Course Objectives

OLIB Service Pack 11 is the eleventh service pack for OLIB. It is available for OLIB 9.0 only.

OLIB 9.0 SP10 is a prerequisite for OLIB 9.0 SP11.

This manual is designed to provide details of the main enhancements included in Service Pack 11, including instructions on how to configure OLIB to implement the change and how to use the new functionality where relevant.

Software Version: OLIB 9.0 Service Pack 11, OLIB Web 2.2.11 (Build 38), Web View 9.0 SP 11, OLIB Folio 9.0 SP11

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OCLC believe the information presented in this document is accurate at the time of production. However the information is subject to change and OCLC cannot accept responsibility for any errors that may appear in the document.
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1. INTRODUCTION

1.1 Introduction to OLIB 9.0 Service Pack 11

The 11th Service Pack for the OLIB software was released in June 2017. It is for OLIB 9.0 only.

This manual incorporates any new functionality both for OLIB Folio and OLIB WebView for SP11.

As with all OLIB upgrade training manuals this is not an exhaustive guide to the Service Pack as many of the items included are bug fixes and minor enhancements which do not need configuration and which will not affect workflows.

The full OLIB Service Pack release notes for OLIB 9.0 SP11 are published on the ‘OLIB Users’ website.

A fully indexed and context sensitive Online Help is available from OLIB Web and the OLIB Users’ Website.

👍 To request an installation of the Service Pack – please contact OCLC Support by email at support-uk@oclc.org or by ringing 0114 267 7502 or 0845 267 7502.
1.2 Layout Changes

The following layouts are changed by the installation of OLIB 9.0 SP11:

- Admin Client Defaults
- Calendar
- Copy Statuses
- Digital/Film Projects
- Digital/Film Project (Group) Notes
- Email Lists
- Geographic Codes
- Locations
- MARC21 Mappings
- Notices
- Object Types
- OLIB Defaults
- Output Formats
- Places
- Reports and related layouts
- Styles
- Title ISNs
- User Categories

If you have made any changes to any of these layouts/sheets since your last full upgrade, these changes will be lost when OLIB 9.0 SP11 is installed.
1.3 Changes to the User List Of Loans notice

The User List Of Loans notice has been changed so that it is now sent to users a given number of days in advance of the user’s membership expiry date, irrespective of whether they have items on loan. Previously it was only sent if the user had at least one item on loan.

The notice text should be amended to reflect this. For example:

“Your membership will expire on <EXP>. If you have any items on loan, these will be listed below. Please ensure that they are returned before you leave.”
2. GENERAL

2.1 Refine search Dialogue redesigned

The Refine Search dialog in all domains has been redesigned. In certain domains, the content of the Refine Search dialog has also been reviewed.

1. In the Titles domain, enter a search term for the Title (first few words) e.g. time management.
2. On the right, click Refine Search.
3. OLIB displays the Titles Domain Refine Search dialog:

Fields are now listed in two columns:
- General Fields
- Date Fields

There is also a Search Fields box - Use this to type part of a field name, e.g. op to navigate directly to that field to filter on it. For example:
Note: The **Search Fields** box is only shown if there are more than 15 fields listed in either column.

**Linked Domains drop down** - The Linked Domains have been moved from the right-hand column to an initially collapsed list accessible by clicking on **Linked Domains**.

If you enter text in **Search Fields** that is not found on the main fields, OLIB automatically searches for it in **Linked Domains** and shows matching fields below:

---

**2.1.1 Include / exclude fields from refinement dialog**

The system administrator can control what fields are available for filtering in the **Refine Search** dialog (including the Linked Domains). This is now manageable through the **Enable Filter** flag on the attribute record:

1. Go to **Admin Client Configuration**.
2. In the **Attributes** domain search for the Attribute (e.g. search by **Attribute Description**).
3. In the Attribute Details set **Enable Filter** = No (Yes/NULL allows filtering).
4. Save changes.

**Note:** for the changes to take effect you need to rebuild OLIB Web.

### 2.2 Changes to search refinements

Several new options are available when refining searches.

#### 2.2.1 Text Refinements

To obtain the text refinements:

1. Search for the items and click **Refine Search**.
2. In the Refine Search dialog, select the text field you want to filter on, e.g. *Series*.
3. OLIB displays the refinement options next to your search criteria:
<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Similar to</td>
<td>This option has been amended to be not case sensitive. This was always the situation for fields that are normalised, but it has been extended to all fields. This change may have a noticeable performance impact. Contact OCLC Support if there is a requirement for a refinement on a particular field that is causing a problem.</td>
</tr>
<tr>
<td>Equals</td>
<td>This option remains unchanged – a case sensitive match on the entire value.</td>
</tr>
<tr>
<td>Begins with</td>
<td>This option provides the same functionality as given by “Similar to” prior to Service Pack 11 – a case sensitive match on the start of the text. In many cases this option will perform significantly better than “Similar to”. It is therefore highly recommended that this option be chosen for Saved Searches.</td>
</tr>
<tr>
<td>Not equals</td>
<td>This option remains unchanged – a case sensitive match on the entire value to exclude results.</td>
</tr>
<tr>
<td>Coalesced</td>
<td>This is a new option intended to facilitate refinements for fields that contain data such as telephone numbers, postcodes or other code values. It will carry out a case insensitive match on only the letters and numbers entered. For example, “01142677502” will match “(0114) 267-7502”, and “s14lw” will match “S1 4LW”.</td>
</tr>
<tr>
<td>Between</td>
<td>This is a new option – a case sensitive match to facilitate a range search. This option can be useful, for example, to limit a title search to titles that have a copy record with a shelfmark between the two values entered. The match is inclusive at both ends of the range. For example, specifying between “123” and “456” will include both “123” and “456”. However, it will not include “456.7”</td>
</tr>
<tr>
<td>Before</td>
<td>This option remains unchanged – a case sensitive match to facilitate an open-ended range search.</td>
</tr>
<tr>
<td>After</td>
<td>This option remains unchanged – a case sensitive match to facilitate an open-ended range search.</td>
</tr>
</tbody>
</table>

### 2.2.2. Select List Refinements

An improvement has also been made to the **Select List Refinements** box.

1. Search for the items and click **Refine Search**.
2. In the Refine Search dialog, select the field you want to filter on, e.g. Media Type.
3. Click the **Select Items** icon.

In the **Select List Refinements** box, all refinements are shown:
A new **Search List** box is now available to search long lists. Enter a few letters / words to obtain a sub-set:

Optionally you can also use **Select/Deselect All** buttons.

