# How to Use the Layout Manager in OLIB Web

## DOCUMENT DETAILS

<table>
<thead>
<tr>
<th>Deliverable Ref/filename</th>
<th>Intranet/Operations/Training/How to/How to Use the Layout Manager in OLIB Web.docx</th>
</tr>
</thead>
<tbody>
<tr>
<td>Author(s)</td>
<td>Derek Taylor</td>
</tr>
<tr>
<td>Version</td>
<td>1.0</td>
</tr>
<tr>
<td>Status</td>
<td>Released</td>
</tr>
<tr>
<td>Date</td>
<td>12/12/2013</td>
</tr>
</tbody>
</table>
# Document Control

## DOCUMENT HISTORY

<table>
<thead>
<tr>
<th>Version</th>
<th>Version date</th>
<th>Responsible</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>0.1</td>
<td>20/11/2013</td>
<td>Derek Taylor</td>
<td>Draft for review</td>
</tr>
<tr>
<td>0.2</td>
<td>06/12/2013</td>
<td>Derek Taylor</td>
<td>Complete draft for review</td>
</tr>
<tr>
<td>1.0</td>
<td>12/12/2013</td>
<td>Derek Taylor</td>
<td>Updated after corrections</td>
</tr>
</tbody>
</table>

## DOCUMENT REVIEW

<table>
<thead>
<tr>
<th>Version</th>
<th>Review Date</th>
<th>Reviewed By</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>0.2</td>
<td>11/12/2013</td>
<td>Christine Willott</td>
<td>Minor corrections</td>
</tr>
</tbody>
</table>
How to Use the Layout Manager in OLIB Web

Derek Taylor

Contents

1. Introduction 4
1.1 Glossary of Terms 4

2. Modifying an Existing Layout 5
2.1 Modifying an Existing Layout 5
2.2 Moving a Control 9
2.3 Adding New Controls 10
2.4 Publishing the Draft Sheet 14
2.5 Adding Fast-Forward Button Fields to Layout 14

3. Managing Layouts from the Menu 15
3.1 Editing Layouts from the Menu 15
3.2 Managing Infotypes 19
3.3 Settings Layouts as Default 21
3.4 Adding Existing Sheets to Layouts 24

4. Creating a New Layout from Scratch 27
4.1 Planning the Layout 27
4.2 Creating the Layout 28

5. Styles 37
1. Introduction

The Layout Manager is the screen design tool used to configure details screens in the OLIB Administrative client. Before the release of OLIB 9.0 all Layout Manager work had to be carried out using a WorldView client. OLIB 9.0 saw the introduction of the Layout Manager to OLIB Web. This ‘How to’ guide describes how to use the Layout Manager in OLIB Web.

1.1 Glossary of Terms

**Attribute**  
A field in the OLIB database. The attribute bar available for each domain lists the fields from the OLIB tables that relate to that domain.

**Control**  
Used to describe any feature on a layout. Controls may be either labels or attributes.

**Hide if Null**  
Whether the control should be displayed if no data is present. Note that all controls display when a record is in modify mode.

**Infotype**  
The type of information to be displayed. In the bibliographic area this equates to Media Type, but for layouts in the Copies domain, for example, each Copy Category is an Infotype.

**Label**  
A feature used to add headings, labels and general text to layouts.

**Layout**  
The set of sheets (or a single sheet) which is used to display a single record in the full Details View.

**Permissions**  
The Users and User Groups allowed to use a layout.

**Privileges**  
The Privilege level set against each attribute is determined by the system and controls what level of user can see that attribute and data displayed in it.

**Properties**  
The settings, such as size and position, of a particular control, sheet or layout.

**Sheet**  
The component parts of the layout, e.g. the Users Layout includes 7 sheets - Main Details, Circulation History, Email Notice History, SMS Notice History, User Services, WebView Authentication and Update Audit Trail.

**Style**  
The graphical style, such as colour and font, applied to a particular control.
2. Modifying an Existing Layout

It is now possible to create, modify, manage and delete layouts in OLIB Web.

This has been achieved partly through the enabling of modifications in the Admin Client Configuration domains and partly by the introduction of several new interface features for editing the fields and labels on a sheet.

Note that, due to the technological differences between WorldView and OLIB Web, a new workflow is required for modifying Layouts in OLIB Web, involving the creation of Draft sheets that are only visible to the user who created them until the work is complete and the changed sheet is published.

You must be logged into OLIB Web as a system administrator to be able to modify or create layouts, sheets or styles.

