


STAFF (PAC) TRAINING (July 14, 1998: 8:30 - 12:00)**Introduction to Horizon / PAC Overview**

- a. Search Flow
- b. Types of Searches
- c. How the System "thinks"

I. Simple Keyword Searching

- a. The Search Window
- b. Closed Lists vs. Open Lists
- c. Titles list window
- d. Bib detail window
- e. Copies window

II. Boolean Keyword Searching

- a. Using AND
- b. Using NOT
- c. Multiple Keywords and Operators
- d. Broadening a Search using OR
- e. Truncation
 1. In a multiple keyword search
 2. To narrow a search term
 3. In the middle of a search term

III. Alphabetical Searching

- a. Conducting Alphabetical Searches (Author, Subject, Series)
- b. Using an Alphabetical List
- c. Search Flow
- d. Searching on cross-references
 1. See References
 2. See Also References

IV. Bib and Item Lists: Limiting, Saving, Sorting and Printing

- a. Limiting a List
- b. Saving a List in PAC [Bookmarking]
- c. Sorting and Printing a List



V. Making and Viewing Requests from PAC

- a. Making Requests
- b. Viewing the Request Queue

VI. Viewing New Additions

VII. On-line Help Feature in PAC



SYSTEM ADMINISTRATION TRAINING (July 14, 1998: 1:00 - 4:30)

I. Table Editor

**Interacting With the Table Editor*

II. Startup Services

**Startup Services*

III. Security

**Securing Your System*

IV. Day End Processing

**Day End Processing*

V. PAC Parameters

**Setting Up An Online Catalog That Works For You*

VI. MARC Maps

**MARC Maps*

VII. MQ VIEWS

**Reconfiguring Views*

**MQ View Tables: Arranged Alpha By Description Name*

**MQ View Tables: Arranged Alpha by View Name*

**MQ Views Training: Exercises and Answers*

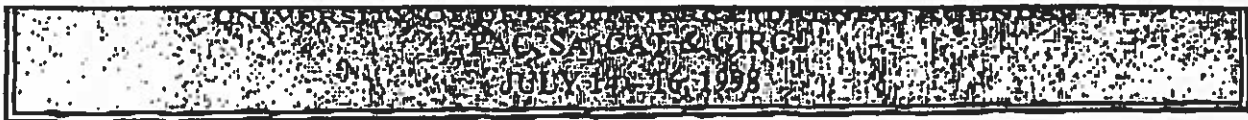
VIII. REPORTS

**Reports*

IX. CONFIGURING MENUS

**Configuring Menus*

BREAKS WILL BE SCHEDULED THROUGHOUT THE SESSIONS!



CATALOGING TRAINING (July 15, 1998: 8:30 - 4:30)

I. Beginning CAT Procedures

- a. Introduction to the MARC record
- b. Horizon Navigation Tools Unique to CAT

II. Basic Bib Editing

- a. Opening a Bib Record (Several Ways)
- b. Adding a Tag / Codes Lookup
- c. Adding Subfields
- d. Copying and Pasting Tags
- e. Editing Text
- f. Editing Indicators
- g. Editing Fixed Field Tag Positions
- h. Deleting Tags, Subfields and Text
- i. Diacritics
- j. Special Characters
- k. Copying a Bib Record

III. Authority Records

- a. Overview of Authority-Controlled Tags
- b. Opening an Authority Record
- c. Editing an Authority Record
- d. Adding or Creating a New Authority
- e. Attaching an Authority to a Bib
- f. Copying an Authority-Controlled Tag from One Bib to Another
- g. Deleting Authority Tags and Records

IV. Item Records

- a. Creating Items for a Bib
- b. Copying Item Records
- c. Batch-Creating Item Records
- d. Relink Items to Bib Records
- e. Deleting Item Records
- f. Printing Cataloging Labels



V. Copy Records

- a. Creating Copy Records for a Bib
- b. Copying Copy Records
- c. Attaching Item Records To Copy Records
- d. Deleting Item and Copy Records
- e. Relinking Item Records to Other Copies
- f. Relinking Copy Records to Other Bib Records
- g. Deleting Copy Records
- h. Working With Summary of Holdings in Cataloging

VI. Workforms

- a. Creating and using Workforms

VII. Other Cataloging Procedures

Bib Records

- a. Coping
- b. Merging
- c. Linking
- d. Uniform Titles
- e. Bib Status/Control Records

Auth Records

- a. Merging
- b. Creating See References
- c. Creating See Also References

VIII. Importing MARC Records

IX. Exporting MARC Records (overview only as requested)

X. Cataloging Reports

- a. Activity
- b. Bib Lists
- c. Authority Lists
- d. New Additions Lists

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CIRCULATION TRAINING (July 16, 1998: 8:30 - 4:30)

I. Basic Circulation Procedure

- a. Basic Checkout
- b. Basic Checkin
- c. Searching for Borrowers (Find Borrower Command)
- d. Circulation with Unknown Barcode (Find Item Command)
- e. Editing an Item During Checkout and Checkin
- f. Renewing an Item (s)
- g. Changing Checkin Date and Time
- h. Lost items
- i. Claimed Return Items
- j. Checking Out Non-Circulating Items
- k. Using Checkin Modes
- l. Show Borrower in Checkin

II. More About Borrower Records

- a. Fast Adding Borrower Records in CIRC
- b. Editing a Borrower Record
- c. Lost Barcodes
- d. Renewing a Borrowers Registration
- e. Dealing With Expired Borrowers
- f. Proxy Borrowers

III. Creating and Resolving Borrower Blocks

- a. Creation of Borrower Blocks and Notes--System Generated
- b. Creation of Borrower Blocks and Notes--Operator Generated
- c. Viewing Current Block Detail
- d. Resolving Borrower Blocks and Notes
- e. Transacting and Waiving Fines Payments
- f. Viewing Block History and Detail
- g. Payment History

IV. Fast Adding an Item Record in CIRC



V. Hold Requests

- a. Holds Workflow--Overview
- b. Placement of Request/Holds
- c. Viewing and Printing a Request List
- d. Filling/Capturing a Hold & CKI Procedures
- e. Holds Shelf
- f. Checkout Procedures
- g. Requests/Holds Reports
- h. Requests/Holds Monitoring

VI. Circulation Reports

- a. Reports
- b. Printing Notices and Reminders

**VII. Workflow (as time allows)
Questions and Answers**

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