KLAS IRC Symposium
and Administrator Training

October 29-30, 9 AM – 4 PM

Tuesday, October 29, Morning:

Introduction to Symposium

WebOpac vs Web-based Ordering

- Benefits of Webopac
- Benefits of Web-based Ordering
- Potential / requested updates

Catalog

- Improving catalog to help teachers / requestors
- Getting new APH products into the system efficiently

Acquisitions

- Creation of purchase orders
- Tracking production of materials
- Issues with Receiving

Reports

- Running reports in KLAS
- Saving reports
- Extracting data from KLAS using Excel
- Report formats
- Helpful / Needed reports
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October 29 - Afternoon:

APH Census options

- Current Email process
    - Generating forms
    - Emailing
    - Noting return of forms
    - Completing of form processing
- Online Census process
    - Set up of permissions
    - Review / correction of records
    - Submission of waiver request
    - Finalization of census entry
- Submission to APH
    - Extraction of file
    - Upload to APH
    - Corrections and upload of those to KLAS

Wednesday, October 30 - Morning:

Control Files

- Discussion of important control files and their effect on your system
- Setting up defaults for Materials Requests and Acquisitions
- Patron Roles and Relationships, and their effect on Circulation Patterns
- Cross references for action codes

Cross References

- Mat Request Action emails
- Relationships and patron roles
- Customize printing output

Circulation Policy

- Create and adjust rules for circulation of various media, and to various patron types

WebOPAC Setup and Configuration

- Control files for WebOPAC
- Filters for display information
- Additional options

October 30 - Afternoon:

IRC Development Wish List

- Discussion of features in various modules that would make life easier for you.

Review of Maintenance Files

- Block Maintenance – setting up blocks to circulation
- Code Maintenance – adding and adjusting codes in the system
- Library Maintenance – keeping the library record current
- Heading Maintenance – administer and manage the four types of headings records
- Filter Maintenance – adjusting displays and cataloguing rules
- Shelf Maintenance – creating and maintaining shelves, both temp and permanent
- Period Maintenance – creating and maintaining statistical periods
- Charge Policy Maintenance – how to set up and maintain charges
- Stop Words Maintenance – listing words that searches should ignore
- Sequence Maintenance – automatically numbering patrons and titles

Users & User Permissions

- Adding, changing, disabling and enabling users
- Adjusting user permissions for an individual user