

2024 5-day Intermediate Training Event Syllabus

DAY 1 - Acquisitions Agenda

- New Enhancements or Shortcuts:**
 - Request Item Now.
 - Display Options.
- Maintenance Settings You Should Use:**
 - Recommended Default Settings.
- Fund Account Setup:**
 - Why Create Multiple Levels.
 - The Importance of Fund Account Menus.
 - Important Fields to Use.
- How to Use Bill-to/ Ship To:**
 - How to Setup and Use.
- Best Practices:**
 - Tips to Create New Record vs Process Existing Record.
 - Create New Purchase Order
 - Create New Line Item Record.
 - Process Existing Line Item Records.
 - Reconcile Paid Titles Received from Accounting Department.
- How to Use Invoice Features:**
 - Search for Invoices by Number, Vendor, Invoice Date, or Purchase Order Number.
 - Inside the Invoice Record.
 - Link to Line Item Record.
- How to Prepare Fund Accounts for the Next Fiscal Year:**
 - End-of-Year Procedures.
- Search for Records by Various Fields and Export to Excel:**
 - Search by Account Code, Department, Invoice Number, or Title.
 - Search by Date Range and Status.
 - Select Line Item Records.
- Acquisition Reports (select reports):**
- Premium Modules:**
 - BCA Acquisition Reports.
 - ILL.

DAY 2 - OPAC Agenda

New Enhancements or Shortcuts:

- Auto Advance Slider Feature.
- OPAC Site Record - Search Limits Setting.
- Report Broken Link.

Search Types and Search Options:

- Simple Search.
- eSearch.
- Icon Search.
- Advanced Search.
- Tile Search.
- Browse Search.
- Publication Year.
- Search Filters.
- Wildcards.

How to Create Record Sets:

- Save a Set of Records.
 - Create a New List.
 - Add to Existing List.
 - Delete from Existing List.
 - Replace an Existing List.
 - View Created Records Sets.
 - Copy Permanent Link.

Horizontal Menu – My Account:

- My Profile.
- My Checkouts.
- My Checkout History.
- My Holds.
- My Messages.
- Change Password.
- My Requests.
- My Reviews.
- My Classes.
- My Routings.
- My Subscriptions.
- Request Title Now.

Other OPAC features:

- Library Info.
- Library Menu.
- Library Pages.
- Switch Language.
- Sign In.

Faceted Search:

- Faceted searching.

Complete Display Action Menu:

- Print Record.
- Email Record.
- Permanent Link.
- RefWorks and Endnote.
- Hold.
- MARC.
- Tips.

How to Create Saved Searches:

- Create a Saved Search.
- Save a Search.
- Copy Permanent Link.

How to Make an OPAC Slider:

- Turn on OPAC Slider.
- Confirm Records have ISBN Numbers.
- Add Records to a Record Set or Saved Search.
 - Saved list/search for Slider.

OPAC Reports (selected reports):

Premium Module:

- Overdrive Integration.

DAY 3 - Cataloging Agenda

New Enhancements or Shortcuts:

- Open Copy Button.
- Flagged for Export/URL Check.
- List & Flag buttons.

Browse Search Tips:

- Search Options:
 - Browse.
 - Begins with.
 - Contains.
 - Ends with.
- Main Title vs All Titles.
- Date Added vs Date Updated.
- Who Added vs Who Updated.

Copies List Page Features:

- Tips to Save Time.
- How to Use:
 - Add, Auto Add, Clear, Delete, Filter, Print Record, and Reassign.
- How to Use Icons:
 - Select (box), Insert, Edit, Print cards, Clone. View items,
- Display Options.

Copy Info Tab Explained:

- Tips to Save Time.
- All Fields Explained.
- History Section.
- General Info Section
- Volume Information.
- Notes Section.
- System Management.

Order Info Tab Explained:

- Tips to Save Time.
- All Fields Explained.
- Details Section.
- Renewal Instructions.

Authority Control:

- How are Authority Records Created?
- How to: Split, Reassign and Merge Authorities.
- How to Create Cross References.
- Authority Reports.

Linked Media:

- What is it? How to Use It? Where are They Stored?
- Difference between Linked Media and 856 Tag.
- Linked Media Buttons.

Learn Ways to Change Display and Clean-up Records:

- Learn how to find and clean-up records.
 - Change the number records displayed on browse view (5-100).
 - Change the number of advanced search fields available.
 - Edit picklists/location.
- Use the global replace tools.

Cataloging Reports (selected reports):

Premium Modules:

- Indexer.
- ERM.

DAY 4 - Circulation Agenda

- New Enhancements or Shortcuts:**
 - How to Make Patron Labels.
- Self-Registration:**
 - How to Setup.
 - How to Use it.
 - How to Edit Self-Registration Fields.
- Self-Checkout & Self-Check-in:**
 - How to Setup.
 - How to Use.
 - How to Edit Self-Checkout/Self-Checkin Fields.
- Patron Records:**
 - How to Create Patron Records.
 - Patron Detail.
 - Address.
 - Institution.
 - Other.
 - System.
 - Account Details.
 - Networking.
- Patron Search Utility:**
 - Report: Patron Listing (Columns).
 - 2 Ways to Do Patron Search.
 - Steps to Make Global Changes to Patron Records.
- Patron Clean-up Another Way:**
 - Search, Select, and Export Patron Records in 2 formats.
- How to Use Item History:**
 - Why use it?
 - Useful info. in Item Summary.
 - Pervious Patron Section.
- The Different Ways to Use Temporary Records:**
 - Track Equipment.
 - Use for Interlibrary Loan.
 - Item Status with Patron Information Columns Report.
- Checkout Due Date Setup & Troubleshooting:**
 - Due Date Type Setup.
 - Troubleshooting Examples.
- Circulation Reports (selected reports):**
- Premiere Modules:**
 - BCA – Circulation Reports.
 - RFID Self-Checkout Station.
 - Media Bookings.

DAY 5 - Serials Agenda

New Enhancements or Shortcuts:

- Hide Patron from Routing Slip.
- List, Excel, Flag Buttons.

Learn How to Create Print Serial Records:

- How to Prepare Before You Start.
- Examples for: Weekly, Monthly, Quarterly, etc.
- Serials Info Tab.
- Checkin Info Tab.
- Enumeration Tab.
- Pattern Tab.
- Tips.

Learn How to Create Electronic Serial Records:

- Overview of the ECM e-Journal Process.
- What to Know Before you Start.
- Serials Info Tab.
- Checkin Info Tab.
- Enumeration Tab.
- Pattern Tab.
- Tips.

e-Journal Tab:

- Email List.
- From Address Search Type.
- Subject & Body Search Types.
- Replace Incoming Subject with.
- Days Until Email Expires.
- e-Journal Settings.
- Note Fields.

Copy Level Settings – Routing:

- Routing Slips.
- Routing Labels.
- ECM records.
- Tips.

Copy Level Settings - Copy Info Tab & Order Info:

- Links: Copy Notes & Purge History
- Retention Information.
- System Management.
- Order Details Information.
- Renewal Instructions.

Serials Check-In & Checkin History:

- Serials Check-in Features.

Serials Reports (select reports):

Premium Modules:

- Content Aggregator.