

# Frequently Asked Questions about Oliver v5 Implementations?

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## General

### 1. General Process Diagram



## 2. Who do I ask for help?

During the implementation phase, you can contact your project sponsor who will normally answer your question or refer it to the appropriate technical expert. Once Oliver v5 has gone live, all questions should go to Softlink's HelpDesk by emailing [support@softlinkint.com](mailto:support@softlinkint.com) or calling:

Australia - 1800 777 037

New Zealand - 0800 47 63 85

## 3. How long will it be before my library is ready to use?

Typically from the first e-mail sent by the project sponsor to the go-live day is about 2 months, however this can vary and we have had customers live in less than a week. The timeframe depends very much on your needs and your readiness. Softlink will not schedule any part of the implementation process until you have completed the steps outlined in the first email from the project co-ordinator – look for an email with the subject *Oliver v5 Implementation*.

## 4. What happens if I miss a milestone?

Once you have provided Softlink with the necessary information, your project co-ordinator will schedule some milestones through to the completion of the implementation. Your action and co-operation is required to meet these milestones, it is very important that you keep your key stakeholders (e.g. IT staff, library staff and administration staff) aware of these milestones. If you miss a milestone, the rest of the implementation may need to be rescheduled. This can cause significant delays and inconvenience for your library.

## 5. What is required of my IT Department?

Your IT department will be required to:

- Ensure that all server pre-requisites are met, a server checklist will be sent to you. If you are hosted by Softlink this is not required.
- Assist with the completion of the *Oliver Implementation Questionnaire*.
- Assist with data uploads to Softlink
- Attach databases supplied by Softlink to your library system. If you are hosted by Softlink this is not required.
- Provide a suitable network and internet connection.
- Provide suitable hardware for your library system.

## 6. When should I schedule training?

Training can be scheduled at different stages of the project and there are advantages and disadvantages to having training at different times. Please see the discussion on this topic in the *Oliver Implementation Questionnaire* document which you received at the start of the project.

## **Installation**

### **7. Can we install Oliver v5 ourselves?**

For normal use you do not need to install Oliver v5 on your workstations (OPAC terminals and Loans/Returns), however it does need to be installed on your servers unless Softlink is hosting your library solution for you. Usually Softlink does the server installation. If you do the installation incorrectly Softlink may need to assist you further to remedy the installation and configuration. If you choose to do this, you will need to sign a Change Order to accept that there may be additional charges should Softlink need to spend additional effort to assist you.

### **8. Our library system will be hosted by Softlink, do we still need to install it?**

No. Softlink will install Oliver v5 on its servers and provide you with a URL where you can access your library system. For OPAC terminals, cataloguing terminals and loan/return terminals you normally do not need to install anything.

### **9. When do you need to install software on OPAC, cataloguing or loan/return terminals?**

Offline Circulation, which enables you to continue circulation in the event of your internet connection failing, requires a small installation, as does the use of certain types of receipt printers. If you need to print barcodes you should install Free3of9 font on the workstation.

## **Technical Specifications**

The server technical specifications are only relevant to schools that will have Oliver v5 installed on to their own servers. For schools that have elected to have Softlink host Oliver V5, the server technical specifications are not applicable.

### **10. What are the minimum specifications to run Oliver v5?**

The latest server and client technical specifications for your version of Oliver v5 are referenced at the bottom of this web page: <http://v5.softlinkint.com/OliverV5Implementations/>

### **11. When using MS SQL Express, there is a database size limit. How do I know if this will be large enough for my library?**

Microsoft restricts the DB size to 4GB for MS SQL Express 2008 and 10GB for MS SQL Express 2008R2 / 2012. Please consult MS SQL documentation for the latest database size restrictions. These sizes are typically suitable for a single library however this cannot be guaranteed. For example you could add 400 10M videos to your library which could exceed this limit. If you wish to remove this as a risk, you need to use MS SQL Standard Edition or better.

### **12. Are we able to use virtual servers instead of physical servers?**

Yes, the server specifications apply to either compliant physical servers or virtual machines certified to be their equivalent by the virtual machine vendor or the vendor's approved agent. There can be additional challenges with Virtual Servers; Softlink's standard services do not include troubleshooting the virtual server configurations.

## **Training**

### **13. What sort of training am I getting?**

Check your signed proposal to see what sort of training you are getting. Various types of training are available; onsite training, remote training and remote phone sessions. Onsite training is where a Softlink trainer comes to your library and delivers training face to face. Remote training is similar but is delivered remotely using a phone and internet connection. Remote phone sessions are well defined short sessions which cover the basics over the phone, a remote internet session is established if readily available.

### **14. How many people can attend training?**

Standard onsite training covers up to 8 attendees unless stated otherwise on your proposal. Remote training is limited to 4 attendees.

