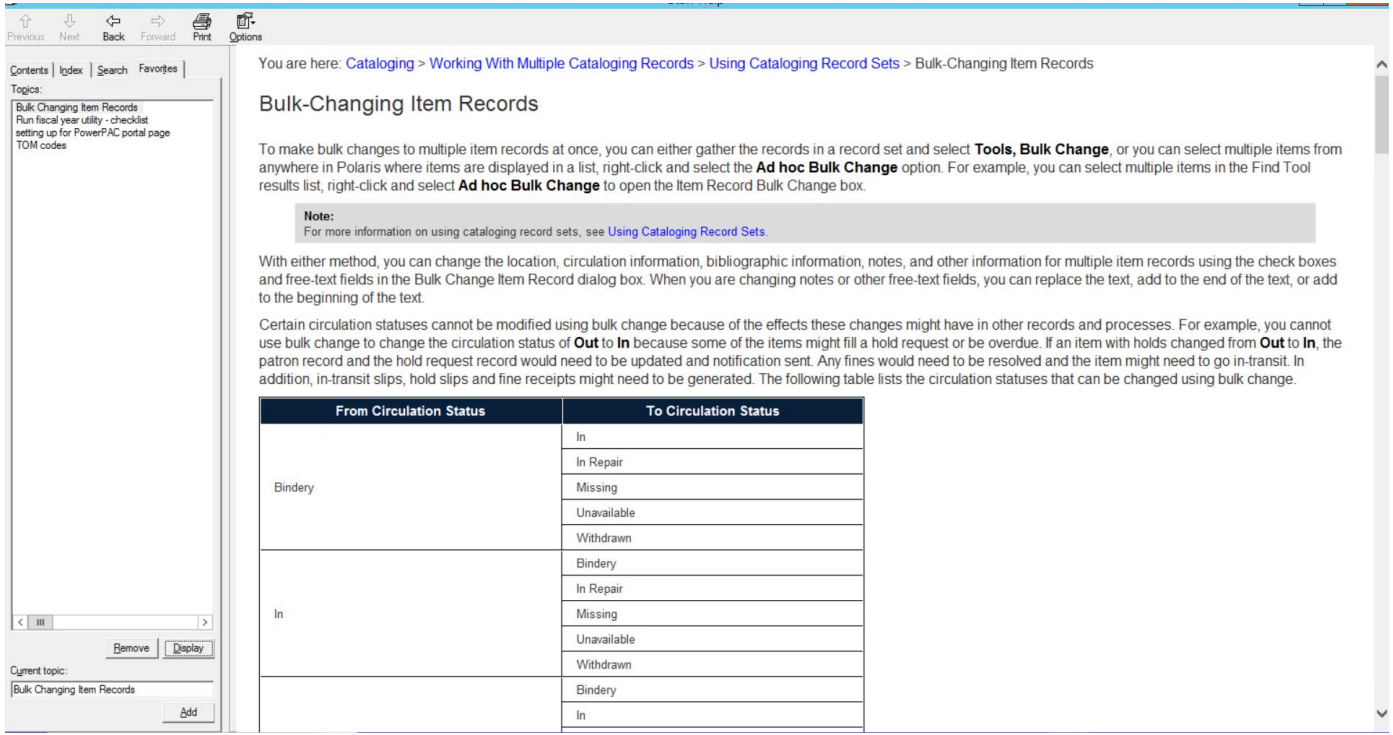


HOW DO YOU LEARN?

Polaris Help Tips

- Favorites – if it took you a while to find something – save as a favorite

HOW DO YOU LEARN?

