• Get started

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Get started with OLIB Web

- OLIB basics
- Search options
- Add, edit and delete
- Workspaces, saved searches, folders

• Users

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Manage users and staff users in OLIB

- Search and edit users
- Manage users
- User subscription services
- SDI

• Catalogue

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Manage catalogue records in OLIB

- Search
- Title and copy details
- Additional details
- RDA
- Maintain the catalogue
- Stocktake

• Circulation

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Manage circulation transactions in OLIB
• About circulation
• Configure circulation
• Configure reservations
• Issues and returns
• Users and copies
• Renewals
• Reservations
• Recalls
• Trap messages
• Library charges
• Overdue notices

• Acquisitions
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Manage acquisitions in OLIB
• About Acquisitions
• Set up Acquisitions
• Order process
• Outputting orders
• Check in and invoicing
• Other Acquisitions options
• Claims process

• Funds
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Manage funds in OLIB
• About funds management
• Funds set up procedure
• Accounts
• Financial periods
• Account instances
• Allocate money
• Manage funds
• Account discrepancy alerts
• Permissions on funds
• Financial period close
• **Serials**

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Discover how to manage serials in OLIB.

- About Serials management
- Set up Serials management
- Create Serials information
- Issues generation
- Check in issues
- Serial publishing changes
- Subscription management
- Claims and alerting
- Serial binding

• **Library locations**

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Manage library locations in OLIB

- About locations
- Calendar
- Locations
- Location Types, Areas and Address Types
- Shelves
- Sub-locations

• **Folio**

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Discover OPAC searching and how to configure Folio end user features using OLIB Web.

- Get started with Folio
- Library search
- Welcome screen
- Menu bar
- General settings
- Banner graphic
- Brief and full displays
- Circulation transaction history
- Citations
Configuration blocks list
- Copies availability display
- Delimited OPAC and SSI
- Enable end user help
- Enable end user tags
- Enable enquiry management
- Enable purchase suggestions
- Facet sidebar
- Folio lists
- Generate a search Qwidget for Folio
- Journals display
- Links to e-resources
- Links to WorldCat
- Link to catalogue enrichment data
- Media type icons
- Permalinks
- Quick launch searches
- Ratings and reviews
- Reservations
- Saved searches
- Search configuration
- Self-registration
- Self issue, return and renewals
- Set / reset with temporary password
- Set password directly
- Title details display
- Title hitlist display
- User account details

- Alerts

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Create alert messages for users and staff in OLIB
- About alerts
- Broadcast notices
- Configure alerts
- Configure SMTP server
Suspend alerts and overdue emails

- View alerts

- **System management**

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  Configure and manage system wide settings in OLIB

  - General
  - OLIB defaults
  - Daystart
  - Privileges and permissions
  - Search configuration
  - Customise OLIB
  - Layout manager
  - SIP2 server

- **Reports**

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  Learn about reporting in OLIB.

  - Use OLIB reports
  - Download reports

- **Data import and export**

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  Import or export your data from OLIB using MARC and other formats

  - Automated upload to WorldCat
  - CONTENTdm integration
  - Import MARC records
  - Example MARC import: JISC e-books file
  - Output formats
  - Export to third party discovery
  - MARC tags details
  - MARC21 export
  - OLIB Standard Transfer Format (OLSTF)
  - OLIB User Import
• **User guides**

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  Discover how to use new OLIB features, including new service pack features.

  - Service pack 11
  - Service pack 12
  - Service pack 13
  - Process standing orders and loose-leaf publications

• **OLIB to WMS migration**

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  Discover how we manage migrating from your OLIB system to WorldShare Management Services.

  - Moving to WorldShare Management Services
  - Migrating bibliographic data
  - Migrating patron data
  - Migrating circulation data

• **Release Notes**

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  Find OLIB release notes and key features. Release notes are documents that contain information about new product features and enhancements as installed in scheduled releases.

  - OLIB 9 Service Pack 15 Key Features and Release Notes
  - OLIB 9 Service Pack 14 Key Features and Release Notes
  - OLIB 9 Service Pack 13 Key Features
  - OLIB 9 Service Pack 13 Release Notes
  - OLIB 9 Service Pack 12 Key Features
  - OLIB 9 Service Pack 12 Release Notes
  - OLIB 9 Service Pack 11 Key Features
  - OLIB 9 Service Pack 11 Release Notes

• **Technical guides**

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  - Creating a .har file for support
  - Enable Folio single sign-on (NTLM)
  - Link checker errors advice
  - OLIB software downloads
Troubleshooting

Find frequently asked questions (FAQ) and troubleshooting steps (Troubleshooting).

- A new staff member's account is slow and not performing as others do?
- A patron is unable to request an online reservation
- A user's account barcode, transaction history and items on loan has disappeared
- A user does not have full cataloging options despite having an appropriate user category
- Can deleted titles/users be recovered?
- Does OLIB support RDA Cataloguing rules?
- Do I need to cancel email notices in my test system? [Hosted OLIB]
- Following an upgrade to OLIB 9.0 Service Pack 12, users are not receiving alerts for available reservations or newly checked in serial issues
- How can I add a new attribute to the Refine Search dialog?
- How can I add our own images to WebView's Welcome Page?
- How can I attach an email list to a SDI alert?
- How can I filter borrower traps by trap message?
- How do I change my name in OLIB Web?
- How do I configure Self-registration?
- How do I delete a user with enquiries attached?
- How do I display User Expiry Date in the user details screen of OLIB Folio?
- How do I export MARC records to OVID?
- How do I find out my OLIB username/password?
- How do I insert line breaks in the privacy policy hover text without it being in double line spacing?
- How do I renew all items on loan to a group of users with minimum checks?
- How do I search for serial issue titles?
- How do I set up a System Administrator account on OLIB if the current System Administrator has left?
- How do I subscribe to the OLIB users' mailing list?
- How do I transfer a report from my Test system to Live?
- How do I unlock a user record? [Hosted OLIB]
- How do I view all items with a specific copy category?
- How to sign in to OLIB
- I'm creating a configurable user import. What OLSFT tag should I use to map the User's Date of Birth?
- If you delete expired users using the "Users For Auto-Deletion" folder, will the copies on loan for that user also be deleted? And if it was the last copy of the title, will the title also be deleted?
- I am no longer able to attach files to my item records
- I am unable to return a book after cancelling a reservation
I cannot find the configurable privacy policy statements - where are these located?
◦ I have added a new attribute to the keyword search index however it is not being used in a keyword search
◦ I have deleted a sheet by accident
◦ I have just tried to log in to OLIB WebView and received an account expired error message
◦ I have made changes to my MARC format. How do I apply this change to my existing records?
◦ My OLIB export to CONTENTdm is not working
◦ My XML export is not displaying correctly
◦ Setting default sorting for indexes
◦ Some of our student record files have not imported into OLIB
◦ Staff accounts are unable to see Helpdesk Online links
◦ The Username and Password fields are populating with my login credentials when I try to create a new user
◦ What is the taxonomy that is used in OLIB?
◦ When I issue a loan I get the message 'User is banned from this copy category. '
◦ Where can I find the latest version of the OLIB schema? [SP13+]
◦ Why am I receiving several emails per hour for my reports?
◦ Why are patrons not receiving their overdue emails?
◦ Why are some changes made to title records not visible in the audit trail?

• **OLIB training**

  [Link to OLIB training](https://help.oclc.org/Library_Management/OLIB)

  Find training on OLIB.

  ◦ OLIB Folio Configuration
  ◦ OLIB service pack training