If you modify an existing layout when your OLIB system is next upgraded that layout is backed up and restored with *** as a prefix (so General becomes ***General). This avoids layout changes from being over-written during upgrades.

2.1 Modifying an Existing Layout

Display a record using the layout which you wish to amend. In this case we are going to move the Title field to the next row and add the Initials field to the Users layout. Logged in as a system administrator you will see **Sheet Actions** at the top of every sheet of the layout.

The process in OLIB Web is to create a draft of the sheet and to edit the draft. Click **Create Draft**.

When you create a draft the draft sheet is added to the layout as the last sheet.

Move to the new draft sheet and choose **Modify Sheet**.
The sheet will be displayed in modify mode.

You can select controls singly or in groups by clicking on them. There is no requirement to hold down the shift or control key when selecting multiple controls.

You can tell that controls are selected as they will display with a pale blue background.

You can also select a whole row of controls by hovering your mouse in the row concerned (but not on a control) and clicking in the box outline with green dashes which will appear.

If a single control has been selected the properties will display in a pop-up box and can be used to alter that control’s properties. This properties box will not display if more than one control is selected. The properties shown are the most commonly used properties.
Text

The text which is to appear if the control is a label. If the control is an attribute this cannot be changed.

Attribute

The name of the attribute which will be used to display data in this control.

Style

The style to be used for this control.

AutoXPos

Where the control is positioned in relation to the previous control.

Stretchy

If this is set to Yes the control will extend across the screen and automatically resize to suit the screen space available.

Width

The width of this control.

X Pos

The exact position on a sheet may be defined with this feature.

Right Margin

The margin between this control and the next to the right.

Bottom Margin

The space between this control and the next one below.

If you want to see (and alter) all the properties for an attribute you can click on the Control Details link and all the options are displayed.
If you want to change any of these properties then you will need to modify the record.

Fields which can only be set using this details display:

**Height**
The height in which the control will be displayed. 1 equates to a single line display regardless of the number of rows of data present.

**Auto Height**
Enable the Auto height facility, which will allow the data display to expand up to the setting entered for Normal Mode Height.

**Modify Height**
This setting applies to fields in which you type data e.g. Title or Abstract and allows you to see all the data entered. The height
has no effect on fields which are linked via related searching e.g. Subject or Author.

**Hide If Null**
Tick this box if the control is not to be displayed if there is no data in it. This feature does not apply in modify mode.

**Mandatory**
Tick this box if you want the control to be a mandatory data entry field.

**Force Case**
Allows the case, e.g. upper case or lower case, of the text which is to appear when this control is used, to be set.

**Help**
The Help Text to appear when this control is used.

**Accelerator Key**
This controls the short cut keys used in WorldView. You should not configure this here – but use the key bindings property in the Layout Manager in WorldView.

**Accelerator Modifier**
This controls the short cut keys used in WorldView. You should not configure this here – but use the key bindings property in the Layout Manager in WorldView.

**Web Accelerator Key**
This controls the short cut keys used in OLIB Web. It will not normally be populated and should be set with care as the short cut keys may also be in use elsewhere in the browser for other functions.

**Web Accelerator Modifier**
This controls the short cut keys used in OLIB Web. It will not normally be populated and should be set with care as the short cut keys may also be in use elsewhere in the browser for other functions. The modifier would be, for example, the use of the shift key in combination with the function key shown in the Web Accelerator Key field.

### 2.2 Moving a Control

Here the label for the title field has been set to AutoXPos (position) as **Below** and the **Width** set to 170 (to match the Surname label). Close the properties by clicking on the red ‘x’.

![Image of control settings](image)

The control and the immediately succeeding control will now move to the next row on the sheet when the sheet rebuilds.
2.3 Adding New Controls

It is possible to add new controls one at a time but it is probably quicker to copy existing controls and then amend the copies. If you wish to add a single new control then select an existing control.

Navigate to the bottom of the sheet and click on the New link.

A form to define the new control will be displayed.

You can complete this form and add the new control and it will be inserted after the selected control. If the control is a label – then add the words you want to display into the Text field. If the control is to display information from a particular field in the database – then choose that fields from the list of attributes. Complete the other fields as required – don’t forget to choose the style which is consistent with the styles in use in other fields in that layout.
It is quicker to copy an existing control or controls and edit the copied controls. As I want to add the Initials field and a label to the sheet just below the forename field I've select the Forename label and the Forename (bo_forename) attribute.