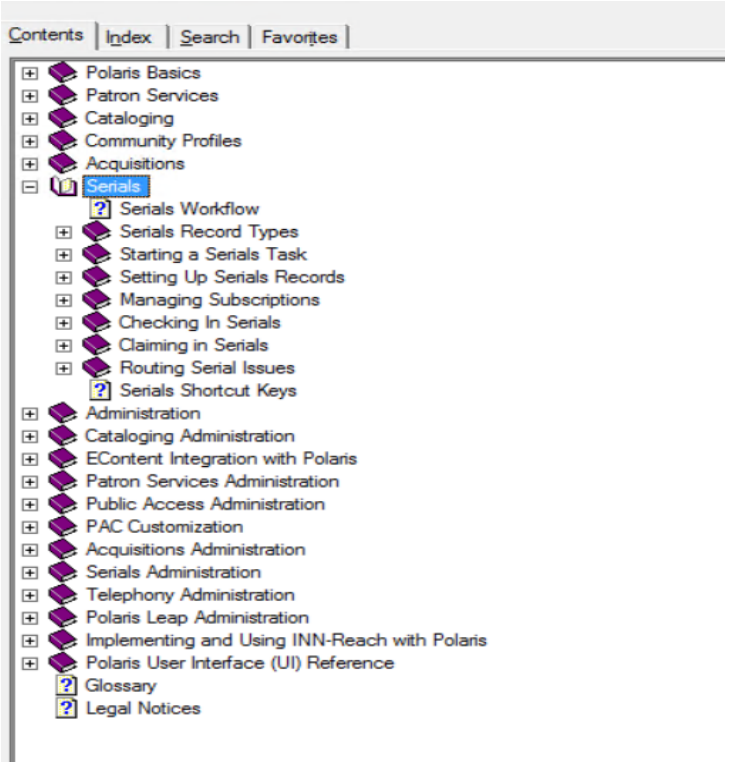


HOW DO YOU LEARN?

Polaris Help Tips

- Favorites
- Administration setup vs. How-To

HOW DO YOU LEARN?



HOW DO YOU LEARN?

Polaris Help Tips

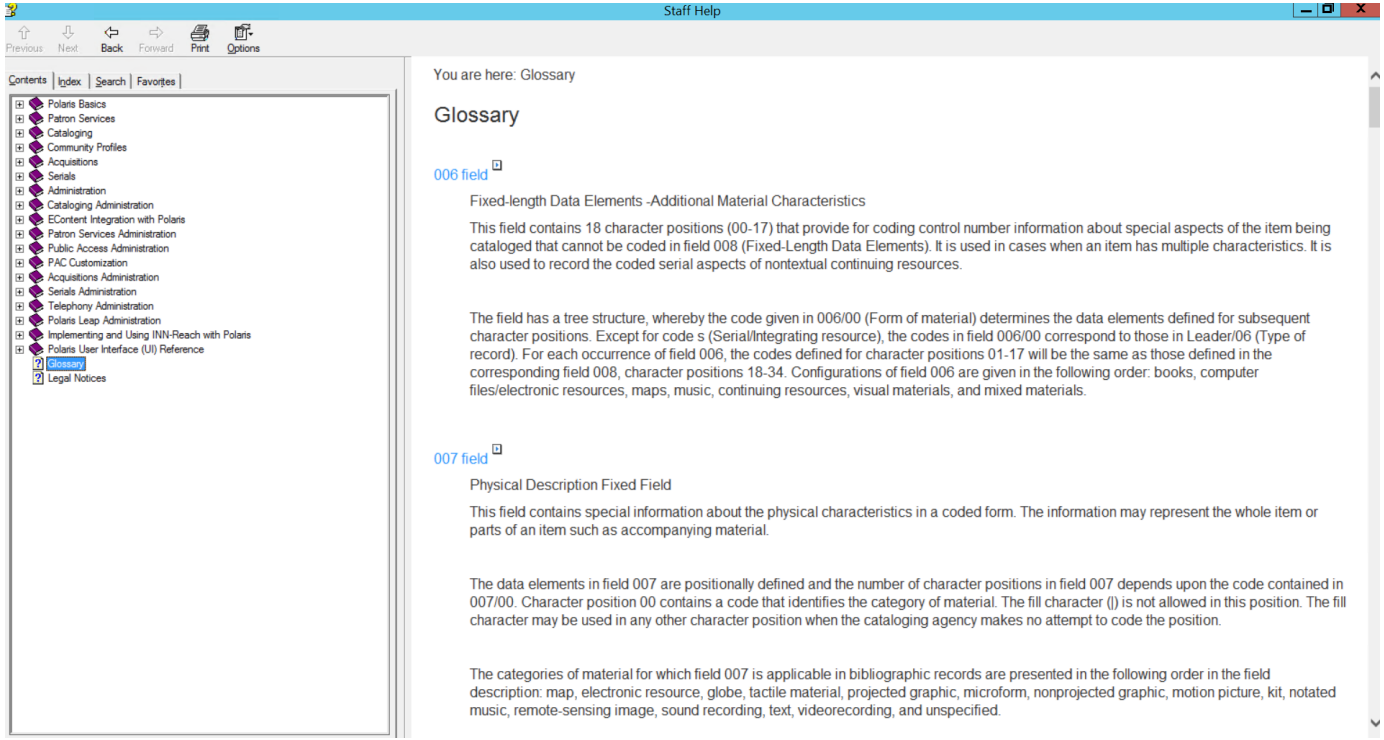
- Favorites
- Administration setup vs. How-To
- Index vs. Search – two different ways if you don't know what Polaris calls it!!

