Find an overview of the OPAC features available in OLIB Service Pack 13.
All changes described in this chapter are for FOLIO only unless otherwise specified.

User barcode not recognised

If you enable Reset Password in OLIB, the Set/Reset Password option displays on the Folio Logon form:

When the user clicks the Set/Reset Password link Folio requests their user barcode or "usual login field":

Please enter your user barcode and click 'Continue' to proceed

On entering the barcode, Folio then asks for their email address and other security question(s) you may have configured.

When OLIB asks for the user's barcode, Folio now immediately checks if it is recognised. If the user enters an incorrect barcode, Folio's default message is:

The user ID that you entered is not recognised. You must contact the library for them to assign you a valid user ID.

If you want to change the message, create this setting in g_forgotten_password, with your preferred text contained in the Value field in double quotes. (Sequence 1=1, Sequence 2=0)
Configure display of the user’s name

When the user logs in to Folio, their name is displayed at the top of the screen. This is now configurable via the `l_loginmenu_username` setting in `gno_startup`.

The **Value** field contains `<FNAME> <SNAME>` (forename and surname). Edit if required to include only the forename for example.

1. Go to **OPAC> Configuration Settings**.
2. From **Other Searches**, use **Folio Configuration Settings by Setting** and search for `l_loginmenu_username`:
3. Edit the **Value** field if required to include only the forename for example:
Configure the "Hello" message

Once you have logged in the welcome message is overlaid on the banner graphic.

The Hello part of this message is taken from the `l_hello` setting in `g_user_msgbox`.

By default Folio displays "Hello" followed by any relevant update message, for example, Hello (Items ready for collection: 3)

You can now also include the user's forename and/or surname by editing the Value field in the `l_hello` setting to include `<FNAME> <SNAME>` as required, e.g: "Hello <FNAME> <SNAME>"

or -

"Hello <FNAME>"

1. Go to OPAC> Configuration Settings.
2. From Other Searches, use Folio Configuration Settings by Setting and search for `l_hello`: 

---

Printed: Tue, 08 Mar 2022 22:02:41 GMT
3. Modify the record to include FNAME and/or SNAME in double quotes as shown in the Value field:

![Setting ID](Image)

**Setting ID**: 603960

**Interface**: g_user_msgbox

**Setting**: _hello

**Description**: The text and other alerts that appear when the user logs in

**Value**: “Hello <FNAME> <SNAME>”

**Allowable Values**: A short piece of text

**Sequence 1**: 24

**Sequence 2**: 0

**Include?**: Yes

4. Save the changes.

**Display a note to all users**

The Folio Account Details screen can be configured to include a message to all users in the header bar, for example:
This is configured by creating the **user_notes** setting in **g_user_details**:  

![User profile details](image)

Tip: use the `<FONT SIZE='0.5'> HTML tag to increase the size of the message. Use the `<B>` HTML tag to highlight selected text in bold. For example:

"Make sure you `<B>log out</B>` when you have finished, to prevent other students from accessing your personal details.<br/>

`<FONT SIZE='+1'><B>Double-click on a field to modify it.</B></FONT>`"

**Configure the Title option on the Advanced search to be a Keyword search**

By default, the Title option in the Advanced search, searches on the first few words of the Title. You can change this so that Folio searches on keywords - for example in the Title, Subtitle and Alternative Title fields.

To do this, enter a specific keyword index into the **searchfields** array setting. For example:
Keyword Index 2 indexes the title, subtitle and normalised title

Keyword Index 3 indexes the author surname, forename, initials, corporate author, subordinate unit and composite name fields

Using OLIB Web, configure the Advanced search form to replace the second Folio search input field (which defaults to Title) with the keywords2 search:

1. Go to OPAC> Configuration Settings.

2. Use Folio Configuration Settings by Setting to search for searchfields.

3. Modify the g_adv setting containing Seq.2=2 (the one with "title Title" in the Value field).

4. Set Value to "keywords2 Keywords in Title".

5. Optionally, change Value 2 (hover text) and Value 3 (in-field text prompt) to something appropriate.

6. Save your changes.

Changes take effect when you reload Folio.

In the Advanced search, when the user enters their terms into Keywords in Title, Folio searches for them in the Title, Subtitle and Alternative Title fields:

Following any changes just click the banner in your Folio to refresh and display your new configuration.

OPAC List enhancements

The configuration for OPAC lists has been extended and simplified for Folio. It is now possible to provide a collection of lists for:

- Users who are using the specified SSi(s)
- Users who are registered on specified courses
- Users who are registered at specified locations
- Users whose supervisor owns the list
All users

During the Service Pack installation, OPAC List groups are copied to the Folders domain and configured as an OPAC List Folder, containing the folders that were accessible to the group. This means that no configuration changes are immediately required following the upgrade for lists to be shown to the users.

