Online help

Get started

Get started with OLIB Web
- OLIB basics
- Search options
- Add, edit and delete
- Workspaces, saved searches, folders

Users

Manage users and staff users in OLIB
- Search and edit users
- Manage users
- User subscription services
- SDI

Catalogue

Manage catalogue records in OLIB
- Search
- Title and copy details
- Additional details
- RDA
- Maintain the catalogue

https://help.oclc.org/Library_Management/OLIB
Printed: Thu, 23 Jul 2020 08:29:09 GMT
Stocktake

• **Circulation**

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**

Manage acquisitions in OLIB

- About Acquisitions
- Set up Acquisitions
- Order process
- Outputting orders
- Check in and invoicing
- Other Acquisitions options
- Claims process

• **Funds**

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

No image available

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

No image available

Manage library locations in OLIB
△ About locations
△ Calendar
△ Locations
△ Location Types, Areas and Address Types
△ Shelves
△ Sub-locations

• Folio configuration

No image available

Find out how to configure end user features available in Folio.
△ Enable end user help
△ Folio lists
△ Generate a search Qwidget for Folio
△ Link to catalogue enrichment data
Quick launch searches
  ◦ Ratings and reviews
  ◦ Set / reset with temporary password
  ◦ Set password directly

• Alerts

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

Configure and manage system wide settings in OLIB
  ◦ General
  ◦ OLIB defaults
  ◦ Daystart
  ◦ Privileges and permissions
  ◦ Search configuration
  ◦ Customise OLIB
  ◦ Layout manager
  ◦ SIP2 server

• Reports

Learn about reporting in OLIB.
  ◦ Use OLIB reports
  ◦ Download reports

• Data import and export

Import or export your data from OLIB using MARC and other formats
Automated upload to WorldCat
  ◦ Export to third party discovery
  ◦ Import JISC e-books MARC file
  ◦ MARC21 export in OLIB 9.0
  ◦ MARC tags details
  ◦ OLIB Standard Transfer Format (OLSTF) Tags
  ◦ OLIB User Import

• User guides
  
  No image available

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
  
  No image available

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
  
  No image available

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 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

**No image available**

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

• Troubleshooting

**No image available**

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?
- I have set up SDI alerts. Why are no emails are being generated?
- 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+]
- 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**

  No image available

  Find training on OLIB.

  - OLIB Folio Configuration
  - OLIB service pack training