HOW DO YOU LEARN?

Polaris Help Tips

- Favorites
- Administration setup vs. How-To
- Index vs. Search
- Glossary – especially if you don't know Cataloging!

HOW DO YOU LEARN?



HOW DO YOU LEARN?

Polaris Help Tips

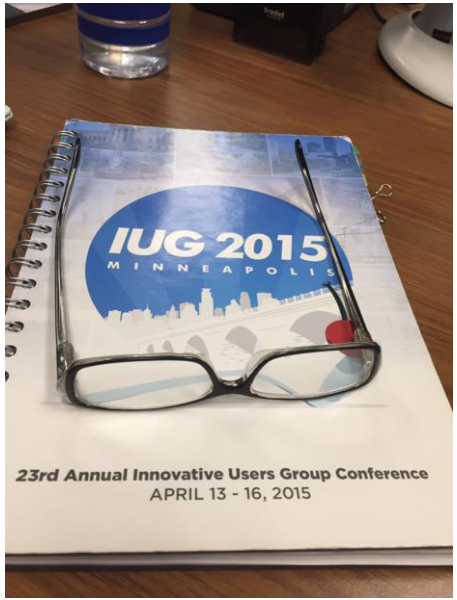
- Favorites
- Administration setup vs. How-To
- Index vs. Search
- Glossary
- Own documentation

HOW DO YOU LEARN?

- READ, READ, READ Polaris Help
- Ask Questions

HOW DO YOU LEARN?

- READ, READ, READ Polaris Help
- Ask Questions
- Retain -- My notebooks



HOW DO YOU LEARN?

- READ, READ, READ Polaris Help
- Ask Questions
- Retain
- Develop a track changes

