

Upgrade Package Options for Canadian Customers

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Upgrade Package Options

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Migrating to Horizon/Corinthian 8.x

SirsiDynix Implementation Services staff are committed to ensuring a smooth and successful upgrade from your current Horizon 7.x system to the new cutting edge 8.x platform. Just as our Engineers have spent countless hours ensuring the integrity of this exciting new release, we have taken great care in designing services to help our customers make the switch to the new system. The Managed Care service package provides for the basic requirements for all 7.x to 8.x upgrades. In addition, SirsiDynix has designed a suite of à la carte add-on services designed to enhance the Managed Care service.

The availability of these choices underlines our commitment to our customers' success in migrating to the new platform, and ensures that each library or library consortium can work with their Account Manager to assemble the upgrade package to specifically meet each library's unique needs..

The purpose of this document is to describe the Managed Upgrade service, as well as the list of optional services and products available to your library. For pricing and further information, please contact your SirsiDynix sales consultant.

Start with the Managed Upgrade Service...	...and add any or all Optional Services
Managed Upgrade Service includes: <ul style="list-style-type: none"> • Project Management • Basic Dataload • Remote Training 	<ul style="list-style-type: none"> • SureStart • Acquisitions Dataload • Serials Dataload • Specialized Staff Training • Stress-Free Start • Onsite Detailed Network Analysis • Software Technology Planning Review • Database Cleanup Services • Acquisitions Workflow Consultation • Web Reporter Consulting • IP Upgrade Consulting • LiveNetwork • Enriched Content • Secured Resources

Preparing for your Upgrade

Step #1

- Data preparation and cleanup
- Gather and assess your current policies and profiles; determine what you would like to keep going forward and what you would like to change
- Talk to your Sales Consultant regarding your future hardware and network needs
- Begin organizing the upgrade project team from your library
- Work with your Sales Consultant to get an upgrade cost proposal for budgeting purposes

Step #2

- Attend to any necessary network and workstation upgrades
- Identify server needs for 8.x and determine what to purchase, or what current servers may be upgraded
- Begin preparing staff for the upgrade process and for the idea of learning a new interface
- Work with your Sales Consultants to view pre-recorded demo sessions to help initiate staff prior to training.
- Work with your Sales Consultants on updated quote for actual purchase

Step #3

- Work with Sales Consultants on PO receipt
- Work with SirsiDynix staff on appropriate upgrade time line
- Begin upgrade process

Managed Upgrade Service

The managed upgrade service includes a standard level of services.

- A SirsiDynix Project Manager is assigned to work with your library to determine mutually acceptable upgrade timeline. Once a date is “locked in” an upgrade date will not be changed by SirsiDynix.
- SirsiDynix staff will install the software remotely and run the necessary upgrade scripts.
- Site will be given the opportunity to determine changes to the database they would like made during the upgrade. Examples include merging two material types into one type, merging of patron types, deletion of old unused codes, etc.
- Dataload will be completed up to two times: The first dataload will be a test and will allow staff to check how their data migrated and make changes as needed. The second dataload will be a final production dataload. Gap processing will be performed (when necessary).
- Access to remote interactive training on all modules licensed during implementation and up to 60 days after to Go Live date.
- Access to interactive webex sessions that will discuss profiling and other activities that must be completed in order to upgrade. These sessions will be scheduled on a regular basis and will be open to any upgrading library’s staff members. These will be in addition to full interactive training on profiling.
- Access to regularly scheduled Q/A sessions prior to go live will be used if sites have questions about policy setup, profiling, notice setup, etc. These will be group sessions.
- SirsiDynix staff will also ensure that critical reports such as notices and daily statistical reports are properly configured.

Pre-Upgrade Optional Services

Onsite Upgrade Detailed Network Analysis

SirsiDynix network engineers will use the latest network evaluation technology to analyze your network. We can determine trends, discover and define network anomalies and offer network “best practice” solutions. SirsiDynix engineers will perform onsite network evaluations and provide you with a

detailed report outlining their findings and possible solutions. The tasks that our engineer will perform with the network analyses include:

- Work with the library to create a Scope of Work document to determine how many onsite days will be required
- Place a network analyzer in a predetermined location and gather information about your network infrastructure
- After this information has been gathered and analyzed, SirsiDynix will meet with key personnel to discuss problem areas and possible network upgrades (if any)
- Submit a Network Evaluation Report which will include the following:
 - As built network topology map
 - Bandwidth analysis
 - Identify the top network users and protocols
 - Port scanning vulnerability analysis
 - Recommendations for problem areas or upgrades
- If changes in the network are recommended, a new diagram will be submitted with recommended changes illustrated
- Quotation from SirsiDynix for network upgrade equipment and/or services (if any)

The standard network analysis includes 3 days of consulting services with 1 day onsite at a single location. Additional days can be added as required or defined in the Scope of Work document for larger libraries with multiple locations.

