OPALS Manual

Franklin-Essex-Hamilton

School Library System

July 2011
# Table of Contents

## OPALS Circulation:
- Loans ......................................................... 1
- Overriding Restricted Loans ................................. 2
- To Print Overdue List ...................................... 3
- To Print Overdue Notices ................................... 4
- Renewals ....................................................... 5
- Reserves ....................................................... 6
- OPALS Offline Circulation Module .......................... 7
- Returns ....................................................... 8
- Item Status .................................................... 9
- In-Library Use ............................................... 9

## OPALS: Items: Additions
- To Add 852 Holding to Existing Record ...................... 10
- To Add a Field to Existing Record ......................... 10
- To Import Records from a Diskette ......................... 11
- To Check for Pending Records after Import ................. 11
- To See Items Added on Specific Date ....................... 11
- To Find and Download MARC Records (Z-Import) ........... 12
- To Add New Item Using Template ........................... 13
- Prefix Classification Standards (852 subfield x) ........... 14
- Classification Standards .................................... 15-16

## OPALS: Deletions
- To Delete 852 Holding ....................................... 17
- To Delete Record ............................................. 17

## OPALS: Users (Patrons):
- To Add User (Patron) ....................................... 18
- To Edit Individual User (Patron) ........................... 19
- To Edit User Group (Patron Group) ......................... 20
- To Delete User (Patron) .................................... 21

## OPALS: Barcode Labels:
- To Print User Barcode Labels (Avery 5X60) .................. 22
- To Print Item Spine and Barcode Labels (Avery 5X60) ...... 23
- To Print Labels for Individual Items Already in Database 24
- To Print Barcode, Spine Labels from Hitlist ................ 25

## OPALS: Reports:
- Loaned Items .................................................. 26
- Adding/Removing New Items List ........................... 27
- Item Acquisitions ............................................ 28
- To Mark an Item “Lost” ...................................... 29
- Lost Items List ............................................... 30
- Deleted Items List ........................................... 31
- To Print Overdue List ...................................... 32
- To Print Overdue Notices ................................... 33
- To Print Circulation Statistics .............................. 34
- To Print Reserved Items List ................................. 35
- To Print User Barcode Labels (Avery 5X60) ................. 36
- To Print Item Spine and Barcode Labels (Avery 5X60) .... 37
- To Print Labels for Individual Items Already in Database 38
- To Print Barcode, Spine Labels from Hitlist ................ 39

*July 2011*
OPALS: Inventory: .................................................................................. 40-51

OPALS: Administration:
To Configure User Types ................................................................. 52
To Configure Item Types ................................................................. 52
Item Types Reassignment ............................................................... 53
To Set Calendar for New School Year ............................................. 54
Library Hours .................................................................................. 54
To Add or Change Logo from Opening Screen ............................. 55
News/Events List Editor ................................................................. 55
Web Links List Editor ..................................................................... 55

OPALS: Miscellaneous
To Eliminate Display of Previous Searches in Internet Explorer 8 .... 56
To Update Mozilla Firefox .............................................................. 56
To Print MARC record in Mozilla Firefox (without wasting paper) .. 56

July 2011
OPALS Circulation: Loans

To Loan: Students

1. Click on Circulation. Click on Loans across the top or in the drop down menu.
   In username/barcode box:
   • Scan barcode
   OR
   • Type all or part of patron’s name, click OK. If more than one choice appears:
     - Find the patron
     - Click on name
     - Click Select

2. In Item Barcode box:
   • Scan barcode
   OR
   • Type barcode, hit enter or click Loan
   • To change patron, click on Switch User or hit escape key

3. If you want to change defaulted due date (for vacations, etc.):
   • Click on the calendar button under Session Due Date.
   • Choose your due date using the arrows to scroll through months.
   • Click on desired date. Date appears in box next to calendar button.
   • Click in the Session Due Date box. This date will remain in effect until it is changed or you logout. If session due date box is not checked, due date returns to default setup when next user is scanned.

Continue loans following steps 1-3.

To Loan: Faculty and Interlibrary Loan

Repeat steps 1-3. You must change defaulted due date by following the steps in number 3 unless you configured specific user types in Administration ➔ Preferences ➔ User Types and included them in Administration ➔ Preferences ➔ Item Types.
**Overriding Restricted Loans:**

Loans may be automatically restricted if patron has overdue items or has exceeded maximum number of loans specified in user type.

1. Go to *Administration ➔ Preferences ➔ System Preferences.*

2. Look at the preference called “allowOverdue”.

3. Reset if needed:

   - Choose the value 0 for no override (patron may not borrow more items until overdue items are returned).

   - Choose 1 for override with question. (Librarian may override the restriction).

   - Choose 2 to override automatically without approval (Item is automatically loaned regardless of the number of overdue items the patron has).
To Print Overdue List:

1. Click on Circulation.

2. Click on Notices across the top or in the drop down menu.

3. Choose From Date, choose To Date.

4. Click on arrow next to Group Loans By box. Choose one of the following: Teacher, Grade, Homeroom.

5. Click Create Report.

6. Click Print List to print entire list OR click in box of each entry you want to print, then click Print List.

7. If Group Loans By User, click on arrow next to Order By box. Choose Homeroom or Name.

8. Click Create Report.

9. Click Select All, File, Print to print entire list.

10. Adobe print screen opens.

   a. Click printer icon.
   b. Verify printer.
   c. Verify the following under Page Handling:
      -Page scaling: Choose none
      -Auto rotate and center: uncheck box
      -Choose paper source by PDF size: uncheck box

11. Click OK.
**To Print Overdue Notices:**

1. Click on *Circulation*.
2. Click on *Notices* across the top or in the drop down menu.
3. Choose *From* Date, choose *To* Date.
4. Click on arrow next to *Group Loans By* box. Choose one of the following: Teacher, Grade, Homeroom.
5. Click *Create Report*.
6. Click *Select All* to print all notices OR click in box of each entry you want to print.
7. Click *Print Notice*.
8. If *Group Loans By User*, click on arrow next to *Order By* box. Choose *Homeroom* or *Name*.
9. Click *Create Report*.
10. Click *Select All* to print all notices OR click in box of each entry you want to print.
11. Click *Print Notice*.
12. Print Option box opens. Choose options:
   - One notice per page, two notices per page, or three notices per page.
   - With titles, without titles.
   - If desired, type custom message in box.
13. Click *Print Notice*.
   a. Click printer icon.
   b. Verify printer.
   c. Verify the following under Page Handling:
      - Page scaling: Choose none
      - Auto rotate and center: Check box
      - Choose paper source by PDF size: Check box
15. Click *OK*. 
OPALS Circulation: Renewals

Renew by barcode:

1. Select Circulation → Renewals from the menu.
2. Click the Standard or the Select Date button.
   - Select Date gives an opportunity to use the calendar and select a date other than the Item’s default date.
3. Scan or type barcode in Item Barcode box (press Enter key or click Renew button if needed.)
4. Scan as many items as needed.

Renew while loaning:

1. Select Circulation → Loans from the main menu.
2. Enter user’s name or barcode.
3. Look in the user’s list of loans.
4. Click in the box next to the item you wish to renew.
5. Use the Renew button at the bottom of the Loans table.
   - If you wish select a date other than the Item’s default date, click Select Date and use the calendar to set the date.
6. Click the Renew button.
OPALS Circulation: Reserve

Reservations in OPALS are made by title not by barcode. This allows an item with many copies to be reserved and loaned as easily as a title with only one copy. Find the title you wish to reserve by using the OPAC search function.

**If you know the item barcode:**

1. Go to Circulation  Reserve
2. Enter username/barcode. Click OK.
3. Scan item barcode. Click Add to Reserve List.
4. Item(s) on Reserve screen appears. Verify bibliographic information.
5. Choose Reserve time:
   1. Standard (Reserve time set in system). Click Reserve. **OR**
   2. Select date. Set date with calendar. Click Reserve.
6. Reserved Items screen appears.
7. Reserve may be canceled by checking in box at far right and clicking Cancel Selected Items.
8. Are you sure you want to delete these reserves? Click OK or Cancel.