On the Folder record, there is a new sheet for OPAC List configuration:

---

**OPAC List Configuration**

<table>
<thead>
<tr>
<th>Expire Date</th>
<th>25-FEB-2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>OPAC List Sequence</td>
<td>3</td>
</tr>
<tr>
<td>For My Students?</td>
<td></td>
</tr>
<tr>
<td>Public OPAC Interface numbers</td>
<td></td>
</tr>
<tr>
<td>OPAC List Courses</td>
<td>Geography, Meteorology</td>
</tr>
<tr>
<td>OPAC List Locations</td>
<td>Main Library</td>
</tr>
<tr>
<td>Parent Folders</td>
<td>Folder, Owner, Created On</td>
</tr>
<tr>
<td>OPAC List Groups</td>
<td>Group Name, Global?</td>
</tr>
</tbody>
</table>

---

**How to configure Folio Lists**

You can create lists of latest acquisitions, reading lists, course lists and so on and make them available in Folio. These will be displayed in the "Lists" menu:

![Screenshot of Folio showing lists menu]

If you want to group your lists as in the above example you will need to group your lists into "container" Folders in OLIB Web.

In Folio, in the above example, Course Lists is one of the container Folders.

In OLIB Web, the container Folder Course Lists, contains several Folders of titles - Business and Finance, Social Care
and so on.

Folio can display the Title contents of these Folders. This looks like a standard Folio title hitlist display, but instead it contains the titles within your OLIB Web folder:

<table>
<thead>
<tr>
<th>Title</th>
<th>Author</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter the start of the title and hit Enter to find records with a title that begins with the letters you entered</td>
<td>Enter the author’s name, e.g. smith or smith, john or john smith</td>
</tr>
</tbody>
</table>


This allows you to make course reading lists and latest acquisitions lists easily available through Folio.

The lists can be restricted to specific groups of users or made available to all.

**Configuration overview**

1. Create course / reading lists folder
2. Create container folder
3. Configure lists on the Folio menu bar

**Example: create course lists / reading lists**

First you create a list of the books, articles and so on that should be in the Course / Reading List. To do this you create a Folder of title records in the Folders domain:

1. Go to Searches> Folders.
2. Create a new Folder with a **Folder Type** of **Titles**. Enter a meaningful **Folder Name** to identify it, e.g. *Business and Finance*. The **Owner** of the folder defaults to you as the logged in user. Change if required.

3. Search and select the title records into the **Contents** field:

![Folder Details](image)

4. Save the details.

5. Repeat the above to create as many Folders of titles as you require - one for each course / reading list.

Next, create a container Folder that contains all the above course / reading list folders:

1. Go to **Searches> Folders**.

2. Create a new Folder with a **Folder Type** of **Folders**, and with a **Folder Name** e.g. *Course Lists*. The **Owner** of the folder defaults to you as the logged in user. Change if required.

3. Search and select the previous titles folders above (e.g. *Business and Finance*) into the **Contents** field:

4. Continue to insert more titles folders into the **Contents** list until all courses / reading lists are present:

![Folder Details](image)

5. Next go to the **OPAC List** sheet.

6. Edit the **Expiry Date** as required. This causes the folder to be deleted at a future date (but not the titles/records in it.) If left null, the default is 5 years.

7. Enter a number in **OPAC List Sequence** that determines the order in which the container Folder appears in Folio's "Library Lists" menu:
For example, *Course Lists* is number 5 in the list.

8. Using one or more of the following choices will limit who can see the list in Folio's "Library Lists" menu. Restrict who can see the folder list by using the following settings in the **OPAC List** sheet:

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>For My Students (Y/N)</strong></td>
<td>Each folder has an Owner. Students can see this folder if the folder is owned by their supervisor. (The user recorded as their supervisor in their user record).</td>
</tr>
<tr>
<td><strong>Public OPAC Interface Numbers</strong></td>
<td>Optionally, if you do have more than one Folio interface, enter the interface number(s) separated by a comma. If set to &quot;1&quot; (your Folio interface number), this Folder will be visible to all users.</td>
</tr>
<tr>
<td><strong>OPAC List Courses</strong></td>
<td>Restrict this course to users registered on these Courses. (All Users with that Course specified in their User record).</td>
</tr>
<tr>
<td><strong>OPAC List Locations</strong></td>
<td>Restrict this course to users registered at these Locations. (All Users with that Location specified in the User record).</td>
</tr>
<tr>
<td><strong>Parent Folders</strong></td>
<td>OLIB displays any &quot;parent&quot; (container) folder if present.</td>
</tr>
<tr>
<td><strong>OPAC Lists Groups</strong></td>
<td>Prior to OLIB 9 SP13, Lists had to be granted permission for viewing by an OPAC User Group. OLIB displays these here for reference.</td>
</tr>
</tbody>
</table>
In addition to the above settings, you can also limit viewing permission of this Folder by using Permissions in OLIB Web to Share the folder to specific Users / User Groups. This field displays those users for which this folder has been granted permissions.

