

Merging Allegany County Library System into Polaris
Information for staff in Garrett and Washington Counties
From Bill Taylor, wtaylor@wmrl.info; 301-739-3250, x 552

Here's some information about what will happen when Allegany County is merged into the Polaris system. There's a separate page with information for the public. If you have any questions, please contact me of course!

Your interface stays the same

You will continue to work with Polaris as you do now, either with the client software or with the Leap web interface. Everything about how you interact with Polaris stays the same.

The catalog expands a lot!

Obviously, you'll now see Allegany County's branches, patrons, and items in Polaris. One major benefit of the merger: there will be thousands of titles from Allegany County that weren't in the catalog before, now easily findable and requestable for your patrons.

Polaris will be down for 3 days

On March 2, 3, and 4, Polaris will be unavailable. At all the circulation desks, you'll be able to check out items using Polaris in "offline" mode, but all other functions can't be done. You won't be able to look up a customer's card number, so ***customers will have to bring their library card when they check out.*** On March 5, when Polaris is working again, the checkouts that happened off line will be uploaded into Polaris and recorded like normal. All of the branches will be getting detailed instructions on how to use Polaris offline mode. We'll send those out a week before, so you'll have time to make sure it's working.

Besides not being able to look up customers, you won't be able to place holds, fill holds, run the picklist, register new customers, etc. And items that are returned during these 3 days need to be stored and not checked in until first thing on March 5.

All in all, it's really inconvenient! I'm very sorry you'll be having to deal with disappointed customers for a few days. Everyone involved with the merger wishes it could be done more quickly, but moving the data properly takes time, and then we want to do a lot of checking and testing after the data is migrated. I do think the addition of Allegany's entire collection to our system is worth the hassles – hopefully your customers will think so, too!

There will be duplicate bib records in the catalog for a while

After the merger, you'll notice many **duplicate bib records**. The software engineer working on the migration has done a lot of special programming to reduce the number of duplicates, but there will still be hundreds at first. Staff in all 3 counties will be working to get rid of these, but for the time being, when you search for a title, make sure you look at **all** the bib records retrieved by your search to be sure you see **all** of the 3 counties' holdings.

Because of the duplicates – ***be careful when you place a hold request.*** If there are duplicate bib records for a title, you should place a hold request on **both** bib records. Then, go into the patron's hold list and link the two

holds, so that when one is filled the other gets automatically cancelled. If you don't know how to link hold requests, just let me know and I'll send you instructions.

(If you have time to send me a quick email identifying duplicates that you've found, that would be very helpful, but I'll be doing lots of systematic searching to find them, so don't feel you have to.)

Holds queues will change but waiting times will **not** get longer

Allegany customers will be merged into the existing hold queues in the order that they placed their requests, but remember – **an item will always go to fill a request in its own county first**. It will only go to other counties if there are no requests from customers in its home county. So: your customers may notice that they are further down the list after the merger – but this will not affect how soon they get the title. All of their county's copies of that title will be available to them and only them, just as they were before the merger.

Here's an example:

Holds Queue Before Merger

Position 1: Patron A, Washington County
Position 2: Patron B, Garrett County
Position 3: Patron C, Garrett County
Position 4: Patron D, Washington County

Today, a Garrett County copy gets returned and Patron B gets it. Tomorrow, a Washington County copy gets returned, so Patron A gets that.

Holds Queue After Merger

Position 1: Patron E, Allegany
Position 2: Patron A, Washington County
Position 3: Patron F, Allegany
Position 4: Patron B, Garrett County
Position 5: Patron C, Garrett County
Position 6: Patron D, Washington County

Today, a Garrett County copy gets returned and Patron B gets it. Tomorrow, a Washington County copy gets returned, so Patron A gets that. The day after, an Allegany copy gets returned, so Patron E gets that one.

That is, there hasn't been any change in how long the Washington County and Garrett County patrons have had to wait.

I think that's about it. Again, thank you for your patience (and fortitude!) during the down time. Please let me know if you have any questions.