



SEREC

Southeast Regional Evergreen Conference
Raleigh, NC
October 8 - 9, 2014

Conference url: <http://statelibrary.ncdcr.libguides.com/serec>

Twitter feed: #SEREC2014

Program Schedule - Wednesday, October 8, 2014

10:00 am – 1:00 pm

Conference Registration opens

1:00 – 1:15 pm

Welcome and General Announcements

Location: Ballroom

1:15 pm – 1:45 pm

Keynote speaker: Cal Shepard, State Librarian of North Carolina

Location: Ballroom

2:00 – 3:00 pm

Session 1: Patron Exceeds Fine Threshold: An End-User Look at Patron Billing

Presenter: Dawn Dale, PINES (Georgia Public Library Service)

Location: Ballroom

This session will look at different ways to add a bill to the patron account as well as pay the bills on a patron account. It will also cover how to remove negative balances (that seem to be “stuck”) from patron accounts, the difference between voiding and forgiving fines, and the difference in a lost item and a missing item and how that affects a patron’s account.

Session 2: What’s in your bucket?

Presenter: Tanya Prokrym, NC Cardinal (State Library of North Carolina)

Location: Haywood

Explore old and new ways to use buckets. This presentation discusses how to 1) import a list of records into a bucket; 2) search for records within the Bucket window to bring groups of bibliographic records or copies together; and 3) create a webpage for recommended patron reading lists for summer reading and special projects.

3:00 pm – 3:30 pm

Break- afternoon snack provided

3:30 – 4: 30 pm

Session 1: Resource Sharing Tips and Tricks

Presenters: Jennifer Dale, NC Cardinal (Forsyth County); Jonathan Furr, NC Cardinal (Forsyth County)

Location: Capital

This presentation provides a brief overview and tips and tricks that they have learned for Resource Sharing within NC Cardinal. After the presentation, Jennifer and Jonathan will facilitate a round table discussion to identify and address Resource Sharing questions relating to communication, circulation, tracking and reporting.

Session 2: Customize Your Receipt Templates

Presenter: Terran McCanna, PINES (Georgia Public Library Service)

Location: Cardinal

Want to add your library logo and web address to your checkout slips? Or be able to print out information on a special upcoming event from all of the library workstations without having to manually update each workstation every time? This session will provide tips on integrating simple HTML into your receipt templates to modify the look and feel, to add and remove macros to adjust what information displays on a receipt, and to use includes to add standard text across multiple receipts on multiple workstations.

Session 3: Simplifying Reports

Presenter: April Durrence, NC Cardinal (State Library of North Carolina)

Location: Haywood

Do you have a need for recurring, monthly or daily reports? Not sure how to clone and edit a report for your own use? This presentation provides a brief introduction to the Templates & Output folders as well as step-by-step procedures for running reports using existing templates. Setting up recurring reports (monthly/weekly, etc.) to obtain your patron count and monthly circulation statistics automatically is an additional focus.

4:45 – 5: 30 pm

Roundtable 1: Circulation

Facilitators: April Durrence (NC Cardinal); Kelly Brannock (State Library of North Carolina)

Location: Capital

Get together with other library staff to share tips and tools of the trade on circulation functions. The Interest group is open to any and all participants in the conference who wish to share

information and learn from their counterparts. Be sure to bring your own stories and issues so that you can commiserate together! Here are some agenda items:

- What challenges do you encounter doing your job?
- What changes would you like to see that would facilitate getting your job done?
- Brainstorm ideas on how to better collaborate on circulation efforts within a consortium.
- What best practices need to be defined?

Roundtable 2: Cataloging

Facilitators: Johnnie Pippin, NC Cardinal (State Library of North Carolina); Jeffrey Hamilton (State Library of North Carolina)

Location: Cardinal

Get together with other library staff to share tips and tools of the trade on cataloging activities. The Interest group is open to any and all participants in the conference who wish to share information and learn from their counterparts. Be sure to bring your stories! Here are some possible topics:

- What challenges do you encounter doing your job?
- What changes would you like to see that would facilitate getting your job done?
- Brainstorm ideas on how to better collaborate on cataloging efforts within a consortium.