**If you do not know the item barcode:**

1. Enter your search terms into the "Keyword" box.
2. Click Search.
3. Click on the title of item to view its detail.
4. Click Reserve button.
5. Enter User name/Barcode OR click Switch User.
6. Click Reserve button to use default reserve length set in item types OR click calendar to change reserve length.

**To Print Reserved Items List:**

1. Go to Administration  Reports  Reserved Items.
2. Columns may be sorted by clicking on the column header.
3. To print, Click Browser's File and Print.
**OPALS Offline Circulation Module:**

At times Internet connections can be slow or a router can fail and disconnect the library from the server. The Offline Circulation Module was developed to allow an OPALS library to loan items even when the Internet is not available for a short time. When Internet communication is reestablished, the transactions can be uploaded to the OPALS server.

**Setup:**

The OPALS Offline Circulation Module is a small java file, “OpalsCirc.jar”. Before transactions from the Offline Circulation module can be transferred to your OPALS online library system, it must be installed and configured on the Desktop of the computer used for offline circulation.

1. Copy the OpalsCirc.jar file onto your Desktop.

2. Open the OpalsCirc.jar file.

3. Select the *Setting* tab.

4. Type your OPALS library URL into the "Server Address" field. For example: mylibrary.fehb.org (substitute your three letter code for “my library”).

5. Click *Save* button.

After you have set the server address and loaned items offline, two files will be created on your desktop.

1. The server address is recorded in a small file called opals.ini. If the file is deleted for any reason, you will need to use the Setting tab again to register your OPALS URL, thereby recreating the settings file.

2. All transactions will be saved in a file called transactions.csv. Only the transactions that have not been uploaded will be maintained in this file. As soon as the most recent transactions are sent to OPALS, the file will be emptied.

*If you see what appears to be gibberish when the file is opened, you need to install free Java software. Go to [www.java.com](http://www.java.com) to download and install the software. After Java is installed the offline circulation application should work.*
OPALS Circulation: Returns

Returns on the Loans page:
1. Select Circulation \(\rightarrow\) Loans from the main menu.
2. Enter user's name or barcode.
3. Look in the user's list of loans:
4. Click in the box next to the item(s) you wish to return.
5. Click the Return button at the bottom of the Loans table.

Returns on the Returns page:
1. Select Circulation \(\rightarrow\) Returns from the main menu.
2. Scan or type barcode into the Item Barcode box.
3. If the item is damaged and you wish to remove it from the collection for a time, click the “Damaged” button before scanning or typing the barcode.
**Item Status:**

**To Find Status of Items by Scanning Barcodes:**

Use this function to view who has a particular item. You may also modify the Item Status or Item Type of each item via this page.

1. Select *Circulation ➔ Item Status* from the main menu.
2. Scan or type barcode in Item Barcode box (press Enter key or click Check Item Status button if needed.)
3. You may modify the Item status (Active, Missing, Damaged, Lost) and Item Type (G, Ref, video, etc) from this page.
4. Be sure you use the "Save" button after any modification.

**In-Library Use:**

To keep track of items used in library:

1. Select *Circulation ➔ In-Library Use* from the main menu.
2. Scan or type barcode in Item Barcode box (press Enter key or click Register button if needed.)
3. The Circulation Statistics report keeps track of these totals.
OPALS: Items: Additions

To Add 852 Holding to Existing Record:

1. Search for title.
2. Click on correct title.
3. Click Edit.
4. Using the side scrollbar, scroll all the way down to the bottom.
5. Click in the last 852 in the record.
6. Click Add Field.
7. Enter number of duplicates of this holding:
   • Leave at 1 for one holding, click OK
   • Type 2 for two holdings, click OK
   • Type 3 for three holdings, click OK
   • And so on.
8. Enter first barcode. If you have more than one holding, it is vitally important that the barcode numbers are sequential. If there is more than one holding, it will add them in sequential order.
9. Add or update subfield x.
10. Click Save.

Required 852 holdings information should be in the following format:

```
852 9 price
a FEH three letter code (example: SRS)
b three letter code (example: SRS)
h classification number
i author letters/cutter
k prefix
m call number suffix
p barcode
x Fund Vendor Date
```

To Add a Field to Existing Record:

1. Search for title.
2. Click on correct title.
3. Click Edit.
4. Click in field directly above location of new field. Click Add Field.
5. Type information in new field.
6. Click Save.
To Import Records from a Diskette:

1. Click on Items  Import. The Importing Records screen appears.
2. Browse to find file.
3. Double click file to import.
4. Check duplicated record ☑
5. Do you want to add additional holding subfield? Click Yes
   -Subfield code: x
   -Subfield data: Fund Vendor Date (example: 711 Follett 200909)
6. Click Upload. “Data enqueued. Check back later to see imported records” Click OK. (may take 10 minutes).
7. After import is “Done”, check accuracy of call numbers by doing the following: Go to Administration  Reports  Item Acquisitions. Make necessary corrections.
8. Any items with “TMP” barcodes must either be deleted OR given an accurate barcode.
9. Any items with “DUP” barcodes must be deleted OR corrected.

To Check for Pending Records after Import:

1. Click on Items  Merge. The Pending items screen will appear.
2. Click ISBN number to process pending item.
3. Follow directions on Compare Records and Choose Merge Option screen.
   OR
1. Click Items.
2. Click Import.
3. Number of duplicate records appears in Pending box.
4. Click number in Pending box to process duplicate records.

To See Items Added on Specific Date:

1. Click Administration  Reports  Item Acquisitions
2. Items entered on current date appear on screen.
3. Modify the From and To dates to search for items entered on another date. Click calendar icon in From, choose date. Click calendar icon in To, choose date.
4. Click Create Report.
To Find and Download MARC Records (Z-Import):

1. Click Items → Z-Import.

2. Choose the search site. Always start with your own catalog. If the correct record is found, add a holding for the new copy. (If “no records found”, select next search site with drop down arrow).

3. Choose search method.

4. Type keyword(s). Click Search.

5. Click on appropriate title.

6. Edit MARC record, if necessary.

7. Be sure 852 is complete.

8. Click Save.

Required 852 holdings information should be in the following format:

```
852 9  price
   a FEH three letter code (example: SRS)
   b three letter code (example: SRS)
   h classification number
   i author letters/cutter
   k prefix
   m call number suffix
   p barcode
   x Fund Vendor Date
```
To Add New Item Using Template:

1. Click Items → MARC Editor.
2. Click in circle next to template name.
3. Click New Record.
5. Proceed entering appropriate information in each field
6. **Delete all unnecessary fields and subfields.**
7. When record is complete, click Save.
### Prefix Classification Standards
**(852 subfield k)**

<table>
<thead>
<tr>
<th>MATERIAL</th>
<th>PREFIX</th>
</tr>
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<tbody>
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<td>Audio Cassettes</td>
<td>AUDIO</td>
</tr>
<tr>
<td>Big Books</td>
<td>BB</td>
</tr>
<tr>
<td>CD (Music)</td>
<td>CD</td>
</tr>
<tr>
<td>CD-ROM</td>
<td>CDROM</td>
</tr>
<tr>
<td>Digital Videodisc</td>
<td>DVD</td>
</tr>
<tr>
<td>Equipment</td>
<td>EQ</td>
</tr>
<tr>
<td>Filmstrips</td>
<td>FS</td>
</tr>
<tr>
<td>Filmstrips, Sound</td>
<td>FSS</td>
</tr>
<tr>
<td>Games</td>
<td>GAME</td>
</tr>
<tr>
<td>Interactive Media</td>
<td>IM</td>
</tr>
<tr>
<td>Kits</td>
<td>KIT</td>
</tr>
<tr>
<td>Laser Discs</td>
<td>LASER</td>
</tr>
<tr>
<td>Micro-software</td>
<td>CP</td>
</tr>
<tr>
<td>Oversized Books</td>
<td>OVERSIZE</td>
</tr>
<tr>
<td>Puppets</td>
<td>PUPPET</td>
</tr>
<tr>
<td>Puzzles</td>
<td>PUZZLE</td>
</tr>
<tr>
<td>Records</td>
<td>RE</td>
</tr>
<tr>
<td>Slides</td>
<td>SLIDE</td>
</tr>
<tr>
<td>Standee</td>
<td>STANDEE</td>
</tr>
<tr>
<td>Study Prints</td>
<td>SP</td>
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<tr>
<td>Toys</td>
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<td>Transparencies</td>
<td>TRA</td>
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<tr>
<td>Vertical File</td>
<td>VF</td>
</tr>
<tr>
<td>Video Cassettes</td>
<td>VIDEO</td>
</tr>
<tr>
<td>Wall Hanging</td>
<td>WHG</td>
</tr>
</tbody>
</table>
Classification Standards

CALL #: Consists of appropriate Dewey classification number. 921 will be used for individual biographies and 920 for collective biographies. FIC is the designation for fiction, SC for story collections, E for picture books.

