OPALS Updates Newsletter – January 2017

“Happy New Year”

1. OPALS Mobile Device APP
2. OPALS Icon Library – Uses: Portal, Pathfinders, Lists
3. Genre / Topics Utility Updates – “Browser Walls”
4. Children’s OPAC Interface Updates
5. OPAC Display – Series & Volume
6. Global Editor – Batch upload barcode hitlist
7. Item Loan Statistics – Yearly circulation parsing
8. Patron / Member Self Service Trans Renewal Option
9. Patron / Member Search by Telephone #
10. Patron / Member – Private and “Public” Notes
11. Patron / Member – Anonymise or Retain History
12. Patron /Member – Modify specific personal information
13. Patron Barcode Printing from user editor template
14. Checkout Block option: Set OD/Fine amount thresholds
15. MLA Bibliography 8th Edition Updates
16. MLA Bibliography 8th Edition Updates
17. Customized Status Reports
18. DPS: Activate multiple database listings (k-5, MS,HS)
19. DPS Update: Customizable focused database listings
20. Equipment Management
1. OPALS Mobile Device APP

This version of OPALS includes a mobile device APP enabling library members to view and search your library catalog on most mobile devices. We encourage you to introduce this feature gradually, and report any comments you are or your members might have about it. Once we are satisfied that the APP is working reliably in our community, we will add additional functions as noted and illustrated below within a month of this release.

![APP - Menu Icon – Access APP Functions](image)

**This winter, we will add other resources to the OPALS search APP, such as research databases, union catalogs, and citation features. Here is what the mobile APP can do now:**

- OPALS APP is automatically-configured for each OPALS library location (no need to retrieve it from a “store”)
- When members use mobile devices to access an OPAC, the system displays the mobile APP interface
- The mobile APP conforms to and is responsive to mobile phones or tablets
- Email selected item(s) to one’s email address

**Additional Near-Future Updates (1 month)**

These features have been developed but not released at this time in order to focus on ensuring basic functions are working well. We plan to add new features as feedback from the OPALS community confirms stability.

- Library can add other OPALS OPACs in a district or region to the APP
- Library can configure a “landing page” where members pick up the APP & install an APP icon
- Members can search any or all other libraries listed
- Select preferred color combination displays
- Library “splash” page (...will be optional)
- OPALS Mobile APP mission is develop an application that can be customized by librarians and modified without having to contract with programmers whenever changes are necessary
APP - Click the magnifying glass to view this display:

- Sort by and sort order toggling can be changed by clicking the drop-down box arrows
- Enter search terms & click “Search” to display results

Search results display in designated sort order
- Search results are responsive (i.e. will “size” to a device’s screen dimensions – ex. tablets, mobile phones)
- Click item(s) to email (a check mark will appear)
- Browse forward of back (… having browsed forward) by clicking the right or left arrow displayed on the right or left side of the results display
- Click the menu icon then the email option to send selected items

Near Future Update (1 month)

Add multiple libraries to the APP – Search Multiple library locations

These features have been developed but not released at this time in order to focus on ensuring basic functions are working well. We plan to add new features as feedback from the OPALS community confirms stability.
APP - Click the “Menu” Icon & Select Checklist Icon

- This option displays all of the databases available to search from the OPALS APP
- You can check or un-check any of the OPAC databases on this list
- Selecting this list after you have launched a search, enables you to view the number of “hits” at each marked location. By clicking the magnifying glass next to a location, you can view the items found there
- The screen below lists results found at the Reynolds Library

Near Future Update (1 month)

APP- View List of Catalogs Available and number of hits after searching:
- You can view sites available to search as well as search results at each, after launching a search, by clicking on the drop down box located beneath the APP’s mast, top left corner of the screen display
Near Future Update (1 month)

These features have been developed but not released at this time in order to focus on ensuring basic functions are working well. We plan to add new features as feedback from the OPALS community confirms stability.