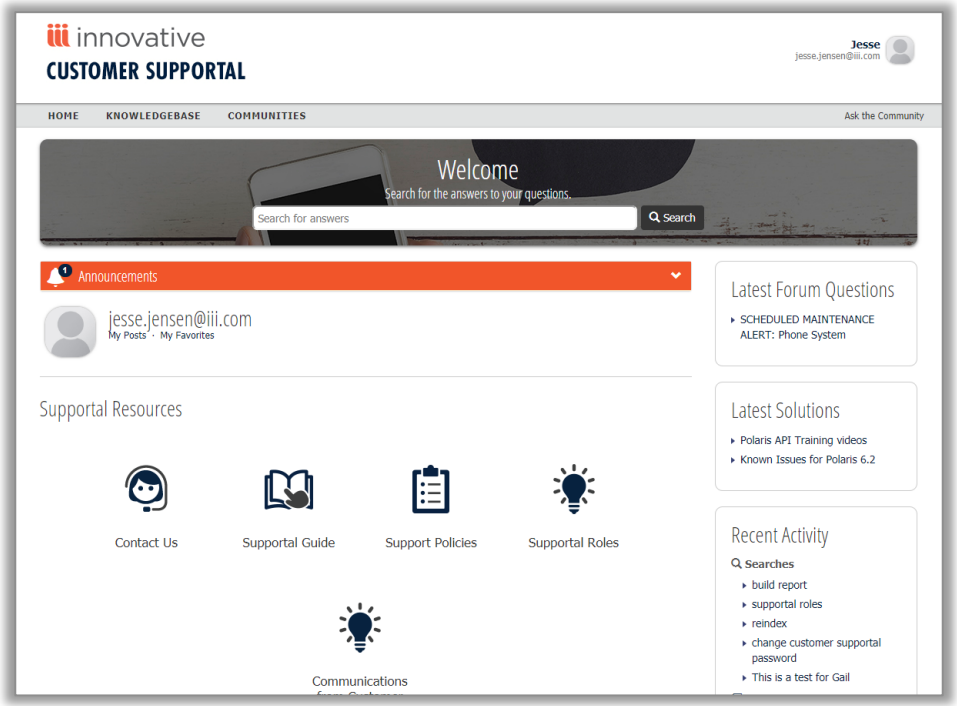
HOW DO YOU LEARN?

- READ, READ, READ Polaris Help
- Ask Questions
- Retain
- Track Changes
- Training Database

HOW DO YOU LEARN?

- READ, READ, READ Polaris Help
- Ask Questions
- Retain
- Track Changes
- Training Database
- III Supportal / Knowledgebase

Understanding Supportal Resources



Understanding Supportal Resources

Solutions

Downloads

Training Videos

Documentation

Understanding Supportal Resources

Solutions

- Contain knowledge compiled by your Support Team as they work through specific issues
- While solutions themselves may be individually focused on a specific issue, they cover a wide variety of topics overall

Understanding Supportal Resources

Solutions

- There are currently over 1600 Polaris-specific solutions in the knowledgebase
- They cover…

Polaris API
eCommerce
Mobile PAC
Upgrades
Circulation
Cataloging
Notices
Leap
SIP
PowerPAC
Database Administration
Staff Client
NCIP
Acquisitions

Understanding Supportal Resources

Solutions

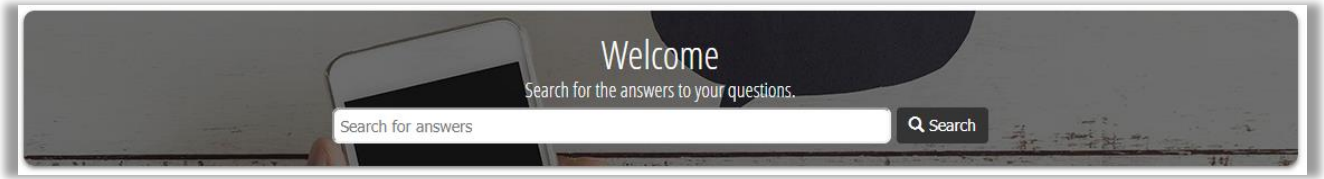
- There are currently over 1600 Polaris-specific solutions in the knowledgebase
- They cover…

AND MORE!

Understanding Supportal Resources

Solutions

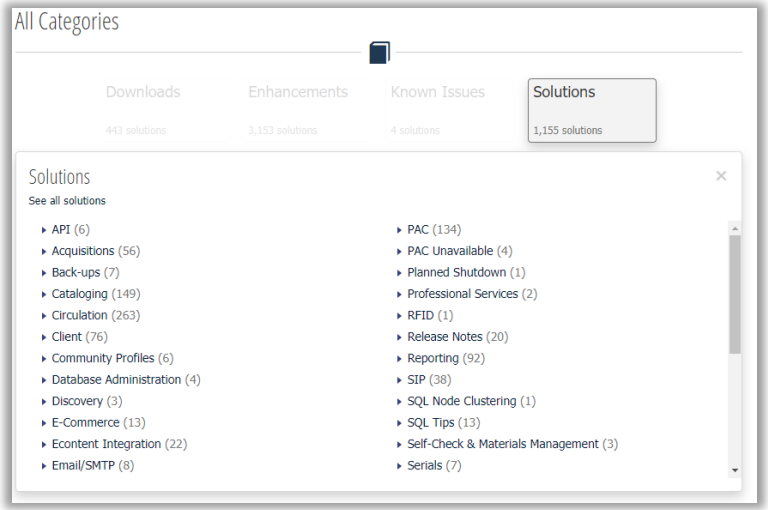
- Different methods for locating solutions
  1. **Search**