CUTTER: In all cases, the call number will be followed on the next line by the first three letters (all CAPITALIZED) of the author’s last name. EXCEPT: Biographies in which case the entire last name of the biographee should be spelled out in CAPITAL letters. Ignore punctuation when doing “Cutter” (e.g. FIC OBR, when cataloging a fiction book by O’Brien).

PREFIXES: Prefixes should always be CAPITALIZED. Example: JUV, REF, PRO, VIDEO

<table>
<thead>
<tr>
<th>EXAMPLES:</th>
<th>ADULT</th>
<th></th>
<th>JUVENILE</th>
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<tbody>
<tr>
<td></td>
<td>(MARC Tag)</td>
<td>(Spine Label)</td>
<td>(MARC Tag)</td>
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<tr>
<td>Nonfiction:</td>
<td>852h - Call #</td>
<td>356.3 OBR</td>
<td>852k - Prefix</td>
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<tr>
<td></td>
<td>852i - Cutter</td>
<td></td>
<td>852h - Call #</td>
</tr>
<tr>
<td></td>
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<td></td>
<td>852i - Cutter</td>
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<td>852h - Call #</td>
<td>FIC OBR</td>
<td>852k - Prefix</td>
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<td>852i - Cutter</td>
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<td>852h - Call #</td>
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<td></td>
<td></td>
<td></td>
<td>852i - Cutter</td>
</tr>
<tr>
<td>Easy Fiction:</td>
<td>852h - Call #</td>
<td></td>
<td>E OBR</td>
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<td>852i - Cutter</td>
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<td>Story Collections:</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>852i - Cutter</td>
</tr>
<tr>
<td>Biography:</td>
<td>852h - Call #</td>
<td>921 OBRIEN</td>
<td>852k - Prefix</td>
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<td>852i - Cutter</td>
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<td>852h - Call #</td>
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EXAMPLES:  

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<td>852k – Prefix*</td>
<td>REF</td>
<td>JUV REF</td>
</tr>
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<td>852h - Call #</td>
<td>852h - Call #</td>
<td>940</td>
<td>720</td>
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<tr>
<td>852i - Cutter</td>
<td>852i - Cutter</td>
<td>OBR</td>
<td>OBR</td>
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<tr>
<td>852m- Suffix</td>
<td>* put second prefix on same line, with space in between.</td>
<td>Vol. 1</td>
<td></td>
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Professional:  

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<thead>
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<td>852h - Call #</td>
<td>852h - Call #</td>
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<tr>
<td>852i - Cutter</td>
<td>852i - Cutter</td>
<td>OBR</td>
<td></td>
</tr>
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Foreign Language:  

<table>
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<th></th>
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<th>First 3 letters of Language:</th>
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<tbody>
<tr>
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<td>852k - Prefix</td>
<td>SPA</td>
<td>Chinese (CHI), French (FRE),</td>
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<tr>
<td>852h – Call #</td>
<td>852h – Call #</td>
<td>428</td>
<td>German (GER), Italian (ITA),</td>
</tr>
<tr>
<td>852i - Cutter</td>
<td>852i - Cutter</td>
<td>ROD</td>
<td>Latin (LAT), Russian (RUS),</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>Spanish (SPA), etc.</td>
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</table>

Audiovisual:  

| AV Prefixes: |
|-------------|-------------|-------------|-------------|-------------|
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
| 852k - Prefix | 852k - Prefix | VIDEO | KIT |
| 852h - Call # | 852h - Call # | FIC | 937 |
| 852i - Cutter | 852i - Cutter | OBR | WOR |
|  |  |  |  |  |
|  |  |  |  |  |

First Line - Use appropriate prefix for the type of material (e.g. VIDEO)  
Second Line - Nonfiction or fiction call number * (* For fiction, use FIC if there is one title on media, SC if multiple titles)  
Third Line - First 3 letters of author’s last name (or of title if main entry is by title). (EXCEPT: If a biography, use entire last name of biographee).
OPALS: Deletions

To Delete 852 Holding:
1. Search for title.
2. Click on correct title.
3. Click Edit.
4. Click in the 852 you want to delete. Click Delete Field.
5. Click Save.

To Delete Record:

1. Search for title.
2. Click on correct title.
3. Click delete. Are you sure? Click OK.
4. Record and every holding on it is deleted.
OPALS: Users (Patrons)

To Add User (Patron):

1. Click Users → Add.
2. In the User Information box, enter information.
3. Click the drop down arrow next to User Type and select user type: Student or Faculty
4. Patron number goes in the barcode box.
5. Scroll down, click Add. User created.
6. Continue adding users until finished.
To Edit Individual User (Patron):

1. Click Users → Edit.
2. Type username or scan barcode.
4. Edit information in User Information box.
5. Scroll down, click Save.
To Edit User Group (Patron Group):

1. Click Users → Group Editor.
2. To find records to change, choose search strategy: (example shows how to add teacher’s name when homeroom is in record).

   Example: Search: Homeroom
   For: 111
   Order by: Last Name
   Click: Ascending
   Status: Click All (or whatever is appropriate)
   User Type: Click Student (or whatever is appropriate)
   Go back up and click OK.

3. Enter new information in gray box:
   Example: Status: N/A
   Type: Student (or whatever is appropriate)
   Info: Click Teacher
   In next blank box, type teacher’s name

4. To select records to change, do one of the following:
   a. Select Whole List (selects entire list) OR
   b. Select Page (selects that page). Selected records turn green OR
   c. Select individual records by clicking in the box next to the name. Selected records turn green.

5. Click Modify.
6. Are you sure? Click OK.
To Delete User (Patron):

In order to be deleted, Users must have Active status and no outstanding transactions.

1. Click *Users* → *Delete*.
2. Search for individual or group by selecting and entering information in search boxes. Click *Create List*.

   Example: To find all active students in grade 12:

   Search: *Grade* for 12 order by *last name* status Active *User Type* Student
   Click *Create List*

3. Put check mark in box for students to be deleted. Selected students turn bright green.
4. Click *Delete Selected*. Are you sure? Click *OK*.
5. Students are deleted.
OPALS: Barcode Labels

To Print User Barcode Labels (Avery 5X60):

1. Click Users → Group Editor.

2. Choose search strategy.
   Example: Search: Grade
   For: 9
   Order by: Created Date
   Click: Descending
   Status: Click All
   User Type: Click Student (or whatever is appropriate)
   Go back up and click OK.

3. Do one of the following to print barcode labels:
   a. Select Whole List (selects entire list) OR
   b. Select Page (selects that page). Selected records turn green. OR
   c. Select individual records by clicking in the box next to the name. Selected records turn green.

4. Click Print BC Label.

5. Adobe print screen opens.
   a. Click printer icon.
   b. Verify printer.
   c. Verify the following under Page Handling:
      - Page scaling: Choose none
      - Auto rotate and center: uncheck box
      - Choose paper source by PDF size: uncheck box

6. Click OK.
To Print Item Spine and Barcode Labels (Avery 5X60):

1. Go to Administration → Reports.

2. Click Item Acquisitions.

3. Items entered today will appear on screen. To select items entered another day, do one of the following:
   - For DATE RANGE SELECTION, select From and To dates by clicking on calendars.
   - Choose Fiscal Year to see all items entered for the Fiscal Year.

