OLIB Service Pack 12
Release Notes

OLIB®
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1. INTRODUCTION AND CONFIGURATION AND TECHNICAL NOTES

1.1. Introduction

OLIB Service Pack 12 is the twelfth service pack for OLIB. It delivers 164 enhancements and bug fixes. Highlights include:

- GDPR Notice compliance
- RDA cataloguing
- Folio facet sidebar re-design and smartphone/mobile/device optimisation
- configurable sorting
- automatic renewals
- a re-write of the OLIB SIP Server

OLIB 9.0 SP11 is a prerequisite for OLIB 9.0 SP12.

Subsequent sections give full details of each enhancement or bug fix included in SP12, including instructions on how to configure OLIB to implement the change and how to use the new functionality where relevant.

1.2. Configuration Notes

- Change the no_hits_message and no_hits_messagef OPAC configuration settings – see OLB-10441

1.3. Technical Notes

Keyword Index Rebuild

A rebuild of the Main Word Index is required following the completion of the SP12 installation. (See OLB-14521)

MARC Cache

As there have been a significant number of changes to the MARC export (see Section 11.1), the MARC output cache is cleared during SP12 installation. This therefore guarantees that any MARC records that are exported subsequent to the SP12 upgrade will include the changes.

Java and Tomcat versions

An updated ojdbc driver has been included in OLIB Web to resolve a database password security issue. This means that OLIB Web now requires Java 8 and Tomcat 8. The installation script on UNIX will verify this and fail if Java 8 is not identified.

Layout Changes

The following layouts are changed by the installation of OLIB 9.0 SP12:

- Admin Client Defaults
- Admin Client Settings
- Areas
- Controls
- Classification Schemas
- Import Batches
- Languages
- Media Sub-Types
- Media Types
- Name Types
- Notices

- OLIB Defaults
- Output Formats
- Record Source Codes
- Responsibility Types
- Stocktaking
- Subject Headings
- Title/Author Relationship
- Title-Series Relationship

If you have made any changes to any of the layouts and/or sheets in these domains since your last full upgrade (i.e. OLIB 9.0, not just a service pack installation), these changes will be lost when OLIB 9.0 SP12 is installed.

The standard Names layouts have been changed, but local layouts will remain in place.

Finally, new Titles layouts are supplied to support RDA cataloguing – see section 5.1.

2. OLIB WEB / WORLDVIEW / SYSTEM / GENERAL

The release version of OLIB Web that is applicable to SP12 systems is OLIB Web 2.2.12 (Build 44).

The release version of WorldView that is applicable to SP12 systems is WorldView SP5 (Build 308865). (Please note, however, that the help associated with this version of WorldView is only up to date to OLIB 9.0 Service Pack 5.)

2.1. Configurable Sorting

A facility has been included to configure sort rules for different domains, with options to define specific character and string replacement rules and to specify various general rules such as case sensitivity and left-padding numbers with zeros. For example, when sorting a set of bibliographic records by title, numbers spelt out as words (e.g. Nineteen eighty-four) can be “unspelt”, i.e. replaced by the number itself, so that the records sort consistently by number regardless of whether they are entered as numbers or as spelt-out numbers.

With this configurable sorting facility, it is possible to specify sorting rule sets for titles, authors, classmarks and copies (using the shelfmark field as the primary sort field for copies). For classmarks, different rule sets can be defined for different classification schemes. These classification scheme-specific rule sets can then be extended to shelfmarks, specifically to improve the usability of the stocktaking module for libraries which use an alphanumeric scheme such as UDC, rather than the Dewey Decimal Classification system, which generally sorts correctly without requiring special processing.

(Another example of an alphanumeric scheme is the Wessex Classification Scheme created by WRLIN from the NLM schedules, and used by the Chartered Society of Physiotherapy library and by several of the S&W NHS libraries.)

The sorting rules are used to generate a sort key for each record in the respective domain. Subsequently, whenever a list of records is sorted by title, author, classmark or shelfmark (e.g. following a title search in the Titles domain, following a search in Folio or WebView, or when the contents of a folder are displayed), the records are sorted by this pre-generated sort key rather than being sorted “on the fly”.

Sorting rule sets are defined in the new Sorting Rules domain, which can be found under System Administration. Six predefined rule sets are supplied:

- Titles
- Authors
- DDC classmarks
- UDC classmarks
- DDC shelfmarks
- UDC shelfmarks

These are “model” rule sets, and as such cannot be deleted or modified. Also, they are not enabled by default, with the exception of the title rule set which will be enabled on the evening of the Service Pack installation.

Four actions can be applied to a sorting rule set:

- **Apply to applicable records**
  This action enables the rule set and commences the update of the appropriate records as a background task. For shelfmark rule sets, this will be applied to all copies belonging to the locations specified in the rule set. If no locations are specified, the rule will be applied to copies at locations which do not have an enabled shelfmark rule set.

  In addition, a shelfmark rule set can be applied to specific copies using a new action in the Copies domain. See below for details.

  For classmarks, the rule set will be applied to all classmarks in the selected scheme.

  For titles and authors, the enabled rule set with the highest key ID will be applied to all titles or authors,

even if the one you initiated the action on is not the rule set with the highest key ID.

In all cases, if the record is flagged as Manual Sort (see below), the sorting rule set will not be applied to that record.

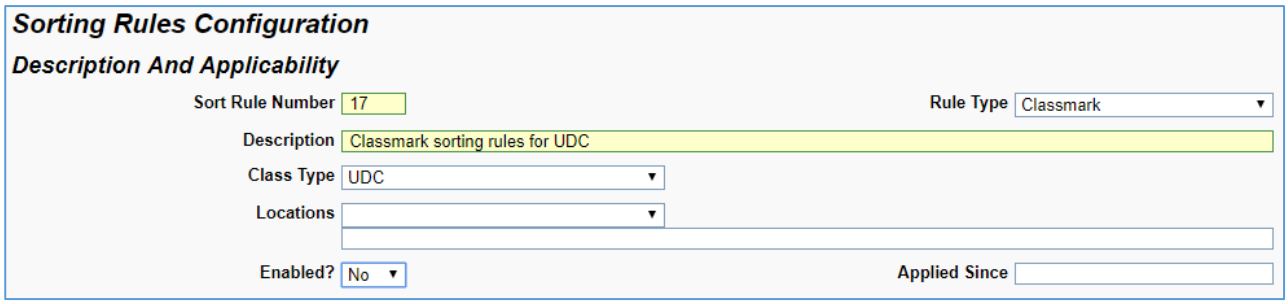
- **Create Close Copy**
  This action creates a copy of the selected rule sets, adding an asterisk (*) to the end of the description to differentiate the copy from the original in the hitlist. These rule sets can then be modified as required. The newly created rule set will not be enabled.

- **Enable and Disable**
  These actions enable or disable the selected rule sets. (Note that this is the only way to enable or disable a predefined rule set, as predefined rule sets cannot be modified. Note also that the predefined Titles rule set (-5 - Titles sorting rules) cannot be disabled, even using the Disable action.)

If more than one rule set is enabled for a record (e.g. the same location has been included in more than one shelfmark rule set), then the rule set with the highest number will be used.

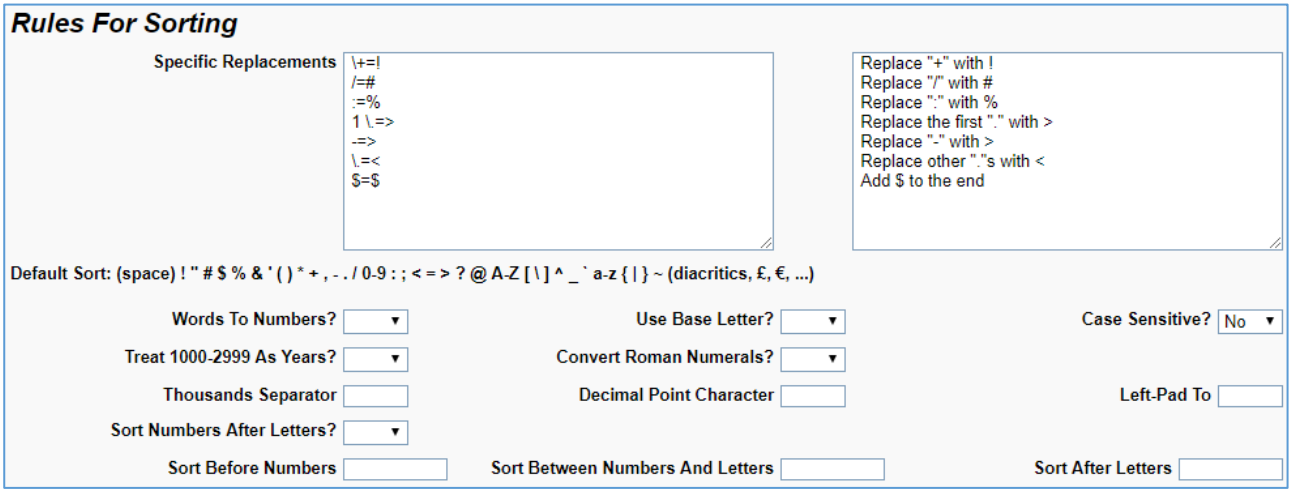
Modifying a sorting rule set

The section at the top of the sorting rule set screen describes and specifies the applicability of this rule set:



Type	This determines whether the rule is applied to titles, names, classmarks or shelfmarks
Description	A description of this rule. This is used by the search for sorting rule sets in the Sorting Rules domain and is shown on the hitlist
Class Type	For classmark rule sets, this specifies the classification scheme to which the rule set applies
Add Location	For shelfmark rule sets, this is a drop-down list of locations. It can be used to quickly add the location codes to the field below, which specifies the locations that utilise this sort rule for their shelfmarks
Locations	This is a list of the applicable location codes, separated by semicolons (;). You can enter location codes straight into this field rather than selecting them from the drop-down list. If this field is left blank, the shelfmark sorting rule set will be applied to copies at all locations other than those that are specified in an enabled shelfmark rule set
Enabled	This Yes/No field specifies whether the rule set is used
Applied Since	This is populated with the date and time when the *Apply to applicable records* action has completed its background processing

The Rules For Sorting section includes the fields that determine the sort rules to be applied:



A description of the usage of each of these fields follows. The layout reflects the sequence in which the rules are applied.

Specific Replacements	The two fields in this section allow for the specific replacement of characters or sequences of characters. These are the first rules to be applied when generating a sort key. They will therefore be processed as case sensitive. Further information on the content of the first field can be found below. The second field is a manually maintained description of the actions in the first
Words To Numbers?	Setting Words To Numbers? to Yes will mean that a number that is expressed in words is “unspelt”, i.e. the spelt out number will be converted to its numeric equivalent. For example, “one” will be converted to “1”. Only “known words” are unspelt. “Known words” are defined in the language record. Refer to the Languages Reference Data section below for a description of how to configure a language’s list of known words and their numeric equivalents. (Note that the unspelling process is case-insensitive, e.g. defining “one”=1 in a Known Words list will convert “one”, “One”, “ONE”, etc. to 1. (Note that this may subsequently be left-padded with zeros if the *Left-Pad To* value (see below) stipulates more digits than are generated from the spelt out words.) The language record that is examined for the known words list is the language of cataloguing that is set in the title record. If the title record does not have a language of cataloguing, the default cataloguing language specified in OLIB Defaults will be used as the language of cataloguing. The unspelling facility is currently only available for titles
Use Base Letter?	This will cause diacritics to be converted to their base letters. For example, “ë” will become “e”. If left blank, this will be treated as No. It is set to Yes in the predefined rule set for titles. Note that this is applied after *Words To Numbers* if Words To Numbers is set to Yes. For example, “una” is Spanish for “1”, whereas “uña” is Spanish for “nail”. Thus, “uña” will not be converted to “1” because the “ñ” does not become “n” until after the *Words To Numbers* processing.

	Note that enabling the base letter option will also enforce case insensitivity and therefore auto-upper case the entire sort key, regardless of whether the Case Sensitive field is set to Yes. This means that you cannot use both base letter conversion and case sensitive sort key generation
Case Sensitive?	This will cause all letters to be converted to upper case. If it is set to Yes, and *Use Base Letter* is not set to Yes, lower case letters will be sorted after upper case letters, e.g. “alphabet” will be sorted after “Zoo”
Treat 1000-2999 As Years?	Whether to keep groups of four consecutive digits, starting with a 1 or a 2 separate from other numeric sorting. For example: - 101 Ways To Use OLIB - 2,001 Maths Questions Answered - 1984 If left blank, this will be treated as No. So you should only set the field to Yes if you want to implement this option. Note, however, that it is set to Yes by default in the predefined Authors rule set as it provides better readability when viewing the date portion of the sort key for an author
Convert Roman Numerals?	Whether to convert Roman numerals to “normal” numbers, e.g. “vii” becomes “7”. If left blank, this will be treated as No. This may subsequently be padded to the left with zeros if the *Left-Pad To* value stipulates more digits than are generated from the numeral
Thousands Separator	The character that is normally used as the thousands separator in numbers larger than 999. In English, this is usually a comma (,). This field has no default as a comma may be used for other purposes in classmarks or shelfmarks
Decimal Point Character	The character normally used as the decimal separator. In English, this is usually a full stop (.) and this will be used as the default
Left-Pad To	The number of digits that a number must include. Numbers with fewer than the specified number of digits will be left-padded with zeros until the requisite number of digits is reached. If left blank, no zeros will be added. This facilitates sorting by number in alphanumeric sort keys. For example, if Left-Pad To is set to 8, “6” will be left-padded with 7 zeros so that it becomes 00000006, and 500 will be left-padded with 5 zeros so that it becomes 00000500. Thus, 6 will sort before 500, whereas without the left-padded zeros 6 would sort after 500. Please note that this rule is **not** applied to numbers that are immediately preceded by the character specified in the *Decimal Point Character* field (see above)
Sort Numbers After Letters?	Whether to sort numbers after letters. If left blank, this will be treated as No. This facility may be the preferred option in the following languages: Arabic, Czech, Danish, Dutch, Finnish, French, German, Greek, Hebrew, Hungarian, Italian, Latin, Lithuanian, Norwegian, Russian, Slovak, Spanish, Swedish and Turkish
Sort Before Numbers	A free text field for providing characters that should sort before numbers. For example, to sort <, = and > before numbers instead of between numbers and letters simply enter “<=>” into this field and do not enter any of these characters in the next two fields
Sort Between Numbers And Letters	A free text field for providing characters that should sort after numbers and before letters. For example, to sort {, | and } before numbers instead of between numbers and letters simply enter “{|}” into this field and do not enter any of these characters in the previous or next field
Sort After Letters	A free text field for providing characters that should sort after letters. For example, to sort <, = and > after letters instead of between numbers and letters simply enter “<=>” into this field and do not enter any of these characters in the previous two fields

The Specific Replacements field comprises of a line-by-line list of replacements to be carried out on the data. Each line comprises 3 or 4 elements:

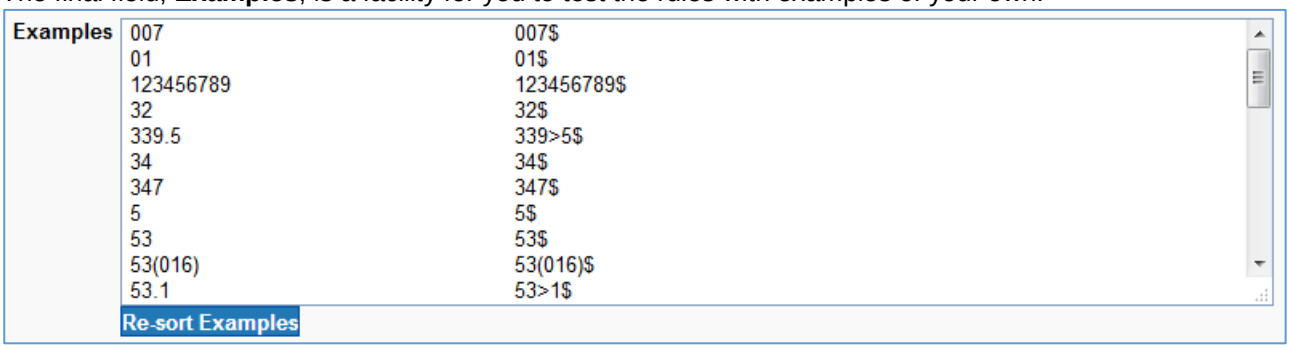
Element	Example	Description
Occurrence, space (optional)	1	This is an optional portion of the line providing a single digit and a space to indicate which of the occurrences of the *regular expression* should be replaced. In the predefined rules for UDC, the line described in this table (`1 \.=>`) indicates that the first, and only the first, dot should be replaced with a greater than symbol (>). In order to replace a digit and a space with something, you can start the line with "`* `" (or "`0 `" – a zero and a space) to indicate that all occurrences of that expression should be replaced
Regular Expression	\.	This specifies an expression to identify what should be replaced. For additional visual clarity and to avoid issues with copy/paste, an underscore (_) will be treated as a space. The hover text for this field lists the characters which must be preceded by a '\' to be treated literally. These are: **$ ( ) * + < > ? [ ] \ ^ _ | .** Shortcuts for "start of word" and "end of word" have been provided as "\<" and "\>" [1]. This is utilised in the author sorting rule set to allow "O'Connell" to be placed between "Oakley" and "Owen". Detailed information on regular expressions can be found in the Oracle documentation at: https://docs.oracle.com/cloud/latest/db112/SQLRF/ap_posix.htm#SQLRF020
Equals	=	This is used to separate the "what to replace" from the "replace with" elements of the line. When examining the line for this character, the first character (after any *occurrence* portion) is ignored, allowing the user to specify a replacement for an equals sign by entering "==eq" to replace "=" with "eq"
Replacement	>	Except for replacing an underscore with a space, this portion of the line is read literally as the replacement to use in the resulting sort key. To remove the expression from the sort key completely, simply leave this portion empty. If the regular expression includes any parentheses – (and) – to capture the matching portion of the text then the replacement portion of this line can include \1 through to \9 to re-instate the first through ninth captured portions respectively. Using the shortcuts for *Start of Word* or *End of Word* will include parentheses. This is utilised in the author sorting rule for handling names such as "O'Connell"

The field on the right is a manually entered, free text line-by-line description of the replacement rules stated in the field on the left. This can be useful when trying to interpret replacement lines which look odd at a glance – for example: "`$=$`".