Understanding Supportal Resources

Solutions

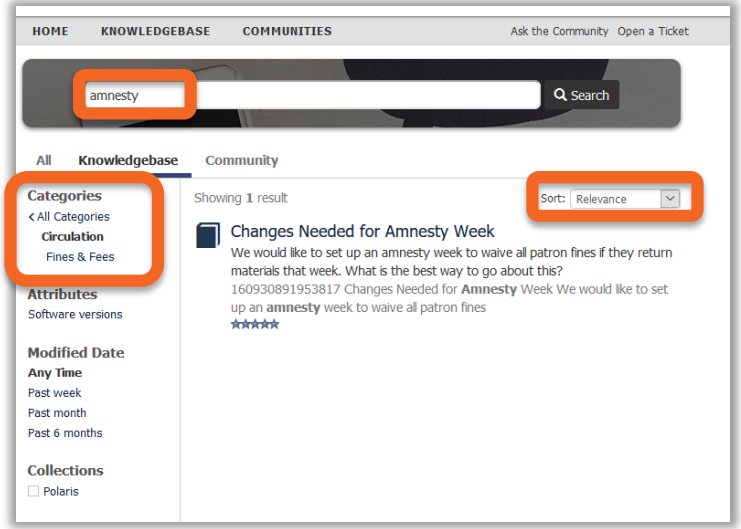
- Different methods for locating solutions
  2. **Browse**



