

Polaris – Workflow Consultation

Purpose and goals of the Workflow Consulting – Identify the workflows and processes the library currently follows in the various Technical Services functions to help determine the setup needed in Polaris. And to discuss the different tools and configurations needed to start using acquisitions, cataloging, and serials.

Review of Documents

- Agenda
- Library's current workflow for acquisitions (survey results)
- Workflow Start Up Tasks
- Workflow setup documentation (PPT, Word docs., and Appendices)

Workflow options – issues to keep in mind:

- What will continue to work with Polaris
- What may need to be changed
- New processes to consider
- Effects on/changes for cataloging
- Outstanding orders transition workflow (Legacy ==> Polaris)

Acquisitions

Review of current workflow

- Fiscal year/fund structure
- Suppliers
- Selection process
 - Vendor selection tools
 - Source of MARC records
- Ordering
 - EDI
 - Enriched EDI
- Floating items
- Hold request workflow
- Receiving
- Invoicing
- Printing
 - PO's
 - Workslips
 - Vouchers
- Claiming/cancelling
- Credits
- Fiscal year processing

Polaris acquisitions setup needed

- Workflow overview
- Overview of System Administration
- Setting up Acquisitions
 - Fiscal year/fund structure
 - Suppliers
 - EDI
 - Enriched EDI
 - Web selection tools with or without 970s
 - Profiles with vendors if using Enriched EDI
 - Import profiles for bib order records
 - PO templates with order distribution
 - On order bibliographic templates
 - On order item templates - *create example to show in the session*
 - Workslips Currency conversion
 - Selection lists
 - Purchase orders Titles to Go
 - Printing/Transmitting PO's
- Purchase Order Acknowledgement
- Receiving and invoicing
 - Manual receiving/invoicing
 - Rapid Receipt
 - Receiving on a PO or POLI and copying over to an invoice
 - Hold requests
 - EDI invoicing
 - System Administration settings
 - Invoice log email
 - Update linked POLI to received
 - Hold partial shipment invoices
 - Advanced Shipping Notice (ASN)
 - Receiving shelf-ready materials (Enriched EDI)
 - Prepaid invoices
 - Creating an invoice without a PO
 - Misc. invoices
- Claiming/cancelling
- Crediting
- Fiscal year rollover

Cataloging

Review of current workflow

- Record structure in current system
- Sources of MARC records
- Duplication detection
- Importing MARC records

- Editing MARC and item records
- Labels/barcoding/physical processing
- Spine Labels
- Authority control

Polaris cataloging setup needed

- Overview of record structure
- Overview of System Administration settings
- Importing records
 - Duplication detection Import Manager
 - Import profiles to clean up order bibs
 - Importing full MARC records with embedded holding statements (Enriched EDI)
Bibliographic tags to retain/delete
- Bibliographic record templates
- Item record templates
- Editing bibliographic records individually and bulk
- Editing item records records individually and bulk
- Subfield 9 cleanup utility
- Authority control options
- Spine labels

Serials

Polaris acquisitions setup needed

- Are individual titles accounted for in acquisitions
- Current publication pattern set up
- Adding new serial titles
 - Source of MARC records
 - Suppliers/jobbers
- Serials check-in
 - Route slips
 - Labels
 - Circulation/barcoding
- Changes in publication patterns
- Claiming
- Subscription management

Overview of Polaris serials

- Workflow overview
 - Subscription record relationships
 - Standing order record relationships
- Overview of System Administration settings
- Setting up Serials
 - Suppliers
 - Serial item templates
 - Creating publication pattern templates

- Serial holding records for subscriptions (where acquisitions and serials may meet)
- Serial holding records for standing orders (where acquisitions and serials must meet)
- Serials check-in
 - Checking in subscriptions
 - Checking in standing orders
 - Routing serials
 - Labels
 - Display in PAC
 - Compressed holding statements
 - Notes
 - Expanded vs. unexpanded display
- Claiming serials
 - Automatic vs. mediated
 - Claim alert list