

ELR Survey Setup (for Oliver v5 Build 8.018+)

(Last reviewed: for V5 Build 8.052)

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: | <input type="text"/> |
| Licensed To: | <input type="text"/> |

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

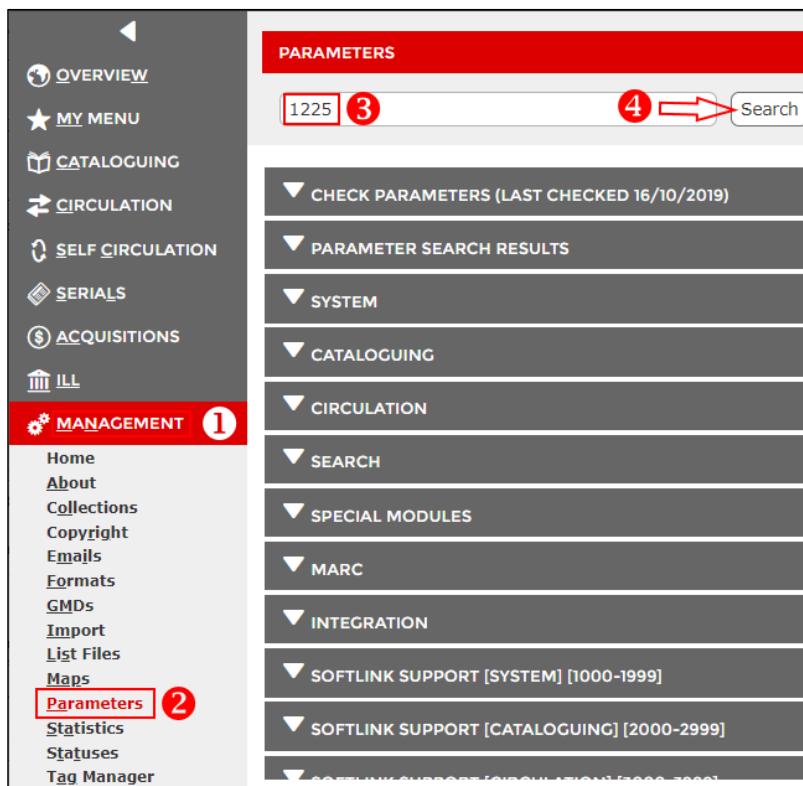
Note: Only Library staff with a suitable elevated User Role will be able to make these changes. If your login cannot access **Management > Parameters** or **System > Housekeeping** you will need to use an Oliver v5 login that is able to do this.

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)

