• 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

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

Manage library locations in OLIB

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

• Folio

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

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https://help.oclc.org/Library_Management/OLIB

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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 OLIS support RDA Cataloguing rules?
- Do I need to cancel email notices in my test system? [Hosted OLIS]
- Following an upgrade to OLIS 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 OLIS 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 OLIS Folio?
- How do I export MARC records to OVID?
- How do I find out my OLIS 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 OLIS if the current System Administrator has left?
- How do I subscribe to the OLIS users’ mailing list?
- How do I transfer a report from my Test system to Live?
- How do I unlock a user record? [Hosted OLIS]
- How do I view all items with a specific copy category?
- How to sign in to OLIS
- 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**

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  Find training on OLIB.
  - OLIB Folio Configuration
  - OLIB service pack training