ELR Survey Setup (for Oliver v5 Build 8.018+)

Changes to ELR Functionality

For customers on *Build 8.018* and later, the Oliver v5 software will generate the ELR Survey and upload it directly to the ESA cloud server during the designated Housekeeping. There are no longer emails sent from your Oliver v5 system to ESA which contains the ELR Survey as an attachment.

As a failsafe, Oliver v5 will also save a copy of the ELR Survey on the Oliver v5 application server. The resulting zip file can be sent to ESA if the automated upload fails for any reason.

How to Check your Current Version

You can confirm your current Patch number by logging into the system and navigating to **Management** > **About**.

The highlighted numbers indicate which patch your system is currently on.

ABOUT OLIVER V5

Build Number:	v5.0 Build 8.052-2109092120
Corporation Alias:	
Licensed To:	

If your Oliver v5 system is not currently showing *Build 8.018 or later* in the Build Number field, please ensure that your ICT team have enabled automatic updates. For more information on how to enable automatic updates for Oliver v5, the Enabling Automatic Updates guide is available for download in the integrated Help of Oliver or in the Oliver v5 Community Portal which should be provided to your ICT team as soon as possible:

If your Oliver v5 system is showing *Build 7.0xx* please email support@softlinkint.com with **Build 8 Upgrade Request** in the subject of your email, and your school name in the body of your email.

Tip: If unsure, include an email address to send future Oliver v5 Build Upgrade notifications so future notifications are not missed.

Enabling the ELR Survey

Every Build 8.018+ Oliver v5 system participating in the ELR survey will need to enable the relevant Parameter setup options and Housekeeping settings before the results will export directly from Oliver v5 to ESA. Two steps are required to enable the running of the ELR Survey, if your library is requested to participate:

1. **Enter the date when the ELR Survey should be sent into Parameter 1225**

2. **Enable the ELR Survey process in Housekeeping**
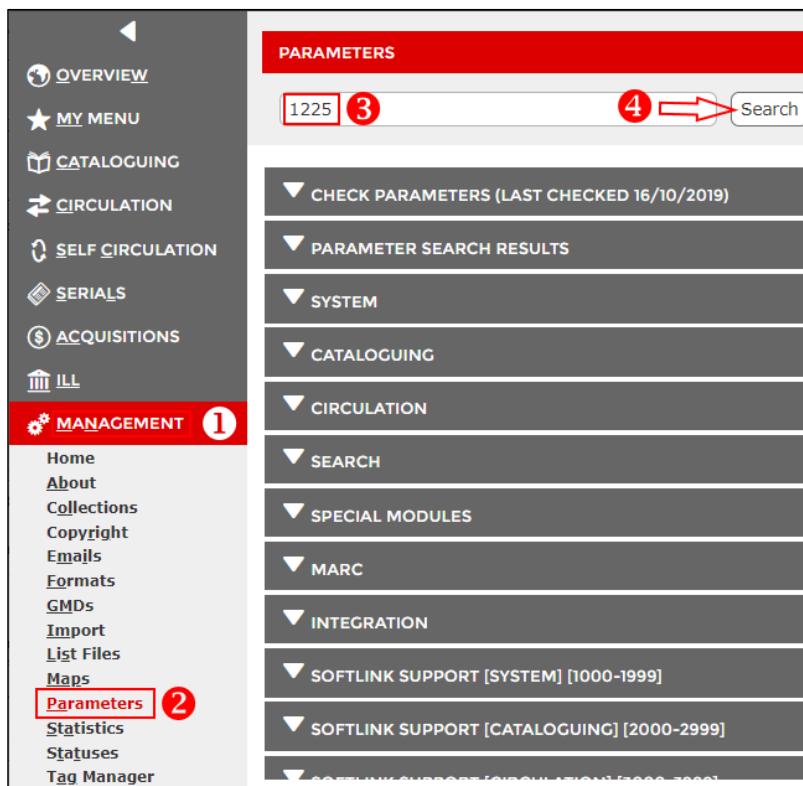
Note: Only Library staff with a suitable elevated User Role will be able to make these changes. If your login cannot access **Management** > **Parameters** or **System** > **Housekeeping** you will need to use an Oliver v5 login that is able to do this.