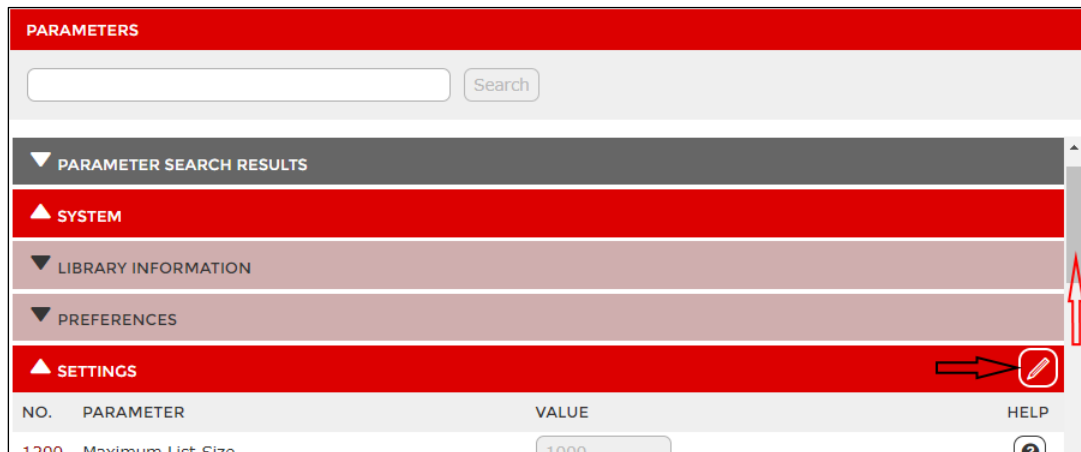


2. This will list a number of parameters. Scroll down the list to view parameter **1225**.

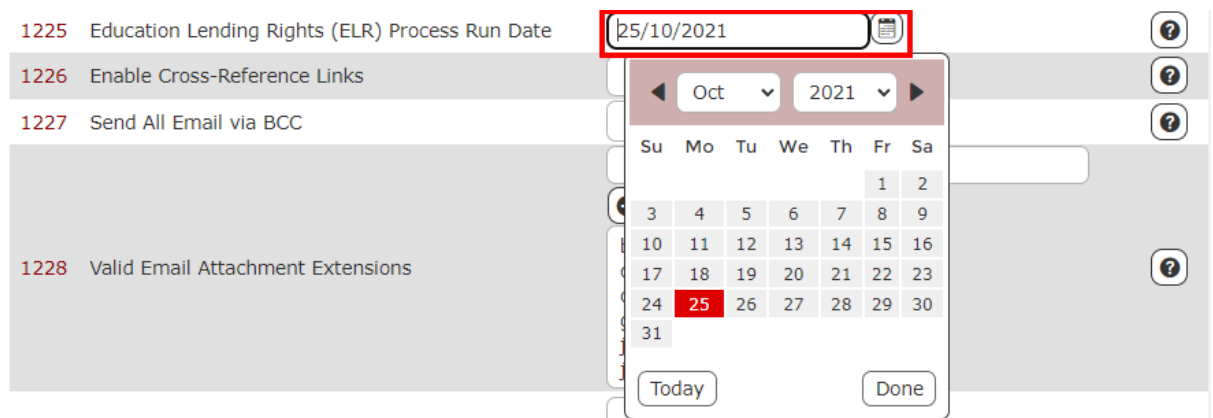
| PARAMETERS | | | | |
|----------------------|---|---|---------|--|
| <input type="text"/> | | <input type="button" value="Search"/> | | |
| 1218 | Inactivity Automatic Logout Warning Period | <input type="text" value="120"/> | seconds | <input data-bbox="1412 1579 1444 1624" type="button" value="?"/> |
| 1219 | Minimum User Inactivity Automatic Logout Time | <input type="text" value="20"/> | minutes | <input data-bbox="1412 1624 1444 1668" type="button" value="?"/> |
| 1220 | Maximum User Inactivity Automatic Logout Time | <input type="text" value="120"/> | minutes | <input data-bbox="1412 1668 1444 1713" type="button" value="?"/> |
| 1221 | Allow Unencrypted Passwords via URL | <input type="text" value="No"/> | | <input data-bbox="1412 1713 1444 1758" type="button" value="?"/> |
| 1222 | Inactive User Session Period | <input type="text" value="60"/> | seconds | <input data-bbox="1412 1758 1444 1803" type="button" value="?"/> |
| 1223 | Global Message Definition Filepath | <input type="text"/> | | <input data-bbox="1412 1803 1444 1848" type="button" value="?"/> |
| 1224 | Embedding Application In Webpages | <input type="text" value="Allow"/> | | <input data-bbox="1412 1848 1444 1892" type="button" value="?"/> |
| 1225 | Education Lending Rights (ELR) Process Run Date | <input type="text" value="25/10/2021"/> | | <input data-bbox="1412 1892 1444 1937" type="button" value="?"/> |
| 1226 | Enable Cross-Reference Links | <input type="text" value="No"/> | | <input data-bbox="1412 1937 1444 1982" type="button" value="?"/> |

Note: If Parameter 1225 does not look like this, check your version of Oliver v5. *These instructions will not apply if you are using a version of Oliver v5 earlier than Build 8.018.*


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.