APP - Configure Preferred Screen Display Color Combinations

- Click the “Gear” icon on the Menu options list to access the color configuration utility
- Choose screen display color preferences from the drop down boxes
- You can view color combinations by clicking on “Restart”
- Check “Enable dark theme” if you wish to display search results on a black background (the default results display background is white)
- You can choose a default color combination for your library

Near Future Update (1 month)

APP – ex. Customized Color Selections Display
2. OPALS Icon Library – Uses: Portal, Pathfinders, Lists, Browser Walls

- OPALS Pathfinder and Genre / Topics list editing templates now enable topical icons to be added to them for easier, visual display and browsing.
- The OPALS community has commissioned copyright-safe icon graphics which can be used by OPALS libraries to highlight and display these special lists and collections (more will be added as requested).
- Access to these libraries is provided within OPALS reports, list & reports … ex. Genre / Topics Lists
- When a “Select Icon” option appears, click to access the icon libraries, then select the one desired
- Term(s) used in the icon libraries are not transferred to the Pathfinder or Genre lists… You can use them in any visual context or with any text in which they are relevant
- Future development will enable you to add your own copyright-safe icons
Create “browser walls” displaying the genre collections in your library. When a genre/topic icon is clicked, it will virtually display all the resources in that collection.

4. Children’s “OWL” OPAC Interface Update
   - The “Owl” interface will change with the seasons: Spring/Summer, Autumn, Winter
   - The leaves remain on the trees (even in winter) because most libraries use the utility enabling links to other kid's resources.
   - When the leaves are “moused” a popup box displays what is “under” that leaf. When clicked, kids will be taken to those resources.

5. OPAC Display – Brief Citations - Series & Volume

We plan to “bold” the series title information to improve legibility.
6. Global Editor – Batch upload barcode hitlist

Click “Upload barcodes from file” to batch upload barcodes to the global editor

7. Item Status – Yearly Circulation Statistics Parsing

Administrators can click an item’s barcode to view current detailed holdings status. The total number of transactions is now parsed so you can view yearly transaction levels on the bottom of this screen display.

8. Patron / Users Self Service Transaction Renewal Option

Patrons / Users / Members can be granted permission to renew their loan transactions when they login to their account. Click “My Loans” then click the “Renew” command to do so. If there are reserve requests for the item, or if the borrower has exceeded fine and other limits, the renewal will not be permitted. System displays a confirmation when a loan transaction has been renewed.
9. Patron / Member Search by Telephone #

The “User” editor includes access by a member’s telephone number. Click the drop down box to select this option as needed.

10. Patron / Member – Private and “Public” Notes

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

11. User / Member “My File” – Anonymise or Retain History – Edit data when authorized

- Authorized “Users” – members can modify certain data in their record, and choose to retain historical transactions or to anonymize them.
- User enters “Login” & “Password” – Clicks “edit” to view detailed data in an editor template to modify

12. Patron /Member – Modify specific personal information
13. **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.

**Users-> Information  Click the printer icon**

![User Info](image)

**Select barcode print options**

![Select barcode print options](image)

14. **Checkout Block option: Set OD/Fine amount thresholds**

Some libraries permit loans when a borrower has outstanding fines and overdue items. This option establishes overdue and fine thresholds up to which additional transactions are permitted. This is especially useful where self-service loan service is implemented. *To set this threshold: Administration-> Preferences-> Users ... Edit a user type... enter amount*
15. MLA Bibliography 8th Edition Updates

- OPALS OPAC-integrated bibliography updated to MLA 8th Edition specifications
- You can edit any items in a bibliography by clicking on the edit icon on the right


- You can also create an MLA citation manually (for items not in the library) – Click “Manual citations”
- Utility will display 3 media citation formats – more will be added
- Future updates will include a portal widget enabling you to place the bibliography on the library’s portal for easy access for library members to use

17. Customized Status Reports
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

- When there are several database groupings, the default display will appear when the service link is clicked
- Tabs designate additional database groupings available

Ex. Database listing default displays all available resources
Clicking the “Elementary Level Databases” tab accesses resources relevant to those library members.

19. **DPS Update: Customizable focused database listings**
   - Librarians can create customized database resource groupings.
   - Lists can be displayed on tabs next to all other library-defined database lists.
   - Lists can be archived & display-activated when designated.
   - Lists can be configured for a specific date range after which they “expire.”

Ex. Customized “Authentic Information Sources” Tab & Listing
20. **Equipment Management**

There are a number of changes to the Equipment / IT Asset Management program. Equipment managers often need to view a member’s previous equipment loan transactions. This feature has been added to the system’s equipment circulation choreography.

**Equipment Borrower’s transaction listing includes a “Loan History List” tab**

Loan History List displays previous transactions, and transaction dates

**Equipment – Barcode Range Assignment Table**

This feature enables you to enter ranges of barcodes to accommodate various equipment type tracking and management practices. The system will keep track of barcodes used within a range and prevent duplication. The ranges and “next available number” for each range will display in data entry drop down boxes when adding new items to the database.

**Equipment Status Updates – Additional item status options have been added**