**Introduction to OLE Basics: Review of Content**

The purpose of this session is to preview for you what the “Basics” class will cover so that:
(1) you know what your attendees presumably will know BEFORE they take your class;

(2) you can focus your class’ content on the specifics of your OLE component; and

(3) you can make informed decisions about what “Basics” you should repeat/re-emphasize/remind your attendees about in your class.

(4) you can decide if there is anything you would prefer I NOT cover but just reference YOUR class instead.

**Introduction to OLE Basics**

**Learning Objectives**

Attendees should be able to do the following:

1. Connect to OLE using a preferred browser
2. Login successfully to OLE
3. Identify design/display characteristics common to OLE components
4. Find the Search Workbench feature
5. Search successfully for a bib/holdings/eholdings/item record
6. Navigate between/among bibs/holdings/eholdings/items

**Activity Training**

1. Class is a lecture/demo
2. Keep audience engaged by:
	1. Asking frequent questions (rhetorical if necessary)
	2. Asking for specific concerns/fears
	3. Encourage questions during the presentation
	4. 10-minute break after 45 minutes
	5. Leave at least 20 minutes for questions

**Materials**

Link of available test databases can be found on:

<http://www.lib.uchicago.edu/staffweb/depts/ils/kuali/index.html>

ILS will produce a list of “OLE Quick Tips” and an OLE FAQ, both posted on Staffweb.

IMPORTANT: Every OLE training should at some point cover the following: (1) once the Library goes “live” with OLE and VuFind, it is more important than ever that every staff member report ANY problems with this new software—a “problem” might end up being a software bug or a misunderstanding of how something is supposed to work or a procedural matter—but in any event, it MUST be reported; (2) it is NEVER acceptable to invent some workaround on your own; (3) every staff member must know his/her departmental procedure for reporting OLE or VuFind problems—this could be taking the problem to a colleague who will then follow-up OR you may be told to call 2-8780 or open a Bugzilla report OR some other variant; (4) if there is no immediate resolution to a critical problem and it requires a workaround, consult your supervisor. Basics on reporting software problems remain the same as before; see:

<http://www.lib.uchicago.edu/staffweb/documentation/horizon/reportingproblems.html>

(The above page will eventually be updated to refer to OLE and VuFind rather than the older systems currently identified there.)

**Class Content Outline**

**Introduction**

Introduce myself.

Ask how many in audience have already been using OLE; encourage them to add comments/suggestions during the session.

Ask group “Why OLE? After all, Horizon and III work. So why OLE?” Record responses on flip chart. Make sure the following points are included:

1. Cost—high maintenance of current systems and little use of vendor support and little new development
2. Unicode—a “must have” and Horizon will never be converted to it
3. Replace dual systems—we have long wanted to have a single system for all major functions for a variety of reasons—cost and convenience being two
4. Can move to ONE user interface; OLE early on decided: no online catalog component because of the availability of open source and very customizable user interfaces such as Blacklight, VuFind and others—we’ve decided to use VuFind
5. Aging systems—some Horizon code dates to the 1980s; harder to maintain and hard to integrate
6. OLE as open source gives us far more flexibility for future integrations

Attempt to set a positive/motivational tone and encourage them to think about the reasons for OLE when/if they encounter problems and issues with the new software.

**OLE Interface**

One of the biggest changes: no client software required. Just a browser. No need to send out updates, install the client software, etc. etc.