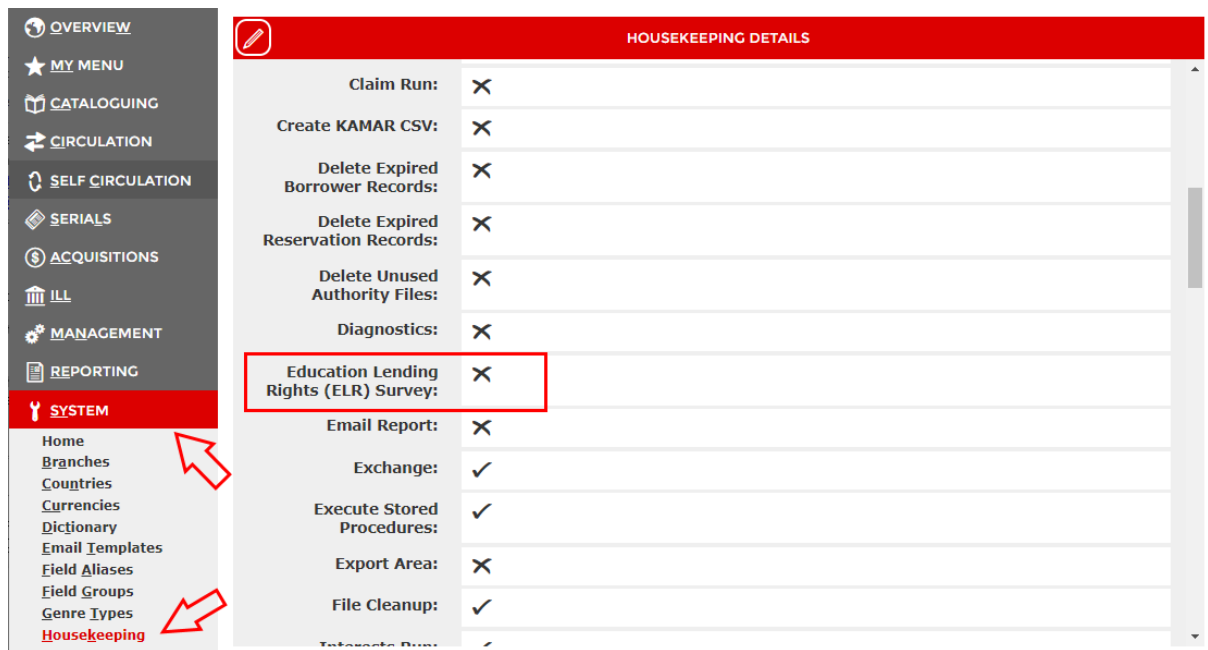
Housekeeping Settings

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.



The screenshot shows the Oliver v5 interface. On the left is a navigation menu with categories: OVERVIEW, MY MENU, CATALOGUING, CIRCULATION, SELF CIRCULATION, SERIALS, ACQUISITIONS, ILL, MANAGEMENT, REPORTING, and SYSTEM. The SYSTEM category is highlighted in red, and its sub-items (Home, Branches, Countries, Currencies, Dictionary, Email Templates, Field Aliases, Field Groups, Genre Types, Housekeeping) are listed below it. A red arrow points to the 'Housekeeping' sub-item. The main content area is titled 'HOUSEKEEPING DETAILS' and contains a table with various system settings. The 'Education Lending Rights (ELR) Survey' entry is highlighted with a red box and shows a disabled status (✕).

| HOUSEKEEPING DETAILS | |
|--|---|
| Claim Run: | ✕ |
| Create KAMAR CSV: | ✕ |
| Delete Expired Borrower Records: | ✕ |
| Delete Expired Reservation Records: | ✕ |
| Delete Unused Authority Files: | ✕ |
| Diagnostics: | ✕ |
| Education Lending Rights (ELR) Survey: | ✕ |
| Email Report: | ✕ |
| Exchange: | ✓ |
| Execute Stored Procedures: | ✓ |
| Export Area: | ✕ |
| File Cleanup: | ✓ |
| Interests Run: | ✓ |

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.



HOUSEKEEPING DETAILS

date is 11 December and parameter 1653 is set to 7 days, the borrower record will not be deleted until the process is run on 19 December. If parameter 1653 is left blank or set to zero, the process will not run.

Delete Expired Reservation Records: ☐ Delete expired reservation records.

Delete Unused Authority Files: ☐ Removes unused authority files that have been scheduled for deletion.

Diagnostics: ☐ Enable/Disable this process.

Education Lending Rights (ELR) Survey: ☒ You should only enable this process if you are taking part in the Education Lending Rights (ELR) Survey. This process will submit a report of the titles in your catalogue. The process will run during the first housekeeping after the date specified by parameter 1225. If parameter 1225 is not set, the process will not run.

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**