Configure lists on the Folio menu bar

This configuration creates the "Library Lists" option on the Folio menu bar. In OLIB Web, create a menu option for the Lists:

1. Go to OPAC> Configuration Settings.
2. From Other Searches, use Folio Configuration Settings by Setting and search for menu_options.
3. Open the menu_options setting for catListsMenu:

   **OPAC Configuration Setting**

   | Setting ID | 604801 |
   | Interface | 1 |
   | Ini File / Config Block | g_menu |
   | Setting | menu_options |
   | Description | The Menu options array. |
   | Value | "catListsMenu" |
   | Value 2 | "Library Lists" |
   | Value 3 | |
   | Allowable Values | A valid Menu option entry. |
   | Sequence 1 | 1 |
   | Sequence 2 | 2 |
   | Include? | Yes |

4. In Value2 you can enter a generic name for this menu item, e.g. Reading Lists, Library Lists. Encase in double quotes.
5. Set Include=Yes.

The new menu item will be available when you next log in to Folio.
• The Lists menu displays along the top of the Folio screen: Library Lists
• The drop down menu contains the names of the container folders: Latest Acquisitions, Subject Lists, Course Lists
• The sub-menu for each container folder contains a list of the (courses) titles folders: Nursing, Social Care...

If more levels are desired, container folders can themselves contain container folders. The last level container folder must contain titles folders in order for results to be accessible.

Tip: consider the usability for your end users when adding multiple levels of folders in this way.

### Allow end users to create Lists

It is now possible to configure Folio to allow end users to save their Basket as a List.

**In Folio**

👩‍💻 The logged in user clicks on the Basket icon at the top of the screen as normal, to open the items in it.

In the list of Basket items, they select “Save Basket List” from the Actions drop down:
Folio prompts them to enter a name for the List and to save it:

The new saved list will be added to the first container Folder owned by that user. If a container folder does not already exist, then Folio creates it. The newly saved Basket List folder is added to it as a “contents” Folder.

The new Lists are visible to the user immediately in the “Library Lists” menu:

**Configuration in OLIB Web**

To achieve this, two settings are required:
- A new *action_array* setting in Folio configuration
- A new *Can Save Lists?* field in User Categories

Create new *action_array* setting

1. Go to OPAC> Configuration Settings by Setting.
2. Using Folio Configuration Settings by Setting search for *action_array*.
3. Existing actions from *g_titles_hitlist* are displayed:

<table>
<thead>
<tr>
<th>SETTING</th>
<th>ID</th>
<th>GCB</th>
<th>SETTING</th>
<th>VALUE</th>
<th>SEQ.1</th>
<th>SEQ.2</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>603011</td>
<td>1</td>
<td>g_title_hitlist</td>
<td>action_array</td>
<td>&quot;Reserve&quot;</td>
<td>10</td>
</tr>
<tr>
<td></td>
<td>603013</td>
<td>1</td>
<td>g_title_hitlist</td>
<td>action_array</td>
<td>&quot;Add to your eMarked Items list&quot;</td>
<td>10</td>
</tr>
<tr>
<td></td>
<td>603015</td>
<td>1</td>
<td>g_title_hitlist</td>
<td>action_array</td>
<td>&quot;Add to a List&quot;</td>
<td>10</td>
</tr>
<tr>
<td></td>
<td>603017</td>
<td>1</td>
<td>g_title_hitlist</td>
<td>action_array</td>
<td>&quot;Display in ISBD&quot;</td>
<td>10</td>
</tr>
<tr>
<td></td>
<td>603021</td>
<td>1</td>
<td>g_title_hitlist</td>
<td>action_array</td>
<td>&quot;Download MEDIN XML&quot;</td>
<td>10</td>
</tr>
<tr>
<td></td>
<td>1000016</td>
<td>1</td>
<td>g_title_hitlist</td>
<td>action_array</td>
<td>&quot;Save search&quot;</td>
<td>10</td>
</tr>
<tr>
<td></td>
<td>1000022</td>
<td>1</td>
<td>g_title_hitlist</td>
<td>action_array</td>
<td>&quot;Download for&quot;</td>
<td>10</td>
</tr>
<tr>
<td>SETTING ID</td>
<td>GCB</td>
<td>SETTING VALUE</td>
<td>SEQ.1</td>
<td>SEQ.2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>------------</td>
<td>-----</td>
<td>---------------</td>
<td>-------</td>
<td>-------</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1000053</td>
<td>1</td>
<td>g_title_hitlist</td>
<td>action_array</td>
<td>&quot;Download HARVARD&quot;</td>
<td>10</td>
<td>8</td>
</tr>
<tr>
<td>603044</td>
<td>1</td>
<td>g_title_hitlist</td>
<td>action_array</td>
<td>&quot;Save search&quot;</td>
<td>10</td>
<td>7</td>
</tr>
<tr>
<td>603019</td>
<td>1</td>
<td>g_title_hitlist</td>
<td>action_array</td>
<td>&quot;Email citations&quot;</td>
<td>10</td>
<td>5</td>
</tr>
</tbody>
</table>