Understanding Supportal Resources

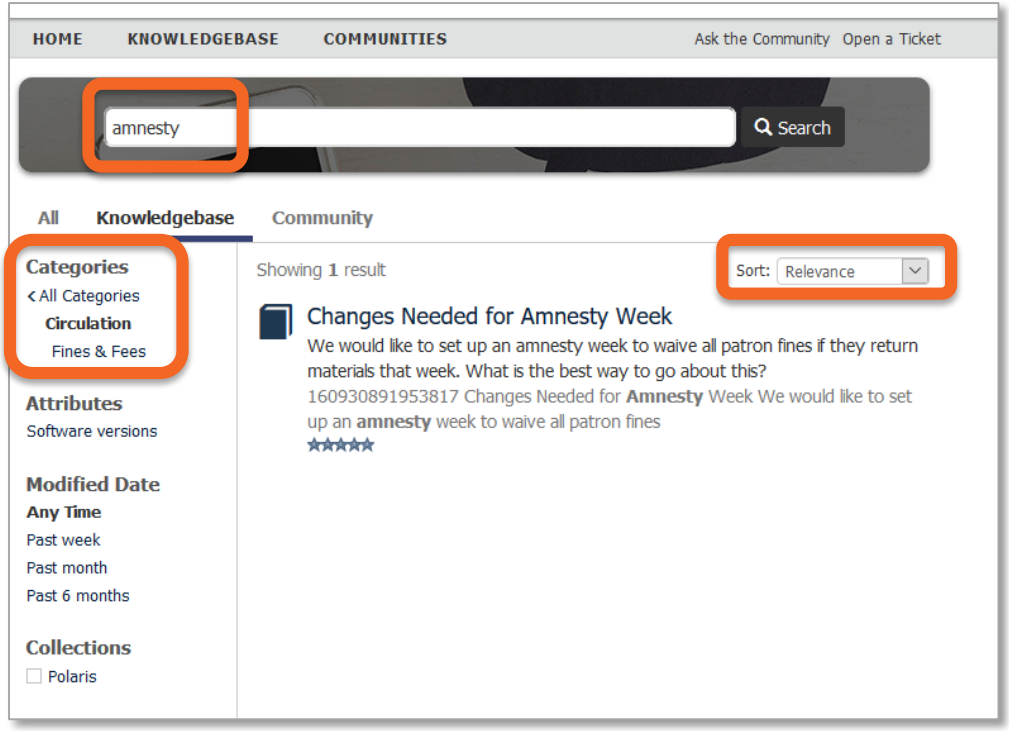
Solutions

- Different methods for locating solutions
  3. **Browse and then Search**



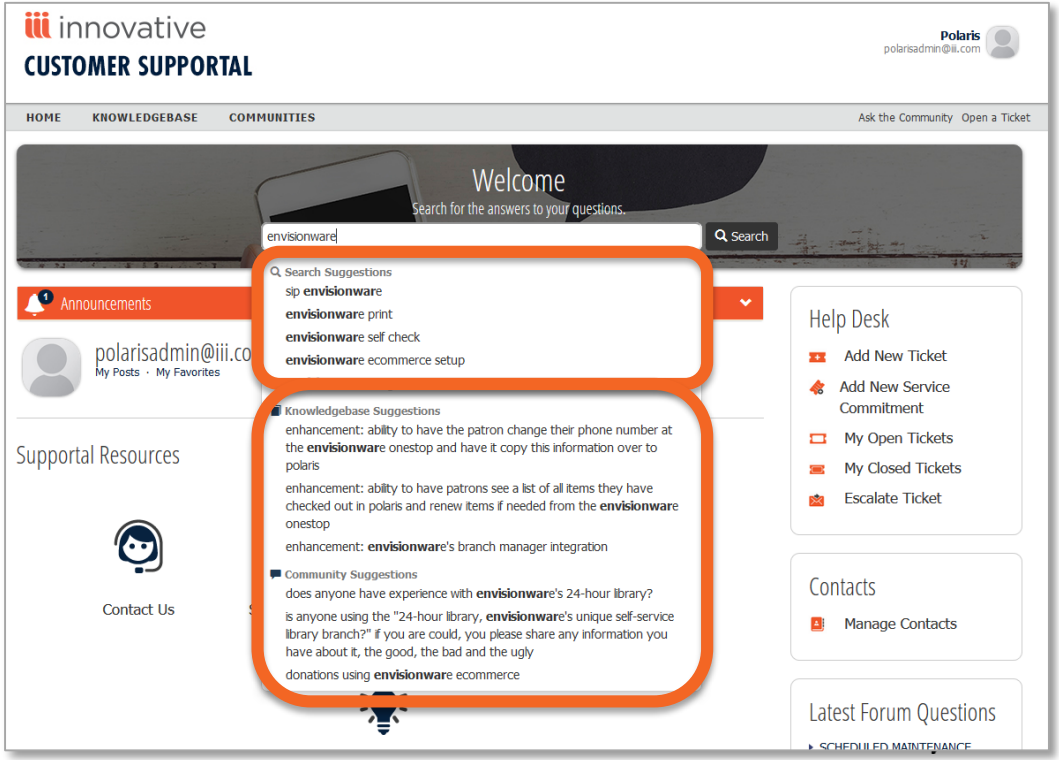
Solution Searching Tip

- When searching, you can use keyword and browse searching together to narrow results.
- For example, to look a solution on fines amnesty
  - Click on Knowledgebase tab → Solutions → Circulation
  - Type Amnesty in the Search box.
  - Sort by Relevance



Solution Searching Tip

- When using the Search option…
  - Knowledgebase Suggestions and Community Suggestions are based on keywords
  - Search Suggestions based on searches by other users



Understanding Supportal Resources

Training Videos

- Compiled using the knowledge of our Product team
- Provide training on different areas of the Polaris ILS
- Two different types available:
  - How To
    - Feature-specific workflows
  - Informational
    - General topic overviews

Understanding Supportal Resources

Documentation

- Downloadable Excel, PDF, and Word files
- What's New
  - Provide details about new features and functionality included in the latest releases
- Topic / Product guides
  - Provide in depth information about specific areas within Polaris
    - Ex. Cataloging, Acquisitions, MyLibrary, etc.

