• 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
- 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**

No image available

Manage acquisitions in OLIB

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

• **Funds**

No image available

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**

[No image available]

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: Thu, 07 Jul 2022 10:14:28 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

No image available

Create alert messages for users and staff in OLIB
- About alerts
- Broadcast notices
- Configure alerts
- Configure SMTP server

https://help.oclc.org/Library_Management/OLIB
Printed: Thu, 07 Jul 2022 10:14:28 GMT
Suspend alerts and overdue emails

- View alerts

- System management

  No image available

Configure and manage system wide settings in OLIB

- General
- OLIB defaults
- Daystart
- Privileges and permissions
- Search configuration
- Customise OLIB
- Layout manager
- SIP2 server

- Reports

  No image available

Learn about reporting in OLIB.

- Use OLIB reports
- Download reports

- Data import and export

  No image available

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

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.

◦ 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

No image available

◦ Creating a .har file for support
◦ Enable Folio 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?
- 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**
  
  [No image available](https://help.oclc.org/Library_Management/OLIB)

  Find training on OLIB.

  - OLIB Folio Configuration
  - OLIB service pack training