Roundtable 3: Reports

Facilitators: Jennifer Beach, Evergreen Virginia (Cumberland County); Raye Oldham (State Library of North Carolina)

Location: Haywood

The Reports module is one of the most user-unfriendly modules within Evergreen. Get together with other library staff to share tips and tools of the trade on creating and running reports. Bring a report example that you are struggling with! Here are some agenda items:

- What canned reports would you like to see provided?
- What changes would you like to see that would facilitate creating or running reports?
- Brainstorm ideas on how to better collaborate and share existing reports.
- What best practices need to be defined?

6:00 pm – Dine-a-rounds

For Dinner - join a group of people you know or a group you've never met! Sign-up sheets are located at the registration table during the conference.

Program Schedule - Thursday, October 9

8:00 am – Registration Desk Open

8:00 am – 9:00 am

Morning snack provided - assorted muffins, danish, donuts, coffee, tea

9:00 am – 10:00 am

Topic: Browser-based Staff Client

Special Speaker: Bill Erickson

Location: Ballroom

The staff client is changing. What is your Evergreen staff client interface going to look like in the future? It will be browser-based! Over the last several months, Bill has been working on phase one of the new browser-based staff client project which is now complete and ready for broader testing. Bill will discuss the benefits, challenges, and how we got here to begin with. He will also demonstrate some of the interfaces and discuss how we as a community anticipate the project will evolve going forward.

10:15 – 11:15 am

Session 1: A Walk through Acquisitions

Special Speaker: Shae Tetterton, Equinox

Location: Capital

This session will provide a start-to-finish walkthrough of an Acquisitions workflow. Workflows including the batch import of vendor records and overlay of on order copies will also be demonstrated. An overview of the structure of funds, funding sources and provider records will also be discussed.

Session 2: Serials and Evergreen

Special Speaker: Erica Rolfs, Equinox

Location: Cardinal

This session provides a start-to-finish walkthrough of a Serials workflow. Within Alternate Serial Control View, we will focus on the entry of subscription and ancillary information and discuss the Pattern Code Wizard. We will take a look at receiving serial items within both Serials interfaces.

Session 3: Intensive Customer Service Training

Presenter: Molly Westmoreland, State Library of North Carolina

Location: Haywood

Participants will experience the three basic components of Intensive Customer service – approachability, connection and closure – and the specific behaviors associated with each.

Through a combination of experiential training and discussion, participants will understand why welcoming behaviors are so important in today's public libraries. Library staff working behind the scenes, instead of on a public service desk, will understand why excellent internal customer service is just as important.

11:30 am – 12:15 pm

Roundtable 1: Acquisitions

Facilitator: Martha Crawley, NC Cardinal (Cumberland County); Lori Special (State Library of North Carolina)

Location: Capital

The Acquisitions module is one of the newer modules within Evergreen. Are you currently using acquisitions? In the process of implementing acquisitions? Just curious about acquisitions in Evergreen? If so, the Acquisitions Interest Group is for you. Get together with other library staff to discuss the available functions within acquisitions. Learn whether your library would find the acquisitions module useful. Here are some agenda items:

- Current uses of the acquisitions module
- Workflows and practices within Evergreen
- What issues have been encountered with the acquisitions module?
- Brainstorm ideas on how to improve this newer module of Evergreen.

Roundtable 2: Serials

Facilitator: Jennifer Pratt (State Library of North Carolina); Kelly Brannock (State Library of North Carolina)

Location: Cardinal

Do you order and receive subscriptions? Distribute issues to branches? Take an opportunity to explore the world of serials. Ask questions to those already using the serial management feature within Evergreen. Some agenda issues are:

- How does one start using the serials component?
- What issues have been encountered with using serials within Evergreen?
- Brainstorm ideas on how to improve serials management.

Roundtable 3: Panel Discussion - An Overview of PINES, Evergreen Virginia and NC Cardinal

Presenters: Terran McCanna, PINES (Georgia Public Library Service); Rose Schooff, Evergreen Virginia (The State Library of Virginia); Tanya Prokrym, NC Cardinal (State Library of North Carolina)

Location: Haywood

Learn how other consortia are organized – their structure, history, goals, and both similarities and differences. Terran McCanna from Georgia, Rose Schooff from Virginia, and Tanya Prokrym

from North Carolina will talk about their state's consortium and then open the floor for questions. Come hear how your neighbors are using Evergreen!

12:15 pm – 1:30 pm

Lunch (provided with registration)

Location: Ballroom

Closing Remarks by Jennifer Pratt (State Library of North Carolina, North Carolina)

1:30 pm

End of Conference