The Select All and Deselect All buttons act only on the items that are visible. Selections are preserved even if the item is not visible. The user can therefore search for e.g. *John*, click **Select All**, search again for *Smith* and click **Deselect All**. This will result in a list of values containing *John*, but not *Smith*.

### 2.3 Modify from the Hitlist

A new option has been included on the hitlist to enable you to modify the selected record straight from the hitlist, rather than having to display the record details screen first and then click Modify Record.
The hitlist now includes the **Modify this record** icon to the right of the record’s checkbox for records that the user is allowed to edit. For example:

![Subject Controls](Subject Controls)

![Subject Details](Subject Details)

![Subject Main](Subject Main)

### 2.4 ISBN conversion can be included in the Keyword Index

Depending on the **Show Equivalent ISBN** setting in **OLIB Defaults** (user the Cataloguing heading)

![Show Equivalent ISBN](Show Equivalent ISBN)

the ISBNs will be displayed on a **Titles** record as ISBN (EAN) or EAN (ISBN) depending on which was entered first.

![Series](Series)

**Note:** OLIB will still do this conversion in the database, regardless of whether you have this setting enabled.

It is now possible to search via ISBN or EAN, (10/13 digits) in the **Keyword Index** also.

This is not dependent on the **Show Equivalent ISBN** being enabled.

Any keyword indexes which include ISBNs at the time of the upgrade will be automatically updated to incorporate this change so that you can search using 10/13 numbers.
2.4.1 To include ISBN 10/13 conversion in the Main Word Index

In this example, the ISBN conversion searching is being applied in the Main Word Index. For example, if ISBN is not included in the index and you now want to include it, you will need to check that the following are in place and then rebuild the Keyword Index.

⚠️ You are advised to rebuild the Keyword Index only at a time when there is likely to be limited use of OLIB.

1. Go to System Administration> Keyword Indexes. In this example, you would locate Main Word Index. Check that the list of Attributes for indexing includes TITLEISNS_ALL.

2. Go to the hitlist view, select the index and from Other Actions choose Build Index.
After the index has built, when you next log in to OLIB Web or Folio, a Keyword search on either 10/13 digits will retrieve the Title record:
3. USERS

3.1 Enhancements to Refined Searches

Service Pack 11 includes a number of new user refined searches.

3.1.1 Refine by User Group

It is now possible to refine a user search by user group. The Groups refinement is listed under the Linked Domains heading on the Refine Search dialogue box:

Select the Group Name (for filtering) refinement.
The filter enables searches to be restricted to users who are direct members of the selected user groups.

![Select List Refinements](image)

Here we can see those users who belong to the Acquisitions Group.

![User Records](image)

3.1.2 Refine by Area

It is now possible to refine a location search by Area.

![Refine Search](image)

Here the search is refined to search for those locations that are in the City Campus Area.
3.1.3 Refine by Borrower Trap Message

It is now possible to refine a user search by standard borrower trap message. The Traps refinement is listed under the Linked Domains heading on the Refine Search dialogue box:

Select the Standard Trap Message refinement.
Here you can refine on the standard trap messages associated with one or more user records.
4. CIRCULATION

4.1 Renaming of In Transit Transaction Types

To add clarity to the meaning of the In-Transit transactions, the names of these transactions have changed.

The Return in Transit transaction has been renamed In Transit Receipt.

In conjunction with this, the Issue In Transit transaction type has been renamed In Transit Issue.

The functionality of these transactions remains the same.

4.2 Configurable Transaction Types List on the I/R/R Screen

It is now possible to configure the content and order of the entries in the Transaction Type drop-down list on the I/R/R screen. This can be defined at user category level, location level and system level.

If the Transaction Types list has been defined at user category level (currently logged in user), it will be used in preference to any definitions that have been defined at location or system level. If it has been defined at location level (PC Location), it will be used in preference to the list that is defined at system level.
A default system level Transaction Types list is delivered with Service Pack 11. This can be viewed on the OLIB Defaults layout, on the User/Circ sheet.

In modify mode, the list can be configured as follows:

**Changing the order of the transaction types**
Select the transaction type you wish to move and use standard Up and Down re-sequencing facilities to change the order of the entries in the list.

**Adding a transaction type**
To add a transaction type to the list, select it from the drop-down list immediately above the list.

Click the Add to list button.

This adds the new transaction type to the end of the list.
To insert a transaction type in a specific position in the list, enter the position number in the sequence field to the left of the drop-down list, then select the transaction type and click the **Add to list** button.

The items at and below that position will be shuffled down to accommodate the new transaction type.

**Removing a transaction type**

To remove an item from the list altogether, select it and click the **Delete** option.

Subsequent entries in the list will be shuffled up so that the gap in the sequence numbering is filled.

The Transaction Types to be created at **location level** are configurable on the **Location** layout, on the **User/Circ** sheet.
The Transaction Types to be created at **User Category level** are configurable on the **User Categories** layout on the **Details** sheet.

### 4.3 New Reservation Refinements

The reservations filters have been enhanced so that you have the option of filtering by copy location or by user location when searching for reservations from the Reservations domain.

#### 4.3.1 Refine by User Location

To refine a reservation search by user location, use the **Users** refinement listed under the **Linked Domains** heading on the Refine Search dialogue box:
Select the **Location** refinement.

Select the location of the user as required.
Here the results are for reservations placed by users who are at the Bristol location.

4.3.2 Refine by Copy Location

To refine a reservation by copy location, use the **Reserved Copies (for filtering)** refinement listed under the **Linked Domains** heading on the Refine Search dialogue box:
Select the **At Location** refinement.

Select the location of the copy as required.

Here the results are for reservations placed on copies belonging to the Bristol location.
4.4 Date and Time Recorded for Copies Lost

OLIB now records the date and time on which a copy was flagged as Lost.

A new field has been included in the Copies domain, **Recorded as Missing on**.

This field has been added to the bottom of the standard Copies layout's **Main Details** sheet, under the **Miscellaneous Copy Settings** heading. If you use locally-defined layouts for your copy records and you want to use the Recorded As Missing On field, you will need to add it manually using the Layout Manager tool.

This field is set to the current date and time whenever a copy’s status is changed to a status that has its **Lost Status** field set to **Yes**.

Here the copy status **Lost presumed missing** has it Lost Status set to Yes.

The Lost Status is a new Yes/No field in the Copy Statuses domain.