Parameter Setup

Parameter 1225 - Education Lending Rights (ELR) Process Run Date – defines the date when the ELR Survey will be sent to ESA.

The following steps show how to edit the required parameter:

1. Navigate to **Management** > **Parameters** and Search for: **1225** (Education Lending Rights (ELR) Process Run Date)
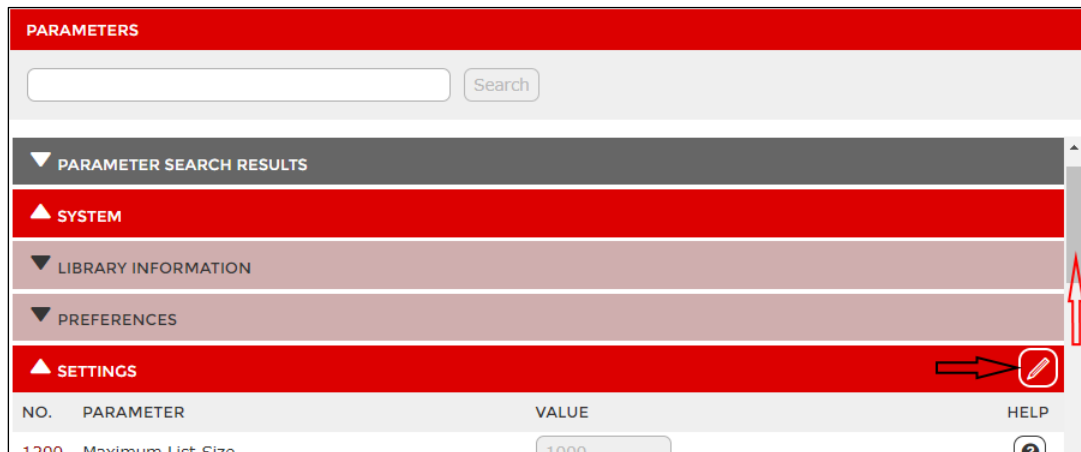

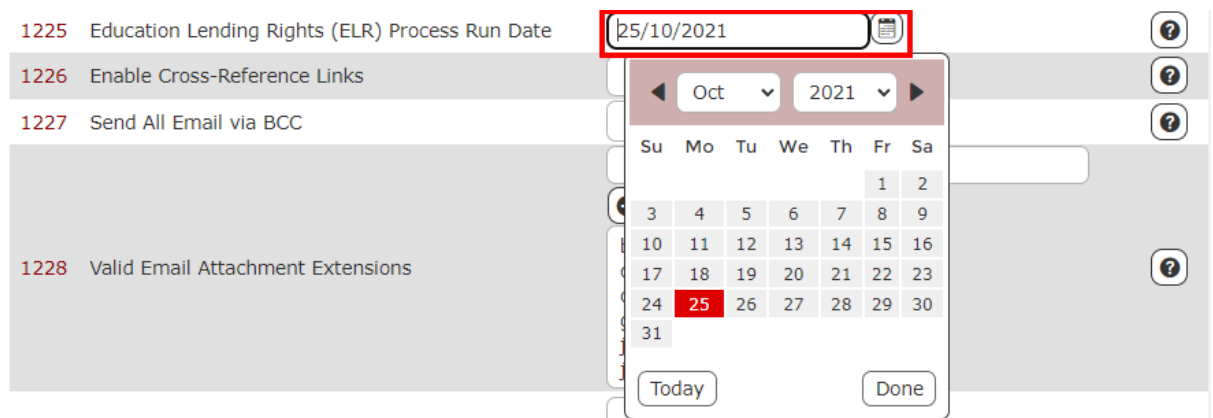2. This will list a number of parameters. Scroll down the list to view parameter **1225**.

3. Scroll up to Settings line and click the Edit icon

4. Then scroll down to enter the date on which the ELR survey should be run in Parameter 1225. You can also click the Calendar icon and select the date from the calendar.

Note: By default, the date is 03/10/2016 and will need to be changed.