Software Technology Planning Review

To ensure preparedness for the implementation phase, a consultant from Consulting Services will spend 2 days onsite working with library staff to identify current workflows or processes that need tuning ensuring staff awareness and comfort with upcoming changes for maximum productivity. Following each visit, a personalized software technology plan will be delivered.

During or Post-Upgrade Optional Services

SureStart

SureStart is a layer of consulting support designed to smooth the transition to Unicorn or Horizon 8.x. The service provides continuing dialogs with librarians experienced in the software, library workflow, and current technology solutions. This service also helps library staff understand the new system. SureStart is a resource for the entire staff, not just system administrators. SureStart addresses issues outside the scope of education services training and client care support, including how to make the most of the system features to improve library workflow. Most often SureStart begins in tandem with a library's go-live. Weekly calls are up to 1 hour in length and monthly calls up to 2 hours in length, but note that service is counted by the call, not minutes.

- SureStart12: 12 months of consultations following go-live
10 consecutive weekly calls followed by 9 consecutive monthly calls.
- SureStart6: 6 months of consultations following go-live.
4 consecutive weekly calls followed by 5 consecutive monthly calls.
- SureStart3: 3 months of consultations following go-live
3 consecutive weekly calls followed by 2 consecutive monthly calls.

Agenda items for each call are determined by the client based on their individual needs. Sites are encouraged to send their agenda items 24 hour in

advance to allow consultants time to research responses. This approach increases the focus and productivity of the calls. Topics might include:

- Customizing workstation properties to streamline staff workflow
- Refining configurations
- Selecting, configuring and scheduling reports that track activity or productivity and maintaining efficiency of procedures, communicating with patrons
- Configuring the public interface
- Consulting with staff members on processes and workflows for specific modules
- Developing strategies for maintaining systems and databases
- Investigating and reporting techniques to help libraries communicate most effectively with their staff and SirsiDynix
- Planning for the upgrade process

On-site Go Live Visit

The purpose of a SureStart Consultant coming onsite for up to 3 days of the go live week is to have an expert available to answer questions from members of the library staff, assist the system administrator and make sure the staff is prepared to handle the day to day tasks using the new software. The Go-Live visit is a less structured environment than the formal training sessions that have already taken place allowing questions to be addressed as they arise. The actual activities are governed primarily by the site administrator and generally include the following:

- Assistance to the library's system administration staff with answering questions from library departments or member libraries.
- Review the library's support procedures to make sure library staff has a streamlined process for submitting questions to the site administration staff and that site administration staff know how to document and submit software issues for quick resolution by SirsiDynix.
- Even though go-live focus is primarily on public services activities, questions from technical services are addressed. However, opac customizations are not part of a go-live visit.
- Impromptu, informal review sessions on an aspect of the software where a large number of staff are reporting similar questions.
- Configuration or policy adjustments that are urgent for public service operations.

Acquisitions Dataload

Extract and load Acquisitions data.

Serials Dataload

Extract and load Serials data.

Specialized staff training

On-site and private webinars are available to your library if you wish. Options include:

- **On-Site Training for Basic Modules: Cat, Circulation, and Policies**
Includes Basic Cat, Intermediate Cataloging, Cataloging Management, Basic Circulation, Intermediate Circulation, Circulation Management, Searching. Total of 3.5 days on-site.
- **Private Online Training for Basic Modules**
Includes Basic Cat, Intermediate Cataloging, Cataloging Management, Basic

Circulation, Intermediate Circulation, Circulation Management, Searching. Total of seven half-day sessions. Private Online Training includes up to 10 WebEx connections.