Below these fields is a list of ASCII characters in sequence. This is provided for reference to facilitate selection of a suitable character to place before or after a specific other character.

[1] "`\<`" is a shortcut for "`(^|[^[:alnum:]])`" and "`\>`" for "`([^[:alnum:]]|$)`"

The final field, **Examples**, is a facility for you to test the rules with examples of your own:



In this field, simply enter various values line by line, and then click the Re-sort Examples button. This will apply the rules and refresh the page with the lines in the Examples field sorted according to the rules. Once sorted, a second column will be displayed to show the sort key that was generated, so that you can determine why the value is sorted in that position with respect to the other values. For title sort rules, this column also reports the language that was used to unspell a number.

(Note that the columnisation used here is not supported by Internet Explorer.)

Stocktaking

Note that the misfiled report will now take account of the configurable sorting rules for the shelfmarks involved in the project.

On the Stocktaking project record is a new optional field to select the sorting rule. This field is applied to the Shelfmark range fields to advise the stocktaking process of the range of shelfmarks which are included in the project. The misfiled report will be based on the rules associated with the copy records themselves (if any).

New Action for Copies

When at least one shelfmark rule is enabled, a new action is available in the Copies domain: **Update shelfmark sorting rules**. This action presents a list of options to apply to the selected copies:

Option	Purpose
(a sorting rule description is given)	This will assign the selected sorting rule set to the selected copies, by adding the selected rule set's ID to the copy's Sort Rules Used field. This assignment will be overridden if another shelfmark sorting rule set is applied from the Sorting Rules domain to all copies at their locations
Remove Configured Sorting	This will remove the assignment of a sorting rule set from the selected copy records. The sort key will be removed, returning the sorting of the selected copies to the default – UPPER(shelfmark)
Set Sorting To Automatic	This will set the *Manual Sort Key?* setting to NULL, assuring that the generated sort value is effective
Set Sorting To Manual	This will set the *Manual Sort Key?* setting to Yes, preventing any further automatic updates of the generated sort value

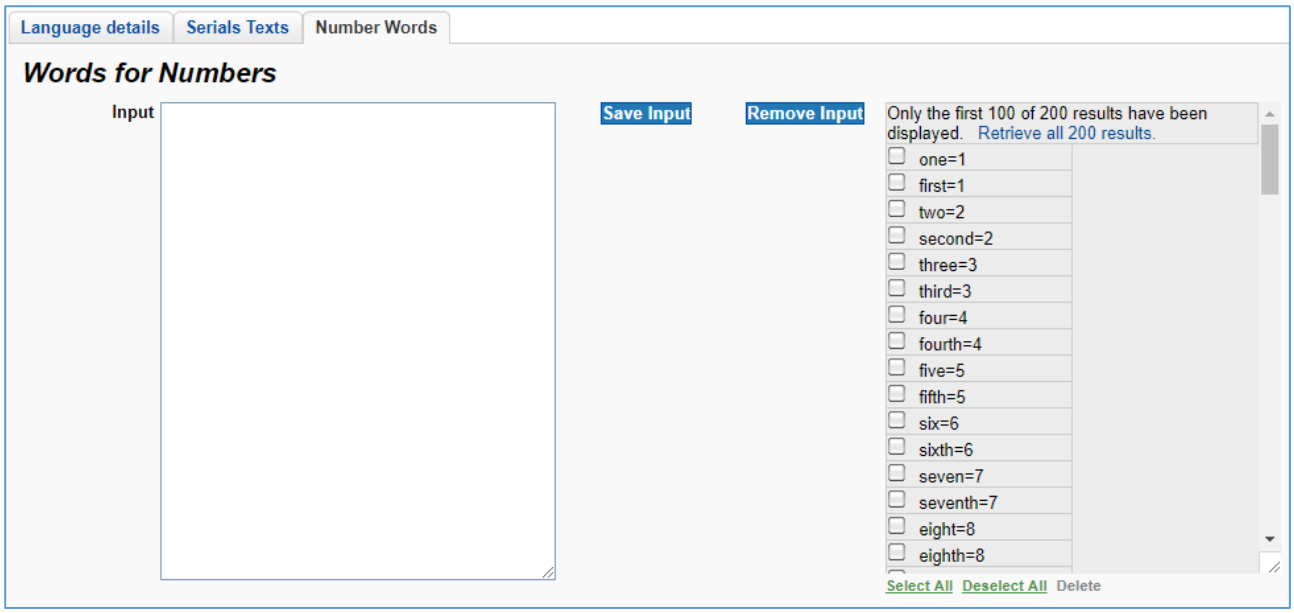
Ye thorny iſsue with ethels

In older publications, there may be English titles that use characters such as an old style long S, e.g. "Paradiſe loſt". With the sorting rule sets configuration, these can be placed as equivalent to an "s" in the hitlist.

Title Sorting and Languages Reference Data

If Words To Numbers is set to Yes in the active Titles sorting rule set, the language of cataloguing specified in the title record will be used to determine which words will be changed to numbers (before being padded with zeros). If the title record does not have a language of cataloguing, the default cataloguing language specified in OLIB Defaults will be used as the language of cataloguing. If this default is not set, word-to-number conversion will not take place.

In support of this, the Number Words sheet has been added to the Cataloguing Reference Data / Languages layout:



This new sheet is used to maintain the list of translations from a number as a word to a numeric value. English numbers 1 – 100 (cardinal and ordinal) have been added as predefined to the standard ENG language record.

The **Input** field is used to list, line by line, a "word=number" conversion, as shown on the saved list to the right. Once entered, the Save Input button can be used to add the items in the Input field to the saved list. The Input field may contain spaces in front of the equals sign (e.g. "one hundredth=100"). The matching will only be applied for entire words (or phrases). For example, "twofold" will not be converted to "2fold".

Items that have just been added to the saved list can be removed immediately by clicking the Remove Input button.

Items can be removed from the saved list by selecting them and using the Delete option. Alternatively, use the Remove For Edit action to delete the selected items from the saved list and place them into the Input field. They can then be modified before being re-added to the saved lists using the Save Input button. This provides a quick way to modify an item without having to delete it and re-enter it from scratch, or to copy an item easily.

Special cases may need to be considered. For example, without adding a special Words for Numbers rule in the English language record, "Nineteen eighty-four" will be converted to "19 84" and will therefore be sorted between "19" and "20". Users may expect this to appear between "1983" and "two thousand". Thus, you may want to consider adding the following in Words For Numbers:

nineteen eighty-four=1984

Sort Key Generation and Titles with Subtitles

The title sort key is generated as a composite of the title, the subtitle and the surname of the primary author. If you look at the sort key that has been generated for a record with a title and a subtitle, you will see that the separator between the title and the subtitle is an exclamation mark rather than a colon. This is because the colon comes after the numbers in the ASCII table. Thus, if the colon were to be used as the separator in the sort key, records with subtitles beginning with a number would sort incorrectly in relation to records that have an identical main title except that one of them has a number at the end. For example:

RDA Cataloguing : 101 ways to skin a catalogue
RDA Cataloguing 101 : RDA cataloguing for dummies

If the colon were to be used as the title/subtitle separator in the sort key, the 1st record would sort after the 2nd record in the above example. The exclamation mark is the lowest character in the ASCII table, so using it as the title/subtitle separator in the sort key results in the above records being sorted correctly.

Manual Sorting

If a sorting rule set is enabled for a domain (Titles, Names, Classmarks or Shelfmarks (in Copies)), a sort key is automatically generated for each record in that domain. It is possible to modify this sort key manually if the configurable rules do not get it quite right. If a sort key is modified manually, you must also set the respective **Manual Sort Key?** field to Yes. If you leave Manual Sort Key? blank or set it to No, your manual edits to the sort key will be lost the next time the record is saved.

Each domain includes a pair of attributes to enable you to set the sort key manually for a record in that domain:

- Sort Key
  This field contains the sort key that has been generated for the current record. It can be modified, but if it is, you must also set Manual Sort Key? to Yes, otherwise it will revert to the automatically generated sort key when the record is next saved.

- Manual Sort Key?
  This Yes/No field will, if set to Yes, stop any further automatic changes to the sort key.

Flagging a title as a "super title"

Using the manual sorting facility, it is now possible to flag a title record as a "super title", one that is sorted above other records in a hitlist. This can be done simply by adding an exclamation mark (!) at the beginning of the record's sort key and setting the Manual Sort Key flag to Yes.

(Note: if the underlying Oracle system is configured as a Spanish Oracle system, you will need to add an exclamation mark **and** a space, rather than just an exclamation mark, as the exclamation mark is sorted differently in a Spanish Oracle system.)

Leading Articles

Leading articles in titles and authors will be removed from the start of the sort key. This is done automatically and cannot be switched off in the Sorting Rules configuration.

(Leading articles are defined as words included in the Stop Word List that have Non-File set to Yes.)

Reporting

To take advantage of the new sorting methods in reports, the SQL must be changed to use the new sort keys.

In titles, this will be "`ORDER BY sort_title_main_key`". This value should always be populated and there is no longer a need to consider non_file_chars when using this value as it is already accounted for.

For copies sorted by Shelfmark, this will be "`ORDER BY NVL(sort_shelfmark_key, shelfmark)`".

For classmarks, this will be "`ORDER BY NVL(sort_key, classmark)`".

For authors this will be "`ORDER BY f_sname`", once the appropriate sorting rule has been applied.

Reports in the OLIB Reports Repository will be updated accordingly once Service Pack 12 has been released.

General Note on System Language

It should be noted that the above description of the new configurable sort facility relates to English systems. If the non-OLIB elements of your system (server, Oracle and/or Tomcat) are configured to utilise another language by default, then the sorting behaviour may be affected.

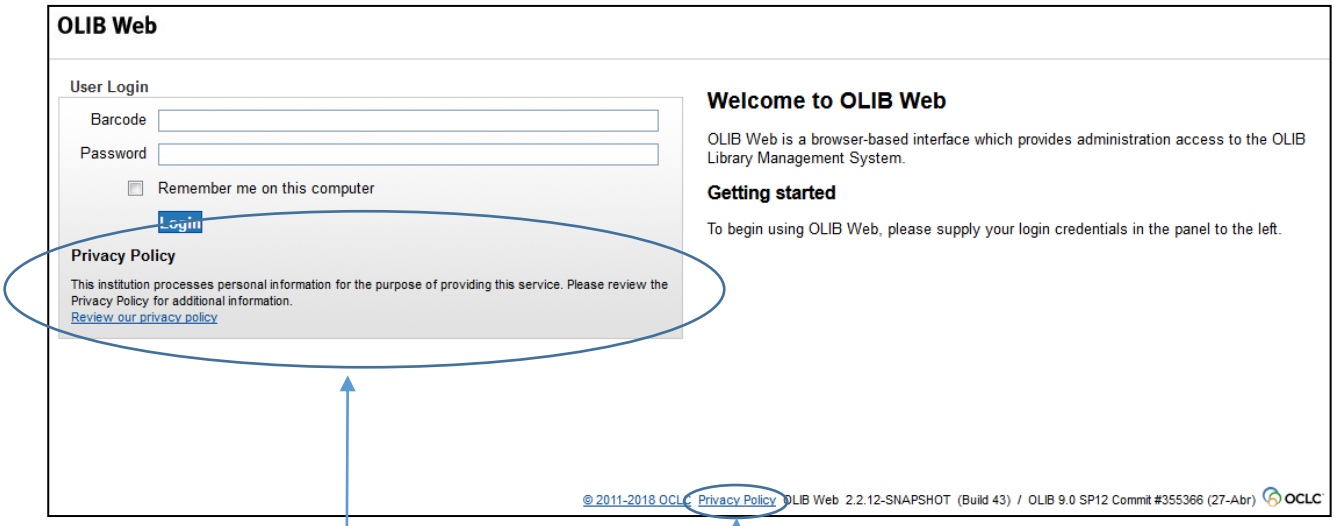
(OLB-2594, OLB-8107, OLB-13352, OLB-7704, OLB-6165, OLB-4046, OLB-13402 - S&W NHS, CSP, Defra, Leeds College of Music, Summer Conference vote)

2.2. Privacy Policy Statement and Links for GDPR Compliance

It is now possible to configure your OLIB system so that it presents a brief privacy policy statement to your library staff and your end users, together with a link to your organisation's full privacy policy statement, as is stipulated in the new GDPR legislation that is enforceable from 25 May 2018.

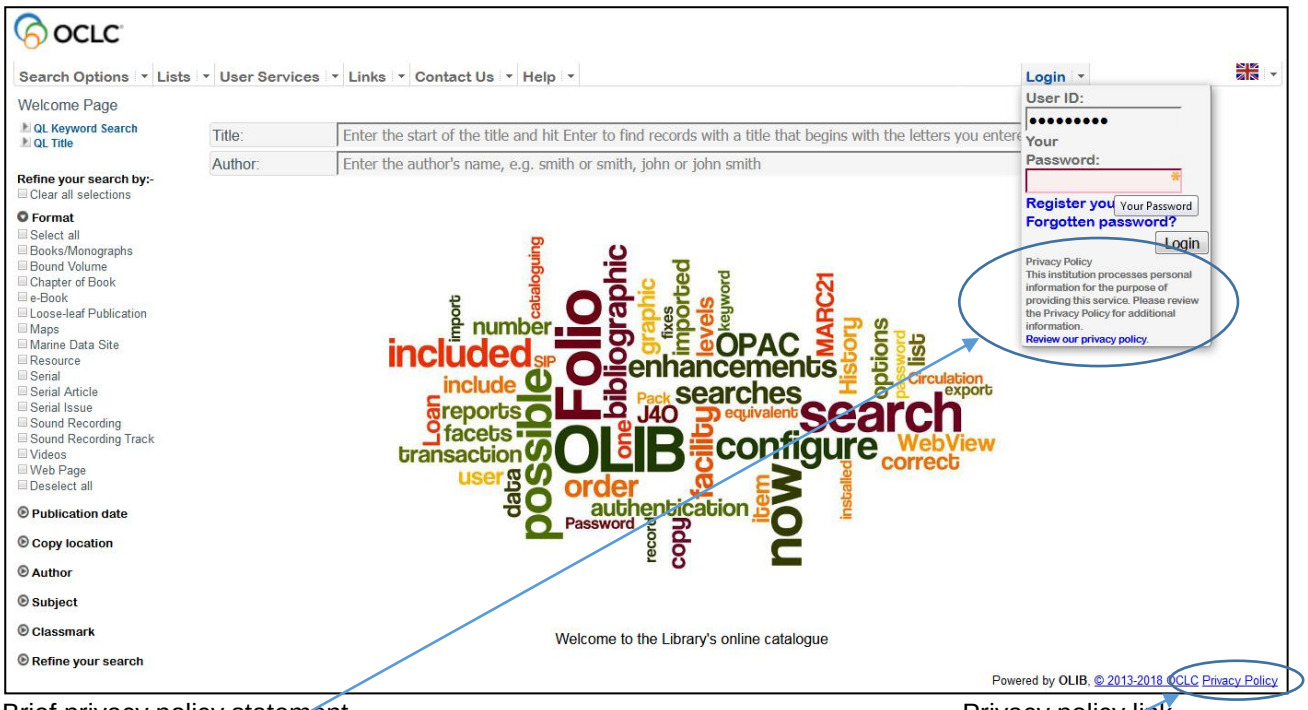
The brief privacy policy statement can be displayed on the login screen in OLIB Web and on the login form in Folio and WebView. The link to your organisation's full privacy policy statement can be displayed both in the brief privacy policy statement and as a link in the footer in OLIB Web, Folio and WebView.

Brief Privacy Policy Statement and Privacy Policy Link in OLIB Web



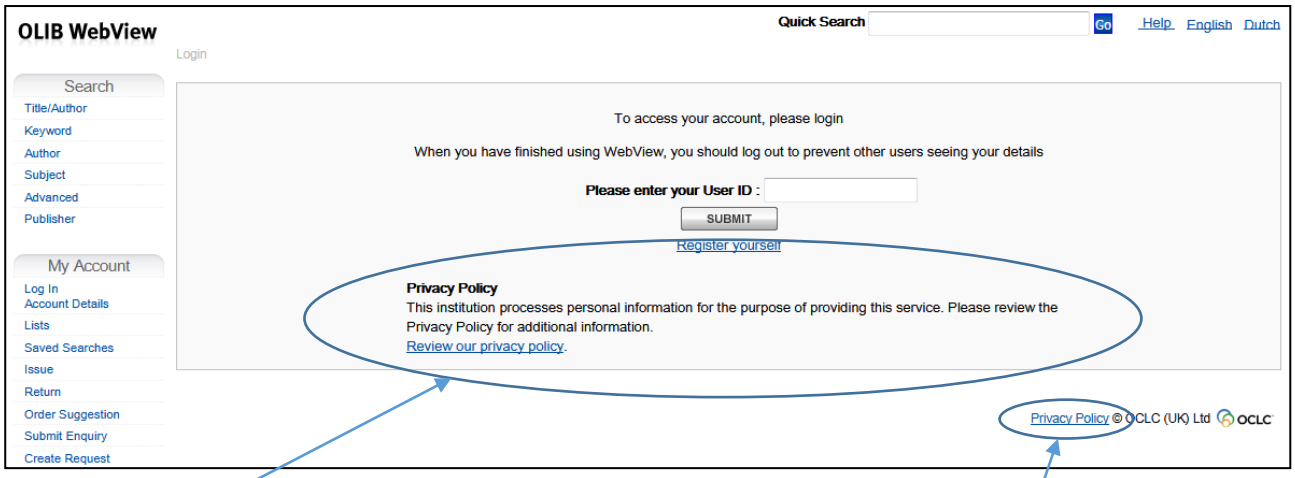
Brief privacy policy statement Privacy policy link

Brief Privacy Policy Statement and Privacy Policy Link in Folio



Brief privacy policy statement Privacy policy link

Brief Privacy Policy Statement and Privacy Policy Link in WebView



Brief privacy policy statement

Privacy policy link

Configuration

General

When configuring hover text, please note that Internet Explorer imposes a 512-character limit on hover text. If you enter a message in a hover text setting that is longer than 512 characters, it will be automatically truncated to 512 characters when it is displayed in Internet Explorer.

OLIB Web

The configuration required to enable the display of the brief privacy policy statement and privacy link in OLIB Web is done in the System Administration-Admin Client Settings domain.

