OPAL Training Checklist

Serials

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>
</table>

- [ ] Describe Ohio library consortia organizational structure and relationships
  - OPAL
  - OhioLINK
  - OhioNET

- [ ] Provide overview of catalog (local, OPAL, & OhioLINK)
  - Searching
  - Serials holdings records

- [ ] Provide overview of acquisitions module
  - Ordering
  - Invoicing
  - Posting
  - Reports

- [ ] Provide overview of serials module
  - Entering new titles
  - Creating checkin & holdings records
  - Checkin process
  - Binding procedures

- [ ] Discuss impact locally of OPAL membership
  - [OPAL Cataloging Community of Interest](#)
  - [OPAL Cataloging Standards & Procedures](#)
  - [OPAL Acquisitions Community of Interest](#)
Discuss impact locally of OhioLINK membership

- Mailing Lists
  - OhioLINK
  - Serials
  - SERIALST

Provide information on Innovative Interfaces Inc. (III)

- Sierra – Integrated Library System
- Reports (e.g. age of collection, collection development
- Create Lists

**Ongoing information**

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

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

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

- **OhioLINK**
  - OSTAFF
  - Mailing Lists

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