- **On-Site Training for Serials**
Serials Control, Serials Check-in Serials Management. 1.5 days. Usually combined with Acquisitions.
- **On-Site Training for Acquisitions**
Basic Acquisitions, Intermediate Acquisitions, Acquisitions Processing Centers, Acquisitions Mgmt. 2 days. Usually combined with Serials.
- **Private Online Training for Serials**
Serials Control, Serials Check-in Serials Management. Three half-day sessions. Private Online Training includes up to 10 WebEx connections.
- **Private Online Training for Acquisitions**
Basic Acquisitions, Intermediate Acquisitions, Acquisitions Processing Centers, Acquisitions Mgmt. Four half-day sessions. Private Online Training includes up to 10 WebEx connections.

On-site training requires a 3-day minimum purchase.

Stress Free Start

The Stress-Free Start is an ASP-based solution that allows your library to have its own test system for six months during the upgrade process. The package includes having your Horizon 8.x profiles and converted data loaded onto a server located at a SirsiDynix office. Your staff will have 24x7 access to the system in order to test and train on up to 10,000 bibliographic records from your system.

Note: Sites who do not have a designated server (other than the current 7.x server) onsite during the upgrade will be required to have this service.

Package Includes

- Access for 3 concurrent users to ASP server for up to 6 months
 - Your own unique test environment to “perfect” on your own schedule
 - Your library’s Profiles
 - Your library’s Process
- Basic dataload up to 10,000 of your own records
- An additional 8 hours of profiling
- Master Webinar coupons to all 8.x training available during implementation and up to six months after Go Live. If purchased, master coupon training time begins with the beginning of the Stress free Start.

Database cleanup services

The SirsiDynix Data Services team provides many options for cleaning up and updating your bibliographic and authority data, including

- Authority processing
- LC bibliographic updates
- Database deduplication
- Custom mapping for data upgrade service

Acquisitions workflow consulting

To assess needs in regard to the Acquisitions process and VIP configuration a consultant from Consulting Services will spend 2 days onsite analyzing the processes/needs of the library including proposed workflows and recommendations, and outline of the profiling needed to support the workflow and reporting needs.

Web Reporter consulting

Up to 2 days of Web Reporter remote assistance targeted to the specific needs of the library. Topics include strategic planning for system administration, licensing and managing levels of access; strategies for report and document constructions, custom metrics and filters assistance, and options for effective delivery of reports.

Information Portal consulting

Capitalize on the flexibility and versatility of Information Portal with up to 2 days of IP Customization remote assistance Secured Resources

Secured Resources is a peace of mind service to ensure that, in any type of emergency, library users and staff will have access to all electronic resources. This service includes a 1 year subscription for libraries to send SirsiDynix system backup tapes for storage and restoration during an emergency situation

Relevant Add-on Products

LiveNetwork

LiveNetwork™ provides libraries unprecedented visibility, control, and protection over network resources. More control could lead to dramatically increased performance of 500% or more on your network. Fully managed by SirsiDynix, LiveNetwork delivers:

- **Traffic regulation** - We customize your system to allow only the traffic that you want on your network. LiveNetwork can identify mission-critical traffic and give it the highest priority.
- **Bandwidth optimization** - Our engineers customize your configuration for peak efficiency by prioritizing, shaping, limiting, or even blocking traffic.
- **Unique protection** - We protect your network from malicious spyware, adware, malware, viruses, and more - before they enter your system.
- **Custom real-time reporting** - We create alerts and automated real-time reports to provide effortless, ongoing network oversight.
- **Trend analysis** - Our engineers offer suggestions for your library's growth.
- **Instant Visibility** - See what is happening on your network instantly in real time.

Discover what's behind your network's sluggish performance

In many cases, valuable bandwidth is consumed by Internet browsing, spyware, and viruses, which in turn slow down your library's ILS tools. With LiveNetwork, we can instantly identify the trouble spots on your network - and rectify the situation by prioritizing your network resources and reallocating bandwidth.

LiveNetwork™ can identify mission-critical traffic and give it the highest priority.

Enjoy unprecedented control over your network resources

At a glance, you'll see how your network resources and bandwidth are being used in real-time, whether it's peer-to-peer, streaming media, or simply Web surfing. SirsiDynix will provide automated reports on usage, as well as recommendations for improvements. LiveNetwork can even send you alerts

related to network traffic and specific URL requests (e.g., those with sexual or violent content).