This domain includes a series of settings that will need to be configured as follows:

Setting Name	Description	Usage
PrivacyBrief	A summary privacy policy statement, displayed immediately underneath the Login button on the login screen. The first line is displayed in bold, as a heading. This setting is also used as the hover text for the privacy policy link in the OLIB Web footer.	Enter the text you would like to be used as the brief privacy policy statement on the login screen.
PrivacyBriefLinkText	The text to use as the name of the link to your organisation's full privacy policy page that is displayed immediately below the brief privacy policy statement on the login screen.	Enter the text you would like to be used as the text of the link to your organisation's full privacy policy page. In the example above, this has been set to "Review our privacy policy".
PrivacyLink	The URL of your organisation's privacy policy page.	Enter your organisation's privacy policy page's URL.
PrivacyBriefLinkHover	The hover text that is displayed when you hover over the privacy policy link on the login screen.	Enter the text you would like to be used as the hover text for the privacy policy link on the login screen.
PrivacyFooterLinkText	The text to use as the name of the link to your organisation's full privacy policy page that is displayed in the footer. As mentioned above, the text of the PrivacyBrief setting is used as the hover text for this link.	Enter the text you would like to be used as the text of the privacy policy link in the footer.

Once these settings have been configured, an OLIB Web rebuild must be completed in order for them to be implemented.

Folio

The brief privacy policy statement and privacy link are enabled in Folio by modifying or including two OPAC configuration settings and adding a new one, as follows:

Setting Name	Description	Usage
l_privacyPolicyMessage in login.ini	Whatever is included in the Value field of this setting is displayed as the brief privacy policy statement on the Folio Login form, immediately below the Login button.	An example l_privacyPolicyMessage setting is delivered as part of the RSD. So to display the brief privacy policy statement on the Login form, simply retrieve the setting (using the **WebView Configuration Settings by Setting** search rather than the Folio Configuration Settings by Setting search), modify the example statement in the Value field so that it matches your organisation's prescribed brief statement, set Include to Yes, and save your changes.
footerDisplayText in gno_startup	The HTML for the link to your organisation's full privacy policy page can be added to the end of this setting to display the link immediately to the right of the copyright statement in the footer.	At the end of the Value field, just before the closing double quote mark, add a space followed by the HTML code for the link to your organisation's full privacy policy page. An example HTML portion to add is shown below: <A HREF='http://www.mylibrary.myorg.org' target='new' TITLE='This institution processes personal information for the purpose of providing this service. Please review the Privacy Policy for additional information.'>Privacy Policy</A> The teal text is the URL of your organisation's privacy policy page, the light grey text is the hover text, and the dark grey text is the link text. These should all be set to the values prescribed by your organisation.
external_css in gno_startup	Add this setting to ensure that the footer is not overlaid with the sidebar. Without this setting, the Privacy Policy link will not be live.	Add a new setting in gno_startup with Setting=external_css and Value="<STYLE>#footer { z-index: 1; }</STYLE>". Please note that your system may already include an external_css setting. The facility to process the external_css setting was included in SP7, under OLB-8542, and you may have added an external_css setting to implement it. If your system does already include an external_css setting, simply add the above <STYLE>…</STYLE> HTML to the end of it.

WebView

The brief privacy policy statement and privacy link are enabled in WebView by modifying or including two OPAC configuration settings, as follows:

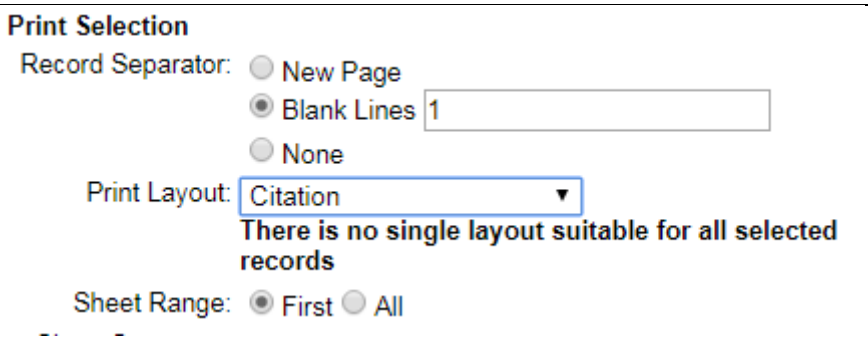
Setting Name	Description	Usage
l_privacyPolicyMessage in login.ini	Whatever is included in the Value field of this setting is displayed as the brief privacy policy statement on the WebView Login form, immediately below the Submit button.	An example l_privacyPolicyMessage setting is delivered as part of the RSD. So to display the brief privacy policy statement on the Login form, simply retrieve the setting, modify the example statement in the Value field so that it matches your organisation's prescribed brief statement, set Include to Yes, and save your changes.
footerPrivacyPolicy in setup.ini	The HTML for the link to your organisation's full privacy policy page that is displayed immediately to the left of the copyright statement in the footer.	An example footerPrivacyPolicy setting is delivered as part of the RSD. So to display the privacy policy link in the footer, simply retrieve the setting, modify the example HTML in the Value field to make it specific to your organisation, set Include to Yes, and save your changes. The example setting includes the following in the Value field: <A HREF='http://www.mylibrary.myorg.org' target='new' TITLE='This institution processes personal information for the purpose of providing this service. Please review the Privacy Policy for additional information.'>Privacy

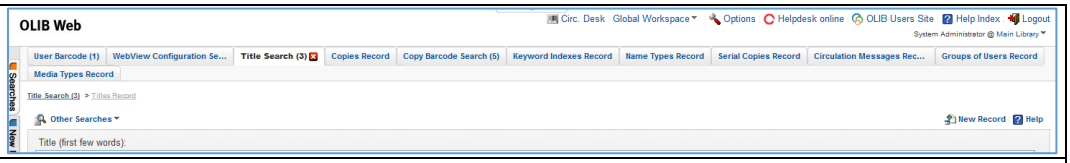
		Policy</A> The teal text is the URL of your organisation's privacy policy page, the light grey text is the hover text, and the dark grey text is the link text. These should all be set to the values prescribed by your organisation.

(OLB-14723. Delivered to SP11 systems in RSD-1110-OLIB14744 and the accompanying RSD-1110-OPAC14744)

2.3. Minor Enhancements

IMS Ref.	Description
OLB-14682 OLB-14703	The **Show more** option in list boxes with many entries is now retained for each individual list box while the record is under edit, even if the user navigates away from the record being edited or issues a *Save & Close* or *Cancel.* Additionally, **Show all** will continue to show all records in the list box, even if more are added since the user has opted to **show all**. (FamilySearch)
OLB-14683 OLB-14704	The columns in a list box can now be manually resized. The sizes will persist in the browser for the display of this list box on this record (whether in edit or display mode) for the duration of the browser session, even if the user logs out of OLIB Web and logs back in again. (FamilySearch)
OLB-2838	It is now possible to specify that a layout is not to be included in the list of layouts available in the Print dialog window. A new Print Preference option has been added to the Layouts screen. This can be set to one of: - Preferred - Not preferred - Excluded When appropriate for the records that have been selected for printing, the preferred layouts will be listed alphabetically, followed by any layouts for which there is no preference specified, and finally layouts that have been marked as not preferred. Layouts that have been marked as excluded will not be included in the list. If the default layout for the domain is offered, this will be preselected. (Bank of England)
OLB-13638	OLIB Web no longer allows the selection of a layout for printing that is not associated with all the infotypes of all the records that have been selected for printing. If there is no single layout suitable for all the selected records, a message will advise this:

	 In this case, the layouts offered will be associated with at least one infotype and sorted as per their configured preference. If the default layout for the domain is offered, this will be preselected. (Cafcass)
OLB-7733	OLB-7733 requests that OLIB Web should be enhanced to provide a way for system administrators to be able to execute arbitrary select statements and review the results. The OLIB Reports module that was delivered in SP11 also delivers this functionality. The following workflow should be used to enter and execute an arbitrary select statement: - create a new report - set Report Type to No Parameters - add a Report Name - set Output Type to HTML Formatted Email - on the Report Definition tab, set Domain to System (so that it doesn't appear in the standard domains' lists) - enter the SQL in SQL To Run - back on Run Report, click the Preview Report button. The results of the SQL are displayed in the Preview Panel Note that you should not include a semi-colon at the end of the select statement. Tip: adding || CHR(13) || CHR(10) at the end of the SELECT clause puts each row on a separate line. (Shropshire NHS, S&W NHS)
OLB-10894	It is now possible to configure how long to keep data in the audit trail tables for all audited domains. The following additional fields have been added to the OLIB Defaults screen: - Orders Audit Retention Period (on the Funds/Acq/Serials tab) - Order Items Audit Retention Period (on the Funds/Acq/Serials tab) - Invoices Audit Retention Period (on the Funds/Acq/Serials tab) - Invoice Items Audit Retention Period (on the Funds/Acq/Serials tab) - Days To Keep User Audit Records (on the Daystart tab) In all cases, enter a number to specify the number of days to retain the audit trail data for. Alternatively, enter a negative number to specify the number of audit trail records to retain per order, order item, invoice, invoice item or user record. (Colchester Institute, Colombia, Lincoln College, Nottingham College)
OLB-13941	The tabs across the top of the screen in OLIB Web wrapped onto a second line too soon, resulting in a lot of space on the right hand side and everything squashed into the left hand side. This has been corrected so that the tabs stretch the full width of the browser window before wrapping to a second line:

	
OLB-14666 OLB-14523	OLIB Web stability was compromised by the encountering of a hidden exception in various circumstances. Changes have been made to OLIB Web to avoid this. A further amendment was made to improve the performance of the generation of the links for “First”, “Previous”, “Next” and “Last” records. This will be particularly evident in User searches. (NE NHS, NESC, Colombia)
OLB-14743	The Help Link and the Login options are no longer displayed in the top right corner on the OLIB Web Login screen. The Help Index link is only displayed once the user has logged in

2.4. Bug Fixes

IMS Ref.	Description
OLB-14761	If a record was printed using a layout that included an obfuscated field (e.g. the Password field on the Users layout), the data in the obfuscated field was included in plain text in the PDF that was generated by the print action. This has been corrected so that the obfuscated data is displayed as 5 asterisks in the printout. (S&W NHS)
OLB-14760	A change was introduced in SP8 so that, when you have a hitlist of records, display one in full, switch to a different sheet, and finally click next or previous, you see the same sheet for the next record (OLB-13798). However, this did not work in a folder. If you clicked next or previous, the record was displayed with the first sheet showing again. This has been corrected in SP12 so that it works in a folder hitlist the same as for a search hitlist, i.e. the same sheet is displayed as for the previously displayed title. (S&W NHS)
OLB-14557	In SP11, printing from a hitlist intermittently resulted in an error. This has been corrected. (Thames Valley Police)
OLB-14592	OLIB Web was producing a Null Pointer Exception under certain circumstances, resulting in numerous error messages in the stack trace. The most identifiable of these circumstances have been remedied. (NE NHS)
OLB-14696	The links to the OCLC Copyright page in the OLIB Web, Folio and WebView footers have been corrected following a change in the URL. Additional changes include: - Links to http://www.oclc.org changed to https://www.oclc.org - The OCLC™ graphic has been replaced with the OCLC® graphic
OLB-14721	In SP11, when viewing a record detail in OLIB Web, the First, Previous, Next and Last links either were not being logically populated if the search had ambiguous sort criteria, or included values from other domains in the hitlist. This has been corrected. (NE NHS) (Delivered to SP11 systems in OLIB Web 2.2.11.3)
OLB-14622	The OLIB Web search option cookie used an invalid character (,) to separate the view style from the number of hits. This has been corrected.

	This change was required so that OLIB Web operates using Tomcat 8.5.16. As this Tomcat is enforcing a standards compliance, the opportunity was taken to remedy the issue to avoid potential problems with more recent browser releases
OLB-14624	Actions on a selected list item were applied only to the first match of the selected record, and not to subsequent matches of the same secondary searched record. This has been remedied
OLB-14612	If you add 2 refinements, then run a search, then remove one of the refinements, the search was re-run without first notifying the user that it will retrieve nnn records. On large systems where the search with the remaining refinement is likely to retrieve several thousand records, this really slowed up the day-to-day use of the system. OLIB Web has therefore been corrected so that it re-runs the count search first, and displays the “Your search will retrieve nnn hits. Press Search again to continue” message if appropriate. (S&W NHS)

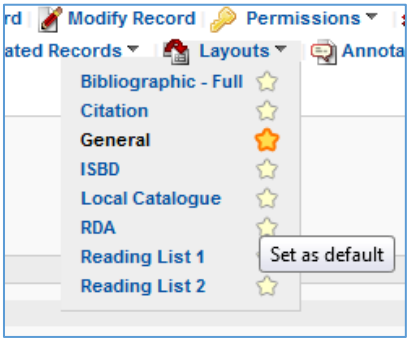
3. CATALOGUING

3.1. New Cataloguing Layouts

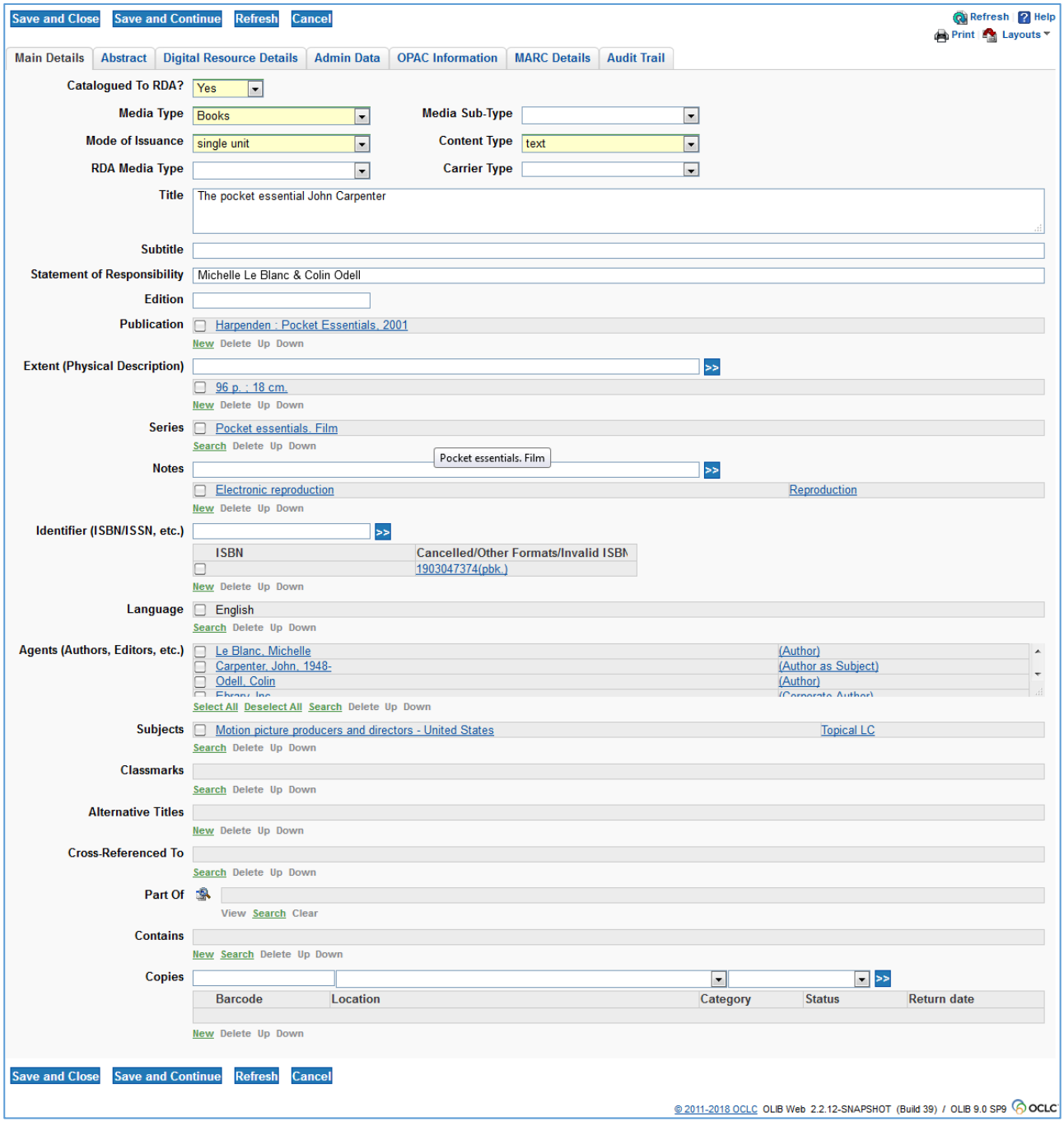
New layouts have been included in the Titles and Names domains that present a consolidated set of fields organised across several tabs, including recently added administrative fields that up to now had to be added to your existing layouts in Layout Manager, and “quick data entry” fields to enable the entry of copies, URLs, etc. without having to go to a separate screen.