1. Browsers—start by asking for show of hands on what browsers people use
	1. Firefox
	2. Chrome
	3. Internet Explorer
	4. Safari
		1. OLE utilizes pop-ups so these need to be enabled
		2. If you don’t wish to be bothered by pop-ups when using other apps, make the OLE site an exception to blocking pop-ups. Add the URL to a list of exceptions as follows:
			1. Firefox: Tools>Options>Content>Block pop-up windows>Exceptions
			2. Chrome: click on the three-bar icon on upper right. Then Settings>Show advanced settings>Privacy>Content settings>Pop-ups>Manage exceptions
			3. Internet Explorer: Tools>Internet Options>Privacy; click Settings
			4. Safari: Preferences. Safari apparently has no place to enter exceptions
	5. All browsers have shortcuts that allow for the use of keyboard instead of a mouse; you might find these useful
		1. Firefox>Help>Keyboard Shortcuts
		2. Chrome>[three-bar icon on upper right]>Help>search for “keyboard shortcuts”>click on link “Windows keyboard shortcuts”
		3. Internet Explorer—go to: <http://support.microsoft.com/kb/306832>
		4. Safari—one place among many: <http://browsers.about.com/od/s5/a/safarishortcuts.htm>
	6. Possible that your screen resolution may need adjustment to get your preferred browser to display OLE properly; ask for help if you can’t figure it out.
	7. In the other OLE classes on specific functions, instructors may suggest one or more preferred browsers in case there are any known compatibility issues
2. Major divisions of OLE
	1. As of today, all staff will see all tabs; possibly in the future not all will display if you don’t have permissions for any function on that tab
	2. Deliver (i.e., circulation)
	3. Describe (i.e., cataloging)
	4. Select/Acquire (i.e., acquisitions)
	5. Maintenance (many things)
		1. Most of these things—most staff will NOT use except for the batch import links
	6. Admin (many things)
		1. Most staff will never use this tab with one exception
		2. Notice that the batch import features are here—these may be moved to Describe tab in the future—not sure yet
3. Logging in & permissions
	1. By June, we may have individual logins set up and working but maybe not. If so, using the automatic login of ole-quickstart should be explained as being there for the convenience of testing and training.
	2. No more special login/password as with Horizon and III—with OLE, you’ll use your CnetID and password.
	3. Each login is a “person” who is assigned to one or more “roles” to which are assigned “permissions”, e.g., David Larsen will have his own login and may have a role such as “Circulation Head Honcho” and to that role will be attached ALL the applicable circulation-related permissions. Scott Perry might similarly be “Acquisitions Head Honcho”, etc.
	4. Unfortunately, links for which an operator does NOT have permission are showing as though you did; you should be blocked if you attempt to open a link for which you have no permission
	5. Depending upon a link, you may be blocked from access with an explicit message
	6. Show how “ole-quickstart” cannot do Loan or Return in blackberry but can view and create Requests (which is probably not a real-life example).
	7. Permissions can allow operators to view certain records but not edit them, e.g., bib records
4. Action List/DocSearch/ Search Workbench
	1. Most of you will not use the Action List. But its use may be expanded in the future.
		1. Possible exception: circ staff filling copy and paging requests will use this as will those who need to approve certain records before processes proceed (e.g., Scott will see all invoices in this list and approve them from there; Jim Mouw approves PO above a certain amount; deletion of Serials Receiving Records will require approval from designated staff.
		2. Other uses of workflow/Action List are possible in the future.
	2. DocSearch
		1. Again, not for most staff. “Documents” are what move around in the background of OLE and you need not pay attention to these.
	3. Search Workbench is where you will search for bibliographic, holdings and item records
5. Searching the bib/holdings/item database
	1. Click the Search Workbench button to find the search interface—it’s in the same place on all tabs
	2. One search interface for all—no more SerPac, AcqPac, etc. as in Horizon
	3. Keyword searching is the default
