Learn how to benefit from OLIB folders in the catalogue.

About folders

This information explains the benefits of using Folders as part of maintaining the catalogue.

Folders enable you to store a list of references or 'pointers' to records that you are interested in for ongoing use and management. In the case of Title records for example you may have a folder of Titles (catalogue records) that are for deletion or cataloguing update. You can have as many folders as you like to organize your work and they are 'owned' by you as the creator of the Folder.

Add records to existing folder

When you search in the catalogue and obtain a hitlist, you can quickly add an item to an existing Folder from the hitlist

1. Check the box to select the title and click Add to Folder.
2. In the Choose Destination window, select which folder the title(s) should be added to and click OK for OLIB to complete the task.

Note: at the top of the window, you also have the option to create a new Folder.

Search for existing folders

1. Go to Searches> Folders.
2. There are several search types in Other Searches:

<table>
<thead>
<tr>
<th>SEARCH</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Folders Search</td>
<td>Includes ALL folders in OLIB. Search by folder name. Excludes:</td>
</tr>
<tr>
<td>Standard Searches</td>
<td>SDI folders and system folders - Titles/Copies/Users For Auto-Deletion folders</td>
</tr>
<tr>
<td></td>
<td>Import/export issues folders</td>
</tr>
<tr>
<td>SEARCH</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>---------------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>• My Folders Search</td>
<td>Includes ONLY folders owned by the currently logged in user. Note: use a wildcard (%) search to see all your folders.</td>
</tr>
<tr>
<td>System Folders Search</td>
<td>Includes ONLY: • Titles/Copies/Users For Auto-Deletion folders • Import/export issues folders and their template folders</td>
</tr>
<tr>
<td>OPAC List Folders Search</td>
<td>• Folders the library has created for Folio Lists • Folders the users have created in Folio</td>
</tr>
<tr>
<td>Titles Folders</td>
<td>Searches on Folders created in that domain.</td>
</tr>
<tr>
<td>Copies Folders</td>
<td></td>
</tr>
<tr>
<td>Users Folders</td>
<td></td>
</tr>
<tr>
<td>Classes Folders</td>
<td></td>
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<tr>
<td>Digital/Film Folders</td>
<td></td>
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<tr>
<td>Invoices Folders</td>
<td></td>
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<tr>
<td>Names Folders</td>
<td></td>
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<tr>
<td>Order Items Folders</td>
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<tr>
<td>Orders Folders</td>
<td></td>
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<tr>
<td>Series Folders</td>
<td></td>
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<tr>
<td>Subject Headings Folder</td>
<td></td>
</tr>
<tr>
<td>SEARCH</td>
<td>DESCRIPTION</td>
</tr>
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<td>--------</td>
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</tr>
<tr>
<td>Folders Folders</td>
<td>Includes Folders the library has created, that are a container for any of the above Folders.</td>
</tr>
<tr>
<td>Folders</td>
<td>A list of all the container Folders (folders containing other Folders) owned by the logged in User. (The system manager will see all Folders).</td>
</tr>
<tr>
<td>Folders</td>
<td>When you click to select one, OLIB immediately displays the full details of the Folder and the list of items in the Folder.</td>
</tr>
</tbody>
</table>

3. Choose one of the above search types and enter your search criteria in the box, to obtain a hit list of folder names. Note: use wildcard (%) to search all the Folders in that search type, e.g. all Titles folders:

4. Click on the Folder name to view full details and the contents (e.g. Titles), listed in that folder.

### Create new folder

Folders can be created directly in the folders domain.

Note: new folders will not be visible in the Other Searches or Folders drop downs until the next time the user logs in to OLIB Web. Alternatively, creating a folder by selecting items from a hitlist and adding a new folder will make the folder available in the Other Searches drop down and the Folders domain immediately.

1. Go to Searches> Folders.
2. In the Folders search window, click New Record. OLIB opens Folder Details.
3. Select the appropriate Folder Type from the drop down list. The screen re-draws to provide relevant fields for this Folder Type.
4. In Folder Name enter a meaningful label for this new folder, e.g. Nursing or Titles for re-cataloguing.
5. Optionally, change the default Owner of the folder (simply start typing the new user name to obtain a matching list - "da,j" would match on surnames beginning with "da" and forenames beginning with ")").
6. Optionally the folder can be saved at this stage and records added to the folder at a later date, or you can Save and Continue to add records to the folder as shown below.
Add items to the folder

There are 2 ways:

Via titleno

1. In the Title Numbers field, add the Titleno on separate lines - input them directly or paste them from another application.
2. Having added all the numbers, click the Add Titles to Folder button.
3. On completion Save and Close.

Via search link

1. Click Search to run a search for a title.
2. Click Insert to add a title or use Insert and Continue to add titles to the folder but stay on the Titles dependent search in order to add more titles.
3. On completion Save and Close.