4. Click Create Report.

5. Do one of the following to print item barcode labels:
   a. Select Page (selects that page). Checkmark appears in box before records on that page.
   OR
   b. Select individual records by clicking in the box for that record.

6. Click Print Item Label Set(s).

   In Print Item Dialog Box verify Starting Row:
   - Leave at 1 if starting with new sheet of 30 labels. Avery 5X60 address labels are 3 across and 10 down. You can only select the row because OPALS prints 1 spine label beside 2 book labels with the barcode.
   OR
   - Select appropriate row.

7. Print All (everything on every page) OR Print Selected (all checked items)

8. Adobe print screen opens.
   a. Click printer icon.
   b. Verify printer.
   c. Verify the following under Page Handling:
      - Page scaling: Choose none
      - Auto rotate and center: uncheck box
      - Choose paper source by PDF size: uncheck box

9. Click OK.
To Print Labels for Individual Items Already in Database:

1. Search for title in the OPAC.

2. Look at MARC record and note the ID number in tag 001 and the date entered in tag 005 (yyyyymmdd).

3. Go to: Administration → Reports → Item Acquisitions.

4. Using the calendar, search for the date the record was entered as noted in tag 005.

5. Sort results either by title or ID.

6. Click in the box in front of the record.

7. Click on Print Item Label Set(s).

8. Click Print Selected.

9. Select Printing Option (Print Labels Set, Print Barcode Labels, or Print Spine Labels)
   - Choose information to appear on labels.
   - If printing spine labels, choose 2 5/8” X 1” 3 across, 10 down.
   - Set starting row and starting column. Leave at Row 1, Column 1 if using a new sheet of 30 labels. Avery 5X60 address labels are 3 across and 10 down.

10. Click Print Selected button. **Recommendation: Print sample page on paper to be sure everything is correct.**

11. Adobe print screen opens.
   d. Click printer icon.
   e. Verify printer.
   f. Verify the following under Page Handling:
      - Page scaling: Choose None
      - Auto rotate and center: Check box
      - Choose paper source by PDF size: Check box

12. Click OK. Close Adobe print window when printing is complete.
To Print Barcode, Spine Labels from Hitlist:

1. Go to: Administration → Reports/Tools → Print Barcode, Spine Labels from hitlist.
2. Select Search Method (Keyword, Title, Author, Call Number, or Barcode).
3. Type information in box. Click Search button.
4. Sort desired column.
5. Click individual title(s) OR click Select box to select entire page. Selected barcode(s) appear in box on right. Repeat selection process for every page of results.
   - To deselect individual item, click on box to remove checkmark.
   - To deselect all items, click on box before Selected Barcode(s) in right column to remove all checkmarks.
6. When ready to print, click Print Label button in box on right.
7. Select Printing Option (Print Labels Set, Print Barcode Labels, or Print Spine Labels)
   - Choose information to appear on labels.
   - If printing spine labels, choose 2 5/8” X 1” 3 across, 10 down.
   - Set starting row and starting column. Leave at Row 1, Column 1 if using a new sheet of 30 labels. Avery 5X60 address labels are 3 across and 10 down.
8. Click Print Selected button. Recommendation: Print sample page on paper to be sure everything is correct.
   g. Click printer icon.
   h. Verify printer.
   i. Verify the following under Page Handling:
      - Page scaling: Choose None
      - Auto rotate and center: Check box
      - Choose paper source by PDF size: Check box
10. Click OK. Close Adobe print window when printing is complete.
11. When printing is finished, remove selected barcodes by clicking on Selected Barcode(s) box in right column.
OPALS: Reports

**Loaned Items:** (formerly called Transactions List)

1. Go to Administration → Reports/Tools → Loaned Items.
2. From: *Click on calendar* and select date.
3. To: *Click on calendar* and select date.
4. Group Loans by: Homeroom
   - Use drop down arrow to choose Teacher, Grade or User
5. Click on *Create Report* button.

**To Print:**

1. Click *Select All* button to print all items.

   OR

   *Click in box* for each desired item.

2. Do one of the following:
   a. Click *Print List* button to print a list of selected items.
   b. Click *Print Notices* button to print individual notices for selected items.
   c. Click *Print List w/o Headers* to not have headers show on list.
To Add Items to New Items Display:

1. Administration → Reports/Tools → Item Acquisitions
2. Search for the date you entered the items.
3. When the new items appear on the screen, select the ones you want to show in the New Items Display. For example, if you added any ILL items, you may not want them to display as New Items.
4. Click button: New Item List.
5. Use the calendar to set the date you want the items to automatically disappear from the New Item Display. The calendar defaults for three months.
6. Click button: Add Selected. The items will appear in the New Items display.

To Automatically Always Add Everything to New Items Display:

1. Administration → Preferences → System Preferences → 5.OPAC Display Preferences Settings → autoAdd2NewItemList → Edit → Click in circle for Value On → Save
2. If you choose this option, everything you add will appear in the New Items display.

To Remove from New Items Display:

1. Administration → Reports/Tools → New Items List Management
2. Search for the items by selecting the appropriate number of days next to Display new item(s) added within the last:
3. When the new items appear on the screen, select the ones you do not want to show in the New Items Display.
4. Click button: Remove from Listing as new. The items will be removed from the New Items display.
**Item Acquisitions:**

To Search for Items to add to New Items Display:

Any New Items cataloged into the system may be displayed for a selected period of time in the Home \(\rightarrow\) New Items list. To use this, click \(\rightarrow\) Administration \(\rightarrow\) Reports/Tools \(\rightarrow\) Item Acquisitions report.

1. Choose the date range in which you imported new items and click Create Report.
2. To select all items for the New Items Display, click Select All. OR click boxes in front of individual items.
3. Click New Item and a dialog will open.
4. Click the Calendar icon to select how long items will remain in New Items Display.
5. Click
   - Add All (to add all the items found)
   OR
   - Add Selected (to only add the items you have selected with a check mark).

To Delete Items from date range selection:

1. Go to Administration \(\rightarrow\) Reports/Tools \(\rightarrow\) Item Acquisitions.
2. Click Date Range Selection button.
3. Click on calendar icon and select date From.
4. Click on calendar icon and select date To.
5. Click on Create Report.
6. To select all items for deleting, click Select All OR click boxes in front of individual items. Click Delete.
7. Click Delete All or Delete Selected. Are you sure? Click OK.
To Mark an Item “Lost”:

1. Search for item.
2. Open Record.
3. Click on barcode.
4. Click on Lost.
5. Click Save button at bottom of screen.

After being marked as Lost, the status column on the first result screen will show no holdings if there is only one copy. When the record is opened, the barcode will appear in red and say Lost in the Due column.
**Lost Items List:**

1. Go to Administration → Reports/Tools → Lost Items.
2. From: Click on calendar to select date.
3. To: Click on calendar and select date.
4. Click Create Report button.

**To Print Entire List:**

1. Click Select the Whole List box.
2. Click Print button.
3. Click Print All button.

**To Print Page:**

1. Click Select Page button.
2. Click Print button.
3. Click Print Selected button.

**To Print Individual Records:**

1. Click box before record.
2. Click Print button.
3. Click Print Selected button.

**To Delete Lost Item Records or Holdings:**

1. Click box before record.
2. Click Delete button.
3. Choose Option:
   - Delete complete record  OR
   - Delete holding only
4. Click Delete All or Delete Selected.

Deleted items are removed from Lost Items List. They are added to Deleted Items List.
**Deleted Items List:**

1. Go to Administration ➔ Reports/Tools ➔ Deleted Items.
2. Set options for desired report. (This report only goes back to February 1, 2006).
3. From: *Click on calendar* to select date.
4. To: *Click on calendar* and select date.
5. Click Create Report button.