Scroll down to the bottom of the sheet and choose the **Create Close Copy** action.

The new controls will appear immediately after the copied controls.

In this case we want the new controls to be after the Title controls we moved earlier. Select the two controls.

Scroll down to the bottom of the sheet and use the **Down** option. **Down** means move the selected control(s) one position down the sheet. In this case we need to click on **Down** option twice.

The controls will now be positioned after the title controls.

The first thing is to adjust the Width of the **Title (bo_title)** attribute so that the controls line up. You may also need to alter the Right Margin field to align fields.
Now edit the **Text** in the label field to read Initials.

Finally set the **Attribute** in the attribute field to display the Initials data.
The fields are now correctly positioned and will contain the correct data.

Click **Save and Close** and then close the sheet record. Once the sheet has been closed the **Main Details (Draft)** sheet shows the changes.
To delete a control from a sheet – just select it on the draft sheet and use the **Delete** option at the bottom of the sheet.

### 2.4 Publishing the Draft Sheet

Once you are satisfied that the changes you have made are complete then choose **Publish** in **Sheet Actions**.

The draft sheet will now replace the original.

### 2.5 Adding Fast-Forward Button Fields to Layout

Fast-forward buttons are used on a number of layouts in OLIB as a quick way of adding data to the system. For example the method of adding physical information is shown here.

In Layout Manager the fast-forward buttons have attribute names just like any other attribute and therefore they can be added to layouts (in an appropriate position in relation to the data entry and display fields, of course) in the same way as other attributes.

See Section 4.2 of this guide for a practical example of adding the fast-forward button and associated fields to a layout.
3. Managing Layouts from the Menu

In Section 2 of this guide we examined the process of modifying existing layouts from the normal display in OLIB Web. The Issue/Return/Renewals layouts can only be modified when accessed from the Layouts search in the Admin Client Configuration section of the menu because this layout is only ever displayed when editing records and therefore it can only be displayed in modify view (and you cannot edit a layout when viewing records when it is in modify mode).

You also need to access layouts from the menu to set the order of the Sheets, to add Infotypes to Layouts, to make Layout the default for particular Infotypes and to create new Layouts.

3.1 Editing Layouts from the Menu

To alter the Issue/Returns/Renewals layout (or the parallel In Transit layout) launch a Layout search from the Admin Client Configuration section of the menu.

Search for Issues/Returns.

Click on the Issues/Returns/Renewals Layout.
Navigate to the **Sheets** sheet of the layout.

We now need to create the draft sheet for editing – so select the **Issues/Returns/Renewals** sheet and choose **Create Draft** from the Actions available.

You will need to refresh the screen to see the new draft sheet.

In this example we are going to add one of the new fields (User’s email address) to the sheet. Click on the draft sheet record to get to the details view.
Now move to the **Controls** sheet of the layout.

Click on **Modify Record** to display this sheet in modify mode so that you can see it as it would be displayed in operation.
Using the techniques learnt in section 2.3 of this manual, select two convenient fields and the copies will be added to the layout just after the copied fields.

Now click on each of these fields in turn. Alter the label text.

Apply the new attribute for **User Email (iss_mailid)** to the 2nd control.

The new fields now look like this:

Save and close the record. Select the draft sheet and choose **Publish** from the list of Actions.
The draft sheet will now replace the original sheet.

When you scan a user with an email address into the Issue/Returns/Renewals screen the email address will appear.

Any layout can be edited from the menu as shown for the Issues/Returns/Renewals layout – but it is probably easier to edit them with a record displayed as shown above in Section 2.1 of this guide.

### 3.2 Managing Infotypes

If you need to ensure that records with different Infotypes can be displayed with specific layouts you may need to add those Infotypes to the layout. Search for the layout from the menu.

Click on the layout you wish to edit to display the details screen. Here we have selected the Copies layout.
Click on the **Info Types** sheet.

Modify this record and select the 1st **Infotype** in the **Possible Info Types** list. Note that you can only add one **Infotype** at a time.

Use the **Attach** action to link the **Infotype** to the layout. Repeat this process until all the **Infotypes** required have been added.
Save and close the record.

### 3.3 Settings Layouts as Default

You can set specific layouts as defaults for specified **Infotypes** for the system. This is particularly helpful if you want all your colleagues to use the same layouts. Individuals can still change their default layout in the normal way when using the system.

To set a layout as default for all users for a specific infotype – edit the layout and select an **Infotype**.