By default the Lost Status field is set to Yes for the **Claims Lost** (Key ID CLOST) and **Lost presumed missing** (Key ID WRDW) copy statuses when SP11 is installed.
If your OLIB system includes other copy statuses that represent a Lost or Missing status, their Lost Status field should be set to Yes manually.

If the item is recovered and you want to re-activate the copy record, you should clear the **Recorded as Missing on** field manually once you have changed the copy status.

### 4.5 Return Dates when Closed for Expired Users

It is now possible for libraries to specify how return dates are calculated when the return date falls after the user's expiry date but during a closed calendar period.

A new field has been added to the Calendar record, **Allow Issue To Exp. Date?**.

When an item is issued to a user and the user’s membership expiry date falls before the return date, if the expiry date falls during a location or global closed calendar period, **Allow Issue To Exp. Date?** is examined to determine what to set the return date to.

If **Allow Issue To Exp. Date?** is set to **Yes** in the location’s calendar record, the return date is set to the user’s membership expiry date (or, if this falls on a day on which the library is closed, the first open day before then).

If **Allow Issue To Exp. Date?** is set to **No**, the return date is set to the first open day before the user’s expiry date (i.e. the first open day before the calendar start date).

If **Allow Issue To Exp. Date?** is **null** in the location’s Calendar record, the Allow Issue To Exp. Date? field in the global calendar record is examined in the same way if such a record has been defined. If the Allow Issue To Exp. Date? field has not been set in the global calendar record (i.e. if it is null), it will be treated as if it were set to No, i.e. the return date will be set to the first open day before the user’s expiry date (i.e. the first open day before the calendar start date).
5. CATALOGUING

5.1 Link between Publisher and / or Place and Author

OLIB can be configured to suggest publisher and/or places of publication based on the authors assigned to the title.

Additional fields can be added to the Title Publication layout to include drop-down lists for publishers and places that are associated with other titles that are linked to the authors for the title being catalogued.

The new attributes are:

- Publisher Hints (pub_publisher_hints)
- Place Hints (pub_place_hints)

Here the publishers associated with the author added to the new title record are listed. Simply chose the relevant publisher from the drop down list.

Once selected, the publisher field is populated.

The same principle applies for Places.
Publishers not associated can be added in the normal manner.

These hint lists can be extended by setting a value for **Favourite Sequence** in the publisher or place record.

The attribute (Favourite Sequence) will need to be added to the Publisher Layout. Here it has been added to the Main sheet:

![Publisher Layout with Favourite Sequence](image)

The attribute (Favourite Sequence) has been added to the Place Layout by default.

![Place Layout with Favourite Sequence](image)

A negative value in this field will always present the record and it will appear above any publishers that are associated with the authors that are linked to the title.

A positive value in the Favourite Sequence field will add the record to the end of the list, if the configuration allows for more records to be shown.

![Favourite Sequence Value](image)

The number of publishers and places displayed in the list can be configured on the **OLIB Defaults** Layout. Two new fields have been added to the Cataloguing section on the Main Sheet - **No. Of Places Of Publication To Suggest** and **No. Of Publishers To Suggest**.

| No. of Places of Publication To Suggest | No. of Publishers To Suggest |
Add the number of publishers and / or places you wish to be displayed in the hints list. Both fields default to 5 if there is no value present.

Attributes are also available in the Titles domain if you wish to use quick entry publication fields:
- Place Hints (ti_place_hints)
- Publisher Hints (ti_publisher_hints)
- Publication Date Entry (ti_pub_tdate)
- Add Publication Line Button (ti_imprint_add)

### 5.2 Update Title Media Sub-Type

A new action is available from the Title hitlist to update the title media sub-type to a value suitable for the selected titles’ media type.

Check the title record to be updated and select the action **Update title media sub-type** from the Other Actions box. A list of title media sub-types suitable for the selected titles’ media type are presented.
The **Update title media sub-type** action can also clear the media sub-type from the selected titles, using the **Clear** option at the end of the list of media sub-types:

![Image of Clear option]

### 5.3 Enhancements when Filtering on Titles

A number of fields can now be added to the refinements available when searching for titles.

#### 5.3.1 Filtering on Title Notes

It is now possible to enable filtering on the Note 1 – Note 30 fields in the Titles domain. These note fields will not appear by default in the Refine Search box but can be added if your library uses any of these fields on the title layout and wishes to run a refined search on them.

To enable filtering on one of the note fields, launch an **Admin Client Configuration > Attributes** search. Search for the attribute to be added to the refinements. Here Note 1 is to be configured.

![Image of Note field configuration]

Modify the record and select **Yes** in the **Enable Filter** field. Save and Close the record.

NB: You will need to rebuild OLIB Web. The Note 1 field will appear as a refinement option.
5.3.2 Filtering on Dates

The same applies for the Date 1 – Date 10 fields. These date fields will not appear by default in the Refine Search box but can be added if your library uses any of these fields on the title layout and wishes to run a refined search on them.

5.3.3 Filtering on Yes/No fields?

The same applies for the Yes/No 1 – Yes/No 20 fields. These Yes/No fields will not appear by default in the Refine Search box but can be added if your library uses any of these fields on the title layout and wishes to run a refined search on them.

5.4 Searching and deleting Object records

It is now possible to search for Object records which have no linked records by using the new Blind Objects search in the Object domain.

This search returns objects that are not stored in the database and which have no links to catalogue items.
It is also possible to delete objects that are not linked to a title from the Objects search in the cataloguing domain.

5.5 Enhancements to the Title Audit Trail

The Titles Audit trail can be separated into two lists if required – one to show changes made to a record by library staff and one to show changes made by daystart or the OLIBWVSYS login.

The existing Audit Trail attribute will exclude changes made by daystart or the OLIBWVSYS login.

An additional attribute, Audit Trail (system updates), can be added to your Titles layouts to show the changes made by daystart or the OLIBWVSYS login.
The **Audit Trail** (system updates) will include OPAC Sync status changes for syncing data with WorldCat / Ebsco; Corrections to the combined title_subtitle field; copy count, for example. Plus, any changes made by the OLIBWVSY user.

### 5.6 MARC21 layouts for Title ISBN and Title ISSN

The Title ISBN (Full layout) and Title ISSN (Full layout) have been revised so that they present MARC21 fields rather than UK MARC fields.
### 5.7 MARC Country code

A field has been included in Places for the MARC Country code.