**To Print Entire List:**

1. Click *Select the Whole List* box.
2. Click *Print* button.
3. Click *Print All* button.

**To Print Page:**

1. Click *Select Page* button.
2. Click *Print* button.
3. Click *Print Selected* button.

**To Print Individual Records:**

1. Click box before record.
2. Click *Print* button.
3. Click *Print Selected* button.
To Print Overdue List:

1. Click on *Circulation ➔ Notices*

2. Choose *From* Date, choose *To* Date.

3. Click on arrow next to *Group Loans By* box. Choose one of the following: Teacher, Grade, Homeroom, User.

4. Click *Create Report*.

5. Click *Print List* to print entire list **OR** click in box of each entry you want to print. Click *Print List*.

6. Click *Create Report*.

7. Click *Select All, File, Print* to print entire list.

8. Adobe print screen opens.
   a. Click printer icon.
   b. Verify printer.
   c. Verify the following under Page Handling:
      - Page scaling: Choose none
      - Auto rotate and center: Check box
      - Choose paper source by PDF size: Check box

11. Click *OK*. 
To Print Overdue Notices:

1. Click on Circulation → Notices.
2. Choose From Date, choose To Date.
3. Click on arrow next to Group Loans By box. Choose one of the following: Teacher, Grade, Homeroom, User.
4. Click Create Report.
5. Click in box of each entry you want to print, click Print Notice.
6. If Group Loans By User, click on arrow next to Order By box. Choose Homeroom or Name.
7. Click Create Report.
8. Click Select All to print all notices OR click in box of each entry you want to print. Click Print Notice.
9. Print Option box opens. Choose options:
   - One notice per page, two notices per page, or three notices per page.
   - with titles, without titles.
11. Adobe print screen opens.
   a. Click printer icon.
   b. Verify printer.
   c. Verify the following under Page Handling:
      - Page scaling: Choose none
      - Auto rotate and center: Check box
      - Choose paper source by PDF size: Check box
12. Click OK.
To Print Circulation Statistics:

1. Select Administration → Reports/Tools → Circulation Statistics from the main menu.
2. Click Fiscal Year button OR Date Range Selection button.
3. Click on calendar icon and select date From.
4. Click on calendar icon and select date To.
5. Select whether the Period of time should be Daily, Weekly, Monthly or Yearly.
6. Select the Statistic on (breakdown) by None, Call # by 10, by 100 or Item Type.
7. Select From User by None, Grade, Homeroom, Teacher or User Type.
8. Click Create Report.
9. To print, Click Browser's File and Print.
To Print Reserved Items List:

1. Go to Administration ➔ Reports/Tools ➔ Reserved Items.
2. Any of the columns may be sorted by clicking on the Name.
3. To print, Click Browser’s File and Print.
To Print User Barcode Labels (Avery 5X60):

1. Click Users → Group Editor.

2. Choose search strategy.
   - Example: Search: Grade
     For: 9
     Order by: Created Date
     Click: Descending
     Status: Click All
     User Type: Click Student (or whatever is appropriate)
   - Go back up and click OK.

3. Do one of the following to print barcode labels:
   - a. Select Whole List (selects entire list) OR
   - b. Select Page (selects that page). Selected records turn green. OR
   - c. Select individual records by clicking in the box next to the name. Selected records turn green.

4. Click Print BC Label.

5. Adobe print screen opens.
   - a. Click printer icon.
   - b. Verify printer.
   - c. Verify the following under Page Handling:
     - Page scaling: Choose none
     - Auto rotate and center: Check box
     - Choose paper source by PDF size: Check box

7. Click OK.
To Print Item Spine and Barcode Labels (Avery 5X60):

1. Go to *Administration* → *Reports/Tools*.
2. Click *Item Acquisitions*.
3. Items entered today will appear on screen. To select items entered another day, do one of the following:
   - For DATE RANGE SELECTION, select *From* and *To* dates by clicking on calendars.
   - Choose Fiscal Year to see all items entered for the Fiscal Year.
4. Click *Create Report*.
5. Do one of the following to print item barcode labels:
   a. *Select Page* (selects that page). Checkmark appears in box before records on that page. **OR**
   b. Select individual records by clicking in the box for that record.
6. Click *Print Item Label Set(s)*.

   In Print Item Dialog Box verify Starting Row:
   - Leave at 1 if starting with new sheet of 30 labels. Avery 5X60 address labels are 3 across and 10 down. You can only select the row because OPALS prints 1 spine label beside 2 book labels with the barcode. **OR**
   - Select appropriate row.
7. *Print All* (everything on every page) OR *Print Selected* (all checked items).
8. Adobe print screen opens.
   a. Click printer icon.
   b. Verify printer.
   c. Verify the following under Page Handling:
      - Page scaling: Choose none
      - Auto rotate and center: Check box
      - Choose paper source by PDF size: Check box
9. Click *OK*. 
To Print Labels for Individual Items Already in Database:

1. Search for title in the OPAC.

2. Look at MARC record and note the ID number in tag 001 and the date entered in tag 005 (yyyymmdd).

3. Go to: Administration → Reports/Tools → Item Acquisitions.

4. Using the calendar, search for the date the record was entered as noted in tag 005.

5. Sort results either by title or ID.

6. Click in the box in front of the record.

7. Click on Print Item Label Set(s).

8. Click Print Selected.


   j. Click printer icon.
   k. Verify printer.
   l. Verify the following under Page Handling:
      - Page scaling: Choose none
      - Auto rotate and center: Check box
      - Choose paper source by PDF size: Check box

10. Click OK.
To Print Barcode, Spine Labels from Hitlist:

1. Go to: Administration → Reports/Tools → Print Barcode, Spine Labels from hitlist.
2. Select Search Method (Keyword, Title, Author, Call Number, or Barcode).
3. Type information in box. Click Search button.
4. Sort desired column.
5. Click individual title(s) OR click Select box to select entire page. Selected barcode(s) appear in box on right. Repeat selection process for every page of results.
   - To deselect individual item, click on box to remove checkmark.
   - To deselect all items, click on box before Selected Barcode(s) in right column to remove all checkmarks.
6. When ready to print, click Print Label button in box on right.
7. Select Printing Option (Print Labels Set, Print Barcode Labels, or Print Spine Labels)
   - Choose information to appear on labels.
   - If printing spine labels, choose 2 5/8” X 1” 3 across, 10 down.
   - Set starting row and starting column. Leave at Row 1, Column 1 if using a new sheet of 30 labels. Avery 5X60 address labels are 3 across and 10 down.
8. Click Print Selected button. **Recommendation: Print sample page on paper to be sure everything is correct.**
   a. Click printer icon.
   b. Verify printer.
   c. Verify the following under Page Handling:
      - Page scaling: Choose none
      - Auto rotate and center: Check box
      - Choose paper source by PDF size: Check box
12. Click OK. Close Adobe print window when printing is complete.
13. When printing is finished, remove selected barcodes by clicking on Selected Barcode(s) box in right column.
OPALS: Inventory

I. Preparation:

A. Read shelves to be sure items are in correct order.
B. Barcodes manually scanned into inventory will not be checked for shelf order.

II. Setup:

A. Connecting the Tricoder Y cable to computer:

1. Shut down computer.
2. Disconnect keyboard cable from the back of computer.
3. Connect keyboard cable into one end of Tricoder y cable.
4. Connect the other end of the y cable into the keyboard port in the back of the computer.
5. Plug “phone line” looking end into port labeled “computer” on Tricoder.
6. Turn Tricoder on first or keyboard will not work.
7. Put the black “end block” on the “phone line” end of the y cable when Tricoder is not connected to computer.
8. Start up computer.

B. Connecting the Tricoder with USB Wedge Saver to computer:

1. Plug one end of Wedge Saver cable into port labeled “computer” on Tricoder.
2. Plug the USB end into an empty USB port on your computer.
3. When Tricoder is not connected to computer, remember to put the black “end block” on the end of the cable disconnected from the Tricoder.
4. Note: With USB connection, Tricoder does not have to be turned on for computer keyboard to work.

