



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. A full day of online training is 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

POLARIS TRAINING TOPIC

SUBSYSTEM	TOPIC	LENGTH
Acquisitions	Acquisitions refresher	3 hours
	Invoicing Options	3 hours
	Preparing and Executing a Fiscal Year-End Rollover	2 hours
	Purchase order options	3 hours
	Using Electronic Data Interchange (EDI)	2 hours
Cataloging	Adding New Items in Cataloging	2 hours
	Authority control options	3 hours
	Best Practices for Deleting Bibliographic Records and Items	2 hours
	Best Practices in Creating and Using Bibliographic and Item Templates	2 hours
	Cataloging refresher	3 hours
	Cataloging Shortcuts (Record Sets, Bulk Changes, and Macros)	2 hours
	Copy Cataloging Techniques	2 hours
	Creating and Using Import Profiles	2 hours
	Creating Cataloging and Serials Labels Using Label Manager	1 hour

SUBSYSTEM	TOPIC	LENGTH
Circulation	Best Practices for Creating and Managing Holds Requests	2 hours
	Borrow-by-Mail	1 hour
	Course Reserves	2 hours
	Introduction to InterLibrary Loan	2 hours
	Introduction to Leap	2 hours
	Outreach Services	2 hours
	Patron Services/Circulation refresher	4 hours
	Reports & Notices	1 hour
Serials	Creating Complex Publication Patterns	2 hours
	Creating Serials Holdings Records and Publication Patterns	2 hours
	Serials Check in and Claiming	2 hours
	Serials Refresher	3 hours
	Setting Up Subscriptions and Standing Orders	3 hours
Public Services	PAC Customization	3 hours
	Introduction to the Language Editor/WebAdmin	2 hours
	Patron Empowerment in the PowerPAC	1 hour
	Community Records and Feature/It	3 hours
	Creating Dashboards and Content Carousels in the PAC	2 hours
	Presenting Remote Databases in your PAC	2 hours
System Administration	Configuring Floating Collections	2 hours
	Providing Remote Database Access via Z39.50	2 hours
	System Administration - Acquisitions Settings	2 hours
	System Administration - Cataloging Settings	2 hours
	System Administration - Patron Services Settings	2 hours
	System Administration - Polaris Client Settings	2 hours
	System Administration Basics	3 hours
	Understanding and Configuring Duplicate Detection	2 hours
	Working with Permission Groups	2 hours
Interdisciplinary	Exploring the Polaris Client Find Tools including Search Strategies	3 hours
	ExportExpress	1 hour
	Introduction to SimplyReports	3 hours

Note: One training day is equivalent to six hours of content.

POLARIS ILS BASIC TRAINING

Do you have a new staff member or an all new team, who need to get up to speed fast? Our Polaris ILS Basic Training includes topics for those learning a brand new system:

◎ PRE-SESSION WEBINARS WITH ONLINE LABS:

- Polaris Basics (2 hours)
- Introduction to the Polaris (2 hours)

◎ POST-SESSION WEBINARS WITH ONLINE LABS:

- Reports and notices (1 hour)
- Introduction to Interlibrary loan (1 hour)

◎ ONSITE TRAINING

- Patron Services & Circulation in the Client; Leap (1.5 days)
- Cataloging (1.5 days)
- Acquisitions (2 days)
- Serials (1 day)

Ready to learn more about Innovative training services? Contact us today at info@iii.com