

## Oliver v5 Go Live Checklist

This checklist contains items that should be completed on your system after your final conversion has been installed. Full details of these items can be found in the Oliver reference manual as well as the Oliver Integrated Help.



	<p><b>Local Settings</b></p> <p>Ensure any required workstation settings have been completed (See document <i>“Additional Oliver v5 Setup included in the welcome email”</i>). This includes:</p> <ul style="list-style-type: none"> <li>• Set up shortcuts to Oliver or Orbit</li> <li>• Add Oliver as a trusted site in your browser</li> <li>• Installing the barcode font (if required).</li> <li>• Enable pop-ups for Oliver</li> </ul>
	<p><b>Library Staff Logins</b></p> <p>If individual logins are required for library staff, these should be set for each user.</p> <ul style="list-style-type: none"> <li>• Navigate to Circulation &gt; Borrowers</li> <li>• Search for each user you wish to change and check the following fields: <ul style="list-style-type: none"> <li>○ Alias / Username</li> <li>○ Password</li> <li>○ User Role: this will determine what areas that user has access to (e.g. Administrator / Library Staff)</li> </ul> </li> </ul> <div data-bbox="600 1120 1227 1671" data-label="Form"> <p><b>BORROWER DETAILS</b></p> <p>Alias: <input type="text" value="CSMITH"/></p> <p>Last name: <input type="text" value="Smith"/> <small>Enter the Borrower's surname.</small></p> <p>First name: <input type="text" value="Charlie"/> <small>Enter the Borrower's first name.</small></p> <p>Middle Initial: <input type="text"/></p> <p>Username: <input type="text"/> <small>Enter the login name of the borrower</small></p> <p>Branch: <input type="text" value="Library"/> <small>Select the Branch for this Borrower.</small></p> <p>Loan Category: <input type="text" value="Staff"/> <small>Choose a category to set borrowing rights.</small></p> <p>User Role: <input type="text" value="Administrator"/> <small>Select the role this user will have</small></p> </div>
	<p><b>Oliver Homepage Banner</b></p> <p>Using either .jpg, .png, or .gif file types is recommended. The recommended banner dimensions are:</p> <ul style="list-style-type: none"> <li>• Width: 1800px</li> <li>• Height : Between 80px and 140px</li> </ul> <p>The Oliver banner can be changed at any time using the Interface Setup Wizard.</p>

## Library Parameters

There are some parameters specific to your library that should be entered before you start using your system.

- Navigate to Management > Parameters
- Edit parameters 1000-1006 and enter your library details

LIBRARY INFORMATION			
NO.	PARAMETER	VALUE	HELP
1000	Library Name	Grange Hill School	?
1001	Street Address	77 Brandl Rd Eight Mile Plains	?
1002	Phone Number	1800 777 037	?
1003	Fax Number		?
1004	Email Address	grangehill@softinkint.com	?
1005	Search Email Address	grangehill@softinkint.com	?

## Open Hours & Closed Dates

Your opening hours and closed dates should be set to prevent items being due back when the library is closed.

- Navigate to System > Branches
- For each branch, edit and enter the opening hours of the library and the dates that the library is closed (e.g. school holidays).

	<p><b>Closed Dates:</b> <input type="text"/> </p> <p>25/03/2016 - 28/03/2016  </p> <p>25/04/2016 </p> <p>Enter each date range when the library will be closed and then click Add. Enter a single date, in the format dd/MM/yyyy, or a date range comprised of two such dates separated by a hyphen.</p> <p><b>Open hours Sunday:</b> <input type="text"/></p> <p>Enter the times that the library will usually be open on this day.  - Closed days should simply be left blank.  - Open hours must appear in 24-hour format <b>H:mm</b> (0:00 - 23:59).  - Both an open and a close time must be provided, separated by a hyphen (spaces are okay).  - Pairs of times must be separated by commas e.g. 07:30 - 9:00, 12:00-19:00,23:00 - 23:59.</p> <p><b>Open hours Monday:</b> <input type="text" value="08:00 - 17:00"/></p> <p>Enter the times that the library will usually be open on this day.  - Closed days should simply be left blank.  - Open hours must appear in 24-hour format <b>H:mm</b> (0:00 - 23:59).  - Both an open and a close time must be provided, separated by a hyphen (spaces are okay).  - Pairs of times must be separated by commas e.g. 07:30 - 9:00, 12:00-19:00,23:00 - 23:59.</p> <p><b>Open hours Tuesday:</b> <input type="text" value="08:00 - 17:00"/></p>
	<p><b>Circulation Control Card (Optional)</b></p> <p>To access your Circulation Control Card, which includes barcodes for ease of scanning,</p> <ul style="list-style-type: none"> <li>• Navigate to Circulation &gt; Home</li> <li>• Click the Wizard for 'Printable Circulation Control Card'</li> </ul>

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## Lending Rules

Lending rules should be reviewed to ensure these match lending policies.

- Navigate to Circulation > Lending Rules and review.
- Open Resource Loan Categories (from the Lending Rules menu) and set items that are able to be reserved to reservable.
- Open Borrower Loan Categories (from the Lending Rules menu) and check the reservation limits of each.