	4. Can search for bib OR holdings OR eholdings or item records—depending upon the record type, search results will go directly to a bib or a holdings or an item (unlike Horizon, where all search results link to a bib from which you must navigate to copy and/or item records—even when your search key is an item barcode, you still go to the bib first).
	5. Always:
		1. Select Document type (default is bib)
		2. Select search type (default is search; browse is different)
		3. Type in one or more search terms ( \* is truncation symbol)
		4. Select all/any/phrase if wanted (default is all of these)
		5. Select a field (default is blank meaning “all”, i.e., general keyword)
		6. Notice the Boolean operators and the Add button to create a more complex search
	6. Notice the link to help
6. Searching for bibs, holdings and items
	1. Search is keyword; only two browse search types currently available: Title and Call Number
	2. Bib Search (Blackberry)
		1. Show a bib search on “death\*” by title
		2. Show a bib search by adding author “McNamara”
		3. Show display
		4. Showing number of entries
		5. Narrow search feature (should be working before June)
		6. “Local Identifier” is the bib# (in the 001 field)--all Horizon bib record numbers have been brought over to OLE—bib records created in OLE will begin numbering at 10,000,000
	3. Holdings Search (use TST)
		1. Show a holdings search on “B-EDUC/BED-STACKS” for Location Level
		2. Eholdings search same
		3. “Local Identifier” is the bib#--all Horizon bib numbers have been brought over to OLE—records created originally in OLE will begin numbering at 10,000,000
		4. “Local Identifier” is the holdings#--all Horizon copy record numbers have been brought over to OLE—holdings records created in OLE will being numbering at 10,000,000
	4. Item Search (use TST)
		1. Show an item search on “fm” as a barcode
		2. Show navigation to a bib
		3. Show navigation to a holdings
		4. Show navigation to an item
	5. Browse by title or call number (may not be working in either TST or our servers)
7. Tabs/Multiple Browser Sessions
	1. Allows you to have multiple functions available by one click, e.g., Loan and Return
		1. For Loan and Return at the same time, need to open two instances of your browser
	2. For many OLE Functions, tabs open automatically
		1. Don’t get confused. Always close tabs if you get lost.
		2. Open several holdings records—note that the tabs do NOT get properly labeled—this is something that will eventually get corrected but not by the time we implement
		3. Depending on the situation, e.g., looking at more than one record of the same type on one screen, you may need to open multiple instances of your browser and then shrink the windows so you can view simultaneously.
8. Bib/holdings/item records in OLE
	1. Horizon bib=OLE bib
		1. Same MARC records as in Horizon
		2. Same bib# in OLE—known as the “Local Identifier” and appears in the 001 field of the MARC Editor (NOT shown that way in Horizon)
	2. Horizon copy=OLE holdings OR eholdings (NOTE: talk about “instance” may not be necessary as it looks as though the term has been removed from the editors in TST)
		1. Required for ALL titles in OLE—think of “holdings” as a very generic term, i.e., one copy of a single-volume monograph IS a “holdings” – in Horizon, we tend to think of a single volume monograph as an “item” since we don’t use a copy record for that. Not the case in OLE—each title has a holdings
		2. Location and Call Number in the holdings are automatically inherited by any linked item—no need to enter the data twice as we do now.
		3. Fields very similar to what we have in Horizon copy records
		4. Same copy# as in OLE—known as the “Local Identifier”.
		5. Eholdings specifically designed for any e-resource (book or serial) and you will see fields we do NOT have in Horizon (Use Michigan State international law review search in blackberry)
		6. Other classes should explain how we are going to use this new type of holdings record.
		7. Eholdings can link to an Eresource record—which is used for the package of titles you buy—not implementing this at first. Other ERM-type records to come.
	3. Horizon item=OLE item
		1. Items automatically inherit Location and Call Number from the holdings; only enter in item if different from the holdings
		2. Essentially same fields as in Horizon item
			1. Ask someone how do we enter call number prefixes now. In OLE, no more as call number prefix has its OWN field
