• Get started

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Get started with OLIB Web

◦ OLIB basics
◦ Search options
◦ Add, edit and delete
◦ Workspaces, saved searches, folders

• Users

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Manage users and staff users in OLIB

◦ Search and edit users
◦ Manage users
◦ User subscription services
◦ SDI

• Catalogue

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Manage catalogue records in OLIB

◦ Search
◦ Title and copy details
◦ Additional details
◦ RDA
◦ Maintain the catalogue
◦ Stocktake

• Circulation

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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

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Manage acquisitions in OLIB

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

• Funds

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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

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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

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Manage library locations in OLIB

◦ About locations
◦ Calendar
◦ Locations
◦ Location Types, Areas and Address Types
◦ Shelves
◦ Sub-locations

• Folio

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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
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

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

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

• Data import and export
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  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**

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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**

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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**

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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 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**

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

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

https://help.oclc.org/Library_Management/OLIB
Printed: Fri, 30 Jul 2021 16:32:28 GMT
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

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Find training on OLIB.

◦ OLIB Folio Configuration
◦ OLIB service pack training