<table>
<thead>
<tr>
<th>Place Details</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Key ID</td>
<td>UK</td>
</tr>
<tr>
<td>Short Description</td>
<td>UK</td>
</tr>
<tr>
<td>Long Description</td>
<td>United Kingdom</td>
</tr>
<tr>
<td>MARC Country Code</td>
<td></td>
</tr>
<tr>
<td>Favourite Sequence</td>
<td></td>
</tr>
</tbody>
</table>

This 3-character code will be included in positions 15-17 of Tag 008 when a title record is exported in MARC format.
6. SERIALS

6.1 Deleting Owner or Check In Location

It is no longer possible to delete a location if it is marked as the owner or check-in location in one or more serial copy records.
7. DATA EXCHANGE

This section includes a summary of the various enhancements to the import and export processes that are included in OLIB Service Pack 11.

7.1 Subset synchronisation with Third Party Discovery Services

It is now possible to automate the synchronisation of a subset of the catalogue data from your OLIB system to a third-party discovery system or WorldCat.

A number of new fields have been added to the Output Format record on the Export Generation sheet.

The most important changes are described below.

**WorldCat / FTP Information**

Files Sent and Retrieved
This is a list of files that have been retrieved from OCLC as part of the WorldCat synchronisation processing, together with the latest file sent if Retain Sent Files? is set to Yes.

Limit 952 Locations
This option will limit the copy information included in the data supplied to the FTP server to copies for those locations that are included in the title set. This requires usage of a MARC21 Configurable Copies Output Format.

Hierarchical Copies Handling
This option allows control over which copy information is supplied for multi-volume records. The option most suitable for your chosen discovery system should be used. This requires usage of a MARC21 Configurable Copies Output Format.

Track Status?
This option will prevent other libraries who share your OLIB system from being hindered if they attempt to delete titles that have mutual copies. There are other checks to prevent deletion of
titles with copies at certain statuses. Setting **Track Status?** to No will also mean that every time the data is sent, all the titles will be sent.

**Uncompressed Local File Size Limit**
This, measured in kilobytes, is the largest size of file that will be stored uncompressed as a *Sent File* or email attachment. If the option to attach the file to the reporting email has been set, this sizing also determines whether the email attachment is compressed.

The system will not attach a file (compressed or otherwise) to an email if the file is more than 2MB. Leaving this field empty will mean that the file will never be compressed. Setting this to zero will mean that the file will always be compressed. When compressed, the file extension will be ".gz" and is not compatible with Windows Compressed Folders.

**Uncompressed Target File Size Limit**
This, measured in kilobytes, is the largest size of file that will be sent uncompressed to the target. Leaving this field empty will mean that the file will never be compressed. Setting this to zero will mean that the file will always be compressed. When compressed, the file extension will be ".gz" and is not compatible with Windows Compressed Folders.

**Withdrawn Folder**
If a Title is modified such that it is no longer included in the associated title set (for example, all the copies at the included locations have been deleted) and **Track Status?** is not set to No, then the record will be sent as a *Deletion* to this target system. This will be done without marking the title itself as a *Deleted Title* as it may be still required by other locations. When this occurs, the title will be placed into the folder that is specified in this field.

This is the only way to identify such titles without advanced searching and review of the title audit data. The link to the output format is deliberately removed so that, should a copy be re-acquired by one of the included locations, the title will be re-sent automatically to the third-party system as a new record.

### 7.2 Enhancements to the OLSTF import and export process

#### 7.2.1 New OLSTF Data Load options

The OLSTF import process has been extended to enable you to specify that, when a record match is found, it simply adds the holdings to the record already present in the system, without modifying the bibliographic data in any way.

Three new options have been added to the drop-down list in the **Modify Flag** field:
### Option Description

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add Copies for matching records</td>
<td>This will match an existing title record and process only the copy data, adding the copy to the title (provided there is no clash with the barcode). If an incoming record does not match an existing title, nothing of the incoming record will be processed.</td>
</tr>
<tr>
<td>Add new; Ignore matching records</td>
<td>This option will only add new title and copy records. If the incoming record matches an existing title, nothing of the incoming record will be processed.</td>
</tr>
<tr>
<td>Add new; Add Copies for matching record</td>
<td>This option will add new title and copy records, but will also add copies for matching records as per the first option above.</td>
</tr>
</tbody>
</table>

### 7.2.2 OLSTF Copies Note tags

The OLSTF import and export processes can now import to and export from the five Copies Note fields that were added in Service Pack 5.

The tags for a title import/export are **CN1** through **CN5**. For a copy export, the tags are **CP_CN1** through **CP_CN5**.

These tags can also be included in any output format records, notice format text field and any other places where Titles and Copies OLSTF tags can be included.
7.3 OLIB MARC Import / Export for Alternative Titles

The OLIB MARC import and export process have been extended to include 246 $b.

<table>
<thead>
<tr>
<th>Tag(s) Commonly Used</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>240</td>
<td>The tags utilized are those defined in the Alternative Title Types domain.</td>
</tr>
</tbody>
</table>

**Indicators**
- $a$, $b$, $c$, $d$, $e$, $f$, $g$, $h$, $i$, $k$, $l$, $m$, $n$, $p$, $r$, $s$, $t$, $x$, $y$, $z$, 2, 5

**Subfields**
- These subfields are imported and exported from the Alternative Title domain and linked to the Title being imported.

For the MARC21 notes on this tag, start here:

- Example value: '10 Sullary Potter and the Half-Blood Prince. Silvanis' |
- Notes: This subfield imports and exports from the AlternateTitle field in the Alternative Title domain.

This work has extended the MARC import and export handling for all tags appropriate for alternative titles.

7.4 Copying MARC variants and mappings

It is now possible to copy a MARC variant and its mappings to a new MARC variant.

Launch a MARC21 Mappings search.

Search for the MARC Variant (and tag if required) you wish to copy:
If you wish to copy all the mappings use the **Select All** option to select the MARC mappings to be copied. Here the MARC21 tag 100 is searched for. All records are selected using the Select All option.

From the Other Actions drop-down, select the **Copy All Mappings** action.

Select the MARC variant you wish to copy the mapping to. Here the MARC variant Training is selected.

You will receive a message to confirm that the MARC mappings have been copied.
You can also copy selected mappings if required.

Here the MARC21 variant 100 $a only is required for copying.

From the Other Actions drop-down, select the **Copy Selected Mappings** action.

