Discover what changes you can make to layouts using Layout Manager.
►Admin Client Configuration> Layouts

Other users can view layouts in areas of OLIB but the system administrator needs to be logged in to make any changes.

View available layouts in domains

In any domain when you show the full details of a record, the Layouts icon Layouts link at the top of the page lists what layouts are available for this domain:

🌟 Indicates this is the default layout shown when you go to this domain.

🌟 Click to make this the default layout instead.

*** Indicates an older version of a layout. For example if an OLIB upgrade adds new fields to a layout, OLIB still keeps the older version of the layout and marks it with "***". This is because a library may have made their own modifications to it. The library can continue to use the older layout and keep it as their default if they wish. Alternatively they would need to make their own local modifications again to the newest layout, so that they benefit from the latest upgrade AND incorporate their own modifications.

Layouts and Sheets can also be viewed in a separate domain in the Admin Client Config section of the menu.

View the list of layouts

All OLIB's layouts can be viewed from Admin Client Config> Layouts. Each Layout record has the following information:

• Main - basic info about the layout such as layout name and domain(s) where it is made available
• Sheets - the current list of sheets displayed by that layout
• Info Types - the list of InfoTypes that currently use this layout. For example, in the catalogue, the Info Types are the Media Types

Change the sequence of sheets

To change the order in which the sheets appear in a layout do the following

Tip: first go to the domain where you want to change the sequence of layouts to help you recognise it when in Admin Client Configuration.

1. Go to Admin Client Configuration> Layouts.
2. Search on the layout name. In most cases this is similar to the domain name, e.g. users.
3. Check carefully for the correct layout - click to display full details.
4. Click Modify Record and go to the **Sheets** sheet.
5. To change the order of display tick the box for the relevant layout and use the **Up / Down** links to re-order the sheets.
6. Save the details.

### Create new layouts

If radical changes are intended it may be preferable to create new layouts and sheets rather than to edit existing examples.

For example you may wish to create a new layout for a specific **Media Type** such as Acts of Parliament. This could include just the fields required for that Media Type, that are organised in an appropriate sequence.

As a compromise you can also copy an existing Sheet and then use that to edit rather than creating a Sheet from scratch. You can subsequently attach the copy of the Sheet to the new Layout.

1. Go to Admin Client Config>Layouts.
2. Click New Record.
3. Select a value from the Domain drop down, e.g. Titles (TITLES) for cataloguing.
4. Enter a meaningful **Name** for the layout, e.g. Acts. (Background Image, Header, Footer are not normally required).
5. Click the **Sheets** tab. Here you can either click **New** to create a brand new Sheet linked to this Layout, or you can click **Search** to find an existing Sheet that you want to attach to this Layout. The search automatically displays only the Sheets relevant to the Domain you selected.

### Create a new sheet

The above information explains how to create a new Layout, with the option of creating and linking a new Sheet to that Layout. To create the new Sheet -

1. In modify mode, from the **Sheets** tab click New.
2. Enter a meaningful **Name** for the Sheet and the tab **Label**.
3. **Indent** and **Top Margin** for most OLIB Sheets are set at a value of 10. **Type** is set by OLIB and will become either Draft or Published.
4. Click the **Controls** tab. From the links on the far right select **New** for each label and attribute you require for this sheet. More help with **Controls** is available. Save the Control record and repeat for others.
5. Finally, click the **Info Types** tab to select the Info Types for which you want this Sheet to be available. When the domain is Titles for example, the Info Types will actually be cataloguing reference data - Media Types. In the **Possible** types, check the box and select **Attach** from the Actions box. This adds that selection to the Info Types list.
6. **Save and Close** the record. The sheet is immediately available as 'published'.
Create a copy of a sheet

1. Go to the relevant domain (e.g. Users), that contains the Sheet you would like to copy (e.g. History).
2. Using Sheet Actions you can make a copy of a Sheet - Create Copy.
3. The new Sheet can be linked to the new Layout in Layouts, using Search from the Sheets tab.

Edit layouts from the menu

Most simple edits to Controls will be carried out on the relevant Sheet as described in Sheets. However this method is not possible for the Circ. Desk (Issues/Returns/Renewals) layout and the In Transit layout. This is one scenario where you would use the Layouts domain in Admin Client Config>Layouts.

Create a draft sheet and edit it

1. Go to Admin Client Config>Layouts.
2. Search for issues/returns.
4. Click the Sheets tab. This displays the Sheet belonging to Issues/Returns/Renewals.
5. Click the box next to the Sheet to select it and from the Actions drop down choose Create Copy.
6. Edit the draft Sheet as described in Sheets. For example you might want to add Users email address.
7. On completion Save and Close the record.
8. Use breadcrumbs to go back in the Layouts record, click the box to select the draft Sheet and from Actions choose Make Public.