Use the **Set/Clear Default** action to set a default (or to clear it if already set).
If a user has selected a specific layout as their default this will be shown on the **Info Types** list in the default column.

<table>
<thead>
<tr>
<th>Info Types</th>
<th>InfoType</th>
<th>Default</th>
<th>User</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>BOM</td>
<td>Y</td>
<td>Taylor, Derk</td>
</tr>
<tr>
<td></td>
<td>POM</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Select the record linked to a user and use the **Set/Clear Default** action to clear the default.

Now select the **Infotype** not linked to a user and set it as default.

Now select the **Infotype** record linked to the user and delete it.

You will be asked to confirm this action.

Now you only have one record for that **Infotype** for that **Layout** and it is set as default for all users.

However, it may be that the user has already set their own default on another layout. Here we can see that Derek Taylor has the **General** layout as his default.
Looking at the **General** layout we can see that it is not Derek's default.

This is Derek's default layout (**General**).

Here the **General** layout is set as Derek's default.

Here the default setting is removed from the ***General layout.

The anonymous (or all users) default should also be removed.

Next time Derek logs into OLIB Web and displays a book record his default is now **General**.
3.4 Adding Existing Sheets to Layouts

You may have developed your own cataloguing layouts and wish to take advantage of new features in OLIB which are on separate sheets. For example you may want to add the Audit trail sheet to your own layout in use for cataloguing.

The layout this is to be added to is the ***General layout.

Launch a Layouts search from the Admin Client Configuration section of the menu and search for ***General.

Click on ***General to display the details view.
Click on the **Sheets** tab to show the sheets linked to this layout.

Now modify this record.

Click on the **Search** link to launch a search for sheets which can be added to this layout.

The search defaults to showing all sheets for that domain (Titles) and if this is a large number of sheets to work through you could add audit trail as a search term in the Enter the Sheet Name field.

If you are happy that this is the correct sheet – then use the **Insert** button to add it to the layout. If you are not certain you can check it in the details view first.
The sheet is now added and if you have completed your work you can click on **Save and Close**.

If you want to re-order the sheets on any layout – then, with the layout in modify mode, you can select a sheet and use the Up or Down options to resequence them.

Once you have finished this sheet is now immediately available on the ***General layout for viewing records.***
4. Creating a New Layout from Scratch

4.1 Planning the Layout

Prior to creating any new layouts it is essential to design the layout first on paper.

Decide upon:

- The domain of the layout.
- The function of the layout - is it for viewing or for printing?
- The name of the layout and the name/s of the individual sheet/s.
- The number of sheets within the layout.
- Do any new styles need creating for either labels or displaying data?
- Who will use the layout? This will influence permissions on styles and sheets/layout as a whole.
- The actual attributes/fields required and their positions on the sheets.
- Can you make use of any existing sheets from other layouts, as this will save you having to re-create them yourself?

Example

A new cataloguing layout for Internal Reports is to be created. This layout will have 1 new sheet – Internal Reports Main Details. It will also use the Control and Audit Trail sheets from the General layout. As the reports are held as links to pdf documents the Objects attribute will be needed so that they can be linked to the OLIB catalogue record. It is in the Titles domain and will use existing styles. It will be used by all staff in the Librarians user group.

Configuring a new layout can be a repetitive task. However, there are several methods that the experienced user can employ to speed up the process.

Adding Labels and Attributes

- Produce a rough design on paper first – list all the attributes required.
- Once you have added one or more controls to a layout – use the create close copy to add similar controls.
- Now apply the control properties to give each item its exact position, style, etc.
- Make use of existing layouts to check the properties of special controls like the fast-forward buttons.

Points to note:

- The normal heading on OLIB Layouts is a Heading style.
- The normal styles used in the body of OLIB Layouts are Edit Box and Label.
- Use the Hide if Null function if empty fields are not to be displayed on the layout.
- Use the Mandatory setting on Control Details to set fields which you want to be compulsory.
- Try to restrict the number of controls on a layout to those which will fill one screen to minimise the use of the scroll bar when viewing information.
4.2 Creating the Layout

Launch a **Layouts** search from the **Admin Client Configuration** section of the menu and create a new record using the ‘New Record’ icon.

Complete the **Domain** and **Name** fields. There is no requirement to complete other fields.

⚠️ At this point you must save the layout before opening it again for editing. The act of adding a sheet to a layout does not automatically save the layout and your work will be lost if you do not save it at this point, although when you save the sheet itself that will be retained, but not linked to any layout.