Eliminate spyware continuously and automatically

LiveNetwork offers best-in-class spyware and virus management tools. Scanning is continuous and automatic, so you don't have to spend time running programs yourself or loading individual copies of spyware or virus scanning software on your PCs. Updates are received on a constant basis so you know you always have the latest threats covered. You can even get detailed reports that include four different levels of blocked spyware.

For one low monthly subscription fee, SirsiDynix provides all the hardware, software, and services you need. [LibraryNameLong] won't spend a dime (or a minute) on system upgrades, consultant fees, or in-house network analysts. SirsiDynix takes care of everything for you.

Partners for Increased Productivity

Featuring best-in-class spyware and virus management tools, LiveNetwork is based on leading-edge technology developed by Cymphonix Corporation, the premiere provider of network management solutions for business, government, and educational institutions in the United States. LiveNetwork keeps spyware and content filters up-to-the-minute automatically with Cymphonix's PiNG™ (Perpetual Intelligence at the Network Gateway) dynamic updates. Cymphonix's patent-pending XLI technology gives LiveNetwork the ability to scan, identify, and control chaotic traffic and threats - creating the secure, intelligent data flow libraries need.

LiveNetwork takes the industry's leading protection and performance suite and deploys it in a model ideally suited to the way in which libraries run their businesses.

Enriched Content

Information Portal supports enriched content from either Syndetics or Baker & Taylor. With a subscription to Enriched Content, a connection will be made to your Enriched Content provider (Syndetics or Baker & Taylor) when the Horizon Information Portal compiles a summary list from a patron search request, or when the patron views a full bib record. The elements that the library subscribes to will then be displayed on the Information Portal through a process of matching ISBN numbers. Having Enriched Content elements display in this way provides the patron with a much richer browsing experience by giving the patron far more available information about an item than just standard bibliographic information.

Enriched Content offers a variety of features and benefits for the online user. To the browser—a title that catches the eye, something that looks interesting based on author, title, subject, publisher, maybe even the book cover, begs for a closer look. To the library, these features mean a richer experience for patrons, resulting in higher patron satisfaction and increased library usage.

Summary of Enriched Content features:

- **Tables of Contents** - When it will assist in a fuller understanding of a title, this information is captured from publisher catalogs, advance information, or the book itself.
- **Summaries and Reviews** - Publisher's summaries, as well as book reviews from other sources such as the Library Journal Review, are available.

Pertinent summary and review information are gathered from catalog descriptions or book jackets.

- **Author Biographies** - When available, brief biographical information about the author is included, generally summarizing the author's personal experiences and/or professional background. This information is captured from publisher catalogs, book jackets or publishers' files.
- **Sequel Identification** - Listing other titles in a series, this information assists the reader in identifying an entire series in the order the author intended.
- **Cover Images** - Scanned cover images are offered as a useful visual aid to the reader's online browsing experience, and in some instances, a natural way of identifying titles that were seen and remembered elsewhere.

Managed Upgrade and Enhancement Services		
Managed Upgrade	Service Description	List Price
Basic Data Migration	A "Basic Data Migration Package" is available to libraries who want to convert basic data types (bibliographic, item, authority, and circulation). This service would be especially useful to any library planning to implement "record ownership" functionality. This includes migrating the sites data twice. Once as a test and one as the final.	
Project Management	Need to get detail here	
Master coupon for unlimited group training from contract signing to go-live	Courses Available: Basic Cataloging, Cataloging Management, Intermediate Cataloging, Basic Circulation, Circulation Management, Intermediate Circulation, Searching Portal Administration, Basic Searching (Staff), Basic Searching (iPortal), Acquisitions Processing Centers, So You've Purchased WebReporter, Web Reporter Desktop Fundamentals, Web Reporter Administration, Security Part 1, Security Part 2.	
	Total	\$8,050=small \$11,500= medium \$17,250= large
à la carte items		
Enhanced Data Migration	An "Enhanced Data Migration Package" is available to libraries who want to convert all data types (bibliographic, item, authority, circulation, serials and acquisitions). This package would be especially useful to site planning to implement "record ownership" functionality. (This is in addition to the Managed Upgrade price)	\$5,750
Go-Live Visit (3 day)	The purpose of a SureStart Consultant coming onsite during the go-live week is to have an expert available to answer questions from members of the library staff, assist the system administrator and make sure the staff is prepared to handle the day to day tasks using the new software. (includes travel expenses)	\$7,935
Go-Live Visit (2 day)	The purpose of a SureStart Consultant coming onsite during the go-live week is to have an expert available to answer questions from members of the library staff, assist the system administrator and make sure the staff is prepared to handle the day to day tasks using the new software. (includes travel expenses)	\$5,865
SureStart (6 Months)	SureStart is a layer of consulting support designed to smooth the transition to Horizon. SureStart6 includes 4 consecutive weekly calls followed by 5 monthly calls. Agenda items are determined by the library. SureStart is a resource for the entire staff. (includes travel expenses)	\$4,830
SureStart (3 Months)	SureStart is a layer of consulting support designed to smooth the transition to Horizon. SureStart6 includes 4 consecutive weekly calls followed by 5 monthly calls. Agenda items are determined by the library. SureStart is a resource for the entire staff. (includes travel expenses)	\$2,415

