

OPALS Cataloging Tutorial:

***A guide for librarians that must reconvert
their library catalogs "in-house."***

Be sure that you upload the "Firefox" browser on the computers that you use to catalog your library collection. You can download the Firefox browser (free of charge) at www.mozilla.org (Firefox browser is necessary only for cataloging... all other OPALS functions operate well with Internet Explorer.)

The best way to convert the catalog cards in your library is to find and use MARC (Machine Readable Cataloging) records that library professionals have entered into a reputable library database. These sources include Library of Congress, National Library of Canada, Access Pennsylvania, etc. and they are accessible on the Internet free of charge. OPALS uses its "Z-Import program to search these databases, find a MARC record for an item, add your local information (classification number, barcode numbers, etc.) then save the record into the OPALS catalog. The program incorporates library standard, Z39.50 client protocol to do this.

Use the Firefox browser to access your OPALS system for cataloging... enter the URL that the OPALS support staff have sent you into the browser's address box (ex. <http://mhs.scoolaid.net/>)

If you are using OPALS to catalog records for the first time, start with some easy items such as "fiction" books to build confidence.

Pull out 20 consecutive "fiction" shelf list cards to catalog.... after completing some "fiction" items, try cataloging some non-fiction items using the instructions below. Please feel free to email OPALS support staff for assistance.

Once you and any helpers have mastered this process, identify parts of the collection that are used most often, and focus on cataloging these blocks. As soon as a section is cataloged, the online catalog can become useful almost immediately. Prioritize each block and catalog them accordingly.

Login to the OPALS system...

Click "Login" on the top right hand corner of the screen
Enter your user name and password to access OPALS' administrative functions

Access the program to find and transfer MARC records into your system

Mouse-over the "Items" tab (... this is color-coded "blue")



Click on "Z-Import" ... this is the function that enables you to access MARC record databases (ex. Library of Congress) to look for, edit and save records that match the items in your collection.

N.B. This is the best, most efficient way to catalog your collection. There are other methods to import MARC records from book vendors, or do original cataloging when you cannot find records online. These cases will be covered in a separate tutorial.

The system will display three rectangular boxes... here is what each of them is about starting from the left hand side of the screen:

Box 1: This is a list of databases that you can access to find MARC records. It is a "drop-down" box... when you click on the arrow on its right side, the box will expand to display other database options. (All other "drop-down" boxes work this way... whenever you see an arrow on the right hand side, you can click this arrow to view and select additional options) You can add as many MARC record database sources as you need to this list.

Box 2: This drop-down box displays field options that you can use to search for MARC records (ex. ISBN #, Author, Title, etc.)

Box 3 "Keyword": This where you enter the information that will locate a MARC record (ex. ISBN#, Author, Title)

Steps to Finding a MARC record

- Choose a source for the MARC record from the first box

- Choose search field... the ISBN field is most reliable.

- Type information in the keyword(s) box. Ex. ISBN number (below)
- Click Search.

- Click the title to display the full MARC record (below)

Title	Author	Number of Pages	Publisher	Pub. Date
New on the job :	Toor, Ruth,	p. cm.	American Library Association,	2007.

- **Tip:** If the card does not have an ISBN number, you can enter an anywhere search by using the author's last name and a couple of significant words from the title. (ex. "anywhere" search: crane red badge... will find MARC records for the title "Red badge of courage.")
- **N.B.** If you do not find a MARC record, you can redirect the search to a different database by clicking on the left hand side drop-down box, then selecting another database to search
- **N.B.** If you cannot find records after searching three different databases, put this card aside for original entry... it is more efficient to catalog as many records as you can using this method.

Edit MARC record:

- Scroll down, read & check to make sure that this is the correct record

		Save	Print	Add Field	Delete Field	Add Subfield	Delete Subfield
		Z ZZ					
100	1	a Toor, Ruth					
		d 1933-					
245	1 0	a New on the job					
		b a school library media specialist's guide to success					
		c Ruth Toor, Hilda K. Weisburg.					
260		a Chicago					
		b American Library Association					
		c 2007.					
263		a 0611					
300		a p. cm.					
504		a Includes bibliographical references and index.					
505	0	a Your philosophy -- Getting the job -- Finding your way -- Getting yourself organized -- Reaching your students -- Reaching yo.					
650	0	a School librarians					
		z United States					
		v Handbooks, manuals, etc.					

- Scroll to the bottom of the screen to display the 852 field and sub fields. These are for local information such as classification and barcode numbers and must be completed... more detailed illustration below...
- After you have entered the 852 local holdings information, click the "Save" button on the floating command bar at the top of the screen to save this record to your library database.
- There are other guides to catalog items that you cannot find using Z-Import. The guides for original cataloging provide instructions for using OPALS' "MARC Editor."

852 Local Holdings Field Details

This is the part of the MARC record that contains local information about each copy of a title that is in the library. We have provided brief explanations of each of the subfields (ex. 852a = Location) and how to fill them out below.

852		a	Location (NR)
LOCATION (R)			BTB
		b	Sublocation or collection (R)
			MEL
		3	Materials specified (Item type - Loan category) (NR)
			G
		k	Call number prefix (R)
		h	Classification part (Classification number) (NR)
			591.7
		i	Item part (Author cutter) (R)
			DON
		m	Call number suffix (ex. V.1) (R)
		p	Piece designation (Barcode) (NR)
		9	Price (NR)

852a Location: The system is usually configured to add the location code automatically. Most OPALS users use this code to identify a library consortium.

852b Sublocation or collection: The system is usually configured to add this code automatically. Most OPALS users use this code to identify their library.

852 subfield 3: Materials specified (Item type – loan category): This field contains the “item type” or loan category code that indicates the loan period that the library allows for this item. It defaults to “G” (general) since that is the category for the majority of library items. However, if you want to change it, you can click on the field, and a pop-up menu will display the loan category codes that you have defined in the system preferences. You can choose the one that applies from this list... (ex. “REF”)

852k Call Number Prefix: Use this field for prefixes such as VID, DVD, REF, BIO... etc.

852h Classification part (Classification number): Use this field to enter a library classification number. If a classification number is in the MARC record that you are importing, the system will insert it into this field. You can edit the inserted

number or erase it and enter the number that appears on the library shelf list card if it is different.

852i Item Part (Author cutter): Enter the author information in this field that appears on the library's shelf list card. The system will enter the author cutter that might have been used in an imported record. You can edit this, or replace it if your author cutter information is different.

852m Call number suffix (ex. V.1): If the MARC record you are creating is a multiple copy set (e.g. Encyclopedia), you can indicate the volume number here. You can add additional 852 holdings for each additional volume in a set. This process will be described later in this tutorial.

852p Piece designation (Barcode): Enter or scan this items barcode into this field. The system requires a barcode for each item that you import. It will also alert you if the number entered here is a duplicate (... already used for another item in the library).

852 subfield 9: Use this field to enter the item's price... (price format ex. "p25.00usd")

For additional information or assistance, please email OPALS technical support:

Richard Grenier rgrenier@bibliofiche.com

Dan Weeks dan@bibliofiche.com

<http://www.OPALS-NA.org>