

Minerva New Library System Integration Process

I. SETUP

- A. Kick-off Phone Call - Introductions will be provided as well as an outline of the migration process. We will review the New Library's Current System Survey, which will help identify patron, collection and circulation setup and data, as well as the Record Delivery, Minerva Expectations, Pre-migration Work Outline and Post-migration Work Outline documents.
- B. New library submits the Patron, Collection and Circulation Survey.
- C. Upon receipt of survey, Maine InfoNet (MIN) will (1 week):
 - 1. provide a spreadsheet outlining the information to be entered into the system.
 - 2. schedule a phone call or other type of meeting to discuss questions or further information.
- D. Confirmation Meeting
 - 1. During the meeting, the new library and MIN staff will go over:
 - a) any questions that came up during the review of the data in the spreadsheet.
 - b) any inconsistencies between the data provided in the spreadsheet.

II. INTERIM

- A. The new library and MIN will work together during this time to solidify any questions and provide further information as needed. If this period is not needed then the process will move on to the next point.

III. 1st VERIFICATION

- A. MIN will provide an updated spreadsheet if there were any changes made during sections I. D. or II.
- B. After the interim point, the new library will verify all information to be entered into the system and provide an email giving an okay to begin the next process.
- C. Upon approval, the expected date to move into the Minerva system, also known as the "Go Live" date, will be set 1.5 to 2 months from this date, which will be agreed upon by MIN and the new library. Any changes to the setup, codes or configurations will result in a delay to the Go Live date.
- D. Additionally, training dates for Circulation functions and Cataloging functions will be agreed upon by MIN and the new library. This will entail two full days of training.

IV. INITIAL DATA ENTRY

- A. MIN will input the following to create library presence in the system:

1. Branch Address
 2. Branch Locations
 3. Hold Pickup Locations
 4. Ptype, Pcodes, Eligible Patrons and Patron Blocks
 5. Loan Rules, Loan Rule Determiners, Location Mapping Table, Scope locations.
 6. MaineCat presence will be created
- B. MIN will provide the new library with documentation of the codes and information inputted into the system for the library's review.

V. 2nd VERIFICATION

- A. The new library will verify all information entered into the system and provide an email giving an okay to begin the next process.

VI. TRAINING

- A. 'Test' ptypes and items will be created for training and functionality assessment.
- B. MIN will provide two days of in person or webinar training for Circulation, Cataloging and Administrative functions. This training will be no earlier than two weeks prior to Go Live date.
- C. Any issues found or changes needed with the system data will be implemented before Go Live date.

VII. GO LIVE

- A. The new library on the Go Live! day will use the system to perform all regular circulation and cataloging functions.
- B. Direct phone and email support will be provided up to 1 week from the Go Live date. After that period, the new library will use the Maine InfoNet ticket system for new issues at <http://support.maineinfonet.org>. Priority support will be provided via the ticket system for the 2nd week after the Go Live date. After the initial priority support periods, all tickets for new issues will be queued along with other system libraries, where support will be prioritized accordingly.

VIII. POST SYSTEM INTEGRATION

- A. Requesting/lending in Minerva will be enabled 1 to 2 week after Go Live date.
- B. Requesting/lending in MaineCat will be enabled 1 to 2 weeks after Minerva requesting begins.
- C. Record creation reviews will be performed periodically to determine further training needs.