Eastern Suffolk SLS – OPALS Users Meeting
Riverhead High School
January 11, 2018

Agenda

OPALS Online Resources:

OPALS Homepage  https://www.opalsinfo.net
OPALS Help        http://help.opalsinfo.net
OPALS Facebook   https://www.facebook.com/OPALSmf/
OPALS TV Tutorials

Join the OPALS listserv:
1) Click opalslist-request@freelists.org to send a blank email.
2) Enter "subscribe" in the Subject field. (We cannot legally add anyone to a distributed list. Subscribing must be initiated by individuals.)

OPAC

1. Autocomplete Search Prompts: OPAC & K-3 Owl Subject, Author, Title, Keyword prompts

2. OPAC Display – Brief Citations - Series & Volume
3. **OPAC – “Awards” – Auto complete / Listing**: Autocomplete lists awards recorded in the database on a picklist.

4. **MARC Editor: 586 “Awards” field authority table**: We have populated the table with many award titles. It is possible to add to that list by manually entering a new one in the 586$a subfield. The new one will be added to the table for future use.

5. **Children’s “OWL” OPAC Interface Update**
The “Owl” interface will change with the seasons: Spring/Summer, Autumn, Winter

6. **MLA Bibliography 8th Edition Updates**
OPALS OPAC-integrated bibliography updated to MLA 8th Edition specifications

You can also create an MLA citation manually (for items not in the library) – Click “Manual citations”

8. **Bibliography Citation Station Utility Portlet**: “Bibliography Citation Station” is a portlet utility that you can add to any OPALS portal page and tab.

9. **OPAC Portal – Color Coded – WYSIWIG Tabs**
OPALS customizable portal tabs, can now be color-coded to better highlight your library’s services. You can add color to any existing tab or any new ones on the OPALS portal. WYSIWIG enables you to reposition them.
10. Reader Reviews: Delete selected reviews

11. Genrefication:

Presentation & Discussion

OPALS Topic / Genre Browser Walls

Create virtual – visual – genre browsers

Add genre icons from the genre icon library to Pathfinder mast, Genre lists, Topic/Genre walls: Icons make it easier and visually more interesting for members to browse your organized resources, than text-only lists.

Circulation

Loans – Returns - Reserves
12. **Group Loans:** Circulation system has an option to pre-load student names and status for a selected homeroom / teacher, reducing transaction processing time by 50-75% – especially helpful, when district networks experience latency.

13. **Circulation: Red Flag - “Private & Public Notes**

Only authorized staff can review a “User’s” private notes. “Public” notes can be viewed by circulation desk staff.

14. **Circulation – Member / User Information Display**

- Patron / User transaction title lists hyperlinked
- Series titles appear on the lists
- Click a hyperlinked title to view transaction details
- Number of renewals made and renewals maximum data displays here and in circ system “Renewals”

15. **Loan Reports – Lists - Overdue Notices**


**Pre-emptive Email Overdue Notices:** Set OPALS settings to send courtesy reminders a designated number of days before they become due

**Overdue Notice & Fine Printing updates:** Reports fines waived, collected, refunds & refunds pending
16. Quick Item Entry Lists
OPALS “Loans” and “Items” applications enable staff to do “quick entries” (minimal data) to lend resources without having to enter all the desirable data. There are three “Quick Item Entry” contexts:

i. Temporary items – When these items are returned, these records are deleted from the system
ii. ILL items – Items borrowed from another library and loaned to a member – these are deleted when the item is returned (Choreography can vary depending on ILL service used)
iii. Quick Entry – Items that need to circulate, and where additional cataloging is desirable

Programmers have developed a utility to list any of these brief item entries.

<table>
<thead>
<tr>
<th>Quick Item List</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Title</strong></td>
</tr>
<tr>
<td>Breaking free</td>
</tr>
<tr>
<td>Create your school library writing center</td>
</tr>
<tr>
<td>Being indispensable</td>
</tr>
</tbody>
</table>

17. Student / User Data Updates & Editing
OPALS technicians can work with district technicians to automatically update student demographic data on a regularly scheduled basis. Ask IT administrators to contact Richard Grenier or Dan Weeks to set this up.

18. Student Data
The student / user data template includes many useful fields. Fields to consider: email address, district assigned passwords - [http://help.opalsinfo.net/about/people/](http://help.opalsinfo.net/about/people/)

19. Patron Barcode Printing from user editor template
You can now print a borrower’s barcode from a user’s account information. Some academic, special and public libraries issue cards when new members register and need to print a barcode after registration is complete.
20. Users – Email Verification

A growing number of OPALS automated libraries use email messages to send pre-emptive and overdue notices or notify members regarding items placed on hold for them. Occasionally the email addresses are incorrect and messages undelivered.

21. Reports options to display 'current' status and historical status

![LOST ITEMS REPORT]

- Report on: Lost Items
- Option to display current status and historical status
- Include ILL and Temporary
- Create Report

22. Customized Status Reports

![Custom Report Fields]

- Select and rearrange fields to display
- Sample Report

18. DPS: Single Login Database Access
Configure & Activate group database listings (ex. k-5, MS, HS)

Libraries using OPALS single login / authentication technology have requested the option to configure their database lists for diverse library member groups in their community. K-12 schools and public libraries are contexts where some information databases appeal to either younger or older members. This update provides these options.

- Customized configuration enables system administrators or branch librarians to define listings,
- Select the databases for a listing from a branch / school subscription list,
- Choose the desired display format (There are four display options available now),
- Select the default display when there are several that have been defined

Database listing default displays all available resources

Clicking the “Elementary Level Databases” tab accesses resources relevant to those library members

Ex. Customized “Authentic Information Sources” Tab & Listing
Q & A Short List..Any Questions From Group Will Be Addressed

1. Adding widgets that work for your library
2. Adding websites such as NOVEL etc. for easier access.
3. Setting up self-check out.
4. How can you enhance the OPALS homepage to include other technology.... Videos/Surveys/Power Points etc...
5. Choosing the Order of a Search Using the VRC with the new searching strategies
6. Authority Tables
7. Barcode Assignment and Table