BORROWER LOAN CATEGORY	Junior Student	Senior Student	Staff
CIRCULATION EXPIRY DATE	9 December, 2016	2 December, 2016	16 December, 2016
LOAN LIMIT TYPE / RLC	LOAN PERIODS		
General	Limit: 8	Limit: 12	Unlimited
Audio-Visual	✗	3 days Renewals: Unlimited	7 days Renewals: Unlimited
General	7 days Renewals: 10	14 days Renewals: Unlimited	21 days Renewals: Unlimited
Magazines	✗	2 days Renewals: Unlimited	3 days Renewals: Unlimited
Short Term	3 days Renewals: Unlimited	7 days Renewals: Unlimited	7 days Renewals: Unlimited



## Overdues

Overdue notices should be reviewed to ensure these are setup as required.

- Navigate to Circulation > Overdues and review or configure notices as required.

2	Overdue Letter to Parents	print	11			
3	Senior Student Overdue Notice *	email	153			
4	Senior Student Reminder Notice *	email	0			
5	Staff Overdue Notice	email	5			
6	Staff Reminder Notice Email *	email	0			



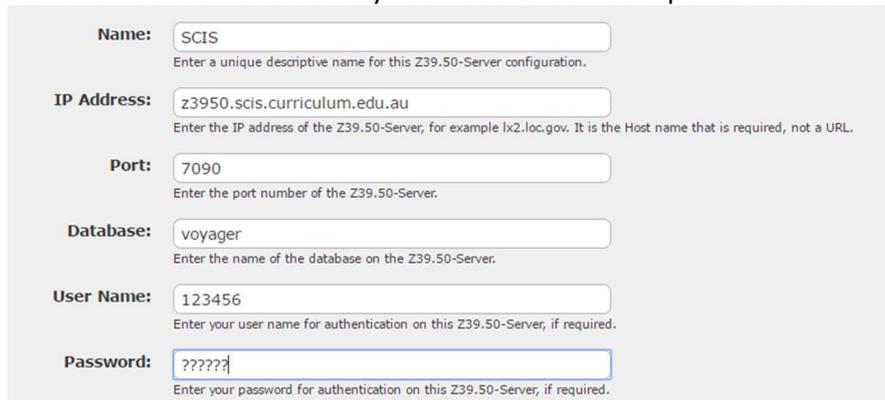
## Z-Cataloguing

If using SCIS with Z-Cataloguing, you will need to enter your SCIS username and password.

- Navigate to Cataloguing > Z-Cataloguing
- Browse sources

The screenshot shows the Z-Cataloguing interface. At the top, there is a breadcrumb trail: 'Cataloguing > Resources > Z-Cataloguing > Search'. The user is logged in as 'Oliver Administrator'. The main heading is 'Z-CATALOGUING'. Below this, there are search options: 'Search', 'Browse Sources', and 'New Source'. The 'Search' option is selected. The search criteria are 'ISBN or ISSN', with 'ISBN' selected. There is a text input field for the search term and a '+ Add new entry in the field above' button. The 'Sources' dropdown menu is open, showing 'SCIS', 'Library of Congress', and 'National Library of Australia'.

- Edit the SCIS source and enter your SCIS username and password and save



The screenshot shows a configuration form for a Z39.50-Server. The fields are as follows:

- Name:** SCIS (with a note: "Enter a unique descriptive name for this Z39.50-Server configuration.")
- IP Address:** z3950.scis.curriculum.edu.au (with a note: "Enter the IP address of the Z39.50-Server, for example lx2.loc.gov. It is the Host name that is required, not a URL.")
- Port:** 7090 (with a note: "Enter the port number of the Z39.50-Server.")
- Database:** voyager (with a note: "Enter the name of the database on the Z39.50-Server.")
- User Name:** 123456 (with a note: "Enter your user name for authentication on this Z39.50-Server, if required.")
- Password:** ?????? (with a note: "Enter your password for authentication on this Z39.50-Server, if required.")

- You may also need to email SCIS and ask them to activate Z3950 for your account. This will need to be setup before the live conversion.
- The server that Oliver is installed to will need to allow external access on port 7090. (If Softlink host your system this has been done for you).

### Orbit (Optional)

If using Orbit, some configuration is required. For full details please see the Orbit how to guides. The basic steps are:

- Under Management > Collections, assign formats and suitability ages to collections that you wish to appear in Orbit. For example:



The screenshot shows the configuration for a collection in Orbit. The settings are:

- Term:** Fiction
- Hidden In Search:** X
- Format:** story
- Suitability Age:** 5
- Bookable:** Ignore
- Reservable:** ✓

- In Management > Parameters set suitability ages as required (see the Orbit how to guides for further information).

4302	Show Orbit and Olly Suitability Age Range Parameters	Yes
4303	Minimum Suitability Age	0
4304	Maximum Suitability Age	10

- Run the housekeeping processes (System > Housekeeping) for assigning the formats and suitability ages – “Catalogue Format” and “Suitability Age”.

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### **SIP2 (Optional)**

The SIP2 Module can be used for third party systems, such OverDrive, to integrate with Oliver.

If you have purchased the SIP module, the Oliver installation server may require additional external access. This is normally port 6001.

You may also need to specify the server name or IP address of the Oliver application server to the third party provider along with a username in Oliver. We have set up a user with the username sip2, you will need to set a secure password on this user for this purpose.