		3. Have the ability to flag items as damaged, missing pieces or “Claims returned”—new features not in Horizon in this way—may not be used right away
		4. No more dummy items for analyzed series or bound-with because in OLE, you can link an item to more than one bib.
		5. Do NOT touch the Shelving Order field
9. Searching for records specific to a functional area
	1. Very specific search types for acq and circ
	2. Enter as many or as few search terms as you want on these types of search screens—these become Boolean AND searches
		1. For a patron, search for Miller and then search for Stuart Miller
		2. For a PO, show how some fields allow you to search for a value to populate the field—wherever a search icon appears it always gives you a “return value” link. Show the same on Loan
		3. Make clear that more on this will be in the component-specific classes
	3. Search results are typically sortable by clicking on the column headers
		1. Show Patron Bill
	4. On some search results, you can export to .csv, .xml, or .xls
		1. Show Patron Bill
10. Horizon/Millennium vs. OLE
	1. Horizon copy record = OLE holdings or OLE eholdings or OLE “instance”
	2. Horizon summary of holdings = OLE extent of ownership
	3. Horizon item record = OLE item or OLE “instance”
	4. Horizon checkout = OLE Loan
	5. Horizon checkin = OLE Return
	6. Horizon borrower = Horizon patron
	7. Horizon serials prediction = [no prediction in OLE]
	8. Horizon serials checkin = OLE serials receiving
	9. Horizon Location = OLE Circulation Desk (for now)
		1. Except for OLE Circulation Desk, you will NOT login in at a Location as you do in Horizon; a “SKCI” location can be in a Serials Receiving Record
	10. Millennium PO = OLE PO
	11. Millennium vendor = OLE Vendor
	12. [no Requisition in Millennium] = OLE Requisition (precursor to every OLE PO)
	13. Horizon Location = [nothing in OLE except for Circulation Desks and later on, for Serials Receiving]
	14. Horizon recall = OLE recall (plus OLE Hold [ask someone for difference between “recall” and “hold”), Copy, Paging Requests with option to physically deliver requested items vs. holdings at a circulation desk for pick-up; some types of request may not be implemented right away)
	15. Horizon Cataloging = OLE Describe
	16. Horizon Circulation = OLE Deliver
	17. Millennium = OLE Select & Acquire
11. “Execution” Buttons
	1. General ones—every class needs to cover any variations that MAY apply to a particular component.
		1. Search
		2. Return to Search
		3. Browse
		4. Clear
		5. Cancel
		6. Close
		7. Submit
		8. Save
		9. Blanket Approve
		10. Add (either brings up another data entry field OR adds data to a record—a “must do” BEFORE Save/Submit/Blanket Approve
		11. Edit
	2. Component specific—these are just some examples; every class needs to make sure any and all buttons are explained in the context of the function being performed
		1. Create Serials receiving record
		2. Show Serials receiving record
		3. Fast Add Item
		4. Clear Patron
		5. Print call slip
		6. Return or Loan
		7. Claims Return
12. Timeouts
	1. 60 seconds; See OLE-5057
13. Between now and your other OLE classes
	1. Take a few minutes a day to play around with the OLE test environment
	2. Click on links and see what happens
	3. Try out some functions
	4. You can’t really break anything—just stay away from the Maintenance and Admin tabs (except for the Batch Profile stuff if you want to test out importing records from files)
	5. Make a list of questions to bring to your next class and get answers
	6. OLE FAQ and OLE Quick Tips to be posted soon
14. Remind attendees about reporting problems when the Library moves to OLE (see above)
15. More features/functions are coming in future releases, so stay tuned.

**Conclusion**

1. Remember why we’re doing this.
2. Ask questions—whoever in your group/workunit or anyone in ILS
3. Remember that WHAT you do is, for the most part, remaining the same—HOW you do it is what is changing
4. Everyone has to learn the new interface
5. Some people will need to learn new procedures, e.g., linking an item to more than one bib, doing serials receiving
6. Here’s MY take on the relative level of change:
	1. Cataloging and Circulation—not so much; a few new things, but mostly learning the interface
	2. Acquisitions—a LOT because you are moving from two systems to one and your procedures will change
	3. Serials Receiving (explain why it’s not “Serials Checkin”) because it will require more attention to detail and more data input