à la carte items	Service Description	List Price
On-site Training for basic modules: Circ, Cat, Policies	Includes Basic Cat, Intermediate Cat, Cat Mgmt, Basic Circ, Intermediate Circ, Circ Mgmt, Searching - total of 3 1/2 days at \$2,070/day (travel expenses included)	\$8,970
Remote Training for a single site for the basic modules	Basic module package includes Basic Cat, Int. Cat, Cat Mgmt, Basic Circ, Int Circ, Circ Mgmt and Searching for total of seven 1/2 day sessions at \$575 per 1/2 day. Single site training allows up to 10 WebEx connections	\$4,025
On-site Training for Serials	Serials Control, Serials Checkin, Serials Mgmt = 1 1/2 days which is usually combined with Acq. because of the 3 day minimum for onsite training. (Travel expenses included)	\$8,970
Onsite Training for Acquisitions	Basic Acq, Intermediate Acq, Acq Processing Centers, Acq Mgmt - 2 days which is usually combined with Serials because of the 3 day minimum for onsite training. (Travel expenses included)	\$8,970
Remote Training on Serials (for a single site)	Serials Control, Serials Checkin, Serials Mgmt = 1 1/2 days at \$575 per 1/2 day. Single site training allows up to 10 WebEx connections	\$1,725
Remote Training for Acquisitions (for a single site)	Basic Acq, Intermediate Acq, Acq Processing Centers, Acq Mgmt - four 1/2 day sessions at \$575 per 1/2 day. Single site training allows up to 10 WebEx connections	\$2,300
Remote multi-site training per module per seat	Multi-site training is \$230 per 1/2 day or \$460 per full day session for each WebEx connection. Sites can have unlimited 'silent participants' viewing a purchased session.	\$230 per 1/2 day; \$460 per full day
Testing Lease Space	A service for libraries who desire access to a personalized test environment. This program will allow libraries the ability to test drive their new software in a stress-free, non-production environment. This service will include server space for up to 3 months, a test data load for up to 10,000 records, 2 profiling sessions, and 2 seats for basic WebEx training classes.	\$21,850
Onsite Detailed Network Analysis	SirsiDynix network engineers will use the latest network evaluation technology to analyze the library's network to determine trends, discover and define network anomalies and offer network "best practice" solutions. SirsiDynix engineers will perform this network evaluation onsite and provide the library with a detailed report outlining findings and possible solutions. (Travel expenses included)	\$10,005
Software Technology Planning Review	To ensure preparedness for the implementation phase, a consultant from Consulting Services will spend 2 days onsite working with library staff to identify current workflows or processes that need tuning ensuring staff awareness and comfort with upcoming changes for maximum productivity. Following each visit, a personalized software technology plan will be delivered. (Travel expenses included)	\$7,935
ACQ Workflow Consultation	To assess needs in regard to the Acquisitions process and VIP configuration a consultant from Consulting Services will spend 2 days onsite analyzing the processes/needs of the library including proposed workflows and recommendations, and outline of the profiling needed to support the workflow and reporting needs. (Travel expenses included)	\$7,935
Web Reporter Consulting	Up to 3 days of Web Reporter remote assistance targeted to the specific needs of the library. Topics include strategic planning for system administration, licensing and managing levels of access; strategies for report and document constructions, custom metrics and filters assistance, and options for effective delivery of reports.	\$6,210
IP Consulting	Capitalize on the flexibility and versatility of Information Portal with up to 3 days of IP Customization remote assistance	\$6,210

