ALL-WALS Agenda With Notes

Ripon Public Library

March 21st, 2017

**9:00 – 9:15** Coffee & Conversation

**9:15-9:30** -- Introduction, and any follow-up from last meeting.

1. On Wed March 8th, SirsiDynix fixed the problem with sorting and duplicate checkouts. Let me know if you still see issues.
2. Patron Address Format –

Not OSHKOSH/WI

Not OSHKOSH, WI

No spaces, apostrophes, commas, $, etc in Email Address. Periods only. And Hyphens. And @ sign—must have @ sign.

Entering CARE OF---be sure to change the field name—otherwise it ends up as an Email Address.

See Extranet: <http://extranet.winnefox.org/wals/sirsidynix/workflows/patronrecords/stylerulesenteringpatronrecords>

1. Publicize your library – A new short promo video showing the importance of connections at your library. Watch it here:

<https://www.youtube.com/watch?v=e6m1rTDiqlI>

<https://vimeo.com/183856435>

Or you can download it and put it on your own website at:

<http://go.sirsidynix.com/Connections-Video-Download.html?aliId=14757720>

1. Important stuff about the Catalog
	1. This catalog is called “Enterprise” and can be found at <http://wlso.ent.sirsi.net>. It is now also available at: “catalog.yourlibrarydomain.org” (ex: catalog.brandonlibrary.net) will also work.
	2. This version of Enterprise isn’t the most mobile-friendly. Some phones “hide” the pop-up login window for MyAccount. It is there, just off to one side. One can find it by zooming out or scrolling.
	3. There is a mobile app called BookMyne that is available from free download. It is not the greatest for searching, but it does well for managing a patron’s account.
	4. ***NEW!*** Rating Info added to detailed display.

**A** – 9:30-10:15 - **Upcoming Upgrade**s.

1. Symphony upgrade. Pretty boring. Basically bug-fixes. Will require updating WorkFlows on your PCs. Probably happening sooner rather than later.
	1. Removes Checkedout items from the Clean Holds List.
	2. Allows for multiple card-swipes of the same amount w/o error.
2. Enterprise Upgrade. Less boring. Some possible new features—many of which require feedback from you.
	1. Sorting Checkout History list: Can ***either*** see Author info displayed, or sort. Which shall it be?
	2. Ability to edit email address (and other fields?) online.
	3. Slightly more mobile friendly.
	4. Favorite Authors Club: Allows patrons to automatically get holds placed on new materials by new, popular authors. Need to decide whether to give patrons option to choose a format or not. The chosen format applies to ***all*** authors—they can’t pick audiobook for some authors and print for others.
	5. Ability to renew card online.

**Break**

**B – 10:30 Winnefox Tech Skills Center.** Winnefox has a new resource libraries that provides self-paced tech tutorials, so your patrons can learn the computer and digital skills they need. The new resource -- the Winnefox Tech Skills Center -- will soon be available from your library's Research Tools page.

**C** – **Online** **User Registration**

**D – Tips & Tricks**

1. Report Session Settings



I now have my default Page width set to 800 all the time. It makes many of the canned reports easier to read and pull into Excel—especially Cash Reports. It also means that one doesn’t need to uncheck “Format Report” for all the customized “+” reports anymore.

And you know you can just double-click on a finished report to view it, right? You don’t need to click on View.

1. Right Clicking in WorkFlows. There are a lot of places in WorkFlows where one can access additional wizards without leaving the screen one is on—just by right-clicking on an item. Basically, almost anywhere that has a list of items (checkout, bookdrop, display user, show holds, etc).
2. Snipping Tool – Did you know you can snip different shapes? Or whole windows or the entire screen?

**F – Classroom Cards**

Winneconne PL has been using special “Group Cards” for their school class visits. Group Cards are a method of tying several people together into a group for borrowing privileges. One person is ultimately responsible for any/all those attached to their group. It seems to be working for Winneconne. If your library is interested, let me know.

**E – Hotspots & MobileCirc**

Winnefox has 2 hotspots that can be checked out. If you want to use MobileCirc at some place where you know there isn’t decent Wi-Fi, or the Wi-Fi is too restricted, reserve a hotspot and use that to create decent Wi-Fi. Anywhere that one can get cell phone service, one should be able to get Wi-Fi through the hotspot. If you find you like it, talk to Pete and he can get a hotspot for your library at a greatly reduced price through TechSoup. There is an annual service fee, but again greatly reduced through TechSoup.

**G** – **Tracking Changes in Word**. Demo, Handout.

**Lunch**

**Leftovers, if any.**