You will receive a message to confirm that the MARC mappings have been copied.
This MARC Mappings layout has also been redesigned with additional headings and new labels to make the layout clearer.
7.5 OLIB Z Server runs a unique title number search

OLIB can be configured to support real time availability information to be sent to display to its users, via a 3rd party Discovery service, such as EDS.

Previously, a problem could occur whereby the 3rd party discovery service would issue a search request to an OLIB Z Server to request this real time availability information using a title number that matched more than one record. This was due to a truncated search being run, and resulted in the OLIB Z Server returning more than one record.

The OLIB Z Server has now been modified to run a unique search when it receives a title number search request (1=12). With the title number search now being a unique search, the OLIB Z Server will only return at most one record.
8. REPORTING and Alerts

8.1 OLIB Reports

The Reports domain in OLIB has been re-designed to enable it to be used as the primary reporting solution for OLIB.

The significant changes to the Reporting domain include:

- A Keyword Search to enable you to search for a report using a word or words anywhere in the report name, description, parameter prompt fields, email subject line, email body and more.
- Drop-down lists to aid selection of report parameters.
- Ability to preview and run the report on screen.
- Ability to record the previous report output.
- Scheduling of reports.
- To be able to generate a GETStream URL with the click of a button based on the report parameters.
- Availability of a selection of output formats, including as the email body or as an attachment in PDF, MS-Word, comma separated (for MS-Excel), or HTML.
- Incorporates rolling date capabilities and academic year configuration.
- Simplifies the method of delivering new reports via a Reports Repository.

The reporting features documented will only work in OLIB Web. WorldView has not been changed to support them.

The OLIB Reports section is located just below User Management in the OLIB Web Menu:
8.1.1 Where to find OLIB Reports

The OLIB Reports section has been moved and is now located below the User Management domain in the OLIB Web Menu:

The default search for the Reports domain is **All OLIB Reports**. This is a simple left-truncated, case-insensitive search on the reports’ names. For example, entering **ca** will list all reports whose report name begins with CA, the standard cataloguing reports.

Search options are available to list all reports in a specific domain such as Cataloguing, Circulation, Acquisitions, Collection Management, etc.

There is also a new **Keyword Search** to enable you to search for a report. The keyword search looks for the word or words entered anywhere in the report name, description, parameter prompt fields, email subject line, email body, header output, SQL To Run field, and footer output.

The fields that contribute to the OLIB Reports keyword index are defined in the OLIB Reports Index keyword index in the System Administration-Keyword Indexes domain. The contents of the OLIB Reports Index keyword index can be modified using the standard keyword index maintenance facilities in this domain.
8.1.2 Running a Report

If you know that the report you want to run is configured correctly and has all the runtime parameters correctly set, you can run the report from the Reports hitlist.

To do this, select the report to run and then choose the Run Report option on the Other Actions drop-down list.

![Run Report option](image)

This will run the report using the report parameters and output type already saved. The report will be emailed directly to the addresses present in the report.

To set or modify the report parameters, open the report record in modify mode. This can be achieved directly from the hitlist using the modify icon.

![Modify report options](image)

The report parameters are displayed on the Run Report sheet of the Reports layout.
Parameters can be entered either by typing directly into the parameter value field on the right, or by selecting from the parameter selection date picker or drop-down list field on the left.

Selecting a value in a parameter selection date picker/drop-down list will automatically copy the selected value into the parameter value field. Once the value is copied into the respective parameter value field, you can amend it manually.

**If the parameter selection field is a date picker**, the date you select will be copied into the parameter value field in the format required by the report and as indicated in the field label, e.g. Start Date (DD/MM/YY).

**If the parameter selection field is a drop-down list**, selecting an option from the list will add the key ID to the parameter value field. If the report is designed to allow multiple values, the drop-down selection will add the selected value to a comma separated list of values in the parameter value field.

**Mandatory parameter value fields will be highlighted** as such. In the above example, they are highlighted with a yellow background, although note that this will vary depending on how your OLIB system has been configured to highlight mandatory fields. You must enter a value in these fields before previewing or running the report.

All drop-down lists include a **Clear** option at the bottom to enable you to clear the parameter value field with a single click.

Some reports include parameters that are **free text value fields**, for example, CA013c – Sortable Accession List (for exporting to Excel) asks for a Start Shelfmark and End Shelfmark range. The parameters should be entered directly into these fields.

### Rolling dates

Some reports, for example, CI011 Hourly Circulation report, use a rolling date, such as Current Month Start, Current Academic Year Start, that can be selected from a drop-down menu. This avoids you having to edit the report parameters at the end of each month or year.
Selecting an option from the rolling dates drop-down list will present a parameter value in the form of an SQL clause, together with a description enclosed by SQL comment tags.

The date format specified here will be suitable for the report query and should not be changed.

**Academic Year options**

The default academic year runs from September through August inclusive. The default values are 01-09 and 31-08 respectively.

These dates can be configured if the Academic Year Start and End for your library are different.

A new **Reports / Email Configuration** sheet is available in **OLIB Defaults**.

These dates can be configured in the Academic Year Start and End fields if they are different from the default values.
When the start date is changed, you will see that the end date defaults to the day before the new start date. Also, the displays immediately to the right of the fields are updated.

The end date can be amended independently of the start date.

Choosing an Output Format

The Output Type field is used to specify how the report is exported.

Here the report can be exported as a HTML attachment or an HTML formatted email. Only targets suitable for the report are available to select.

Preview a report

To preview a report, click on the Preview Report button.

If this is the first time this report is being previewed, then you may need to click the Refresh option:

The report preview will be displayed in the field immediately in the preview panel.
A Preview Only entry will appear in the Report Run History field on the Report History tab. Repeated Preview actions will overwrite the existing Preview entry rather than generating a separate entry for each preview.

**Adding email addresses**

Before running a report, enter the recipient’s email address either straight into the **Email(s)** field.

This field is on both the **Run Report** sheet of the report layout and the **Report Scheduling** sheet.
Alternatively, you can select an Email List from the Email List field on the Report Scheduling tab.

Email Lists can be created from the OLIB Reports menu.

If you are using the Email(s) field, multiple recipients should be entered with a semi-colon between email addresses. Recipients can be CC’d or BCC’d using the cc: or bcc: prefix.

For example:
John.smith@myorganisation.org ; Richard.williams@myorganisation.org ;
c: ben.matthews@myorganisation.org ; jane.edwards@myorganisation.org

In this example, the report will be sent to John.smith@myorganisation.org and Richard.williams@myorganisation.org in the To list, with ben.matthews@myorganisation.org and jane.edwards@myorganisation.org in the CC list.