C. Connecting the Tricoder with USB cable to computer:

1. Plug one end of USB cable into bottom of Tricoder.
2. Plug the USB end into an empty USB port on your computer.
3. Note: With USB connection, Tricoder does not have to be turned on for computer keyboard to work.

D. Creating Inventory folder on Desktop to store barcode files:

1. Right click on Desktop
2. New
3. Folder
4. Type name for folder: Inventory (year inventory is being done)
   Example: Inventory 2009-2010
III. Scan Collection:

A. Important Notes:

1. We highly recommend scanning one bookcase or Dewey section and saving the file. If thousands of barcodes are scanned into the Tricoder, and there is a problem when uploading the file, you may lose the barcodes and have to scan them again.

2. If you are doing a partial inventory on a range of items, name each file with the exact range of call numbers.
   Examples: 500-550.75; 550.76-599
   FIC AAA-FIC LAM; FIC LAN-FIC RAV

3. The inventory program assumes all uploaded barcode files are in shelf order.

B. Scanning Collection without Tricoder:

   Preparation:

   OPALS uses a text file which contains a listing of barcodes you have scanned. Once created and saved, you can load the file into OPALS Inventory. The barcode file can be created by simply plugging your scanner into a Netbook or laptop computer and carrying it to your shelves to scan the items. This solution is cheaper than using a portable inventory scanner of any type.

   Scanning:

   To create a file of your barcodes,

   1. Simply open the Windows accessory program called “Notepad” and scan the barcodes. As you scan you will see them adding to the file in a column – one barcode per line.

   2. When you save the file, name it by the range of call numbers it contains.

   NOTE: You may use any word processor, but always make sure you have saved the file as a DOS TEXT or ASCI file, or it will not be readable by the inventory module. If you use the “Notepad” text editor, that is the only kind of file it makes and it will work perfectly.
C. Using the Tricoder to scan the collection:

1. Insert new AA batteries.
2. Plug wand or laser scanner into the hole in the Tricoder labeled scanner.
3. Turn on Tricoder.
4. *Hit any key.*
5. Program number is *0.*
6. Data Collection? Hit *Yes* (big green button).
7. Screen will say, “enter data”.
8. Start scanning by squeezing the rubberized part of the wand or the trigger on the laser scanner.
   
   *Hint:* To keep a constant beam of light on the wand, wrap a rubber band tightly around the rubberized part of the wand. Please note that by doing this you will use more battery power.
9. After scanning a Dewey section of books (example 100s), turn off the Tricoder and prepare to upload them into Inventory folder created in step IIC in Setup.

D. Saving Tricoder Barcode File:

1. Connect Tricoder to computer using appropriate instructions in step II.
2. Open Notepad.
3. Turn on Tricoder.
4. *Hit any key* on Tricoder.
5. On Tricoder, Data Collection? *No*-key in the bottom left corner.
7. Barcodes will scroll by on screen. Make sure caps lock is off.
8. Tricoder will beep when it is finished uploading barcodes. At this point, you will be able to see if any barcodes scanned incorrectly. Make any necessary changes or corrections.
9. *File, Save*
10. Scroll up to Desktop.
11. Double click the *Inventory folder* created in step IIC in Setup.
12. Click in the box and begin typing filename. Keep file type as text. Name each file with the exact range of call numbers. Examples: 500-550.75; FIC AAA-FIC LAM

13. Click Save. Note: If you upload and save the Tricoder file in the Inventory folder created in Step IIC, the barcodes should always be available in that folder.


15. To start scanning another section, shut off Tricoder, disconnect end of Tricoder USB cable or Y cable from the Tricoder and if applicable put black “end block” on the end of the USB Wedge Saver cable or Y cable.

16. Repeat steps 1-15 until entire collection is scanned. It is very important to create a new notepad file for each Tricoder barcode file that is uploaded.

IV. Load Scanned Barcodes into OPALS and Do Inventory:

A. New Inventory-Entire Collection (We highly recommend using the Entire Collection option)

1. Select Administration → Inventory from main menu.
2. To start a new inventory, click New Inventory button. “Using the New Inventory button closes all editable lists and changes the status to CLOSED”. Click OK.
3. Inventory, choose Entire Collection.
5. Click Browse.

6. Maneuver to Inventory folder on desktop and double click the file to import.
7. Click Add.
8. Repeat steps 5-7 to upload more files.
9. When all files have been added, click Do Inventory button.
10. Check results and print appropriate reports in “Inventory Results” box, see Section V.
    Note: If you click Close Inventory button, you cannot edit results or print reports.
B. New Inventory-By Range:

1. Select Administration ➦ Inventory from main menu.
2. To start a new inventory, click New Inventory button. “Using the New Inventory button closes all editable lists and changes the status to CLOSED”. Click OK.
3. Inventory, choose By Range.
4. Call number: enter exact from: and to: ranges as noted in step III, A, 2.
5. Click Browse.
6. Maneuver to Inventory folder on desktop and double click the file to import.
7. Click Add.
8. Click Do Inventory button.
9. Check results and print appropriate reports in “Inventory Results” box see Section V.
   When finished, click Back to Inventory List button. Click Close Inventory.
   Note: Another range cannot be added until the Close Inventory button is clicked. Once closed, you cannot edit the results or print reports.
10. Repeat steps 2-9 to add and inventory other ranges.

C. Direct Scan: Use this method to scan returned items into an open session before placing them back on shelf.

1. Select Administration ➦ Inventory from main menu.
2. Select the Edit Result link for the open session.
3. Select button "scanner/manually".
4. Click in the box below that and scan each barcode directly into the system.
5. Watch the box on the screen for the barcode.
7. If you are uncertain if an item was scanned, scan it again.
V. **Inventory Results: Choose A or B:**

A. **Inventory Results Boxes:** Immediately following *Do Inventory.*

1. After clicking *Do Inventory,* two boxes appear at the bottom of the screen.

2. "Inventory Results" displays a running account of total barcodes: Whole database, Scanned/Upload Files, Validated and OK.

3. "Results" box allows you to view/edit problem records.

<table>
<thead>
<tr>
<th>Inventory Results for 2010-05-17 13:56:59</th>
</tr>
</thead>
<tbody>
<tr>
<td>Whole Database</td>
</tr>
<tr>
<td>----------------</td>
</tr>
<tr>
<td>Total Barcodes</td>
</tr>
<tr>
<td>Results</td>
</tr>
<tr>
<td>Missing/Not Scanned</td>
</tr>
<tr>
<td>Damaged but Shelved</td>
</tr>
<tr>
<td>Lost/Missing but Shelved</td>
</tr>
<tr>
<td>Loaned but Shelved</td>
</tr>
<tr>
<td>No Call Number</td>
</tr>
<tr>
<td>Misplaced/Out of Range</td>
</tr>
<tr>
<td>Invalid</td>
</tr>
</tbody>
</table>
B. **Inventory Results Boxes:** Accessed at another time, but before closing inventory.

1. Administration → Inventory.
2. Click **View Result.**
3. Click **View/Edit Inventory reports** button.
4. "Results" box allows you to view/edit problem records.
5. To print reports, select **Print Selected** or **Print All.** If you choose **Print Selected**, only items selected on current page will print.

**OR**

1. Administration → Inventory.
2. Click **Edit Result.**
3. "Results" box allows you to view/edit problem records.
4. To print reports, select **Print Selected** or **Print All.** If you choose **Print Selected**, only items selected on current page will print.

### Inventory Results for 2010-03-24 10:58:00

<table>
<thead>
<tr>
<th>Whole Database</th>
<th>Scanned/Upload Files</th>
<th>Item on loan</th>
<th>Validated and OK</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Barcodes</td>
<td>7484</td>
<td>7357</td>
<td>205</td>
</tr>
</tbody>
</table>

#### Results

- **Missing/Not Scanned:** 11, View/Edit, 11, Marked Missing
- **Damaged but Shelved:** 0, View/Edit, 0, Reactivated
- **Lost/Missing but Shelved:** 3, View/Edit, 3, Reactivated
- **Loaned but Shelved:** 8, View/Edit, 8, Returned
- **No Call Number:** 0, View, 0
- **Misplaced/Out of Range:** 1023, View/Edit, 166, Corrected
- **Invalid:** 43, View, 0

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June 2010 46 OPALS: Inventory
C. Inventory Results:

1. **Missing/Not Scanned**: Shows records still to be uploaded. Click on view/edit to work with missing items. Items may be sorted by Barcode, Title or Call Number.