Titles RDA Layouts

A new layout, **RDA**, is included in the list of layouts that you can change to for all media types except serials and articles. (These have their own layouts – see towards the end of this section for a description of these.) The RDA layout does not replace your existing layout as the default layout, but you can make it the default by clicking the star on the right of the layout name in the Layouts drop-down list:



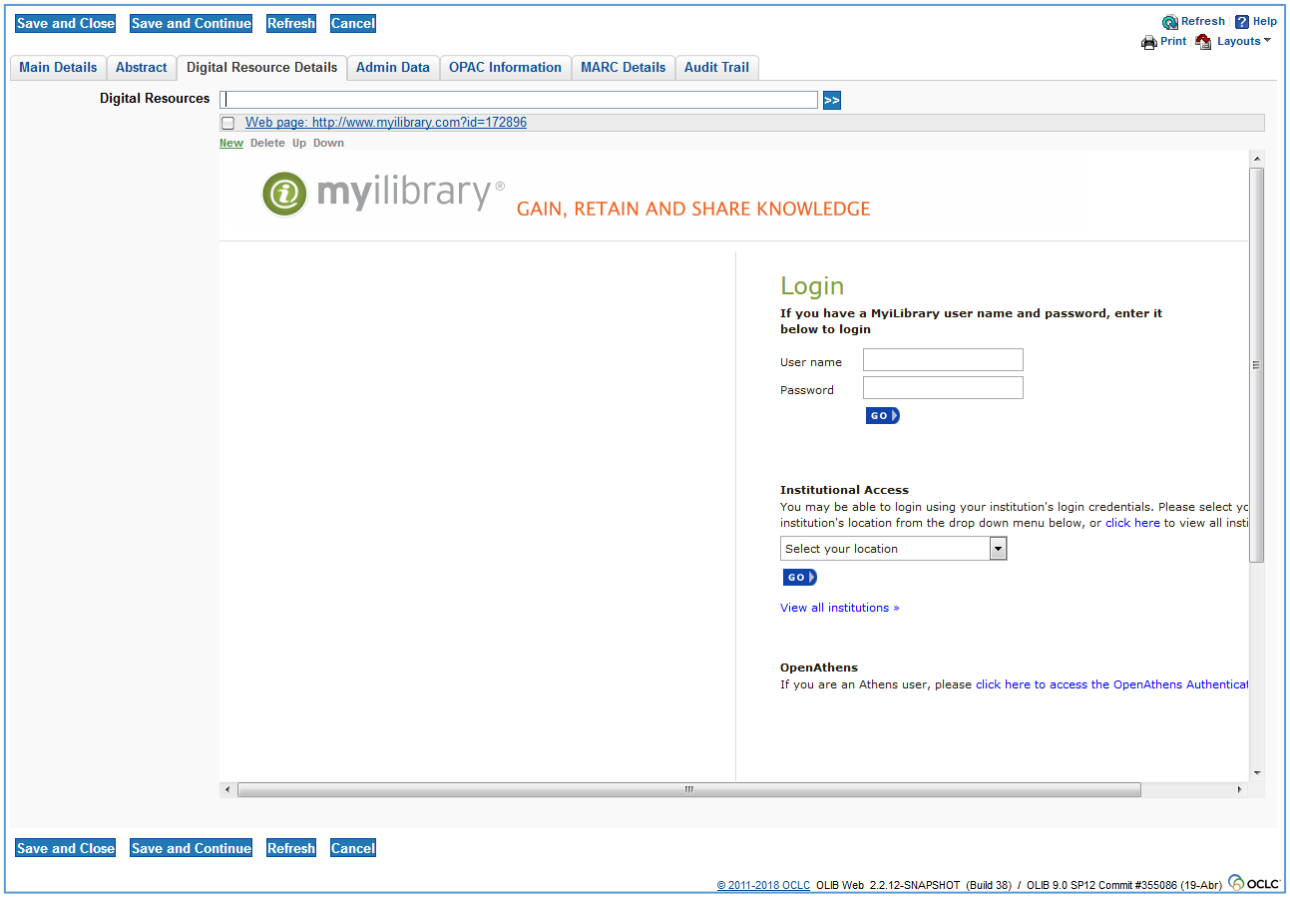
The RDA layout includes five new sheets (tabs), plus the standard MARC Details and Audit Trail tabs:



The **Main Details** tab includes the standard bibliographic fields presented in the order suggested by the RDA cataloguing guidelines (see section 5.2 below for a full description of the new RDA cataloguing functionality in SP12). Where possible, quick data entry fields have been included to facilitate the entry of frequently-entered bibliographic data without having to switch to a separate screen. This includes: extent (i.e. physical description) ; notes ; ISBN ; copies.

The **Abstract** tab includes the Abstract field.

The **Digital Resource Details** tab includes the Object fields:

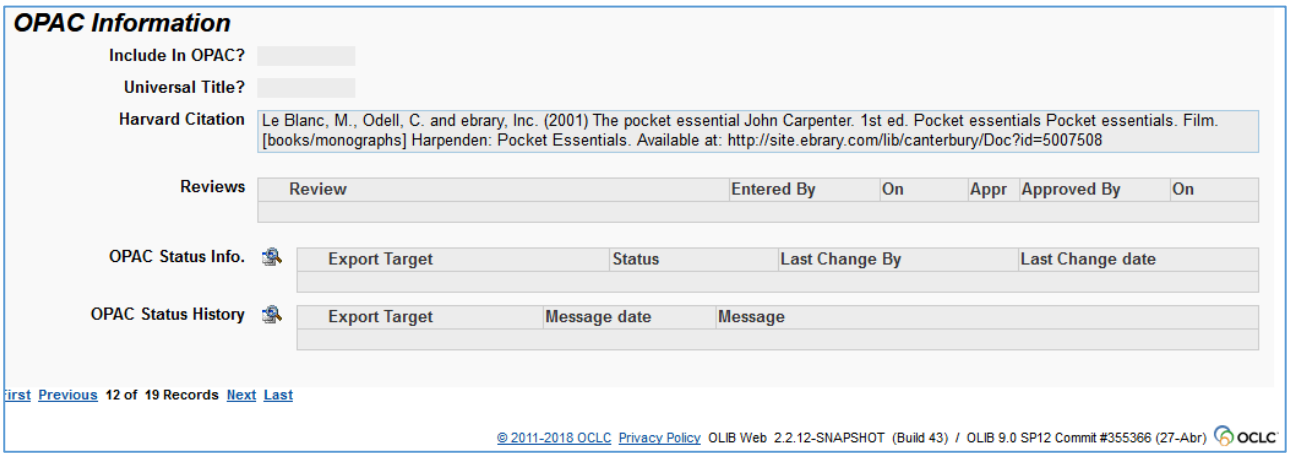


If the object to be entered is a URL, this can be entered straight into the locator field, and when the double arrow button is clicked, a WWW object will be created with the URL you entered in the Locator field. If anything other than a URL is to be entered, use the standard New option to enter the object details in the normal way.

The field below the objects list box is the First Object Preview field that was added in SP11. This field displays a preview of the actual web page, PDF or whatever is referenced by the first object. Note, however, that OLIB cannot preview digital resources that require authentication. You will have to supply your login credentials before the resource is displayed.

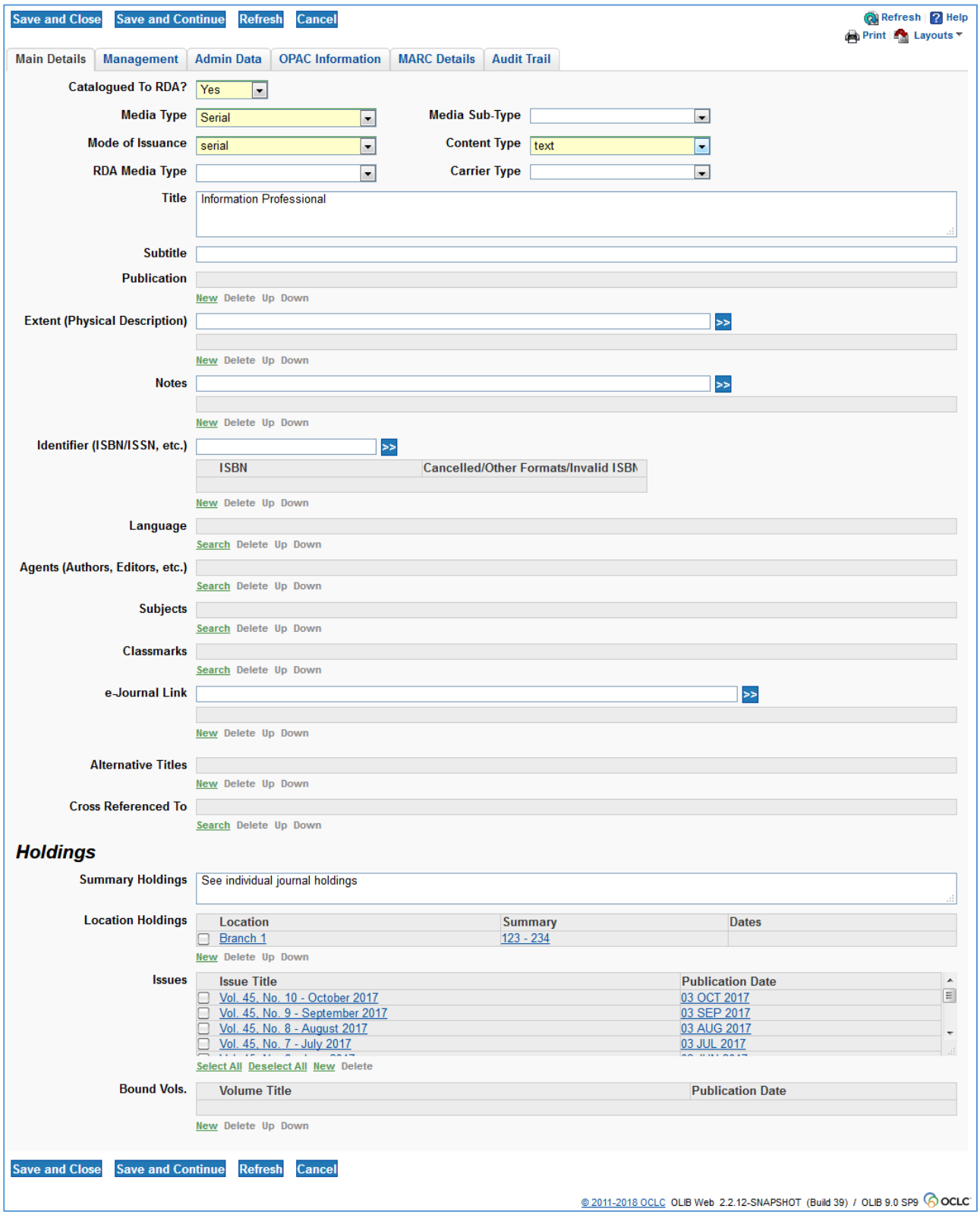
The **Admin Data** tab includes non-bibliographic fields that are used to “manage” the record, such as the title record number, the date catalogued, and information from the Circulation and Acquisitions modules.

The **OPAC Information** tab includes fields that relate to the record in the context of Folio, WebView, WorldCat and 3rd Party Discovery Services:



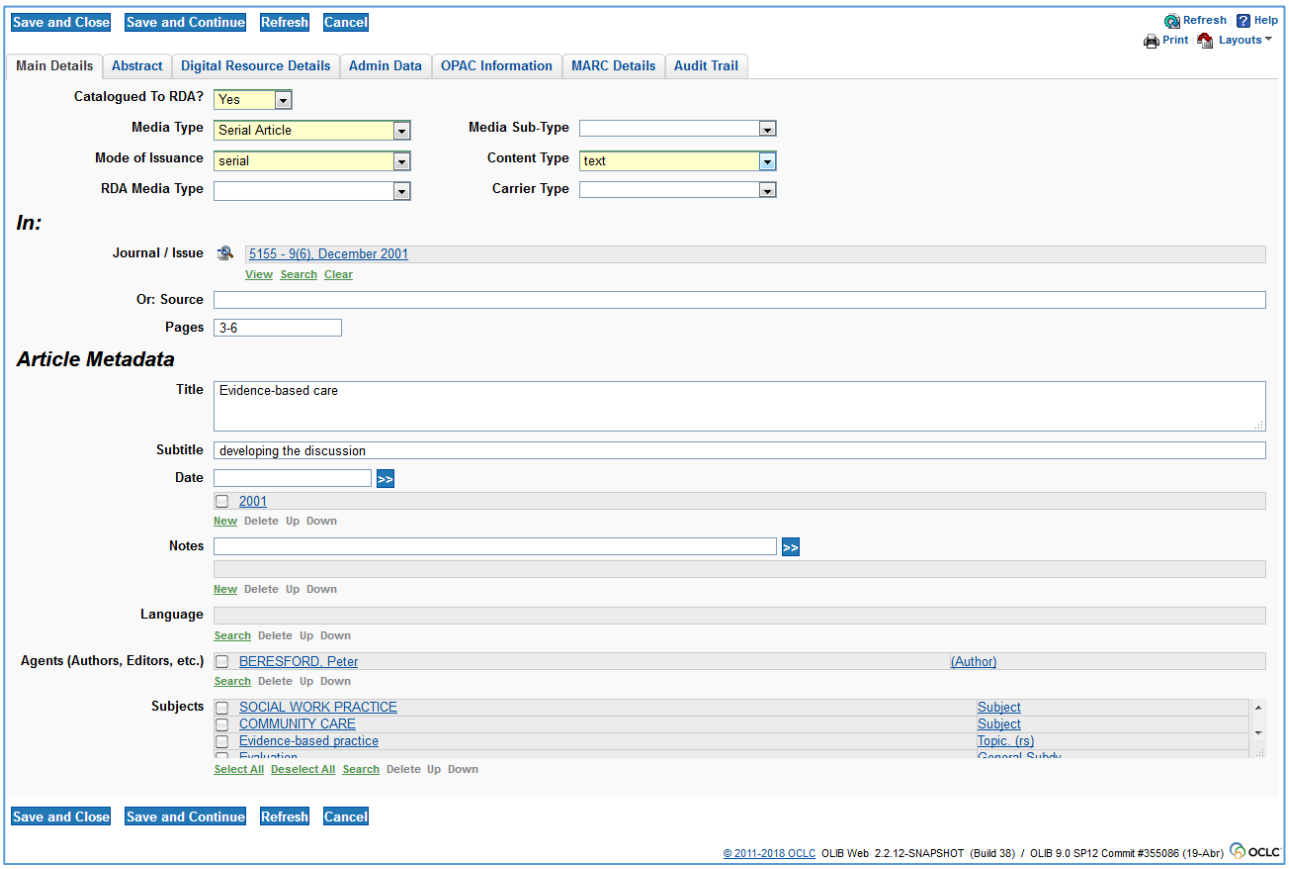
Note in particular the inclusion of the Harvard Citation field. This has been included to enable you to preview the record in Harvard citation format, to confirm that it will be correctly delivered to your end users if they download it from Folio or WebView.

The **RDA Serials** layout is available in the Layouts drop-down list if the record that is currently displayed is a serial record:



This layout includes a **Main Details** tab that presents bibliographic fields that are specific to serials, together with the standard serials **Management** tab and the standard **Admin Data**, **OPAC Information**, **MARC Details** and **Audit Trail** tabs.

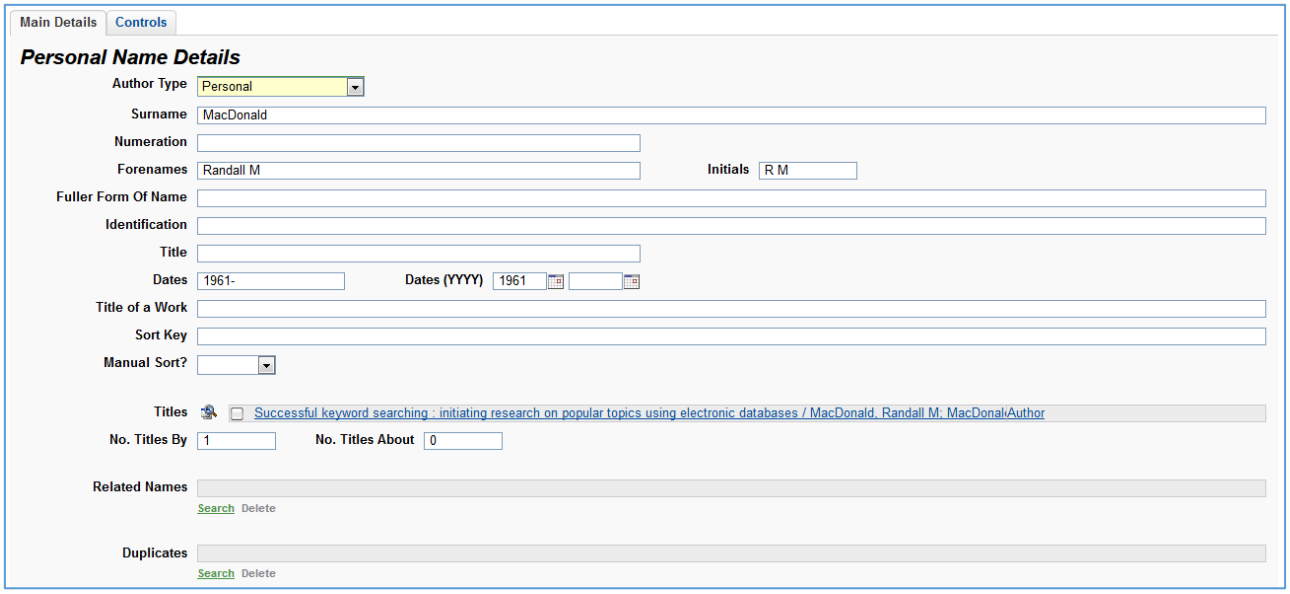
The **RDA Articles** layout is available in the Layouts drop-down list if the record that is currently displayed is an article record:

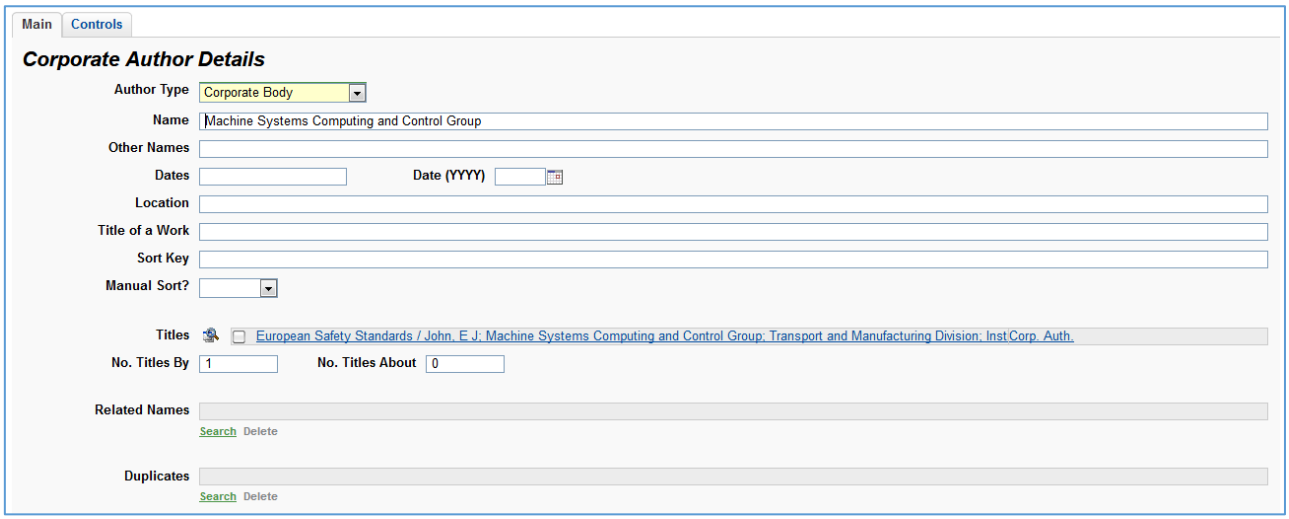


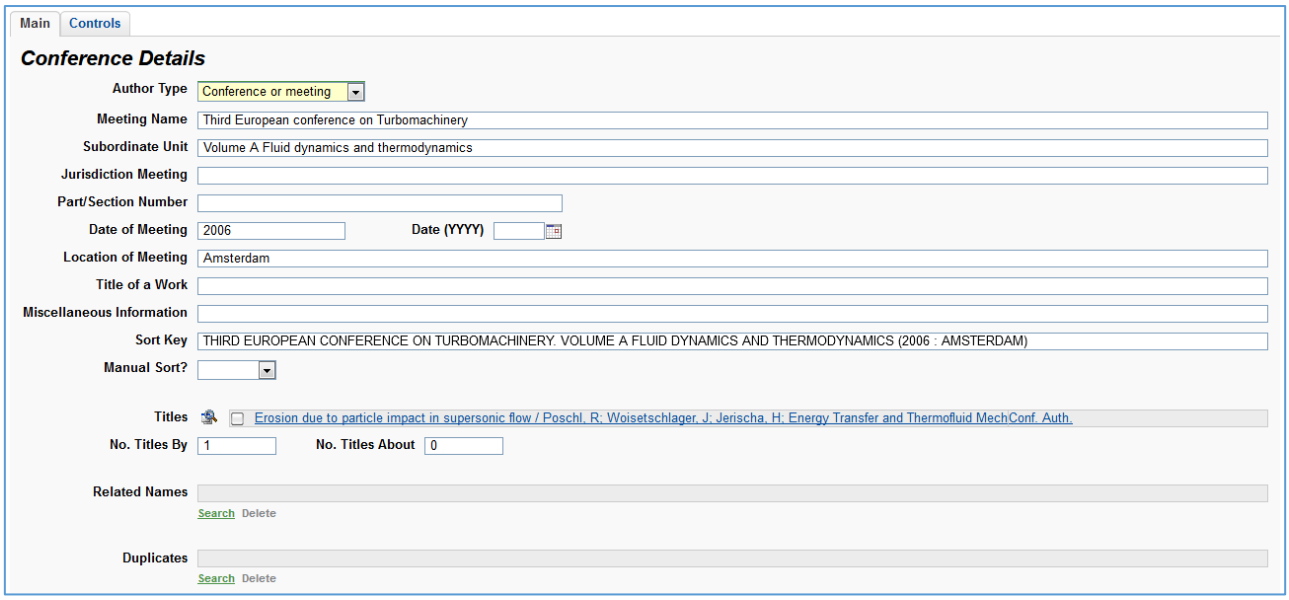
This layout includes a **Main Details** tab that presents bibliographic fields that are specific to articles, together with the standard **Abstract**, **Digital Resource Details**, **Admin Data**, **OPAC Information**, **MARC Details** and **Audit Trail** tabs.

Names Layouts

New Names layouts have been included for the **Personal**, **Corporate Body** and **Conference or meeting** name types:







(OLB-11376 – NERC)

3.2. Resource Description and Access Cataloguing

OLIB has been enhanced in SP12 to enable you to catalogue resources in accordance with the Resource Description and Access (RDA) guidelines. As described in the previous section, new Titles layouts have been included that present the bibliographic data fields in the order they are listed in the RDA list of attributes, together with several new fields that represent data elements specific to RDA, namely:

- **Mode of Issuance**: a categorisation reflecting whether a resource is issued in one or more parts, the way it is updated, and whether its termination is predetermined or not. This is flagged as a mandatory field on the new RDA screen.

- **Content Type**: a categorisation reflecting the fundamental form of communication in which the content is expressed and the human sense through which it is intended to be perceived. This is flagged as a mandatory field on the new RDA screen.

- **Media Type**: [referred to in OLIB as the **RDA Media Type** to differentiate it from the OLIB media type] a categorisation reflecting the general type of intermediation device required to view, play, run, etc., the content of a resource.

- **Carrier Type**: a categorisation reflecting the format of the storage medium and housing of a carrier in combination with the type of intermediation device required to view, play, run, etc., the content of a resource.

There is also a new Yes/No field, **Catalogued To RDA?**, This field should be used to denote explicitly that the resource has been catalogued to RDA standards. Note that this is also a mandatory field on the new RDA layouts. Thus, when you use these layouts to catalogue new records or modify existing records, you will not be able to save the record without setting this field to either Yes or No.

The RDA Cataloguing Workflow

1. Click New Record in the Titles domain to create a new title record.

2. Change to the new RDA layout.

   If all your original cataloguing is to be RDA cataloguing, you can make the new RDA layout your default layout.

3. Set Catalogued To RDA? To Yes.

   If all your original cataloguing is to be RDA cataloguing, you can configure your OLIB system to default this field to Yes by setting the **RDA Cataloguing Rules In Use** field in OLIB Defaults to Yes.

4. Set the OLIB media type and sub-type as normal.

5. Set the Mode of Issuance accordingly.

   You can set a default mode of issuance in the media type and sub-type records, so that, when you start a new record or when you change to a different media type or sub-type, the Mode of Issuance field will be set automatically.

   The SP12 installation process sets the default mode of issuance to the appropriate value in the following standard OLIB media types: BKM, BVOL, CART, DVD, LLEAF, SER, SISS, SREC, VREC and WWW.

6. Set the Content Type accordingly.

   As with mode of issuance, you can set a default content type in the media type and sub-type records, so that, when you start a new record or when you change to a different media type or sub-type, the Content Type field will be set automatically.

   The SP12 installation process sets the default content type to the appropriate value in the following standard OLIB media types: BKM, BVOL, CART, CHAP, LLEAF, LLFPT, SART, SER, SISS, SREC, TRACK and VREC.

7. Set the RDA Media Type accordingly.

   Note that, when you select an RDA media type, the screen will be re-drawn to re-populate the Carrier Type field's drop-down list with the list of carrier types that can be used in conjunction with the RDA media type that you selected.

   As with mode of issuance and content type, you can set a default RDA media type in the OLIB media type and sub-type records, so that, when you start a new record or when you change to a different media type or sub-type, the RDA Media Type field will be set automatically. (And note that, when you modify an OLIB media type or sub-type to set a default RDA media type, the screen will be re-drawn to re-populate the Default RDA Carrier Type field's drop-down list with the list of carrier types that can be used in conjunction with the RDA media type that you selected.)

   The SP12 installation process sets the default RDA media type to the appropriate value in the following standard OLIB media types: SREC, TRACK, VREC and WWW.

8. Set the Carrier Type accordingly.

   As with mode of issuance, content type and RDA media type, you can set a default carrier type in the

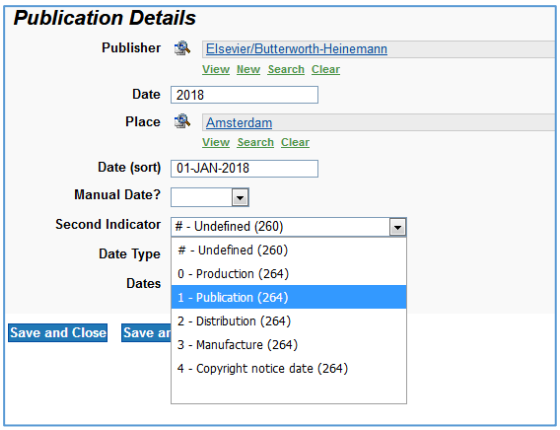
OLIB media type and sub-type records, so that, when you start a new record or when you change to a different media type or sub-type, the Carrier Type field will be set automatically.

The SP12 installation process sets the default carrier type to the appropriate value in the following standard OLIB media types: SREC, TRACK, VREC and WWW.

9. Enter data in the remaining fields in accordance with the RDA cataloguing guidelines and/or your own cataloguing practices.

10. In an RDA record, the correct MARC tag for the publication details is tag 264 rather than tag 260. Whilst entering the publication details in OLIB, it is therefore important to set the 2nd indicator correctly so that, should you ever export the record in MARC format, the publication details will be included in tag 264 rather than tag 260.

    The Second Indicator is included on the standard Publication Details layout. If you do not use the standard Publication Details layout, you will have to add the field to your layout using Layout Manager.



    The Second Indicator field defaults to # - Undefined. In RDA cataloguing, it should be set to the relevant "RDA" value, which will almost invariably be 1 – Publication.

Configuration Notes
The Mode of Issuance, Content Type, (RDA) Media Type and Carrier Type code lists are fixed vocabularies that are governed and maintained by the RDA Steering Committee. The decision was therefore taken to not include reference data domains for them in OLIB. Instead, OCLC will monitor the vocabularies to identify any changes that are made to them. Changes will then be distributed as OLIB RSDs.

Exporting RDA Records to MARC
The new RDA fields are exported to MARC as follows:

- **Catalogued To RDA?**: if this field is set to Yes, the MARC record will include a $e in the 040 tag. This subfield will be set to rda.

- **Mode of Issuance**: this is not explicitly exported to the MARC record. The MARC export process will continue to populate Leader/07 and Leader/19 as before, to represent the mode of issuance.

- **Content Type**: this will be exported to tag 336.

- **Media Type**: this will be exported to tag 337.

- **Carrier Type**: this will be exported to tag 338.

(OLB-13784 / OLB-12537 – Cerge-EI, Colombia, Logos, NLSB)

3.3. Title-Series Linking

The underlying code for linking titles to series has been revisited to address a variety of issues. The workflow has been amended and it is now possible to link a title multiple times to the same series.

To add a series to a title:
1. Modify the title
2. Click Search under the Series field
3. Find the series and click Insert or Insert and Continue
4. Enter the volume number in the Volume/Number field, e.g. Volume 61
5. On leaving this free text field, a number will be derived from it and placed into the Vol./No. (Numeric) field directly below. In the above example, 61 will be added to the Vol./No. (Numeric) field. This will determine this title's position in the series' list of titles
6. Click Save and Close

To add a title to a series:
1. Modify the series
2. Click Search under the Titles field on the Titles tab
3. Find the title and click Insert or Insert and Continue
4. Enter the volume number in the Volume/Number field, e.g. Volume 61
5. On leaving this free text field, a number will be derived from it and placed into the Vol./No. (Numeric) field directly below. In the above example, 61 will be added to the Vol./No. (Numeric) field. This will determine this title's position in the series' list of titles
6. Click Save and Close

When a link is created between a title record and a series record by either of the above workflows, a number is extracted from the textual volume number information according to the process described below. This number will be used to determine where in the series the title should be listed in relation to the other titles in the series. If no number information can be extracted from the textual volume number information, the title will appear at the end after any titles that do have sequence information. An internal sequence number will be used to maintain this ordering. This sequence number can be amended manually if required, using the standard Up and Down re-sequencing options.

To correspond with the above changes to the system, the OLSTF and MARC imports will also set the appropriate sequence number based on the same extraction of the text imported.

The sequencing will also be handled accordingly when titles or series records are deduplicated.

Archiving a title will now also archive the links to the series records. Unarchiving the title will re-create the links and place them in the series according to the rules used for adding titles to a series.

Note that, whilst a title can be moved up or down the list of titles for a series manually, doing so may lead to erroneous positioning of new titles added to the series (either in OLIB Web, through an import or when unarchiving). The new title will be placed immediately above the first title which has a sequence deemed to be higher than the new record.

As part of the installation of the Service Pack, the internal sequencing information will be set for all existing series according to the rules described above.

Deriving a number from the textual volume number information
Numbers are derived from the textual volume number information entered or imported according to the following process:
1. If there are numbers in the value entered, the first set of one or more consecutive digits are used
2. If there are no numbers, OLIB will look in descending order firstly for ordinal numbers in English (from *one hundredth*) and then cardinal numbers (from *one hundred*).
3. If there remains no number to be derived, each word entered is examined as a possible Roman numeral, and converted if possible.

The **Show All Title Details** action, which launches a search to display a hitlist of all the titles in this series, has been amended to sort the title according to the internal number, as used for the attribute.

A new method has been added, **Reset Sequencing**. This method will replace the internal sorting with the sorting derived from the numeric and text fields on the title-series link record. This is useful if several link records have been edited and their positions in the series should be changed as a result.

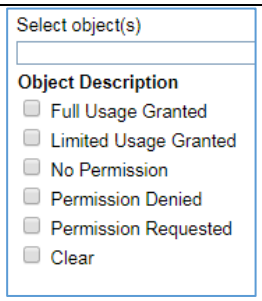
(OLB-3733, OLB-3812, OLB-4606, OLB-6136, OLB-7865, OLB-9743, OLB-12872)

(Colombia, Defra, FamilySearch, NRW, NERC, SNH)

3.4. Minor Enhancements

IMS Ref.	Description
OLB-14340	When an author is inserted into a new title record, the Responsibility field on the Title-Author Relationship screen can now be made to default depending on the author type of the author record being inserted. For example, if the author being inserted is a personal author, the Responsibility field can be made to default to Author, whereas if the author being inserted is a corporate author, Responsibility can be made to default to Corporate Author. This feature is enabled by the addition of the **Default Responsibility Type** field to the Name Types screen (in Cataloguing Reference Data). The Default Responsibility Type field is set as follows in the standard OLIB Name Types records as part of the SP12 installation process: PER – Personal ➔ Author CORP - Corporate Author ➔ Corporate Author CONF - Conference or meeting ➔ Conference Author (IMechE)
OLB-14549	The addition of titles to folders and the removal of titles from folders is now recorded in the title record's audit trail. The audit trail entry indicates who added the title to the folder or removed it from it. In the Deleted Titles domain, this will show after the deletion action record. In addition, the Added By user and Added On date are now shown in the Personal Folders domain for titles, copies and users. This shows the time if the record was added "today", or the date if it was added prior to "today". (S&W NHS)
OLB-7613 OLB-5020 OLB-5884 OLB-6837 OLB-6995 OLB-7188	The All Titles Search hitlist has been modified as follows: - it now displays the main title as well as the alternative title - it includes the alternative title type where relevant - it uses the output format facility to display the main title's details - it includes a column to display the media type and media sub-type. The composition of this column is defined in the Format Display Definition field in Admin Client Defaults - it includes a column to display the classmark - it includes a column for the main title's No. Copies Additionally, the search is now sorted first by the alternative (or series) title and then the main title. (Colombia, Defra, IMechE, S&W NHS, FamilySearch)
OLB-14649	The Delete Titles action has been renamed to **Permanently Delete Titles**. This is to ensure that it is listed well away from other commonly used actions. Prior to SP12, it was immediately above the Export action. It was therefore all too easy to select it by mistake instead of the Export action. (NRW)
OLB-14734	It is now possible to sort title searches by primary classmark and by media type. (Leeds College of Music)

OLB-3581	Conference and meeting author records are now presented correctly in the Names hitlist and whenever the record is displayed, e.g. in the Authors field on the title details screen. "Correctly" means in accordance with AACR2 rules, i.e. Conference Name (Number : Dates : Location). The standard Name layouts have been enhanced to incorporate additional existing and new fields. Any existing customised Names layouts will remain in place. (NERC)
OLB-7642	It is now possible to get a hitlist of title records that have been saved in a folder. This has been delivered by including a Folders option in the list of related domains in the Refine Search box. To refine the title search by folder, select the Folder option in this linked domain, and then select the folders from the Select List Refinements box. (Summer Conference vote)
OLB-13862	The list of folders now includes three new system folders: Titles For Auto-Archiving, Copies For Auto-Archiving and Users For Auto-Archiving. These behave like the auto-deletion folders, except that records that are added to them are automatically archived during daystart, rather than automatically deleted. (Colombia)
OLB-14339	When using the **Edit Responsibility** option in the Authors field and the **Edit link record** in the Series field, the link record now opens in modify mode. (CSP, IMechE, Nottingham College)
OLB-14553	Archiving a title record did not remove it from an OPAC list folder. This has been resolved by modifying the display of OPAC lists to exclude archived title records. (Bank of England)
OLB-14560	When the columns to support names as subjects in the Subject Headings domain were added to the subjects table, corresponding attributes were not added to the Subject Headings domain. These have now been added
OLB-14567	The Responsibility Types, Record Source Codes and Areas layouts have been tidied up
OLB-14668	The Archived Copies searches have had Archived added to the start of the description to bring them in line with the search descriptions in the other archive domains
OLB-14671	A new Copies domain action/method has been included to set/change the Provisional Copyright Status. The new action/method is called **Update User-Defined Data**. (This name can be changed by the system administrator.) The action/method will only be presented if the system includes at least one user-defined reference data value. The action/method first asks for which user-defined data category to update, and whether to update all other copies associated with the titles linked to the selected copies as well as the selected copies themselves: Having selected, for example, Provisional Copyright Status, the user is then asked which value the field should be set to, or whether it should be cleared:

	 A summary of the updates that were carried out is displayed, together with a list and a count of the barcodes that were processed. The summary advises which copies were updated, were not changed, or could not be updated. (The latter is likely due to the copy being locked by the current or another user.) (FamilySearch)
OLB-14676	When the High Density field is changed to No in Copies, the HD number is now deleted. (FamilySearch)
OLB-14684 OLB-14680	The lists of titles in a subject's Titles field are now sorted by title and subtitle, not just by title. (FamilySearch)
OLB-14762	Ten new combo fields have been included in Titles, one for each of the subject type codes (0-9). The drop-down lists for these fields include the subjects with a subject type that has been allocated to the respective code. They can be added immediately above the corresponding subject list field, and used to quickly add a subject to that list, without having to open the dependent search, search for the subject to be added and click Insert. A similar field has also been added for class type code 9 classmarks, which will be added to the Classmark 9 list. (Defra)

3.5. Bug Fixes

IMS Ref.	Description
OLB-14547	Stocktaking only looked at the current loan status of an item to determine missing / OK, not the item status on the date noted for the stocktaking project. The Stocktaking package has been updated to correct this. It now ascertains the loan status at the time of the start of the Stocktaking project. This is done by first examining the Last Issued and Last Return dates. If these show that the item was on loan at the time of the Stocktake, then the result will indicate that. The package will then look for the circulation transactions immediately subsequent and prior to the Stocktaking project start date and, dependent on the type of transaction the result will show that the item was recorded as issued, held, withdrawn or lost after the stockcheck. (Colombia)
OLB-7611	If the publication date is entered in the Date (2) field or the Date (3) field rather than the main Date field (because, for example, the item has two publishers and places of publication), this information was not displayed as the date of publication in any output formats that use the TIPD1 OLSTF tag (such as the Admin Client Title Hitlist Display Attribute 1, which formulates the information to include in the Title Information column in Titles hitlists).

