• 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
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
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

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

Find training on OLIB.

- OLIB Folio Configuration
- OLIB service pack training