ALL-WALS Agenda With Notes
Teams Online
March 30th, 2021

Agenda:

9:00-9:15: Welcome and logistics

9:15: Tips for Teams, Outlook – Pete

10:05-10:30: New procedures for registering patrons & New Online Registration Form

- [New Registration Form](#).
    - o Will go live in April
    - o Auto format: up-cases, formats phone, birthdate, address
    - o Allows and helps patron enter their Ucat1 and Ucat2 info.
    - o Verifies address—not that patron lives there, but that address exists
    - o Verifies email address, and makes patron click link and activate card.
    - o Limits PIN to 4 digits, no letters.
    - o Usable by staff to enter patrons—eliminates worry about Address format
    - o Duplicate Checking is no better than before, but at least that should be the only extra step staff need to do.

- New Procedures for Staff registering patrons in WF
    - o Take time to start training your staff
    - o No more writing out entire word ROAD, STREET, etc
        - ▪ As you modify user addresses, update to new format
        - ▪ We will be working on batch changing to abbreviations, slowly over time.
    - o There's a handout with all the official USPS abbreviations and it is on the extranet.
    - o The "Style Rules for Entering Patron Records" has been updated.
    - o Not new, but remember—no punctuation in Address fields (ie no comma before WI, or periods in PO BOX)
    - o If you need a new UserCat1 code, let Karla or Melissa know

- New Procedures for Staff registering patrons using new form:
    - o This is a work in progress....but at a minimum you will need to:
        - ▪ Fill out the form with the patron info
        - ▪ Go into WF and Scan in the real barcode
        - ▪ Change the User Profile
        - ▪ Extend their Privilege
        - ▪ Tell patron "You will get 2 emails from the library. You can ignore them, but if you don't get them, let us know."

10:30-10:40 Break

10:40-End: Refreshers, Updates, Tips, other...

- Patron Search Tips
  - Browse –Last Name, first 3 letters
  - Keyword -- More options, but can't put in partial word like in Browse
    - Address -- use start of address, leave off suffix. Ex 711 Kirkwood
    - Email - will find by user ID or by domain, or full address. Ex: windyfoxx or yahoo.com or windyfoxx@yahoo.com
    - Phone -- need to enter whole phone number, but punctuation is optional Ex: 920 555-1212
    - Notes – Actually searches Comments field. We could have it search both.
- Reports in Analytics
  - Beginning April 5th, certain reports will cease to run in Workflows.
    - These reports include Daily Circ reports, List Holds No Copies, List Items Missing, List Overdues, and List Renewed Users
    - These reports do *not* include the Onshelf Hold List, Clean Holds Shelf list, Cash Management End of Day reports, and any other customized report that cannot be created in Analytics.
  - For any report moved to Analytics, you will have to schedule it yourself to run on a regular basis.
    - Here's how: https://winnefox-system.screencasthost.com/watch/cqiwYeOE1K. Instructions can also be located on the Extranet: https://extranet.winnefox.org/content/analytics
    - Scheduled reports will be emailed to your email, as an Excel document
    - If there are no results for a particular report on a month, *no email will be sent*. Analytics does not send an empty email. For example, if you have no items to add or remove from SHORTLOAN, you will not get an email with that report that week.
  - There are about 6 reports which you need to run **at least monthly** and take action on:
    - **List Renewed Users** -- To catch changes to patron's address/Ucat1
    - **List Users Registered Online** -- To double-check online registrations, look for duplicates, etc
    - **List Items Missing** -- These items have been missing at least 3 months. Look 1 last time the mark them WD.
    - **List Claims Returned –all** -- I'd recommend weekly.
    - **List Claims Returned –by (Checkout/Item) Library --** 1 or both of these should be run monthly. Lists all claims returned in the past 365 days. Any items with a Claims Returned Date more than 3 months old need to be handled by the library and set MISSING or WD. Search the Extranet for "Claims Returned" to find instructions.
    - At least one of the **Holds related reports** -- to help you know which titles to buy to meet local demand
  - Optionally, you can run one or several of the Daily Circ Reports (total daily circ, daily circ by ICat1, or daily circ at self-check machines). By default the report will list the circ for the last seven days, but can be scheduled to run daily to show yesterday's circ totals.
  - Questions on which reports will be moved or on how to use Analytics can be addressed to Melissa. Klein@winnefox.org (920) 236-5230

- Principles of Participation -- updated to reflect current standards, and to codify some of the decisions that came out of the ILS Collaboration talks with OWLSnet.
    - Increased emphasis on system sharing/Local Hold restrictions
    - Clarified guidelines for browsing collections (Lucky Day)
    - Strengthened Network Security
- UserCat1
    - Why do we have so many Out of State patrons—active even in winter? Are they really using your library actively, or just online resources?
    - 1 wrongly coded patron can really affect CO funding. Last year there was 1 patron who checkedout over 750 items. He was incorrectly coded as living in a township in a county next to the one he actually lived in. In fact, he lived in a municipality served by a library. Bottom line? One of our library's CO funding was nearly doubled this year, because he was coded as a rural resident instead of in the municipality.
    - Tell your rural patrons about how their library usage affects your library's funding
    - Clean up reports -- I am sending a cleanup list of patrons with Out of State, Other WI, and/or Unknown.
    - Take a look and see if any can be fixed or are candidates for being cut off from library resources.
- Donated Lucky Day collection
    - Consider creating an Amazon wishlist for your library and put on your website
    - Remember LD items need to have an Item Type of XXXX-NH. Lucky Day materials are not LH—they are a browsing collection.
- Favorite Author Club:
    - The list is getting mighty long. Newer authors cannot easily be added in spite of suggestions from patrons. What criteria should we use to weed the Favorite Author Club list? Fewer than 10 followers? Fewer than 10 followers just in regular-print edition?
- Status.winnefox.org -- to see if a service (ILS, Website, ER resources) is down.