Search for your layout again.

Open the layout record in the details view and modify it.
Move to the Sheets tab of the layout record.

Click on the New link and create your new sheet.

If at any point you need to save and close your sheet (maybe because you don’t have time to complete the work) you will need to use the process of creating a draft sheet to complete your editing work and then publish the draft to replace your original part-completed sheet.

Give your sheet a Name and Label. The label appears on the sheet’s tab when it is used. It is advisable to use a name which will make it easier to find the sheet for editing in the future. The Indent and Top Margin fields should be set to 10 to be consistent with other sheets in the system.
Now move to the Controls tab on the sheet record. You will see an empty sheet ready for you to start your design.

Click on the New link and create your first control. Here a sheet heading has been created.

Save and Close this control record.

Once you have added a few controls you may find it quicker to copy the controls you have added and alter the properties of the copied controls.
If the you need to set any properties which are not listed on the pop-up list of properties shown here – then click on Control Details from the pop-up list to set properties like the Height of the field.

Here I have set the **Height** to 2 in case the title is very long and will not fit in one line.

Adding the quick entry fields in titles (which use the fast-forward button for simplified data entry) is quite complex and so the properties of each control are detailed here.

The **Physical** label – note that the **Bottom Margin** for this field (and all others in this row) should be set to 1.
The **Physical Entry** field.

The **fast-forward** button.

Note that the attribute name – all these fast-forward fields are filed under **Add** in the list of attributes. You should also set the text to `>>`, the style to **Double-Arrow Button** and the width to **20**.

The **Physical Info** attribute. Note that this has the **AutoXPos** set to **Fixed** and the **X Pos** is set to **170** to align it correctly.
The sheet with all the bibliographic fields added.

The Copies area of the layout has replicated the quick data entry method from the General layout.

If you know of another layout where a particular function has been set up – then view that layout to check the properties and attribute names before you set up your own layout.

Once you have finished your design then save and close the sheet record.

You will need to add any Infotypes (in this case Media Types) that you want to use in this layout. Go to the Infotypes tab of the layout record and select and add the relevant Infotypes.

You should also set it as default at this point.
At this stage we advise you to test the new layout with a record and then return to editing to correct any errors and add the control and audit trail sheets required.

Here we can see a report displayed in the new layout – but it is clear that something is amiss with the copies information area.

It looks as if the wrong style has been used here for all these fields. When the draft sheet is revisited it is found that the style hasn’t been set at all for these fields.

Set the style for these controls and check again.

Next add the additional sheets to the layout. Modify the layout.

Click on the Search link below the Sheets field. You should have noted the name of the sheets you want to add when you viewed them in the layouts where they are used. You will
be presented with a list of all the sheets which are available for that domain and it can be quite difficult to find the one you want without knowing its name.

If you are not sure you have the right layout – click on the link to display the details and you will see which layouts this sheet is linked to.

Insert the selected sheet and repeat the process to add the Audit Trail sheet.

You will now need to give your colleagues permission to use the new layout. After you have saved the layout select Share from the Permissions menu.
Choose to share the layout with the **Librarians** group and click on **Save**.

Your new layout is now ready to be used.
5. Styles

It is possible to create your own styles and to modify styles supplied with the system. If you modify an existing style when your OLIB system is next upgraded that style will be renamed and prefixed with ***. All standard styles have been renamed in OLIB 9.0 (removing the OLIB prefix) and any VDX styles have been deleted. If you have previously amended standard styles their names will still include the OLIB prefix.

Launch a Styles search from the Admin Client Configuration section of the menu.

To see a full list of styles search using the wildcard (%).

Click on a style to display the details.
The **Private Normal** and **Private Edit** displays are used very rarely in OLIB.

⚠️ If you make a change to a system-supplied style (like **Edit Boxes**) then you are applying that change to every field which uses that style.

It is not likely that you will want to create your own styles, but if you do then you should click on the **New Record** link on the **Styles** search.

Complete the fields in the top section of the form which control the font and size, etc.
You also need to set foreground and background colours for the field in display view (Normal), modify view (Edit) and for mandatory fields (Compulsory). You do this using a colour palette.

![Colour Palette](image)

You can set whatever colours you like – but you should make sure they are legible.

![Colours](image)

Once complete you should save your record. The style will now be available to use for any controls on any layout.

⚠️ Note that colours you set against styles will only take effect in OLIB Web if you set your Display option to WorldView.