To run a report, click the Run Report button. The report will be run and sent to the specified recipients. In addition, an Emailed OK entry will be included in the Report Run History field on the Report History tab.
8.1.3 Generating a GETStream URL

Clicking on the GETStream URL button will populate the GETStream URL field with the GETStream URL for this report.

This will allow you to output the report directly to Excel using the GetStream functionality available from OLIB Service Pack 7.

Parameters with dynamic values (e.g. rolling date options such as “Previous Calendar Year Start” and “Previous Calendar Year End”) are not included in the GETStream URL as their values will be generated at runtime.

The GETStream URL button will also update the GETStream URL in any Excel Template that is attached to the Report Definition.

GETStream reports in a browser
To run a GETStream report in a browser, copy the GETStream URL to your clipboard and paste it into your browser’s address bar.

This allows you to view the content of the GETStream report quickly and easily.
8.1.4 Running a report with an Excel template

If the report has an Excel template attached, this can be found at the top of the attachments list:

![Image](GETStream URL button)

Clicking on the GETStream URL button will not only populate the GETStream URL field, but also update the Excel template with your GETStream URL and the currently set static parameter values.

Downloading and opening the Excel template will then require acceptance of two security measures, firstly to enable editing:

![Image](Enable Editing)

and secondly to enable external data connections:

![Image](Enable Content)

Once these have been accepted, the spreadsheet can be used to retrieve the data from OLIB by selecting **Refresh All** from the **Data** ribbon:

![Image](Excel ribbon with Data tab selected)

You may then be prompted for suitable login details.

![Image](Windows Security dialog box)

The spreadsheet can also be saved to your PC for simple re-use or circulated to colleagues.
8.1.5 Running a report in Excel without an Excel template

If the report does not have an Excel template attached, you can still run the report in Excel.

To do this, copy the GETStream URL to your clipboard from the GETStream URL field.

Once copied, the report can be viewed in Excel by using the **From Web** option on Excel’s **Data** menu.

![Excel Data menu with From Web option](image)

Depending on the browser you are using, a New Web Query wizard may be launched with your browser homepage pre-selected.

Replace this address with the URL copied to the clipboard from OLIB Web and click Go.

If this report requires authentication, it will be requested.

![Windows Security dialog](image)

Enter the OLIB Web login details.

After a few moments, the report content will be previewed. The following example shows the result from the CA013c – Sortable Accessions List report:
Clicking on Import will then ask for a location in the spreadsheet in which to start the data.

Select a suitable starting point and click OK.

The data will then be imported into the spreadsheet. The data source is saved with the spreadsheet so that it can be subsequently refreshed by simply clicking on the Refresh All button on the toolbar.

Optionally the data can be set to refresh automatically when the spreadsheet is opened.
8.1.6 Scheduling a report

The new Report Scheduling sheet on the Reports layout allows you to schedule a report to be run at a particular time, for example, daily, weekly or monthly.

Before scheduling a report, enter the recipient’s email address either straight into the Email(s) field or as a mail list in the Email List field.

```
Email(s) christine.willott@ocl.org
```

Note that if there are any email addresses in the Email(s) field, the report will only be sent to these recipients. Thus, if you enter email address in Email(s) and if you also specify an email list in Email List, the email list will be ignored.

Next, select the required frequency (Daily, Weekly or Monthly) in the Frequency Type field and enter a value in the Frequency Value field. For example, select Monthly and 1 to set the report to run every (1) month.

```
Frequency Type Monthly
Frequency Value 1
```

The Once option in the Frequency Type drop-down list can be used to schedule a report to run once. Either set the date on which it should run in the Start/Next Run On field, or leave this blank to schedule the report to be run the next time the background report job runs. Once a report that is scheduled as a Once report has been run, Enabled will be set to No.
Start/Next Run On: select a date from the calendar on which to start the report generation schedule.

If this field is left blank, the report will be run the next time the background report job runs (usually every 15 minutes) after the report is saved as Enabled.

Enabled: set to Yes to activate the report schedule.

Email Body: enter some text to include a covering note in the email that is generated.

8.1.7 Viewing the Report History

Each time a report is run or previewed, it is stored in the database. Previous versions of the report can therefore be viewed at any time in one of two ways:

As an attachment: The report's Attachments list displays the 13 most recent reports.

To view a previous report, simply select it from this list, and depending on the report type, it will be opened in Word, your PDF viewer or your default browser.

Note: The Attachments option is only displayed when the report is displayed in modify mode.

From the Report History Sheet: The Report Run History field on the Report History sheet lists the previous executions of the report.
Details included are the date and time the report was run, the user who requested the report, the status and the report parameters.

You can click through to the Report History record to see a more detailed view of the report parameters, with links to the Object, User and/or Email History record pertinent to this execution of the report.

### 8.1.7 Configuring the Report History

A Library can also decide for how long they wish to maintain the report history. This is configured on the Report History sheet of the Report layout.

The **No. Results To Retain** field specifies how many past executions of this report should be retained.

By default, the last 53 executions will be retained.
The **No. Attachments To List** field indicates how many attachments are listed in the report’s Attachments list.

If nothing is entered in this field, the default number of attachments to list is 13.

### 8.2 OLIB Reports Designer

If you have experience in SQL and report writing, new reports can be written from scratch using the OLIB Reports Designer.

When creating a new report that is not available to retrieve from another system, click **New Record** from the Reports domain hitlist. A report Parameter Type will need to be selected to change the report layout to the appropriate layout for the parameter type you selected.

Next the report definitions will need to be configured. This includes creating the following:

- Report description fields
- Report parameters
- Report SQL

A separate How-To document is available on OLIB Reports which describes in detail how to run, schedule and create reports from the Reporting domain.

### 8.3 OLIB Reports Exchange

An OLIB Reports Repository will be hosted and maintained by OCLC. A list of the reports in this repository will be maintained and made available to OLIB customers, together with URLs to retrieve the report definitions.

The list of reports in the repository can be viewed in your browser using the following link:  
[https://reports.olib.oclc.org/repository/GETReport.jsp?reportno=-33](https://reports.olib.oclc.org/repository/GETReport.jsp?reportno=-33)
You can limit the report listing to reports that were added or modified since the beginning of a specified number of months ago required.

To do this add the syntax `&param2=1` to the end of the URL. This will list reports that were added or amended since the beginning of the previous calendar month:

https://reports.olib.oclc.org/repository/ReportStream.jsp?reportno=-33&param2=1

Similarly, adding the syntax `&param2=0` will list reports that were added or amended during the current calendar month. This will enable you to more easily identify recently added of modified reports in the report repository, for example.