   ![Inventory Results Table]

   - **Mark Selected as Missing**: Once you are sure of what is actually missing, select the missing items in the list and choose one of the “Mark . . as Missing” buttons. The items will then appear on the “Missing Items” list in the Administration → Reports/Tools menu. The listed items will have the text font color changed to brown once the status has been changed to “missing”.
   
   **NOTE**: The status of the holdings listed in this report will **NOT** be changed to ‘Missing’ unless you execute this step!

   - **Remove Selected**: If you are sure you know where some of the items displayed in the list are, and wish to simply ignore the fact that you have not scanned them, you may select them and use the button ‘Remove Selected from Missing List’. This action will remove the marked titles and put them in the Manually scanned list of barcodes.

2. **Damaged but Shelved**: These items were marked as Damaged at some previous time but were on the shelf and scanned. Click on view/edit to see the report. Items may be sorted by any of the named columns. Click in box before record and use buttons to change status to Available as necessary.
3. **Lost/Missing but Shelved**: Click on view/edit to see the report. These Items were marked as lost or missing at some previous time but were on the shelf and scanned.

The first thing you will notice in this report is a column called “Call # Previous to->”. If the item is on the shelf, it may be mis-shelved. Go to the call number listed in that column to find the item. It was scanned just before the ‘Missing but shelved” holding and should be just before it on the shelf.

- Items may be sorted by Call Number or Title or Barcode or “Call # Previous to”.
- Click in box before record and use the buttons to change status of these records to “available” as needed.
- The listed items will have the text font color changed to brown once the status has been changed to “Active”
**Loaned but Shelved:** This report displays items titles that were re-shelved before they were returned in circulation. Items may be sorted by Call Number or any of the other listed columns.

### Inventory :: List of Loaned but Shelved Holdings

<table>
<thead>
<tr>
<th>Barcode(s)</th>
<th>title</th>
<th>Call # Previous to =&gt;</th>
<th>Call Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>YO0001020</td>
<td>The mapping house</td>
<td>VIDEO 399.2 KIP</td>
<td>VIDEO FIC NAP</td>
</tr>
</tbody>
</table>

Items may be returned from this screen.
- Use the button called “Mark All as Returned” to return all of them, or you may need to only select some of them and choose the button called “Return Selected”.
- The listed items will have the text font color changed to brown once the Item has been returned.

**No Call Number:** A viewable list of items with no call numbers.

**Misplaced/Out of Range:** The inventory program assumes all uploaded barcode files to be in shelf order. Barcodes scanned manually into inventory will not be checked for shelf order.

### Inventory :: List of Misplaced Items

<table>
<thead>
<tr>
<th>Barcode(s)</th>
<th>title</th>
<th>Call # Previous to =&gt;</th>
<th>Call Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>YO0001020</td>
<td>Books for the gifted child</td>
<td>011.62 FRR</td>
<td>010.0 AS</td>
</tr>
<tr>
<td>YO0001051</td>
<td>Strategic planning a how-to-do manual for librarians</td>
<td>025.1 HAL</td>
<td>025.1 MC</td>
</tr>
<tr>
<td>YO0001065</td>
<td>Programming author rights</td>
<td>027.625 IRV</td>
<td>027.62 WAT</td>
</tr>
<tr>
<td>YO0001065</td>
<td>Library media center activities for every month of the 2000s year</td>
<td>020.7 SPI</td>
<td>027.022 DAN</td>
</tr>
<tr>
<td>YO0001086</td>
<td>A bear called Paddington.</td>
<td>372.6 RYA</td>
<td>272.642 WMR</td>
</tr>
<tr>
<td>YO0001020</td>
<td>Noon and her mother</td>
<td>FIC CLE</td>
<td>FIC CLE</td>
</tr>
<tr>
<td>YO0001020</td>
<td>Fourteen rats &amp; a rat-catcher</td>
<td>VIDEO FIC NAP</td>
<td>E CRE</td>
</tr>
<tr>
<td>YO0001020</td>
<td>Merry Christmas, Strega Nona</td>
<td>VIDEO E STR</td>
<td>FIC EPN</td>
</tr>
<tr>
<td>YO0001020</td>
<td>Corduroy</td>
<td>VIDEO FIC CUR</td>
<td>E FRE</td>
</tr>
<tr>
<td>YO0001020</td>
<td>A pocket for Cordurys story and pictures</td>
<td>VIDEO E FRR</td>
<td>FIC FIRE</td>
</tr>
<tr>
<td>YO0001020</td>
<td>Alphabet, an AIK book</td>
<td>399.2 OBA</td>
<td>FIC HAG</td>
</tr>
<tr>
<td>YO0001020</td>
<td>Rats don't allow staring mice and the swamp band</td>
<td>VIDEO E GID</td>
<td>E HUN</td>
</tr>
<tr>
<td>YO0001020</td>
<td>In the night kitchen</td>
<td>VIDEO 372.0 IN</td>
<td>FIC SEN</td>
</tr>
<tr>
<td>YO0001020</td>
<td>Another library</td>
<td>645.4 DE</td>
<td>FIC SEN</td>
</tr>
<tr>
<td>YO0001020</td>
<td>The adventures of Pinocchio</td>
<td>VIDEO 435 PER</td>
<td>FIC SPI</td>
</tr>
<tr>
<td>YO0001020</td>
<td>Wind in the willows</td>
<td>VIDEO 291.43 WIN</td>
<td>E GRA</td>
</tr>
<tr>
<td>YO0001020</td>
<td>Burt Dow, deep-water mam: a tale of the sea in the classic tradition.</td>
<td>VIDEO E BEA</td>
<td>FIC MCC</td>
</tr>
<tr>
<td>YO0001020</td>
<td>Changes, changes</td>
<td>VIDEO 372.6 BUR</td>
<td>E HUN</td>
</tr>
<tr>
<td>YO0001020</td>
<td>Clifford's abc</td>
<td>KIT FIC 8KI</td>
<td>E BRK</td>
</tr>
</tbody>
</table>

- Red: The item is misplaced.
- Brown: The item is corrected.
Barcodes directly scanned manually into the inventory will not be checked for shelf order.

- This list will display items that are just one or more places out of order. The call number column will display numbers in red of items that are one or more places out of order.
- This list can only be as accurate as your call numbers. For example: To a computer there is a BIG difference between “FIC ARR” or “F ARR” or “FIC.ARR” for sorting purposes, even if you keep them all together on the shelf.
- Go to the shelves with this list to find the mis-shelved items and re-shelve them.
- Select the titles you have re-shelved and choose the button called “Mark selected as corrected”. Or use the button called ‘Mark all as Corrected” to cause the list to display them all as corrected.
- The listed items will have the text font color changed to brown once the Item has been marked.

