• 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 configuration**

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  Find out how to configure end user features available in Folio.
  
  ◦ Get started with Folio
  ◦ Welcome screen
  ◦ Menu bar
  ◦ Banner graphic
  ◦ Configuration blocks list
  ◦ Enable end user help
  ◦ Facet sidebar
  ◦ 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

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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 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 WebView single sign-on (NTLM)
  - Link checker errors advice
  - OLIB software downloads

- Troubleshooting
  
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  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

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Find training on OLIB.

• OLIB Folio Configuration
• OLIB service pack training