	The code behind the TIPD1 OLSTF tag has therefore been corrected so that it selects Date (2) if the main Date field is blank, and Date (3) if Date (2) is blank. It only then selects Date (Sort) if Date (3) is also blank. (S&W NHS)
OLB-5832	The Titles by Series search was excessively slow owing to an extraneous outer join to titleseries. This has been corrected
OLB-11710	Creating a sub-location at the point of creating a location did not show the sub-location on the location record until the location had been saved, closed and then re-opened. This has been corrected so that the sub-location is displayed immediately after it has been added
OLB-14554	Attempts to update a set of copies' shelves to NULL failed. This has been corrected. (S&W NHS)
OLB-14569	WorldView presented an error 4 times when secondary searching to an ISN from a title record. This has been corrected. (GBMet) (Included in RSD-1110-OLIB14573 for SP11 systems)
OLB-14565	The Copy Categories hitlist was not sorted. This has been corrected so that it is sorted by uppercased long description

4. KEYWORD INDEXING AND SEARCHING

4.1. Minor Enhancements

IMS Ref.	Description
OLB-14521 OLB-8016	It is now possible to configure a Titles keyword index so that an attached object's title, locator and other fields can be made to be searchable in a keyword search in Titles. The SP12 installation process adds the title and locator to the Main Word Index (the main keyword index for the Titles domain). However, for the changes to take effect, the keyword index will have to be rebuilt once SP12 has been installed. (Logos)

4.2. Bug Fixes

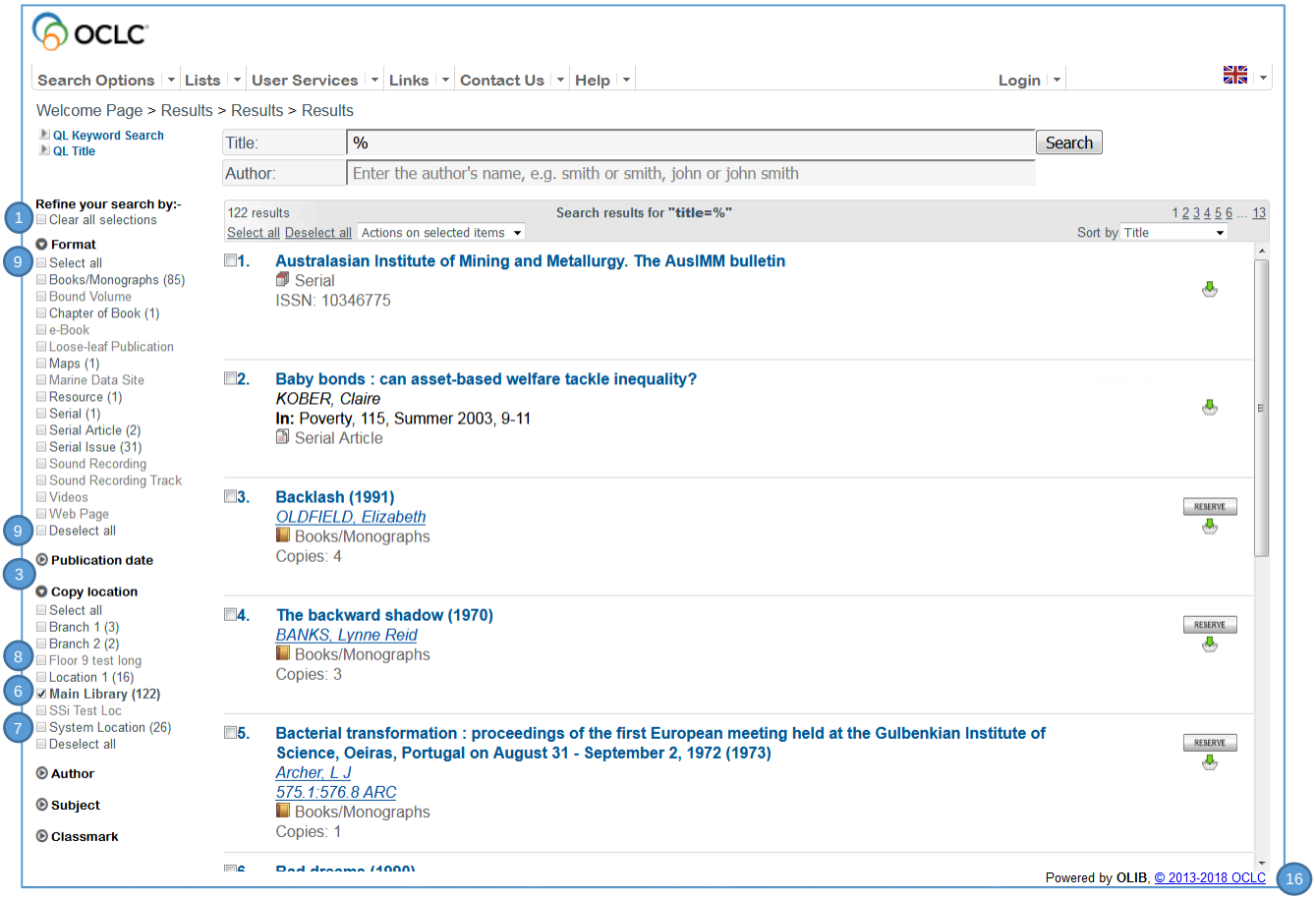
IMS Ref.	Description
OLB-14647	There were several issues with the handling of diacritics in Folio: - a title search in Folio for "Coed Dol-gôch" failed. The diacritic was not handled correctly - if a diacritic was included in the Abstract field, it was not displayed correctly - a keyword search for Coed Dol-gôch failed to retrieve the records containing that phrase These issues have been resolved. (NRW)

5. OPAC

All changes described below are in Folio only unless otherwise specified.

5.1. Facet Sidebar and Smartphone/Mobile/Device Optimisation

The facet sidebar has been completely redesigned, together with several other changes, to improve overall functionality and presentation, and to make Folio more responsive so that it can be used on smartphones, mobile phones and other devices.



The changes that have been made are as follows:

1. A **Clear all selections** option has been included at the top of the facet sidebar. The option text is set in g_sidebar.clearall_checkbox_label. The hover text is set in g_sidebar.clearall_checkbox_title.

2. The search is run automatically when a facet is selected, without waiting for the user to click Search to re-run the search.

3. Each facet box can now be expanded and collapsed by clicking the right and down arrow icons to the left of the facet header.

4. Each facet box for each search option can be configured to determine whether it is displayed expanded or collapsed when the search form is displayed. To configure a facet box so that it is displayed collapsed when a search form is opened, add “closed” (including the double quotes) to the Value 2 field in the respective xxx_facets array entries. For example, to configure the keyword search’s Author facet box so that it is collapsed when the keyword search form is displayed, add “closed” to the Value 2 field in the g_kws2.kws2_facets “name” setting. Entering anything other than “closed” in the Value 2 field, or leaving it blank, will mean that the facet box will display expanded.

   A facet box will display as expanded irrespective of any config settings to the contrary if there is at least

one selected facet in that box.

5. A facet can now be selected by clicking anywhere on the facet, including its checkbox. Previously, a facet could only be selected by clicking its checkbox.

6. Selected facets are displayed in bold.

7. Facets that have hits but are not selected are displayed in normal weight.

8. If a facet has 0 hits, it is displayed greyed out and without the (0) at the end.

9. A Select all option has been included as the first option in each facet box, and a Deselect all option as the last option. These replace the Select all and Deselect all icons that were previously displayed in the top right corner of each facet box, which were deemed to be too small and too unclear as to their purpose. The text of the Select all and Deselect all options is set in the l_select_all_opt and l_deselect_all_opt configuration settings in g_sidebar. This default text can be set differently in each facet box by adding l_select_all_opt_xxx and l_deselect_all_opt_xxx settings, where xxx is the facet box's mnemonic.

10. The facet box borders have been removed.

11. The facet box header background has been changed to white.

12. The facet box cookies have been updated so that, if a facet box is closed, it remains closed whilst the search form is used until it is re-opened. Changing to a new search option clears the facet box cookies.

13. If an author, subject or classmark facet is selected, and then another facet is selected that results in a hitlist that does not contain the selected author, subject or classmark, the selected author, subject or classmark remains included in the respective facet box so that it can be de-selected.

14. In the searchlevel facet box, the lopt0 option is now always displayed at the end. Previously, the options were displayed in numerical order: lopt0, then lopt1, then lopt2, and finally lopt3. This led to it being over-complicated to configure because lopt3 was generally the same as lopt0, which meant that you had to set up two title sets that were identical. Displaying lopt0 at the end rather than the start means that you don't need to include lopt3 at all.

15. The vertical scroll bar is no longer displayed in the facet sidebar. The facet boxes now simply flow below the bottom edge of the main browser, and the main vertical scroll bar is displayed on the right of the main browser window.

16. The footer is now displayed in the bottom right corner rather than bottom left corner.

17. The facility to change the number of hits per page has been removed from the hitlist header bar. All hitlists are now displayed with 10 hits per page.

18. The Previous and Next arrows in the details header have been changed to double arrows and have been enlarged so that they are easier to use.

19. The right arrow icon to the left of the Quick Launch search options has been changed to a proper button icon rather than a flat icon.

Note that the new settings referenced above are not added during the SP12 installation. They must be created manually once SP12 has been installed if you require a different behaviour to the hard-coded default.

(OLB-14606, OLB-13384 / OLB-13743 – IMechE, Shropshire NHS, S&W NHS, OLB-13555 – Summer Conference vote)

5.2. The Help Icons

Several changes have been made to the Help facility:

1. The Help icon now displays constantly on the search form if help is configured to be included for that search form. It is placed to the right of the Search button. Previously, the Help icon only displayed when you hovered over the search form.

2. On the title details screen, on the lower half of the screen, the Help icon previously displayed with the label of the title details tabs, and only when you hovered on the tab. This has been changed so that the icon now displays constantly in the right corner of the tab's header bar.

3. Previously, it was not possible to display the Help icon on the Reviews heading, as the Reviews section does not have a tab of its own. This has been changed so that the Reviews section has its own help page option – **help_page_reviews** in g_title_details_ratings. This is displayed in the right corner of the Reviews section's header bar.

   Note that this setting **is** delivered during the SP12 installation. It is delivered as Included, so the Help icon will display by default. It points to https://www.oclc.org/support/help/olib/folio/Reviews.htm.

4. The online Folio help pages have been compiled so that they are responsive and can therefore be viewed on a smartphone or device.

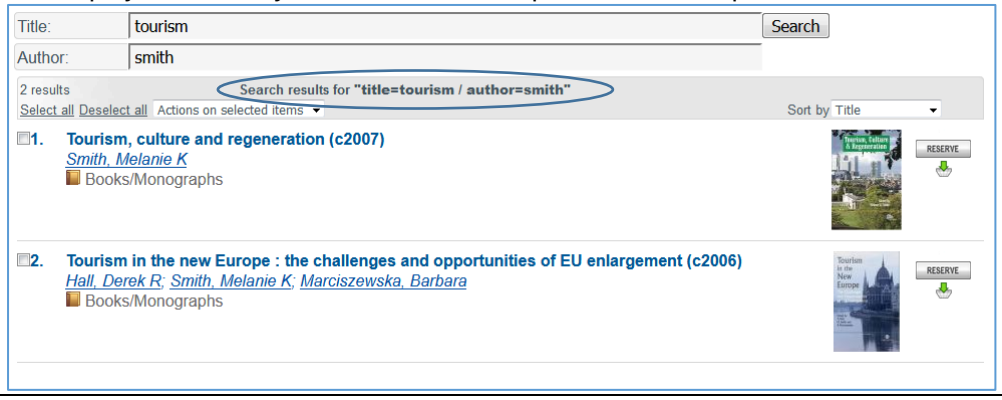
(Summer Conference vote)

5.3. Minor Enhancements

IMS Ref.	Description
OLB-7812	If a search is filtered by location, only the copies at locations filtered on are shown on the Copies tab on the title details screen. (The Technical Library, Cerge-EI, GBMet, Colombia, Nottingham College, S&W NHS)
OLB-14475	It is now possible to assign a user group to an OPAC List group. This will mean that anyone who is a member of that group will be able to see the list in Folio or WebView. This will greatly simplify the configuration of OPAC List Groups as it means that the same set of users (e.g. all HE users) can be assigned to several OPAC List groups without having to add all the users as individuals to each OPAC List group. User groups are added to OPAC List groups in the Groups field on the Members tab, immediately underneath the Users field. Note that it is possible to assign both user groups and individuals to an OPAC List group. (Nottingham College)
OLB-14582	WebView offered an option to include a display format in a StraightToTitle URL, e.g. https://libcat.mycollege.ac.uk/webview/?oid=45924**&tiarray=full**. This option has now been included in Folio. (NRW)
OLB-14534	It is now possible to mark a subject in such a way that it is not included in the Subjects facet list even though it is linked to titles in the hitlist. A new attribute called **Exclude From Folio Subjects Facet** has been added to facilitate this. (Note that this attribute is not added to the Subjects layouts during the Service Pack installation.) This replicates the Exclude From Folio Authors Facet facility that was included in SP11.
OLB-14584	WebView included a configuration option that enabled you to offer an Additional Conditions filter option. This facility has now been included in Folio. The facet mnemonic is **acn**.

	(NRW)
OLB-14697	(Folio and WebView) The Series subtitle is now displayed on the OPAC title details screen, separated from the main title with a space-colon-space. (Logos)
OLB-14733	A new configuration option has been included to specify whether Other Issues are listed in repeat_seq order or in inverse repeat_seq order on the Folio serial titles screen's Issues tab. Effectively, this means that manually created issues (which are included in the Other Issues list) can be listed in chronological order or reverse chronological order. The new configuration option is a Yes/No field on the OLIB Defaults Funds/Acq./Serials tab – **Sort Other Issues Inversely?** Set this field to Yes to sort Other Issues by repeat_seq descending. If it is set to No or left blank, Other Issues will be sorted by repeat_seq ascending, which was the default behaviour prior to SP12. (Colombia)
OLB-14627	(Folio and WebView) It is now possible to configure individual serial issues so that they are not included in the list of issues on the parent journal or bound volume's title details screen. This can be achieved by setting the respective serial issue record's Include In OPAC flag to No. (Colombia)
OLB-14731	The Login form has been changed so that it utilises the password_fieldname configuration setting in login.ini. Previously, it was hardcoded to Password, and could not be changed or translated. (IMechE)
OLB-14525	It is now possible to configure the Items On Loan table on the user details screen so that it does not include the Location or the Charges columns. To hide the Location column, add a configuration setting called **show_loc** in g_user_details and set the Value field to "N" (including the double quotes). To hide the Charges column, add a configuration setting called **show_charges** in g_user_details and set the Value field to "N" (including the double quotes). (NE NHS, Bank of England)

5.4. Bug Fixes

IMS Ref.	Description
OLB-14742	If you enter a title and an author on the Title/Author search form, the **Search results for** message in the hitlist header only included the author. This has been corrected so that it now displays whatever you entered in the respective search input fields: 

OLB-9127	A title record was still retrievable in a search filtered on the location of a copy that had been flagged as “hidden from OPAC”. This has been corrected. Also, the Copy Location facet block has been changed so that it excludes locations at which all copies are hidden from the OPAC. (S&W NHS)
OLB-10441	(Folio and WebView) When an Advanced search found no hits, the message reporting that the search for "..." returns no hits included the normalised version of the search term followed by a % instead of what the user entered. This has been corrected so that the search term as entered by the user is displayed. In addition, the search term will be prepended by the field that the user searched on, e.g. “title=tourism”. Some configuration changes are required to fully implement this change: - For Folio, change the no_hits_message setting to "Your search for <searchString> has returned no hits." - For WebView, change the no_hits_message in advanced_search.ini to " Your search (%stylestr% : %orig_entry%) has returned no hits. ". Also, change the no_hits_messagef in advanced_search.ini to " Your filtered search (%stylestr% : %orig_entry%) has returned no hits. " Note that these settings are not changed during the SP12 installation. They must be changed manually once SP12 has been installed
OLB-14146	There was a problem with the Reserve All link if it was clicked twice in quick succession. This has been resolved by hiding the Reserve All link as soon as it is clicked
OLB-14593	If a record is displayed using its StraightToTitle URL, then another record is displayed using its StraightToTitle URL, and finally the first record’s StraightToTitle URL is clicked, the second record was displayed rather than the first record. This has been corrected. (The Manchester College)
OLB-14596	The facet blocks occasionally listed incorrect (and often duplicated) sets of facets. This has been remedied
OLB-14600	The #AnchoredAuths# and #AnchoredClasses# hash tags were displayed on the reservation screen if they were included in the OPAC Title Hitlist output format record. This has been corrected so that the hash tags are removed accordingly
OLB-14604	The Local Credential Capture SSO facility (as used by CSP) was broken in SP11. It has been corrected in SP12. (An RSD has been installed on CSP’s system to fix this bug in SP11.) (CSP)
OLB-14608	Archived title records were being displayed in various places in both Folio and WebView, e.g. the list of related titles in Folio and the list of serial issue records in WebView. This has been corrected so that archived title records are no longer displayed anywhere in either Folio or WebView. (Colombia)
OLB-14619	A keyword search filtered by an author returned no hits randomly, apparently based on the value of author record number, owing to a bug in earlier versions of Oracle that has been fixed in Oracle 12.2. A fix has been included in Folio so that it works correctly in earlier versions of Oracle, whilst continuing to work correctly in Oracle 12.2
OLB-14705	Not including a welcome_message setting was causing Folio to hang. This has been remedied. (The Manchester College)
OLB-14706	(WebView only) The Google Analytics functionality no longer worked in SP10 and SP11. If the google_analytics_code setting was enabled, it caused WebView to fail to load. This has been rectified in SP12. (PXL)