A listing of the reports held by your library can be retrieved from the following URL:


replacing https://ow-myorg.olib.oclc.org/olibweb/ with your organisation's OLIB Web URL.

### 8.3.1 Getting the URL

If you have requested a specific report, you will be advised of the URL which you can then use to retrieve the definition from the OLIB Reports Repository. This may be from the OLIB Support Desk in response to a support call.

If you have identified the report yourself from the repository, you can copy the URL directly from there.
For example, to retrieve the **CA013c – sortable Accessions List (for exporting to Excel)** from the repository, copy the link from the **Right-click and copy link location to get this report hyperlink**:

![Image of Right-click and copy link location to get this report hyperlink]

### 8.3.2 Download the report

Once you have copied the report’s URL to your clipboard, you can use it to download the report itself into your OLIB system.

From the Reports domain hitlist (not a report record display), click **New Record**.

![Image of New Report interface]

Paste the report’s URL into the **Definition URL** field and click **Save and Continue**.

OLIB will then retrieve the report from the repository and it will be ready for you to add the required report parameters, preview, run and / or schedule.

![Image of Run Report interface]

If the retrieved report has a combination of parameter types that is not compatible with any existing report in your system, then a new layout will be automatically generated for this report type when the report is downloaded from the repository. This layout is not immediately
available, so the new report will continue to be displayed using the New Report layout, and the following message will be displayed:

![OLIB Web]

The report has been added to your system. Please log out and log back in again to use it.

Simply log out and log back in again, then re-display the new report, and it will be displayed using the new layout.

### 8.3.3 Updating a report

It is possible that the requirements for a report change over time, or a bug is found in the report. In such cases, the report will be modified or corrected in the OLIB Reports Repository. When you receive notification of updates to existing reports, you can update your copy of the report.

From the OLIB Reports hitlist, select the report to be updated. From the Other Actions box,

select the **Refresh Definitions** action:

The Refresh Definitions action can be used on multiple reports at a time.

### 8.3.4 Sharing reports between institutions

The OLIB Reports Exchange functionality can also be used to copy reports from one OLIB system to another, so that OLIB users can share reports amongst themselves.

A listing of the reports held by a partner OLIB library can be retrieved from the following URL:


replacing https://ow-anotherorg.olib.oclc.org/olibweb/ with another OLIB library organisations’ OLIB Web URL.
You will be able to download new and modified reports from this repository straight into your OLIB system.

8.4 New Normalisation Test Report

It is now possible to verify that the Normalise Services are working.

A new system report named **SYS006 - Normalisation Test** is available.

Modify the report and click the button to **Preview** it.

OLIB shows this brief output:

| Normalisation Test | Input: "What does this normalise to?" | Result: "what do thi normalis to" |

The **Result** shown above indicates that Normalisation is working and how the **Input Value** was normalised.

The report can also be utilised to check the normalisation result for any other text, as a means of checking a normalised value based on the rules that are in effect.

For example: here the text *the basics of banking is in the CATALOGUE* is entered in the Input value field for checking.
Note: OLIB retains your test text. Re-enter the original text if needed.

8.5 New Potential Duplicate Titles Report

OLIB Reports includes a new catalogue report, **CA015 – Potential Duplicate Titles**, which lists all titles with one or more duplicates.

A duplicate title is defined as having identical first 50 characters of the normalised title and subtitle.

The “main” title is the one with the lowest title number, i.e. the one that was entered first in the database. Duplicate titles are listed under each main title. The title numbers are included in the report as well as the titles.
Media types can be excluded in the report parameters. The report is configured to exclude the BVOL, LLFPT, NONC, _RSRC and SISS media types by default.

8.6 Changes to the User List Of Loans notice

The User List Of Loans notice has been changed so that it is now sent to users a given number of days in advance of the user's membership expiry date, irrespective of whether they have items on loan. Previously it was only sent if the user had at least one item on loan.

The notice text should be amended to reflect this. For example:

“Your membership will expire on <EXP>. If you have any items on loan, these will be listed below. Please ensure that they are returned before you leave.”
8.7 Changes to User Account Update Alert notice

It is now possible to configure a User Account Update Alert notice so that, if a user’s location is changed, an alert is sent to the user’s previous location to notify library staff that the user has registered with a different location. This way the previous location can archive any user records as appropriate.

On the user account update alert, library locations must add their location key ID to the Locations field. If more than one location is added, the location key ID must be separated by a semi colon, for example, ;LOC1;LOC2;

Set the Transmit Type field to **To user’s former location**

Enter the email addresses of the library staff to which the email should be sent in the **To List** field.

Set **Fields To Watch** field to **XLOC** (no semi-colons, double quotes or anything else - just XLOC.)

Set **Enabled** to **Yes**.

**Note:** If you don’t include the email address in the **To List** field and set the transmit to **To user’s former location**, the notice will not be sent. The email address field in the Location record is not referenced by this function.
8.8 Broadcast notice can be set to be sent to current or expired users

There is now an additional option on the Broadcast Notice which allows a library to specify whether the notice is to be sent to users with a status of Current or Expired.

A user’s membership status is deemed expired if their expiry date is prior to the current date and time. Otherwise their membership is deemed current.
9. OPAC

All changes described in this chapter are for FOLIO only unless otherwise specified.

9.1 Straight to User Search

You can now build a 'Straight To' search that goes to a User record.

As with other 'Straight To' links, this link can be created and included in an email, on an intranet page or in a word document.

Simply add the user barcode to the end of the Folio URL using the following syntax:

?barcode=xxxx

For example:

http://myolibsysteo.oa.oclc.org/app900sp11ofcgi?barcode=100382

When the reader of the document clicks on the link, they are taken directly to the User’s record in Folio.

If the User has a password on their account, or if Folio is configured to require a password, then the login menu will be presented and the login will not complete unless the correct password is entered.

Normal rules will be applied for temporary passwords, User Account Expiry dates and Ban settings.
9.2 Exclude Authors and Subjects from the Facets

It is now possible to mark an author in such a way that it is not included in the Folio facet list even though it is linked to titles in the hitlist.

This might be useful to hide electronic providers such as Ebrary, who may have been entered on OLIB as an Author.

A new Yes/No attribute in the Names domain has been included called Exclude from Folio Authors Facet. Tip: add the attribute with Style of Edit Box.