**Invalid:** Allows you to see and print barcodes that did not scan properly or are not in your database.

<table>
<thead>
<tr>
<th>Invalid Barcode(s)</th>
<th>Item scanned before invalid barcode</th>
</tr>
</thead>
<tbody>
<tr>
<td>VIC001229</td>
<td>E will — Mark's chocolate chicken (VIC001229)</td>
</tr>
<tr>
<td>VIC002382</td>
<td>SER 026.1 BBD — Booklet (VIC001111_001)</td>
</tr>
<tr>
<td>VIC002400</td>
<td>SER 026.1 BBD — Booklet (VIC001111_001)</td>
</tr>
<tr>
<td>VIC002424</td>
<td>SER 026.1 BBD — Booklet (VIC001111_001)</td>
</tr>
<tr>
<td>VIC003370</td>
<td>SER 020.1 LBB — Library journal (VIC001224_001)</td>
</tr>
<tr>
<td>VIC003353</td>
<td>SER 371 LIB — Library media connection: LAP (VIC001225_001)</td>
</tr>
<tr>
<td>VIC003315</td>
<td>SER 371 MUL — Multimedia schools: a practical guide to multimedia, CD-ROM, online and Internet in K-12 (VIC001779_001)</td>
</tr>
<tr>
<td>VIC003417</td>
<td>SER 027.5 SHY — School library journal: the magazine of children's young adult &amp; school librarians (VIC001224_001)</td>
</tr>
<tr>
<td>VIC003364</td>
<td>SER 015.73 TEB — Teacher librarian (VIC001225_001)</td>
</tr>
<tr>
<td>VIC001113</td>
<td>372.4 BES — Keeping track of weekly reading bulletin boards: year-round designs for the library and classroom (VIC001776_001)</td>
</tr>
<tr>
<td>VIC002111</td>
<td>VIDEO 346.7 CD — Copyright law: what every school, college and public library should know. (VIC001044)</td>
</tr>
<tr>
<td>VIC002368</td>
<td>WINS 027.52 GAI — Garfield. (VIC001225)</td>
</tr>
</tbody>
</table>

This list cannot display the title associated with the invalid barcode because the record is not in the database. It may be an item that was not cataloged yet, or it may be an item from another library.

- Look at the call number and title displayed in the column named “Item scanned before invalid barcode”.
- Go to the shelf location of that item to find the item having the invalid barcode.
- Remove the item from the shelf for cataloging or return to its owner.
D. To Print from Inventory Results:

1. To Print Individual Item(s):
   a. Click box before individual item(s).
   b. Click *Print Selected* button. Note: Only items selected on current page will print.

2. To Print Entire Page of Items:
   a. Click view/edit in appropriate section.
   b. Click box at top of screen before Barcode. All items on page should be checked.
   c. Click *Print Selected* button.

3. To Print All Items:
   a. Click view/edit in appropriate section.
   b. Click *Print All* button. Nothing will be checked. All items will print.

VI. Other:

Removing barcodes from list: Though rarely needed, uploaded barcode files or individual barcodes may be removed from the barcode list.

A. To Remove Individual Barcode:

1. Go to barcode box on right side of screen.
2. Click in box before individual barcode.
3. Click *Remove Selected* button at bottom of barcode box. The following message will appear; “You are about to remove barcodes from inventory list. Are you sure?” Click OK.

B. To Remove Entire Page of Barcodes:

1. Go to barcode box.
2. Click in box at top of list before word, Barcode. All items on page should be checked.
3. Click *Remove Selected* button. The following message will appear: “You are about to remove barcodes from inventory list. Are you sure?” Click OK.

C. To Remove an Uploaded Barcode File:

1. Go to box with list of uploaded files.
2. Click in box before desired file.
3. Click Remove Selected button at bottom of box. The following message will appear: “You are about to remove barcodes from inventory list. Are you sure?”
4. Click OK.
OPALS: Administration

To Configure User Types:

1. Go to Administration → Preferences → User Types.
2. To modify the maximum number of loans or reserves, click Edit for each user.
3. Edit the settings. Click Save.
4. To add a new User Type, Click Add at the bottom of the screen.
5. Enter the Type, Maximum Loans and Maximum Reserves. Click Add.

To Configure Item Types:

Each Item type can be matched to its own User type configuration. This allows teachers to check out items for longer times than students, etc.

1. Go to Administration → Preferences → Item Types

   a. To edit an Item Type:
      - Select the link for the Item Type you wish to edit.
      - Edit any field for any user type.
      - Click Save.

   b. To Add a new Item Type:
      - Use the Add button at the bottom of the screen.

   c. To Delete an Item Type:
      - Click in the box before the item type. Click Delete at the bottom of the screen.
      - The G (general) type cannot be deleted.
      - Item types cannot be deleted if they are being used in a record. To reassign an item type, see page 53.
**Item Types Reassignment:**

Item Types are applied to each holding. The Item Type is used by the system to apply the number of days that will be calculated by the system for Loans, Reserves, Holds, etc.

- Item types may be created or modified as you wish.
- The system default is "G".

Each MARC 852 holding field must have a subfield $3. This subfield is used to identify the Item Type. Most records will be imported with a "G" in subfield $3. If you wish to change the Item Type of a holding make sure the item type you wish to use is spelled correctly in the 852$3.

*(NOTE: As new records are imported, (e.g. from a vendor) the prefixes (852$k) in the holding part of the record will be used as the Item Type and placed in the subfield $3. See **Item Type Reassignment** below if you wish to quickly merge one item type to another.)*

1. Go to Administration → Preferences → Item Types Reassignment.
2. Select the Item Type(s) you wish to move from the panel on the left.
3. Select the Item Type to which you will change from the panel on the right.
4. Press the Reassign button.
5. The item type category will remain, but with zero (0) items.
6. The item type may be completely removed by using Select and Delete operations in Administration → Preferences → Item Type.
To Set Calendar for New School Year:

The Library opening and closing dates must reflect the current school year.

1. Go to Administration ➔ Preferences ➔ Closing Dates/Editor

2. At the top of the page you will see two calendar icons that may be used to set the First and Last Date of your school year. The first date of the school year and fiscal year is July 1st. The last date is June 30th.

3. If you are setting the Calendar for a new fiscal year, use the calendar icons to set the dates then press the New button.
   - There is a table at the bottom of the screen to display the days the library will be closed. After pressing the New button, the table which displayed the dates the library is closed becomes empty.

4. If you are only changing the holiday dates, do not press the New button because it will delete all the previously selected holidays.

5. There is a table at the bottom of the screen that displays the days the library will be closed. If no Library Closing Dates are displayed in the Table:
   1. Click the link Statutory Holiday Picklist
   2. Select the dates the library will be closed
   3. Press Add

6. There are two ways to add dates that are not on the list.
   1. Selecting the icon in the "Dup" column of a chosen holiday will add a copy of the same holiday and automatically increment the date by one day. (This is a good way to add Winter and Spring holidays.)
   2. Use the Add more Closing Dates button for other dates you wish to add.
      1. Click on the calendar icon and select the date
      2. Add a description to the blank line
      3. Click Save

Library Hours:

This Home tab menu option displays the library’s opening and closing times and days closed.

To set the hours that the page displays, go to Administration ➔ Preferences ➔ Closing Dates Editor.
To Add or Change Logo for Opening Screen:

The logo on the opening screen may be changed to any picture you wish. The digital formats recognized are GIF, JPG, or PNG. The picture will not resize automatically so it is best to use a picture that is 375 pixels wide and 281 pixels high.

1. Go to Administration → Preferences → Custom Files
2. The Type should be image and the Name should be logo.
3. Click Browse to find file for the Location box. Click Set.
4. Click Default to return to the original OPALS logo.

News/Events List Editor:

To access information important to the library or the school, enter it in News/Events List Editor.

1. Go to Administration → Preferences → News/Events List Editor.
2. Click Add More News/Events.
3. Complete the form. Be sure to include an Expiry Date. Internet links may be included by typing http:// before the URL web address or copying and pasting the URL into the form.
4. Click Save News/Events.

Web Links List Editor:

For fast access from the OPALS homepage to specific web sites, including online databases, add their Universal Resource Locator (URL) and description to the Web Links Editor.

1. Go to Administration → Preferences → Web Links List Editor.
2. Complete the form with title, grade level(s), subject area(s), URL, and Description.
3. Click Save Web Links.
4. To add more sites, click Add More Web Links and repeat previous steps.
OPALS: Miscellaneous

To Eliminate Display of Previous Searches in Internet Explorer 8:

1. Click Tools.
2. Click Internet Options.
3. Click Content tab.
4. Under Personal Information, click AutoComplete.
5. Forms: Uncheck box.
6. Click OK twice.
7. Click Refresh button.

To Print MARC record in Mozilla Firefox (without wasting paper):

1. Search for record.
2. Click on record in list.
3. Open by clicking MARC button at top of record.
4. Click Preview/Print. Record opens in new tab.
5. Click File.
6. Choose Print.
7. Click OK