5. After setting the Process Run date for ELR, scroll up and click the Save icon to save your changes.
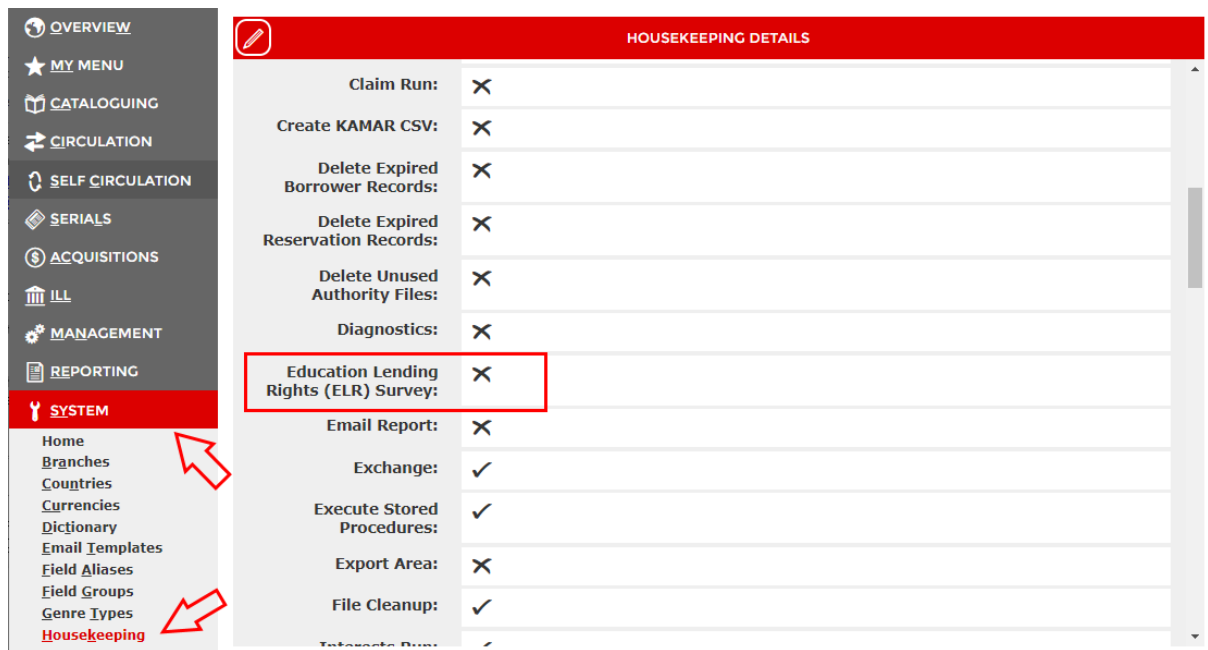
Housekeeping Settings

To allow the ELR Survey process to be run as part of the Housekeeping, the process needs to be enabled. The running of the ELR Survey, and upload will occur during the first Housekeeping to run on/after the date specified in parameter 1255.

By default, the Housekeeping option that allows the extraction, and upload of the ELR Survey is disabled.

The following steps show how to enable the ELR Survey Housekeeping option so it can run on the date specified in your parameter options:

1. Navigate to System > Housekeeping. Scroll down to view the **Education Lending Rights (ELR) Survey** entry. If the **Education Lending Rights (ELR) Survey** is not enabled, an ✕ will be displayed.

2. To enable the Education Lending Rights (ELR) Survey, click the Edit icon 🖉 .

3. Scroll down to view the Education Lending Rights (ELR) Survey entry and click to tick the check-box. Click the Save icon 💾 to save the change.

Extracted ELR Survey Details

On the date specified, Oliver v5 will extract the ELR Survey, and save it during the next nightly housekeeping after your desired date.

Immediately after the ELR Survey has been run, Oliver v5 does the following:

- Saves a local (zipped) copy of the ELR Survey on the Oliver v5 application server. The location where the file is saved is:

    ..\<OliverInstallLocation> \elr\data

- Uploads a file containing the ELR Survey directly to the ESA cloud server. The name of the file that is uploaded to ESA (and saved on your Oliver v5 application server) will be a combination of your Registered School Name and a Timestamp showing the date and time that the file was created.

    For example: Grange Hill School_2016.10.03.01.25.zip