The draft will now replace the original Sheet.

Create a copy of a layout

You can easily copy Layouts, using 2 actions:

Copy Layout with same sheets

- This will duplicate the selected layouts, prefixing the new layouts with Copy of
- The new layout will link to the same sheet records as its original

Copy Layout with copied sheets

- This will duplicate the selected layouts, prefixing the new layouts with Copy of
- The new layout will link to copies of the sheet records (that were linked to the original layout)

1. Go to Admin Client Configuration> Layouts.
2. Search for the relevant Layout you want to copy, e.g. Search On Layout Domain = subjects.
3. Select the Layout in the hitlist and from Other Actions choose the preferred action.
4. Edit the Layout as required.

Copy a sheet in a layout

You can also use the following action to quickly copy a sheet in a layout:

Copy sheet for this layout
This will copy the sheet that the layout is currently linking to. It will replace the original sheet in the current layout and be placed in the same position on the current layout only. (The original Sheet still remains in the system and would be found in the Sheets domain).

1. Go to Admin Client Configuration> Layouts.
2. Search for the layout and open in modify.
3. In the Sheets tab select the Sheet you would like to copy and click in the Actions box to choose Copy Sheet for this Layout.

Enable layouts for different Info Types

If you want a specific Layout to be used to display records from different Info Types, you can add those Info Types to the Layout. For example, you can create a new layout for cataloguing the Title record of "Pamphlets" and a new layout for cataloguing the Copy records of "Pamphlets". To do this you obtain the Layout in the Admin Client Config/Layouts domain.

Note: Daystart creates the info type record from Media Types and Copy Categories and needs to run first after you've created any new Media Type, or any new Copy Category.

1. Go to Admin Client Config/Layouts.
2. Search for e.g. the Copies Layout.
3. In the hitlist click on the relevant Layout to display full details.
4. Open the Info Types tab. This contains a list of the current Info Types and below it a list of the Info Types that are possible to attach. (For Copies, the Info Types are Copy Categories).
5. In modify mode select the Possible Info Type by checking the box. In available Actions click on Attach. This puts the Info Type in the list of current Info Types.
6. Save and Close the record.

Permissions

Permissions can be applied to Layouts and Sheets in the same way that Permissions are applied to other 'objects' such as Folders or Saved Searches.

You use the Layouts domain to set Permissions on a Layout.

1. Go to Admin Client Config/Layouts.
2. Display the Layout details.
3. Use the Permissions drop down on the top right to apply permissions.

**Delete a sheet from a layout**

In Admin Client Config> Layouts search for the relevant layout and open in Modify.
Open the Sheets tab.
Tick the box to select the sheet for removal and either:

- Delete sheet from the layout - click the Delete link.

OLIB prompts if you are sure you want to remove the item from the Sheets list? Yes/No. This deletes the sheet from this layout only.

- Delete sheet from OLIB database - in Actions select Delete Sheet.

OLIB prompts if you are sure you want to permanently delete this sheet? Yes/No. The sheet is immediately removed from all layouts for that domain and from the database.

**Delete a layout**

You can easily remove layouts if they have:

- no linked sheets
- no permissions
- are not system supplied

1. Go to Admin Client Configuration> Layouts.
2. Search and select layout.
3. Click in Other Actions and select either:

**Remove Layout and Sheets**
The layout and the sheets belonging to it are deleted from the database.

**Remove Layout, keep Sheets**
The layout is deleted from the database, but the sheets will still remain and can be re-used.

**Layouts for Archive records**

In the Layouts domain, when you check the box to select a layout, this is available in the Other Actions drop down:

**Copy Layout To Archive Domain**

OLIB will create a copy of the layout. This layout is for viewing records you have archived. The layout will be placed in one of the Archives domains, such as:
• Archived Titles
• Archived Users

The archive record layout will be placed in the correct matching domain, e.g. an archived Users layout will be placed in Archives> Archived Users.

Attributes that are not included in the Archive domain’s definition will not be included in the archive record layout, although their labels will.

Example

In this example we create a copy of a layout for archived User records

Tip: you may consider archiving records for which you have a highly customised layout to assist data entry and wish to view the archived records using the same field labels.

1. In the Layouts domain, when you select **Copy Layout to Archive domain**, OLIB responds with a message that a new layout e.g. "Archived Staff Users" has been created.
2. If this is e.g. a Users layout, OLIB places the layout in Archives> Archived Users.
3. To view it, display the details of any record in **Archived Users**.
4. Under the **Layouts** drop down at the top of the screen, the **Archived Users** layout is visible.

The domain for the layout is ARCH_BORROWERS.

Note: check that the Layout you are creating an Archives copy for, has all possible Info Types associated with it (check these in the **Info Types** sheet in the Layout).

If not, the layout will not be displayed in **Archives** and will still be visible in the “active” domain.