Folder details

When you have added Titles to the folder, they are displayed in the Contents box.

Show as list: use this link below the Contents to obtain an alternative view of the items as a hitlist.

Note: this hit list allows you to change the sorting and/or add filter options, should the folder contain a very large list of items.

Up/Down Links: select an item in the Contents and use Up/down links to change position in the list.

Folders container: you can create a Folder of Folders; in this case the Contents contains a list of Folders. This groups related folders together for easier access (a container of folders). The feature is particularly relevant to OPAC Lists in Folio.

To do this you create the Folder with a Folder Type of Folders, The (Contents) Search link then allows you to search for existing Folders the library has already created.

Remove records from a folder

In modify mode, removing items from your folder can be done in 3 ways:

- Re-enter titleno
  1. Enter the title numbers of the title records you wish to remove from the folder in the Title Numbers field, or copy and paste them as before.
  2. Click the Remove Titles From Folder button.
• Select and click Delete
  1. Select the items you wish to remove and click the **Delete** option.
• Remove ALL items from folder
  1. To empty all the titles listed in the folder, click on the **Empty This Folder** button.

When items are removed from the folder they no longer appear in the Contents box.

### Delete a folder

To delete folders from the Folders domain:

1. Search and select the folder(s) to be deleted.
2. Use the standard Delete button to delete the ones selected.

### Audit trails

Addition and removal of Titles to Folders is audited. The addition of titles to folders and the removal of titles from folders is recorded in the title record’s audit trail.

#### Audit information in Titles domain

The audit trail entry indicates who added or removed the title to/from the folder.

1. Carry out your search and assign the Title to a Folder as normal.
2. Search again to view the Title details - the Audit Trail sheet has a record of who made the change and when, together with the title of the folder it was assigned to.

In the Titles (Deleted) domain, this will show after the deletion action record.

#### Audit information in Folders domain

The Added By user and Added On date are now shown in the Folders domain for –

- Titles
- Copies
- Users

This shows the time if the record was added “today”, or the date if it was added prior to “today”.

1. In Searches> Folders, search for the folder name and click to view details.
2. The Contents list showing e.g. Titles, displays the Added By and Added On columns.
Use folders to create title links

All the items in a folder can be linked to a single title in one go, making the linking of titles much quicker.

1. In Titles display the details of the title you wish to link to.
2. Go to Related Items and Control Numbers: Control Details and make a note of the Title Number.
3. Go to Searches> Folders.
4. Search for the relevant folder containing all the titles to be linked and switch to modify.
5. In Link Title No. enter the title number noted above and tab to the next field. OLIB automatically inserts the Title.
6. Select the relevant Link Type from the drop down list, e.g. Related Title, See, See Also and click the Create Title Links button - OLIB confirms the links.
7. Save and Close.

When you return to the Titles domain, all the newly cross-referenced titles are visible in the Related Items and Control Numbers sheet of the linked record.

Note: title links can be broken using the same process but by clicking the Remove Title Links button followed by [tab].

Export contents of a folder

The contents of a folder can be exported from OLIB in a variety of formats, e.g. EndNote, MARC21, OLSTF.

(This feature works differently from other Folders in OLIB).

1. Go to Searches> Folders.
2. Search for the relevant folder and select it in the hit list.
3. From Actions select the Export option.
4. Choose your preferred export format in the pop-up dialog window and click OK.
5. OLIB responds with an alert you the export request has been submitted and will be commenced shortly
6. When you click OK OLIB will carry out the export in the background and attach the results as an Object (Attachment) to the folder record.
7. The attachment can then be downloaded in the normal way. Open the details of the personal folder and from the Attachments link on the top right select the attached export file in order to save or open it.

Note: for any subsequent exports you create from the same folder, OLIB will also replace any files that are already currently attached.

Search for titles saved in a folder

It is possible to search for Titles that already belong in folders. To do this, search at the main Titles level and filter the results by one or more selected Folders.

The search can be further limited by other criteria (No. copies, date catalogued, …)
1. Go to Titles and enter search words e.g. first few words of title, or Keyword search and such.
2. Click Refine Search. In the Refine Search box, click Linked Domains.
3. In Linked Domains click Folders:
4. The Refine Search box for Folders is displayed.
5. Select from Folder, Folder Type or Owner; e.g. select Folder and verify if the Folder is One of / Not One of.
6. Click the Select Items icon 🔖
7. Use the check box on the relevant Folder(s) and click OK. (You can select one or more folders to retrieve titles that are in any of the chosen folders).

OLIB displays matching Titles from the Folder(s) you selected.

Note: this feature can be used in other domains where Folders can be created. Search in the relevant domain, e.g. Users and from Linked Domains, select the relevant Users folders that you want included in the search.