### **15. Is there a standard program for onsite/remote training?**

Yes, for onsite training here is the standard training program for your reference. If you have purchased 1 day only please refer to Day 1. We are flexible and can adjust the training program to your needs. If you have any special training requirements please contact your Project Coordinator before hand.

Day 1	Day 2
<b>START TIME: 9:00 am</b>	<b>START TIME: 9:00 am</b>
Introduction	Acquisitions
Circulation	Serials
Cataloguing	System Management
<b>END TIME: 3:30 PM</b>	<b>END TIME: 3:30 PM</b>

Remote training includes the same content, although the session times may vary to ensure attendees have appropriate 'screen' breaks.

### **16. What do I need to do in preparation for training?**

We recommend that those attending have watched the online training videos and read the Oliver training manuals available for download from the Softlink helpdesk.

Please ensure that your Oliver system is accessible from the room where the training will take place as it will be used during training. If your system is hosted please ensure the work stations have internet access.

Unless there is only one person attending training, we will require a projector or large screen connected to the device from where you will access your Oliver system. If training is not onsite you will need a conference phone (or normal phone if there is only one of you).



## Conversions

### **17. What happens if I have custom reports on my Oliver v3**

Custom reports are not part of the standard conversion from Oliver v3. However, if you wish, the Professional Services team at Softlink could provide a quote for recreating these on your new version of Oliver.

### **18. How do I send my data to Softlink?**

Softlink will email you shortly with instructions on how to upload your data.

### **19. Is my data secure?**

Yes. Each organisation has their own FTP site created specifically for them. It can only be accessed by entering a unique username and password.

### **20. My ftp is not working. What do I do?**

There are a few things that may prevent you from accessing the Softlink ftp site.

1. We find that using a free ftp client such as Filezilla gives best results.
2. Some people use *Windows Explorer* to ftp data to Softlink. If you are, please ensure you are accessing the ftp via *Windows Explorer* and not Internet Explorer. This is a common mistake. If unsure please check with your IT department.
3. If you have tried the incorrect username or password 3 times your account will lock up. Please contact Softlink if this is the case.
4. There may be security restrictions set by your systems manager on your work station, please try a different work station or consult with your IT department if they can upload the data for you.

### **21. I read about Analysis, Trial and Live phases in the conversion, what are these?**

Some conversions require an *analysis phase*, this is where one of our consultants will look at your data and provide you with information on how they will convert it into Oliver v5. Most conversions have a *trial phase* where our consultants will do a complete conversion of your data and then require you to closely examine and verify the results. This normally leads to a greatly improved understanding of how your data should be converted. The last stage is the *live conversion*, this is where you upload the latest version of your library data and Softlink converts it ready for you to start using it with Oliver v5.

### **22. I don't have a trial or analysis phase for my conversion, should I be concerned.**

No. An analysis is only required for conversions that require additional mapping information. Many conversions have standard mappings and therefore do not require an analysis. Your project co-ordinator will inform you about which stages are required for your conversion process.

### **23. Can I keep using my current library system during the conversion?**

Normally the first step is an upload for a trial conversion or analysis and you should continue to use your library system as usual. You can also use your existing library system up to the point where you

upload your data for the live conversion. After that you should not use your library until you are live with Oliver v5

#### **24. Where do I enter new records and circulation during the trial period?**

New information, such as circulation, or new resources and copies etc. should be entered into your existing (old) system during the trial period. Anything you enter into the trial system will be overwritten at the time of the final conversion, so only enter testing data into the trial conversion system.

#### **25. What if I notice problems with my conversion after we go live?**

The best way to avoid this is to check your data carefully before going live. Testing your library system and promptly raising any issues with Softlink during the trial period is one of the most important steps to ensure a quality transition to Oliver v5. This is explained in the email from Softlink to notify you that your trial data is ready. Further information can be found in our Professional Services Guide at [http://www2.softlinkint.com/guidelines/Professional\\_Services.pdf](http://www2.softlinkint.com/guidelines/Professional_Services.pdf). If you do notice problems after you have gone live you should contact Softlink's HelpDesk on Australia 1800 777 037 or New Zealand 0800 47 63 85 or email [support@softlinkint.com](mailto:support@softlinkint.com). They will identify the cause of the problem and provide you with options to resolve it. Sometimes additional services are required to resolve conversion problems not identified prior to going live.

#### **26. How long can I have my Trial for?**

Once you have received your trial system, you can submit comments and requests for changes about the conversion. Typically this will be between 2 and 6 weeks, however we can be flexible if needed. Too short a time and you won't be able to review the trial properly, too long and your library data may have changed too much.

If you delay the final conversion for a period longer than four months after the trial conversion, it might be necessary to rerun your trial resulting on additional cost. If you have any concerns on this respect please consult with your project coordinator.