More Resources

Log a ticket for your Site Manager

Forums

polaris

Training

More Resources

Log a ticket for your Site Manager

- We’re here for you!
- Do you have a question about…
  - Product configuration?
  - Product functionality?
  - Product workflow?

More Resources

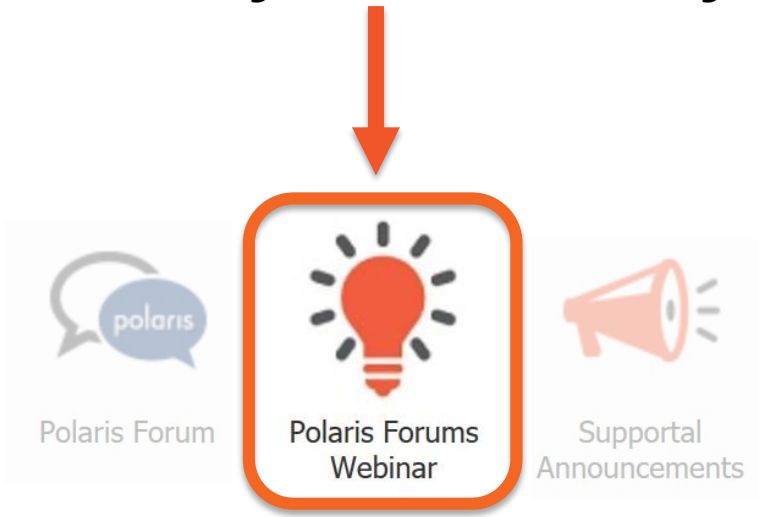
Forums

- Do you have a question about…
  - Library policy?
  - Third party products?
  - Customizations?