OLB-14719	The HTML-encoding for diacritical characters was displayed in the breadcrumb hover-over text. This has been corrected so that the correct diacritic is displayed. (Colombia)
OLB-14738	If a StraightToKeywordSearch search is the first action in a new session, **Welcome Page** was displayed on the search results hitlist header bar instead of **Search results for ...** This has been remedied
OLB-14654	Folio locked up if an attempt was made to display a title record with a large number of copies, or a journal record with a large number of issues. This occurred because there is a limit on the number of characters that can be included in the Copies and Serial Issues display blocks (c.35,000 characters and c.88,000 characters respectively). If this limit is exceeded, Folio locks up. This has been remedied as follows: - the Copies display has been modified so that, if it exceeds the limit, it displays as much as it can, followed by a message to indicate that other copies are also available. The message is defined in the gl_other_copies_avl setting. This setting is not supplied by default. The system is hard-coded to use “Other copies are also available” if the setting is not included. If something other than the default is required, add a gl_other_copies_avl setting in the g_title_details. - the Serial Issues display has been modified so that, if it exceeds the limit, it displays as much as it can, followed by a message to indicate that older issues are also available. The message is defined in the gl_older_issues_avl setting. This setting is not supplied by default. The system is hard-coded to uses “Older issues are also available” if the setting is not included. If something other than the default is required, add a gl_older_issues_avl setting in the g_title_details. (Colombia, Nottingham College)
OLB-13873	The search boxes were occasionally obscured by other parts of the screen so that, if the user had entered a search term in them, they could not easily be read, and if they were empty, they could not be accessed to enter a search term in them. This has been remedied as much as possible. Search form fields are still obscured if you re-size the browser window to a very small size. However, this is deemed to be acceptable as the entire system becomes unusable at this browser window size. (S&W NHS, Bank of England)
OLB-12747	(Folio and WebView) The final three characters of the renewal error message were being truncated. This has been corrected

6. USER MANAGEMENT, USER GROUPS AND LOCATIONS

6.1. Minor Enhancements

IMS Ref.	Description
OLB-14717	A new Yes/No field has been included in the Users domain to explicitly record the fact that the member of staff has authorised for their address to be retained in OLIB. The attribute is called **Address Retention Consent Given**. Note that it is not added to Users layouts during SP12 installation. If you would like to use it, it should be added to your Users layout using Layout Manager. In preparation for the requirement to implement a GDPR Consent facility, two other Yes/No fields have been added to the Users domain: - **Consent Given (Self-Affirmed)** – this will be set to Yes if, during self-registration in Folio, the end user has checked the box that confirms that they have given their consent for their personal details to be held in your OLIB system. (Please note, however, that the Yes/No checkbox has not yet been included on the Folio self-registration form.) - **Consent Given (Staff-Affirmed)** – set this to Yes if the end user or member of staff has checked the box on your library services registration form that confirms that they have given their consent for their personal details to be held in your OLIB system. Changes to these fields are audited in the user update audit trail. (Defra)

6.2. Bug Fixes

IMS Ref.	Description
OLB-12953	Deleting a user record that is linked to an active enquiry resulted in an unintelligible error message. This has been corrected. (The Bar Library)
OLB-13937	It was previously not possible to deduplicate user groups when a user was a member of both groups. This has been rectified. (Colombia)
OLB-14145	When attempting to delete a user record who had entered an enquiry that had since been closed, an Oracle error message ORA-01407 was displayed. This has been corrected by making it possible to clear the Entered By field in the enquiry record. (Shropshire NHS)
OLB-14561	When opened from a secondary search, e.g. from the Lost By field in Copies, archived user records were opened in the Users domain. This has been corrected by changing the Lost By field so that it only lists non-archived users, and adding a new attribute, **Lost By (Archived)**, that only displays archived users. (Nottingham College)
OLB-14566	Creating a new user record following a search including both forename and initial failed if **New Record** was selected from the brief display or following an unsuccessful search. This has been corrected
OLB-14572	A **Missing defines** error was displayed when trying to add or edit a user group. This has been corrected
OLB-14613	The OLIB Web login process has been changed so that a user whose membership has expired can no longer log in if the Password Expiry Date in their user record is null. (Colombia)

OLB-14665	The normalised name fields introduced in SP7 were not indexed. This has been corrected. Other changes were also made to user record indexing and caching which, together with the addition of these new indexes, has resulted in a significant performance improvement when searching, displaying records and navigating from record to record in the Users domain. (Colombia, NESC)
OLB-14621	Attempting to change a location's address's address type returned a **Method requires context object** error. This has been remedied

7. CIRCULATION

7.1. Automatic Renewals

It is now possible to configure OLIB so that it automatically renews loans on the due back date, rather than setting them to overdue.

A **Max. Auto Renewals** field has been added to Copies, Users, Loan Terms and User Categories, and in OLIB Defaults. It is a 3-digit numeric field, so the maximum value that it can be set to is 999. (Note that this new field is only included on the OLIB Defaults screen as part of the SP12 installation. If it is to be used in any of the other domains, it should be added to the relevant layouts using Layout Manager.)

In addition, a new **Auto. Renewal Count** field is included in Copies, to maintain a count of automatic renewals separately from seen and unseen renewals. Again, Layout Manager should be used to add it to your Copies layouts if required.

A new auto-renew process is run in daystart, immediately prior to the process that generates overdue notices.

For each item that is due back "today", the auto-renew process checks whether it can be renewed automatically. It does this by first checking the copy's Max. Auto Renewals field. If this is set to 0, the item will not be automatically renewed, and the process will move on to the next item.

If the copy's Max. Auto Renewals field is set to a number and the item has not already been auto-renewed this number of times, the item will be auto-renewed (providing there is nothing else stopping it from being renewed, e.g. it has already been renewed the maximum number of times).

If the copy's Max. Auto Renewals is set to a number and the item has already been auto-renewed this number of times, the item will not be automatically renewed, and the process will move on to the next item.

If the copy's Max. Auto Renewals field is blank, the process will look at the user's Max. Auto Renewals field and perform the same processing. If this field is also blank, the process will look at the Max. Auto Renewals field in the relevant loan terms record, then the relevant user category record, and finally the OLIB Defaults record.

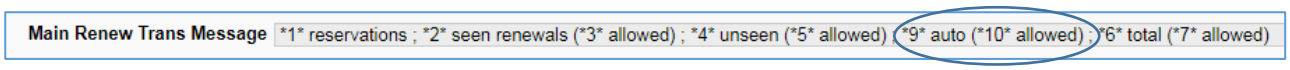
(From this it can be surmised that auto-renewals can be enabled system-wide simply by setting Max. Auto Renewals in OLIB Defaults to a number such as 5. This would mean that every on loan item will be automatically renewed 5 times before it finally moves on to overdue. Setting Max. Auto Renewals to a value at a lower level, e.g. in the loan terms records, will override the system-level setting.

Similarly, auto-renewals can be disabled system-wide by setting Max. Auto Renewals in OLIB Defaults to 0 (or leaving it blank, as the default is 0 if this field is left blank). Setting Max. Auto Renewals at a lower level, e.g. in the Senior Staff user category, will enable it just for users with that user category.)

If an item is renewed automatically, an entry is added to the copy and user transaction histories with Automatic Renewal as the transaction type.

When an item is returned, the copy's Auto. Renewal Count field is re-set to 0.

If you want to include the Auto Renewal count and the Max Auto Renewals value in the Renewal Information message in the Loan Items field on the I/R/R screen, add *9* and *10*, together with accompanying text and punctuation, to the Main Renew Trans Message field in OLIB Defaults, e.g.:



(OLB-8052 - IMechE, Leeds College of Music, Shropshire NHS, Pembrokeshire College)

7.2. SIP Server

To reduce technical debt in OLIB, and to resolve two serious bugs, the SIP Server has been rewritten as a Tomcat-driven web service.

The new SIP Server is not included in SP12 itself. It is available as an optional add-on, in the form of a SIP Server RSD, once SP12 has been installed. OCLC will discuss whether and when to implement the new SIP Server on a system-by-system basis. In the meantime, the current SIP Server will continue to be deployed.

A full description of the new SIP Server web service is included in the SIP Server RSD's release notes.

The two bugs that are resolved by this rewrite are:

- OLB-13813 - the SIP Server records the wrong user in the Changed By field in the copy's update audit trail. It records the first user to have used the SIP Server since it was re-started.
  (reported by Shropshire NHS and S&W NHS)

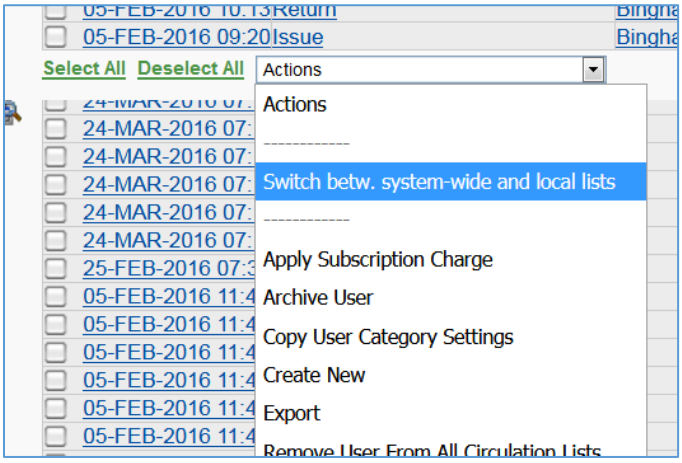
- OLB-11777 – the SIP Server process hangs instead of stopping when a restart is issued.
  (reported by The Manchester College and Stockport College)

7.3. Minor Enhancements

IMS Ref.	Description
OLB-11357	It is now possible to retrieve a list of reservations placed by users at your "home" location. This can be achieved by refining a reservation search by location in the Users linked domain. This is useful in a multi-site system as it enables "home" reservations to be easily identified. (NERC, Summer Conference vote)
OLB-14477	The following data is now written to a copytrans record so that a record is retained of the data at the time of the transaction: - User category – bor_cat - User location – bor_loc - Copy category – copy_cat - Copy location – copy_loc This means that if a circulation statistics report is re-run, say, 12 months after it was first run, the statistics that it delivers will be the same as they were when the report was first run. Currently, if a user moves to a different location, for example, a Circulation Statistics by User Location report that was run before the user moved location will deliver different statistics if it were re-run today covering the same period. In addition, the user record number is also written to a new field in the copytrans table. The new field is called borrowerno. (For information, the PC Location is written to copytrans.loc.) Note that any reports that deliver circulation statistics by user category, user location, etc. will be re-designed after SP12 is released so that they reference these fields rather than the current ones. (Colombia, NE NHS)
OLB-14658	It is now configurable whether the requesting user's location is included in the message that is displayed when a reserved item is returned ("Copy has been held for …"). The requesting user's location is displayed by default in this message. To remove it from the message, change "Copy <CBARC> has been held for <BNAME> (<BBARC> - <BLOCLD>)" to "Copy <CBARC> has been held for <BNAME> (<BBARC>)" in circulation message cmc082.

	(Shropshire NHS)
OLB-8658	It is now possible to remove the **Renew all** and **Renew selected items** options from the Loan Items list box's Actions list, but keep these options included in the Problem Renewals list box's Actions list. This can be achieved using the following workflow: - in the Admin Client Configuration/Method Permissions domain, change the search option to the Attribute Methods domain search - search for renew - go to the details screen for the first record - if the Method ID begins with 888, select the Advanced option on the Permissions drop-down list - click on the ALL USERS GROUP's View checkbox, and click on it again to deselect it - click Save to save the deselection - click Next to go to the next record in the hitlist - if this record's Method ID begins with 888, repeat the above - click Next and repeat for all attribute methods whose Method ID begins with 888 (should be 4 of them in total) - once all 4 888 attribute methods' ALL USERS GROUP's View options have been deselected, re-build OLIB Web, and log out and back in again for the changes to take effect. The Renew options should no longer be included in the Loan Items list box's Action list, but still be available in the Problem Renewals list box's Action list (Nottingham College)

7.4. Bug Fixes

IMS Ref.	Description
OLB-14131	The **Switch between system-wide and local lists** action in the copy transactions list box generated an error. This has been corrected. The order of the actions in the copy transactions list box has also been modified so that the **Switch between system-wide and local lists** action is displayed separately from the standard Copies domain actions:  (S&W NHS)
OLB-14587	In SP11, an error message was displayed in WorldView when user details were loaded onto the I/R/R screen. This has been corrected. (GBMet, Leeds College of Music, Colombia, Logos) (RSD-1110-OLIB14594 delivers this fix to SP11 systems)

OLB-12498	If a reserved item was returned using the **Return all** or **Return selected items** actions in the Loan items box, the alert to say that the item has been held was not being displayed. This has been remedied. (Bank of England)
OLB-11975	The error message that details copies as “problem returns” did not contain the correct fine values. This has been corrected.
OLB-14737	Loan items were not displayed on the I/R/R screen if there were too many characters in the title field. This has been corrected by truncating the title to 700 characters when it is displayed in the Loan Items field on the I/R/R screen. (Leeds College of Music)
OLB-14393	There was a bug in reservations whereby, if an unactivated reservation exists (e.g. the Required After date has been set to a date in the future), another user then places a reservation on the item and the item is held for that second user, the item remains reserved for the first user, even if that reservation is cancelled. This bug has been fixed. (NE NHS)

8. FUNDS AND ACQUISITIONS

8.1. Bug Fixes

IMS Ref.	Description
OLB-1380	The Supplier Address attribute in the Orders domain was designed to display the supplier's address on an Orders layout. However, it had been mis-configured so that it was included in the list of Related Domains in the Orders Refine Search dialog window. This has been corrected so that it is no longer available as a search refinement option
OLB-1381	The Contact Address attribute in the Orders domain was designed to display the Ordered By user's address on an Orders layout. However, it had been mis-configured so that it was included in the list of Related Domains in the Orders Refine Search dialog window. This has been corrected so that it is no longer available as a search refinement option
OLB-5022	Deleting claim sequences did not delete claim steps. This has been corrected
OLB-14598	The OLIB EDI message generation code has been corrected so that it escapes all special characters (+ : ' ?) when they appear in the data, to ensure that the message can be processed correctly when it is received by the EDI target system. (CoHENEL)

9. SERIALS MANAGEMENT

9.1. Minor Enhancements

IMS Ref.	Description
OLB-5406	The **Cancel serial copies (selected)** action has been changed so that it now also sets the Autogenerate flag to No

9.2. Bug Fixes

IMS Ref.	Description
OLB-9702	When re-subscribing to a fixed period serial subscription, the new subscription order item that is created was not being linked to the serial copy. This has been corrected. In addition, the Related Subscriptions field on the serials Management screen now displays the subscriptions in inverse chronological order so that the most recent subscription is listed first. (Nottingham College)
OLB-10105	Serial copies that have been cancelled are now displayed with **(cancelled)** immediately after the owner location in the Serial Copies field on the serials Management screen. In addition, the serial copy records in this field are now sorted so that the cancelled ones are listed after the current ones. (The Law Society, Summer Conference vote)
OLB-14265	The Up and Down re-sequencing options underneath the Serial Issues field on the Serials Management screen did not operate correctly. This has been corrected. (Colombia)

10. REPORTS, ALERTS, EMAILING AND SDI

10.1. Minor Enhancements

IMS Ref.	Description
OLB-7663 OLB-13579 OLB-13600	Various changes to WE001: - the Months Ago parameter has been replaced with the Start Date and End Date rolling parameters, and these default to Previous Month Start and Previous Month End - the SSi parameter has been included - the report date has been included in the report header - the number of access to digital resources (objects) is reported - basket hitlist displays are now excluded from the Successful and Unsuccessful Searches counts - it includes a separate count of the number of times lists are displayed, including a separate count for each list that is displayed at least once - it includes a separate count of the number of times a basket is displayed - separate counts are given of the number of successful and unsuccessful renewal attempts - it includes a count of reservations placed - separate counts of successful and unsuccessful login attempts are given - it reports on the number of times the password reset facility was used - more details of Other options have been included. For this to be effective, you will have to include a button setting in the g_XXXXX GCB. This will be used as the search option text in the web_session_statistics record, and subsequently displayed in the WE001 report. Note that, if a button setting is included, it should have a colon at the end, e.g. "Titel/Naam:" to match the standard style-to-text mappings. For the record, the following statistics are gathered into the web_session_statistics table: 1 Folio/WebView Startup (new session created) 2 Search form displayed 3 Title search run 4 Login form displayed (SSO failed) 5 User details displayed 6 Access to objects 8 Access to lists 9 Saved search accessed 10 Title details displayed 11 Breadcrumb used 12 StraightToTitle link used (if tnh = 0, then it was not a valid titleno) 13 StraightToList link used 14 StraightToOCLCNo link used (if tnh = 0, then it didn't match a title) 15 StraightToISN link used (if tnh = 0, then it didn't match a title) 16 StraightToKeyword link used (if tnh = 0, then it didn't match a title) 17 StraightToUser link used (if tnh = 0, then it didn't match a user; 1 - wanted password; 2 - complete) 20 Basket contents displayed (wst_entry = the borrower number of the user who displayed his/her basket) 30 Password Reset form 1 displayed 31 Password Reset form 2 displayed 32 Temporary password issued 40 Renewal transaction completed 41 Renewal transaction request rejected 50 Reservation placed 97 Session expired from database 98 Login failure 99 Logout Changes to the statistics that are collected are audited in GNO-50. The revised report was added to the OLIB Reports Repository on 4th December 2017, and can be downloaded from there without waiting to be upgraded to SP12.