The system administrator would need to add this field to the Authors (Names) layout using Layout Manager. Here we have added the field to the Controls sheet of Authors (Names) layout.

Controls sheet

Search for the relevant Author and set Exclude from Authors Facet? = Yes.
This will exclude that specific Author from the Folio Author facet.

### 9.3 Displaying Harvard Citation on Hitlist or Replacing Title Details

The OLSTF tag `THARVARD` was added in Service Pack 9 so that a record can be displayed in the OPAC, exported, or otherwise output in Harvard Reference format without having to build a complex Harvard output format. This Harvard reference could be configured to be displayed on the title details screen and as an email output.

Service Pack 11 extends this functionality so that the Harvard reference can be displayed on the Title hitlist screen. The Harvard format citation display can be displayed instead of the title on the details screen.

To configure the hitlist display go to **Data Exchange Reference Data** > **Output Formats** and search for, e.g. *OPAC title hitlist*.

For example, in the Format Text field, here is the default **Format Text** for *OPAC Title Hitlist Display Attribute 1 for Books*:

```xml
<TI>#STNN# : <ST>#/STNN##EDNN# (<ED>)#/EDNN# #TIPD1NN# (<TIPD1>)#/TIPD1NN#
```

This is used for the first line of the title hitlist display.

Replace this text with `<THARVARD>`
3. This will display Harvard citation format in the hitlist instead:

1. Go to OPAC> Configuration Settings.
2. Use the Folio Configuration Settings by Setting to search for g_hitlist_title_display2:

To remove the second and subsequent lines of the title hitlist display:

1. Go to OPAC> Configuration Settings.
2. Use the Folio Configuration Settings by Setting to search for g_hitlist_title_display2:
Change the Value field to:

```
"'<br/>'"  
[open double-quote; open single-quote ; <br/> ; close single-quote ; close double-quote]
```

The Harvard format citation display can also be displayed instead of the title on the details screen.

This is achieved by setting Format Text to `<THARVARD>` in the relevant OPAC Title Details Title Display Format 1 records. You should also exclude all the entries in the tidetails array.

The standard Folio title details display:

```
Career change : New working directions
```

Authors: MORPHY, Leslie
Details: ISBN: 0360218244
Format: Book
Subjects: Curriculum vitae (CV)s; Interviews; Job hunting; Obtaining employment
Classmark: 331.128
Google Books: Check this book on Google Books

This monograph follows the configuration in the Output Format record:

-1107 OPAC Title Details Title Display Attribute 1 for Titles other than Issues

To change the Title details Title display:

1. Go to Data Exchange Reference Data> Output Formats
2. Search for e.g. OPAC title details:

```
-1107 OPAC Title Details Title Display Attribute 1 for Titles other than Issues
```

3. For monographs, modify record -1107 and enter `<THARVARD>` in the Format Text field:
The monograph will now display in Folio as:

```
```

To exclude any repeated data from other fields in the display, e.g. Publication Details, you exclude the entry in the tidetails array (all are visible in g_title_details):

1. Go to OPAC> Ini Files / GCBs and search for g_title_details.
2. In the tidetails array entries, e.g. for pub, set Include=N. (Actions – Exclude)
When you set Include = N, Folio displays the record as follows, with the separate Publication Details field removed:

```
```

Authors: MORPHY, Leslie
ISBN: 0960218244
Format: Book
Subjects: Curriculum vitae (CV’s); Interviews; Job hunting; Obtaining employment
Classmark: 331.128
Google Books: Check this book on Google Books
9.4 Delete Folio Reviews in OLIB Web

Users can rate and review items in Folio. These are not visible until library staff approve them in OLIB Web. This requires the OPAC Reviews field to be added into the Titles layout.

It is now also possible for library staff to Delete reviews in OLIB Web:

1. Modify the Title record
2. Select the review in the OPAC Reviews list box:

   ![OPAC Reviews List Box]

3. Select the Delete option
4. Confirm that the review is deleted and save the changes:

   ![OPAC Reviews List Box - Deleted]

9.5 Editing width and sequence of the Copies Availability table

It is now possible to change the width and sequence of the columns in the Copies table on the title details screen.

![Copies Availability Table]

This can now be implemented with two changes:

1) Using the “cfg_copy” option in the “tidetails_tabs” array
2) Enabling a suitable output format of the type “Folio Title Availability Content”. A sample Output Format is provided, Default Folio Title Availability display.
This is delivered as Excluded, but provides the values that are used as the default format as follows:

**Domain:** Copies (Required)

**Type:** Default Folio Title Availability display (Required)

**Media Type:** The media type for which this output format is pertinent. If not specified, the format will apply to all media types where there is no format specifically nominated.

**Location:** The user or SSi location for which this output format is pertinent. If not specified, the format will apply to all locations where there is no format specifically nominated.

**Call Ref:** A mandatory field used, in the example, to provide some functional description.

**Header Call:** A list of column headings for the table to show in Folio. One heading per line. Optionally a heading may start with a width, e.g. 10% Barcode. If, as with the default, no widths are specified then the width of the table is determined by the browser and the content of each column at the time the information is displayed.

**Footer Call:** A SQL clause to replace the default “ORDER BY” clause. This can be used to list the user’s location’s copies records first or to sort by different criteria.

**Format Text:** A standard configurable output format value with OLSTF Tags from the Copies domain. There are two special handlers:
Copy Status: {status: ... s} : This is used to identify the status value for self-issue processing If not present, it will be added to <CP_CZD> or <CP_CZSD>

Location profile: {locprofile: ... l} : This is used to identify the hyperlink for the Location Profile If not present, it will be added to <CP_LOLD> or <CP_LOSD>

On the second sheet **Export Generation**, the **Enabled** setting is used to determine whether this output format should be in effect.

**Export Generation Details**

<table>
<thead>
<tr>
<th>Saved Search</th>
<th>Exclude Record Source</th>
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<tbody>
<tr>
<td>Title Set</td>
<td></td>
</tr>
<tr>
<td>Folder</td>
<td></td>
</tr>
</tbody>
</table>

Accession Date Between: __________ And __________

Accessioned In The Past: __________ Days

Frequency: [ ] Enabled [ ] No

<table>
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<tr>
<th>Start On</th>
<th>Last WorldCat API Call</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Output On</td>
<td></td>
</tr>
<tr>
<td>Output Next On</td>
<td></td>
</tr>
</tbody>
</table>

Changes to this output format take immediate effect in Folio.