

COSA 2017

Training Schedule Monday 9th & Tuesday 10th October 2017

	Monday am	Monday pm	Tuesday am	Tuesday pm
Room 1	BC Analytics - Starter - Katie Lusk		BC Analytics- Advanced - Katie Lusk	
Room2			API and Web Services Refresher Creating Custom Reports Refresher (API) - Margaret Pelfrey	
Room 3	Symphony Sys Administration - Training Concepts (Holds Management, Secret to running Sym report, Exporting reports in XML, Key to indexing, Customising Staff logins, Label Designer Cathy Cusack		BC Central/Cat/Circ - Cathy Cusack	
Room 4	Enterprise Starter- Administration and Rooms - Rebecca Chile		Enterprise - Training Concepts/Intermediate Marc Maps, Creating Filters, Configuring EDS, Search Sources, Web Services - Rebecca Chile	

Description of classes:

API and Web Services Refresher, including what is new in API Workbook - This class is open to libraries with an API subscription

This session is based on the Mentor class BC916 BLUEcloud API: Web Services Workshop and will review the following:

- REST calls for GET
- POST methods
- Formatting JSON body elements
- Differences between our legacy Web Services and the new ROA Web Services
- How to interpret requests and responses from various Web Services.
- What is new in the API Workbook

Creating Custom Reports Refresher (API) - This class is open to libraries with API subscription

This session provides a refresher of the Writing Reports section covered in the full API Workbook. Topics covered will include:

- Layout of the delivery report directory (Rptscript)
- Tools used by the reporting system

- Prompting side of reports and the configuration files required to write the prompting phases
- Run side of reports and the layout of run scripts
- Printing and formatting reports
- Suggested design cycle for creating reports

Note: Both these API days have a prerequisite that participants must have attended the initial four day API Workshop at some time.

BC Analytics - Starter

This day is for both Horizon and Symphony users. The starter kit will take learners through the basics of using BC Analytics, including

- Navigation and Preference Settings
- Delivered Reports and Dashboards
- Building reports - Blank Reports, Report Builder
- Creating Dashboards

BC Analytics - Advanced

This day is for both Horizon and Symphony users (the class will be split when Stat and Historical cubes are looked at)

- Joining Tables and Deriving Metrics
- Historical vs Stat Log data
- Reports as Filters
- Reusable Prompts, Filters, Groups and Metrics
- Importing Data
- Documents

Enterprise Starter - Administration & Rooms

This session is based on the Mentor class (BC828 BLUEcloud Enterprise : Administration Rooms). Attendees will learn the administrative functions of setting up and managing Enterprise. This course is for system administrators or other library personnel specifically tasked with setting up and profiling Enterprise. After completing this course you will be able to manage:

- Security and authentication
- Displays and themes
- Rooms
- Search limits and Quick Search Buttons
- Search configuration
- Federated configuration

Enterprise Intermediate -Refresher

This session provides an opportunity to revisit key configuration options within Enterprise Administration, some are part of the Enterprise Training Concepts classes available in Mentor . Topics to be covered are;

- Marc Maps
- Creating Filters
- Configuring EDS

- Search Sources
- Web Services for Enterprise

Symphony System Administration

This year's Symphony System Administration class will focus on topics that we get asked about a lot and are structured around the popular *Symphony Training Concepts* classes available through Mentor;

- **Holds Management** - Learn the options for holds and how to make them a reality. Configuration policies that control hold management will be explored as well as a review of the reports used for managing holds.
- **Secret to running any Symphony report** - Learn to effectively setup and schedule any Symphony report
- **Exporting reports into Excel/ XML** - Learn to more effectively export report results from Symphony into Excel or XML (using style sheets)
- **Key to indexing** - Learn to create Keyword and Browse indexes to create a customised experience for staff within WorkFlows
- **Customising Staff logins** - Learn how to modify or create staff logins to reflect the tasks that library staff are commonly asked to perform
- **Label Designer** - Learn how to use the Label Designer Wizard to create label templates for user and item barcodes for printing.

Platinum Premier subscriber bonus - customers with a Platinum Premier subscription are able to register for this class at no cost.

BC Central , BC Cataloguing and, BC Circulation

This popular session has been offered at previous COSA conferences and provides an overview of the navigation of BC Central (previously known as Universal Admin), as well as the creation of Institutions and Staff Users, and defining privileges. The session also covers specific setup relating to BC Cataloguing and BC Circulation and provides an introduction to each of these modules.

Information included in this session is also available as SELF- PACED sessions in Mentor but this gives you the opportunity to go over it with the trainer and ask questions :

- BC466 BLUEcloud Central
- BC 258 BLUEcloud Cataloguing Basics
- BC 161 BLUEcloud Circulation

If your site is not already setup with a BC Central account please open a case with Support to get this done and bring your laptop to the session you will be able to look at your own instance .