	(Barnardos, CSP, Defra, Nottingham College, S&W NHS)
OLB-14579	CA013d has been converted to an OLIB Reports report. The revised report was added to the OLIB Reports Repository on 31st August 2017, and can be downloaded from there without waiting to be upgraded to SP12. (NE NHS)
OLB-14656	CI029 has been converted to an OLIB Reports report. The revised report was added to the OLIB Reports Repository on 30th November 2017, and can be downloaded from there without waiting to be upgraded to SP12. (Leeds College of Music)
OLB-13886	CI001 has been modified to include the Transaction Sources parameter, so that you can report on self-service transactions separately from those recorded in OLIB Web. The revised report was added to the OLIB Reports Repository on 30th November 2017, and can be downloaded from there without waiting to be upgraded to SP12. (Nottingham College)
OLB-14641	Changes to several OLIB Reports: - CA001, CA002 and CA005 have had rolling dates parameters added to them - WE001 has been extended to incorporate digital resources and more detail on searches The revised reports were added to the OLIB Reports Repository on 23rd November 2017, and can be downloaded from there without waiting to be upgraded to SP12. (NERC)
OLB-14580 OLB-14630	CI005 has been changed as follows: - the start and end date parameters default to the current calendar year. Change these as required using the Rolling Dates drop-down list. Alternatively, if you have a specific date range in mind, simply enter the start and end dates in the DD/MM/YY format, e.g. 01/04/17 and 31/08/17 - the Classmark From and Classmark To fields can be used to specify a range of classmarks. For example, entering QA1 and QA3 will include all titles with a primary classmark between QA100 and QA350 - the Classmark (begins with) parameter can be used to specify all classmarks that begin with the value you enter. For example, entering QA will include all titles with a primary classmark between QA100 and QA55 - the classmark is included in the output - unseen renewals are now counted - if a location parameter is applied, the No. Copies column only counts the copies at the locations specified - the report is now sub-sorted by primary classmark The revised report was added to the OLIB Reports Repository on 21st November 2017, and can be downloaded from there without waiting to be upgraded to SP12. (S&W NHS, Shropshire NHS)
OLB-14643	It is now possible to filter a search in OLIB Reports by the Enabled flag. (Leeds College of Music)
OLB-14688	Various changes have been made to the OLIB Reports report CA013c Sortable Accessions List (for output into Excel): - the Accession Date From and To dates now default to the previous calendar month start and end options - the Locations parameter is no longer mandatory - the title and subtitle are concatenated when sorting by title - the title sort is now case-insensitive and takes account of the non-file characters value

	- the shelfmark range option has been changed so that entering, for example, 0 and 9 is interpreted as =>0 and <999.99999... rather than >0 and <9 - colons have been added at the end of the prompts The revised report was added to the OLIB Reports Repository on 4th January 2018, and can be downloaded from there without waiting to be upgraded to SP12
OLB-14707	The report definition refresh process has been enhanced so that it now shows information relating to any errors that may occur, e.g. if the report definition URL has been incorrectly entered
OLB-14540	It is now configurable in the User List Of Loans notice record whether the notice is sent to all users, just to users with loans, or just to users without loans. A new field, **Which Users?**, has been added to the User List Of Loans screen. Leave this field blank or enter 1 to denote that the notice is to be sent just to users with loans. Enter 2 to denote that the notice is to be sent just to users without loans. Finally, enter 3 to denote that the notice should be sent to all users
OLB-14685	The “Alerts per...” reports have been removed as they are not relevant to OLIB. (S&W NHS)

10.2. Bug Fixes

IMS Ref.	Description
OLB-14575	Report copying did not include the report_lines records. This has been corrected. (RSD-1110-OLIB14573 delivers this fix for SP11 systems)
OLB-14631	The SP11 reports package corrupted the Excel Template if it used the PowerQuery 2 style for data retrieval. This has been corrected
OLB-14739	In SP11, it was not possible to send an email from OLIB via Gmail using the STARTTLS protocol on port 587. This has been corrected. (Colombia)
OLB-14588	Corrections have been included in OLIB Reports to enhance regional support to resolve the following problems: - the A4 helper button now uses the system-configured decimal separator rather than being hard-coded to use the full stop - the Letter helper button now uses the system-configured unit of measurement rather than being hard-coded to use inches - generated PDFs were not showing diacritics correctly - a correction has been made to the Yes/No selection SQL helper - an attempt to retrieve a report into a system that utilises a full stop as a decimal separator resulted in failure to retrieve the report - an attempt to retrieve a report that included diacritics in the description, parameters labels, etc. resulted in failure to retrieve the report (Colombia)

11. DATA EXCHANGE / LINK CHECKER / Z39.50 SEARCHING

This section includes summaries of the various enhancements and bug fixes to the import and export processes that are included in OLIB 9.0 SP12.

11.1. WorldCat data sync enhancements

It was found that the WorldCat data sync response processing did not cater well for large response files that referred to several thousand records.

The processing of these files has therefore been re-worked, requiring an additional attribute in the Titles domain to view the response detail. The new attribute is called **Discovery System Report** and is a list attribute showing each line of the report from data sync for this record, allowing the cataloguer to delete each line once it has been corrected.

This attribute shows the date and time of the processing of the response, together with the OCLC Number, the severity and message information. For example:

WorldCat Responses

Date	OCLC Number	Severity	Message
04-Sep-2017 0	991639940	Severe Logical Error	Invalid subfield 1st $u in 1st 650.
04-Sep-2017 0	991639940	Severe Logical Error	Invalid subfield 2nd $u in 1st 650.
04-Sep-2017 0	991639940	Severe Logical Error	Invalid subfield 3rd $u in 1st 650.

The *bibdetailexcpt* file includes Severe (logical), Critical (structural) and Minor responses. Titles that have either Severe or Critical responses will be marked *Rejected.*

During the processing, titles may be marked as Rejected for the following additional reasons:

- More than one OCLC Number has been supplied for a single title*
- The same OCLC Number has been supplied for multiple titles
- The OCLC Number supplied is already assigned to another title
- The title has been archived

In order to prevent the incorrect update of a record to a new status when processing a *bibdetailexcpt* response file several days after the file has been generated, the status will not be updated if it was changed more than 2 days** after the generation of the *bibdetailexcpt* file, unless the update is simply to “Sent to WorldCat, Holdings Pending”. This will ensure that records which have been corrected, re-sent (and possibly received, holdings updated and processing completed) are not rejected due to an error that has been remedied.

* Processing and validation in this respect will occur only within blocks of 1,000 lines of the response file. If a subsequent OCLC Number for the same title appears much later in the *bibdetailexcpt* file, this will not be reported as an error.

** 2 days is interpreted as follows:

- The date in the response file includes no time element and is therefore treated as midnight (00:00 hours)
- Daystart may have sent the file at, for example, 01:30 BST, and the response file may be generated, for example, 90 minutes later at 03:00 BST
- The data sync processing will therefore report this as 22:00 EDT the previous day, without the time element
- The date and time of the current status of the title (the date and time it was sent by daystart) is compared with midnight 2 days after 00:00 on the date in the *bibdetailexcpt* file in order to determine whether or not to update the status

(OLB-14568 - Colombia)

11.2. Author matching during import enhancements

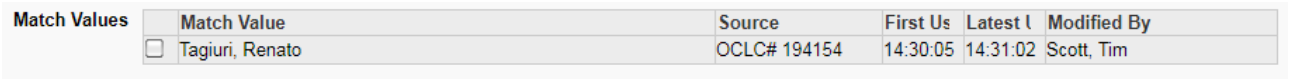
To meet the requirement for customers who do not use the initials field in the authors table (without compromising the matching of existing imported or manually catalogued authors), the author matching, creation and initials setting process has been revised and is now shared by both OLSTF and MARC import procedures for consistency.

The import processes will now not generate initials in the author records they create if the initials field is not present on any authors layout or if the new OLIB Defaults setting, **Prevent Generation of Author Initials**, has been set to Yes.

To provide configurability during the import process a new list of match values will be generated and maintained automatically against each author. These can be seen and manually amended, created or removed as desired using the new Names domain attribute **Match Information for Imports** (au_matchinformation).

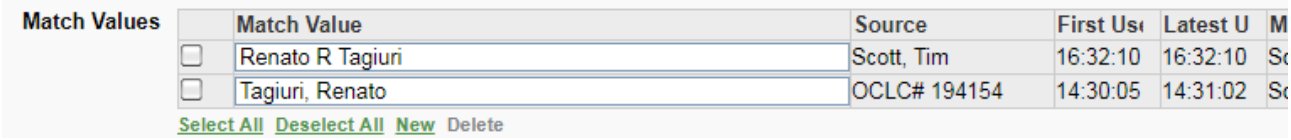
Note that match values are irrelevant and ignored if the author has ORCId, ISNI or VIAF identifiers which can be utilised.

This will show information such as:



Match Values		Match Value	Source	First Us	Latest U	Modified By
	☐	Tagiuri, Renato	OCLC# 194154	14:30:05	14:31:02	Scott, Tim

The **Match Value** is the value that will be used in preference for matching. The import processes will first attempt to match exactly and then attempt a case insensitive match on just the letters, numbers and spaces in the field. If neither of these elicit a successful match for an author, the previous matching approach will be utilised. This matches on a value generated from the existing author record and can be seen by creating a new match value on an author. For the example above, clicking New will give:



Match Values		Match Value	Source	First Us	Latest U	M
	☐	Renato R Tagiuri	Scott, Tim	16:32:10	16:32:10	Sc
	☐	Tagiuri, Renato	OCLC# 194154	14:30:05	14:31:02	Sc

Select All Deselect All New Delete

(Note that, if a time is given, it refers to today. Values prior to the current day will show as the date.)

The catalogue manager can see here who the new value was generated by and when. Where an OCLC#, Import RCN or Batch number is quoted, this refers to a match value generated by an import.

The match value can be edited directly in this list box, or it can be removed by selecting the records to remove and clicking the Delete link below the list.

During normal usage, it is not anticipated that a cataloguer would have cause to visit or maintain this information, but it is anticipated that it could be used to ascertain why an imported record has mismatched an existing author, and as such the author could be amended to avoid future mismatches.

Similarly, if an author has not matched during an import the new author can be deduplicated with the author which should have matched. The match values will be copied over to ensure that future imports with the same incoming data will match accordingly.

For MARC imports, the match value will be generated from all but the Relator Term and Relator Code subfields. The subfield codes other than $a will be included in the match value.

For OLSTF imports, the match value will be generated as **Forenames Initials Surname** for personal names, as seen when generated by New above. In addition, there is an OLSTF import setting that permits the dates associated with the author to be ignored as part of the matching. If this is then enabled, the search will be carried out as a secondary match after the generation of the match value with dates, and a match value including dates will be added to the new or existing author record.

(OLB-7441, OLB-14681, OLB-14702 – FamilySearch)

11.3. Minor Enhancements

IMS Ref.	Description
OLB-14597	A new Titles OLSTF tag has been added for the title's primary classmark. The new tag is **PCM**
OLB-14687	New Copies OLSTF tags have been added for the title record's grandparent title and subtitle, and for the Geo. Collection code and description. The new tags are **CP_GPTI**, **CP_GPSUBTI**, **CP_GEO_COLL** and **CP_GEO_COLLD** respectively. (FamilySearch)
OLB-14611	A Titles OLSTF import tag has been added for the Collection Code in the copy record. The tag is **COLLN**. The OLSTF export process has also been enhanced to support this tag. (S&W NHS)
OLB-14546	The MARC export no longer exports a record if the MARC record it generates includes critical invalid characters. This was required because WorldCat data sync was rejecting the whole file if the first record (and only the first record) had invalid characters in Leader/06 and Leader/07. The following data elements are now validated to ensure that they only contain a valid character: - Leader/05 – Record Status - Leader/06 – Type of Record - Leader/07 – Bibliographic Level - Leader/08 – Type of Control - Leader/09 – Character encoding scheme - Leader/10 and 11 – Indicator and Subfield counts - Leader/17 – Encoding Level - Leader/18 – Descriptive Cataloguing form - Leader/19 – Multipart resource record level - Leader/20 and 21 – Lengths of directory entry elements - Leader/22 – Length of the implementation-defined portion - Leader/23 – Undefined Also, if a title record does not have a language of cataloguing, the default cataloguing language specified in Admin Client Defaults will be exported as the language of cataloguing. (NERC)
OLB-14576	References to WorldCat Batchload have been corrected so that they now refer to WorldCat data sync. Additionally, support for sending data to Batchload has been removed
OLB-14595	The WorldCat metadata API process now records its communications to aid diagnosis of problems. This is recorded in the *worldcat_exchange_diagnostics* table, for reporting usage only. To improve diagnostics, the following additional changes were made: - a flag on the Output Format allows the one-off resending during the next daystart of records that have previously been rejected - a refinement option for OCLC symbol has been added to the Locations domain (off by default) Following the comprehensive testing that ensued, some additional problems were remedied: - when the format (media type or media sub-type) was changed, the holdings for the previous format of the record were not being removed - when the format (media type or media sub-type) was changed, the title record was not being marked as requiring re-authorisation

	(Colombia, NERC)

11.4. Bug Fixes

IMS Ref.	Description
OLB-14543	OLIB failed to send data to the Ebsco ftp target if the file name contained a counter placeholder (<C>). This has been corrected. (The Manchester College)
OLB-14558	The MARC import process cleared the titles.prclassmark field if no preferred classmark was included in the incoming record. This has been corrected. In addition, the import process has been changed to remedy problems with the inadvertent clearing of the title records' accession date and potential loss of OCLC number. Also, when the MARC import replaces a record, previously imported classmarks and subjects will now be removed and not re-imported, and manually entered classmarks and subjects will be retained. (Leeds College of Music)
OLB-14691	In the WorldCat automated updates service, requests to remove holdings were being sent alongside refresh holdings requests if the title record changed format. This has been corrected. (NERC)

12. DIGITAL/FILM CATALOGUING

12.1. Minor Enhancements

Unless otherwise stated, all issues in this section were delivered for FamilySearch.

IMS Ref.	Description
OLB-14672	The name of the dor.xml file is now included in the FILM_PROJECTS table
OLB-14673	Users are now only allowed to delete Digital/Film projects that are allocated to them
OLB-14674	A Films search can now be filtered by the location of film copies. This is achieved by clicking *Refine Search* and, in the resulting dialog, expand *Linked Domains*, and select *Digital/Film Holdings*. The page will then refresh and offer two options for filtering: *Location* and *Date/Time Updated*. Selecting *Location* adds the refinement line to the search. Clicking the *Select Items* button then presents a list of the locations that have digital/film holdings, showing the number of holdings in parentheses. Use the *filter item search* feature introduced in Service Pack 11 to facilitate searching in this list if it is a long list.
OLB-14678	The attribute **Beginning Image Number** has been created for manual addition to suitable layouts
OLB-14679	A number field has been added to the Digital/Film Project Lines table to record the number part of a volume. It will populate with the first 10 consecutive digits entered in the *Volume # / Letter* field. The field is also available and similarly populated at the Digital/Film Project Level on the Lines sheet. It can be manually amended before being used to create a Digital/Film Project Line record. The new field is also populated similarly during the dor XML ingest and when creating a Digital/Film Project from an existing title. This new field is usable as Volume Number in the sorting options for the ungrouped lines on the Groups sheet. The sorting option lists have been updated to show their lists alphabetically. During the first installation, all Film Project lines will be updated to have this new field set as per the default from their Volume # / Letter field. This enables a new line to be placed in the right position using the new sort option without having to set the new field manually for all the existing lines
OLB-14677	The Excel Export Copies by Shelfmark Copies output format can now include the full title for serial issues (serial – bound volume – issue) and the collection. This was resolved by the addition of new Copies OLSTF tags for grandparent title and subtitle, and for the collection code and long description. See OLB-14687 for full details

13. ENQUIRY MANAGEMENT

13.1. Bug Fixes

IMS Ref.	Description
OLB-7272	If the **Create Close Copy** function was used on an enquiry, the contents of the Response Notes field was also copied to the new enquiry record. This has been corrected so that the Response Notes field is not copied to the new record. (Cerge-EI)
OLB-14620	Whilst entering a new enquiry or modifying an enquiry with no log entries, when you enter a number in the Time/action's Time field, an invalid number error was returned. This has been corrected

14. INTERNAL / OTHER

14.1. Windows Server 2016

The testing on Windows 2016 was carried out with the following settings:

- The system path specified all 32-bit directories before the Oracle Home\bin. i.e.:
  - (install area)\WorldView
  - (install area)\WorldView\oic
  - %SYSTEMROOT%\system32
  - %SYSTEMROOT%\System32\Wbem
  - %SYSTEMROOT%\System32\WindowsPowerShell\v1.0\
  - %SYSTEMROOT%
  - (Oracle Home)\bin
  - %USERPROFILE%\AppData\Local\Microsoft\WindowsApps

- The latest security patch for the Visual Studio redistributables
  - As of 7th February, 2018: vcredist_x86_vs2005sp1.EXE

14.2. Configuration notes for Apache 2.4

The configuration syntax for Apache httpd changed between versions 2.2 and 2.4. The default installation will generate a sample configuration for Apache 2.2. The key change resides within the <Directory> configuration section as follows:

Apache 2.2	Apache 2.4
Order allow,deny Allow from all	Require all granted

14.3. Minor Enhancements

IMS Ref.	Description
OLB-14642	The Default OCAPI Log Level field in OLIB Defaults is set to NULL during a service pack installation. (Colombia, Leeds College of Music)
OLB-14648	The standard normalisation rule set has been extended to handle uña and uñas correctly. (Colombia)
OLB-14699	The RSD installation process has been enhanced so that the installation of database-side add-on RSDs that are installed at the same time as the core service pack database-side RSD does not then prevent the installation of the core service pack OPAC RSD. Thus, for example, the core SP12 database-side RSD (RSD-1200-**OLIB**14521) and an add-on RSD (e.g. RSD-1210-**OLIB**14765) can be installed at the same time, followed by the core SP12 OPAC RSD (RSD-1200-**OPAC**14521). Without this change, RSD-1200-OPAC14521 would have had to have been installed immediately after RSD-1200-OLIB14521, followed by RSD-1210-OLIB14765, which would have required several switches between folders (and possibly also between servers). With this change, the installer will only need to switch from the application folder/server to the OPAC folder/server once
OLB-14715	OLIB Web logging has been enhanced to assist in the diagnosis of the problem of when the retrieval of workspace or saved search details fails prior to white-screen downtime

OLB-11841	In WebView, the use of context for filtering has been changed to use the ffdutil managed contexts. This will eliminate problems when users are copied to other databases/schemas

14.4. Bug Fixes

IMS Ref.	Description
OLB-14318	OLIB Web was occasionally hanging and taking out one of the database cores when running a SELECT from OLSTFFetcher.getData. This has been remedied. (Defra)

15. DOCUMENTATION QUALITY CONTROL SHEET

Document title	**OLIB Service Pack 12 Release Notes**
Job Reference	POLIBSP12-000501
Author(s)	George Bingham and Tim Scott
Version	2.0
Date	30 April 2018
Status	Released