OPAL Training Checklist

Acquisitions

Prior to welcoming the new member to your library, send an email to Matt Polcyn, Director, Technology Services at OhioNET, with cc: to the Training & Mentoring Coordinator to introduce the new member and to setup initials, passwords, and permissions for Sierra, and to schedule training. The Training & Mentoring Coordinator will be back in touch to make arrangements for a mentor.

<table>
<thead>
<tr>
<th>OPAL Helpdesk</th>
<th>OPAL Contacts</th>
</tr>
</thead>
<tbody>
<tr>
<td>614-486-2966 :: Local</td>
<td>Matt Polcyn, Director, Technology Services, ext. 27</td>
</tr>
<tr>
<td>800-686-8975 :: Toll Free</td>
<td>Susan Furniss, Technology Support Specialist, ext. 24</td>
</tr>
<tr>
<td>614-352-9411 :: Emergency</td>
<td>David W. Green, Technology Specialist, ext. 26</td>
</tr>
</tbody>
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☐ Describe Ohio library consortia organizational structure and relationships
  - OPAL
  - OhioLINK
  - OhioNET

☐ Provide overview of acquisitions
  - Maintaining vendors / funds files
  - Identifying correct bibliographic record
  - Creating order records on existing bibliographic records
  - Creating a new (brief) bib
  - Using standard format – OPAL Acquisitions Policy (May 2000)
  - Ordering, Receiving, Invoicing, Posting
  - Reports
  - Fiscal close

☐ Discuss impact locally of OPAL membership
  - Acquisitions in a consortium
  - OPAL Acquisitions Community of Interest
  - OPAL Acquisitions Standards & Procedures
  - Mailing Lists

☐ Discuss impact locally of OhioLINK membership
  - Mailing Lists
    - OhioLINK
    - Database Management & Standards (DMS)
    - CIRM Subject Lists
    - Discards Sharing List
- EJC Announcements
- Marketing List

- Provide information on Innovative Interfaces Inc. (III)
  - Sierra – Integrated Library System
  - Reports (e.g. age of collection, collection development)
  - Create Lists

- Other helpful resources
  - Join email lists to such sites as Amazon, Barnes & Noble, Borders and other local bookstores that provide valuable collection development updates
  - Be familiar with Books in Print

**Ongoing information**

- **Sierra**
  - Username: 
  - Password: 
  - Initials: 
  - Password: 

- **Sierra Manual**
  - Initials:
  - Password:

- **OPAL Website**
  - Communities of Interest
  - Task Forces
  - Mailing Lists
  - Directory

- **OPAL Catalog**

- **OhioNET**
  - OPAL Consortium
  - Continuing Education
  - Available eResources

- **OhioLINK**
  - OSTAFF
  - Mailing Lists