More Resources

Forums

For more information about the Forums and how they can work for you…



More Resources

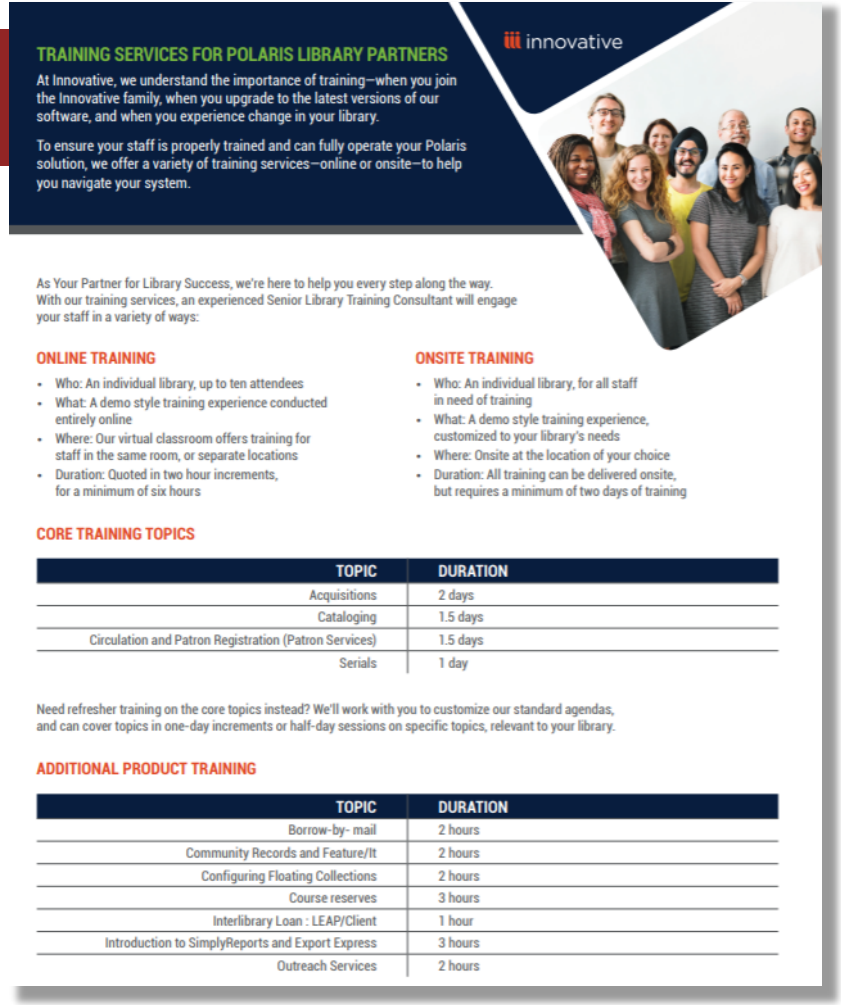
Training

- Have you reviewed all of the documentation and watched all of the training videos?
- Our trainers offer training for a wide variety of topics

More Resources

Training

- Core topics
  - Acquisitions
  - Cataloging
  - Serials
  - Patron Services
- Additional Topics
  - Outreach Services
  - SimplyReports
  - Etc.



innovative

TRAINING SERVICES FOR POLARIS LIBRARY PARTNERS

At Innovative, we understand the importance of training—when you join the Innovative family, when you upgrade to the latest versions of our software, and when you experience change in your library.

To ensure your staff is properly trained and can fully operate your Polaris solution, we offer a variety of training services—online or onsite—to help you navigate your system.

As Your Partner for Library Success, we're here to help you every step along the way. With our training services, an experienced Senior Library Training Consultant will engage your staff in a variety of ways:

ONLINE TRAINING

- Who: An individual library, up to ten attendees
- What: A demo style training experience conducted entirely online
- Where: Our virtual classroom offers training for staff in the same room, or separate locations
- Duration: Quoted in two hour increments, for a minimum of six hours

ONSITE TRAINING

- Who: An individual library, for all staff in need of training
- What: A demo style training experience, customized to your library's needs
- Where: Onsite at the location of your choice
- Duration: All training can be delivered onsite, but requires a minimum of two days of training

CORE TRAINING TOPICS

TOPIC	DURATION
Acquisitions	2 days
Cataloging	1.5 days
Circulation and Patron Registration (Patron Services)	1.5 days
Serials	1 day

Need refresher training on the core topics instead? We'll work with you to customize our standard agendas, and can cover topics in one-day increments or half-day sessions on specific topics, relevant to your library.

ADDITIONAL PRODUCT TRAINING

TOPIC	DURATION
Borrow-by- mail	2 hours
Community Records and Feature/It	2 hours
Configuring Floating Collections	2 hours
Course reserves	3 hours
Interlibrary Loan : LEAP/Client	1 hour
Introduction to SimplyReports and Export Express	3 hours
Outreach Services	2 hours

Polaris Admin Jeopardy!

Is it a Parameter or Profile?

PowerPAC

Polaris Admin Jeopardy!

Is it a Parameter or Profile?

Staff Client

Polaris Admin Jeopardy!

Is it a Parameter or Profile?

Default view selected when item record opened

Polaris Admin Jeopardy!

Is it a Parameter or Profile?

Acquisitions EDI Invoice Default

Polaris Admin Jeopardy!

Is it a Parameter or Profile?

Setting up the number of days after item is late that an overdue email is sent

Polaris Admin Jeopardy!

Is it a Parameter or Profile?

Hours of library is closed

Polaris Admin Jeopardy!

Is it a Parameter or Profile?

Hours library is closed for display in PAC

Polaris Admin Jeopardy!

Is it a Parameter or Profile?

Reading History

Polaris Admin Jeopardy!

Is it a Database table or Policy Table?

Contact persons

Polaris Admin Jeopardy!

Is it a Database table or Policy Table?

Patron Name Titles

Polaris Admin Jeopardy!

Is it a Database table or Policy Table?

Objects Locked

Thank You!

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Illinois Heartland Library System

Imagining Tomorrow – Delivering possibilities Today!