OLIB

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

https://help.oclc.org/Library_Management/OLIB
Printed: Sat, 24 Sep 2022 08:00:15 GMT
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.

   ◦ Post Service Pack 15 Release Notes  
   ◦ 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**

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  Find training on OLIB.

  - OLIB Folio Configuration
  - OLIB service pack training