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Date:	**March 13, 2015**
To:	**SWAN Member Library Directors and Administrators**
CC:	**Library Department Managers, Library Staff**
From:	**Kate Boyle, SWAN Member Services Manager**
Re:	**Migration Memo #11: Circulation Updates**

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We have just completed our fourth week of Circulation training with over 2,500 staff members in attendance. Now that we have covered all the Circulation basics, SWAN Member Services will now focus on creating crib sheets (or cheat sheets, if you prefer) to distribute to the SWAN libraries on various Circulation functions. So, be on the lookout for those in the next few weeks on the SWAN website and our SWANcom emails. As we get closer to Go-Live, there are a few points that bear repeating.

Migration weekend

Do not use Millennium Offline

Use Workflows Offline
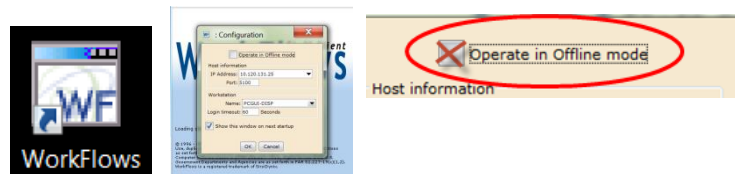
- Migration weekend for Circulation begins Friday night, April 10th. at closing.
- On Saturday, April 11th until at least Tuesday, April 14th, your library is required to use the Workflows Offline module to **check out and renew materials to patrons**. Please don't check in materials unless absolutely necessary. **We recommend that you do not register any new users.**
- Please refer to the Offline Powerpoint on the SWAN website if you have any questions.
- SWAN will be sending out a SWANcom and updating the banner on the SWAN website when SWAN is up and running on SirsiDynix Symphony Workflows (hopefully the morning of the 14th).
- Once notified, libraries can log out of Offline and log back into Workflows and begin to checkin items. Remember to uncheck **"Operate in Offline Mode"** when you are ready to start circulating on Workflows.
- Libraries should not checkin any materials unless absolutely necessary when using Offline; to assist libraries, SWAN will be updating the MilCirc Loan Rules in order to avoid any items being due from **April 6th through April 19th** at your library.

Training tutorials and documentation

Circulation tutorials and training documentation are available on the SWAN website at: **https://support.swanlibraries.net** . You will need to log in to the website and then click on the Migration tab and choose Circulation Training from the dropdown.

April Statistics

Circulation statistics for 4/1 through 4/10 will be compiled using Millennium reports and made available on the Report Server as usual. We will also be compiling and posting to the SWAN website the usual monthly statistics. Circulation statistics for the remainder of the month of April on Workflows will be made available in the SirsiDynix Workflows Report module.   More specific information on accessing these reports will be made available before the end of April. In addition, we plan on organizing a training session on Reports sometime in May – watch for an announcement.

Patron Purge

We are planning on running a Patron purge to update the patron database before we migrate the patron (user) data to SirsiDynix. Our test report indicates that if we purge good patrons that have been inactive for three years and have no money owed we would be deleting 130,000 patron records.   Our plan is to purge these patrons before the end of the month. However, if you would want to include any of your patrons and owe less than $5.00 or $10.00 (and have been inactive for three years or more), please send your request before April 1st to migratonhelp@swanlibraries.net .

Email notification

If your patrons have an email address in their MilCirc record, we have updated their Notice Preference in MilCirc to email.   This information has been mapped to the Notice Preference in Workflows.   In Workflows this will not impact notices, as the Workflows software sends all notices via email, if there is an email in the user record. This will, however, allow you to run a statistic in Workflows as to how many of your patrons use email as opposed to phone, text, or print notifications.

Catalog access over Migration Weekend

Over migration weekend, the Innovative Classic (WebPAC) and Encore catalogs will be available for viewing and searching by patrons and staff.   However, circ data will not be updated during migration weekend. The data will be snapshot from Friday evening, April 10th.   Also, patrons will not be able to login to their account to place holds or update their PIN or email.

Cleanup before Go-Live

We will be migrating the current and one additional (most recent) patron barcode (User ID) to SirsiDynix. **You DO NOT NEED to take any action to cleanup any barcodes.**   Before any patron details are sent to SirsiDynix, Unique Management Services will be checking the patron's address for currency and correctness. In addition, they will reformat the patron's phone number.   Going forward, library staff will need to enter the phone number when registering patrons as 10 digits only, no punctuation, no leading +1. **You DO NOT NEED to remove any notes or messages from the MilCirc patron record**, these notes and messages **WILL NOT display** to the patron in Enterprise.

My Wish Lists

Patrons' Wish Lists from the Innovative catalog (OPAC or Encore) will not be migrating.   If a patron wants their Wish List data, they will need to export it from the Innovative catalog. Patrons can follow the prompts within their account to export the Wish Lists data and either email it to themselves or save the text file to their computer.

Easy directions: Patron logs into My Account in the catalog.   Clicks on My Wish Lists. Patron chooses the Wish List they want to export. They then click on the Export List button. Screen re-paints and they follow the prompts.
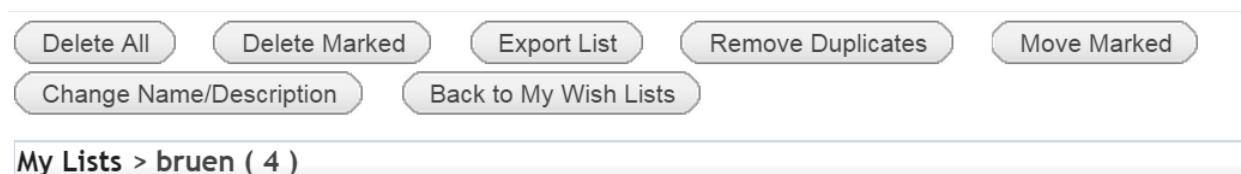
Charging History

The patron's Reading History in the Innovative catalog will be migrated to SirsiDynix Enterprise.   The patron does not need to export the file.

PINS

Patron PINS are not migrating as they are presently encrypted. The patron's initial PIN will be set by SirsiDynix to the last four digits of the phone number in their record.   Patrons may choose to keep this PIN or create another one in the My Account area of Enterprise.   Patrons who do not have a phone number in their MilCirc record will be assigned an auto-generated PIN number. Patron in "My Account" can click on "Forgot PIN" and will be emailed a link to reset their PIN. If that patron does not have an email present on their record, please anticipate that they will contact you to have their PIN reset.

Testing

All libraries have access to the Workflows test server.   Please keep testing the Circulation functions in Workflows. We are aware that new materials are not circulating correctly at present. This problem has been addressed, however, should you identify any other problem behavior in Circulation, please notify SWAN at migrationhelp@swanlibraries.net .

If you should have any questions, please contact us at migrationhelp@swanlibraries.net or 630-734-5153.