4. Click **New Record** to create a “Save Basket List” action as follows.

1. Set **Value** = e.g. “Save Basket List” (NB double quotes).
2. Set **Value 2** = 8.
3. Set **Sequence 1** = 10 (Should match the Sequence 1 value of the sibling action_array items).
4. **Set Sequence 2** to wherever you want this action to appear in the drop down list:
Set “Can Save Lists” for relevant User Categories

2. Search for the user categories whose linked users should be able to create Lists.
3. Set Can Save Lists = Yes:

### User Category

<table>
<thead>
<tr>
<th>Key ID</th>
<th>STAND</th>
</tr>
</thead>
<tbody>
<tr>
<td>Short Description</td>
<td>Standard</td>
</tr>
<tr>
<td>Long Description</td>
<td>Standard</td>
</tr>
</tbody>
</table>

###Privilege Level

- View searches, folders, workspaces

###Login To OLIB Web Allowed?

###Display CMC Code?

###Allow Iss/Ren/Res via SIP?

###Can Save Searches?  Can Save Public Searches?

###Can Save Lists?

Yes
The above configuration takes effect in Folio immediately.

**Copy level reservations**

The end user can now select a specific copy to reserve when they are placing a reservation in Folio.

Search the item and click the RESERVE button as normal. OLIB displays all the copies.

A *Reserve only this copy* button appears next to the barcode of each copy:

Add items to Basket without logging in

The end user no longer needs to log in to Folio in order to add to the Basket:

When the user does log in, Folio includes those items in their basket so that they can Reserve, Save Basket List or Download.


Printed: Tue, 08 Mar 2022 22:02:41 GMT
New “Straight To” searches

Several new “Straight To” searches are now available.

Straight To Object / File Attachments

You can now build a URL that links straight to objects / file attachments in OLIB. There are 2 ways to achieve this.

Link to specific object

In your email / intranet page / word document, add the key from the Object record in OLIB to the base URL as follows:

?sobj=xxx For example:

http://myopac.library.org/folio?sobj=123

When the reader of the document clicks on the link, this navigates directly to the object with a key ID of 123. If display is allowed for that object, the object will be shown.

Tip: this is useful for inclusion in your privacy notice in order to provide a link for the PDF privacy document.

Link to first object of a Title

You can also build a URL that links to the first object / file attachment of a particular Title number.

In your email / intranet page / word document, add the Title number and URL suffix to the end of the base URL as follows:

?stobj=xxxxx For example:

http://myopac.library.org/folio?stobj=3457

When the reader of the document clicks on the link, this navigates to the first displayable object that is linked to Title number 3457.

Straight to a Renewal

You can now build a URL that navigates to Folio for a renewal process following user authentication.

In your email / intranet page / word document, add the user barcode and copy barcode to the end of the base URL as follows:

?xbarcode=xxxxxx&sren=xxxxxx For example:

http://myopac.library.org/folio?xbarcode=0010654B&sren=000123X

When the reader of the document clicks on the link, this navigates to Folio for the user to log in and the renewal to take
Straight to a Reservation

You can now build a URL that navigates directly to the reservation screen in Folio for a specified Title number. The user is prompted to authenticate in order to complete the process.

In your email / intranet page / word document, add the Title number for reservation to the end of the base URL as follows:

?sres=xxxxxx For example:

http://myopac.library.org/folio?sres=3457

When the reader of the document clicks on the link, this navigates to the reservation screen in Folio, for the specified Title. The user logs in to process the reservation.