

SirsiDynix Docutek ERes 5.5.1

Release Notes

December 2008



© 2008 SirsiDynix. All rights reserved.

The processes and all the routines contained herein are the proprietary properties and trade secrets of SirsiDynix. Except as provided by license agreement, this manual shall not be duplicated, used or disclosed for any purpose or reason, in whole or in part, without the express written consent of SirsiDynix. The information in this document is subject to change without notice and should not be construed as a commitment by SirsiDynix.

SirsiDynix grants the right of copying the enclosed material solely for the internal business use of the end user if (1) this document has been obtained by purchase or by license agreement in conjunction with SirsiDynix products, and (2) this copyright statement is included with each copy. All other copying or distribution is strictly prohibited.

Use, duplication, or disclosure by the U.S. Government is subject to restrictions as set forth in sub-paragraph (b)(3) of the Rights in Technical Data and Computer Software clause in DFARS 252.227-7013.

Rights for non-DOD U.S. Government departments and Agencies are as set forth in FAR 52.227-19(c)(1,2).

Docutek ERes is a trademark of Docutek, a SirsiDynix Company. Microsoft .NET Framework is a registered trademark of Microsoft Corporation.

Sirsi®, WebCat®, Vizion®, WorkFlows®, Unicorn®, UnicornECOLE®, UnicornOASIS®, UnicornSTILAS®, Site Source®, DRA®, DRA Net®, Inlex®, MultiLIS®, Taos®, JurisLink™, Corinthian®, Dynix®, URSA®, Horizon™, Remote Patron Authentication™, and TeleCirc™ are trademarks of SirsiDynix.

Other product and company names herein may be the trademarks of their respective owners. All titles, versions, trademarks, claims of compatibility, etc., of hardware and software products mentioned herein are the sole property and responsibility of the respective vendors. SirsiDynix makes no endorsement of any particular product for any purpose, nor claims responsibility for its operation and accuracy.

This document is compatible with ERes 5.5.1. Information in this document may also be compatible with later versions.

12/2008

Contents

Chapter 1: ERes 5.5.1 Release Notes	1
Enhancements	1
Fixed bugs	3
Known issues	7
Chapter 2: Upgrading and Installing ERes	11
System Requirements	11
Upgrading to ERes version 5.5.1	12
Fields: ERes Update	13

Chapter 1: ERes 5.5.1 Release Notes

This document provides information about enhancements and fixed issues in version 5.5.1 of SirsiDynix Docutek ERes®.

This document includes these sections:

- [Enhancements on page 1](#)
- [Fixed bugs on page 3](#)
- [Known issues on page 7](#)

Enhancements

This section includes information about key features and enhancements in this version of the software. Features and enhancements are new additions or modifications to the software from the previous version.

Expanding .zip archives on upload

ERes® now allows you to expand files archived in a .zip file into the ERes system. You can still choose to have uploaded .zip files remain in the compressed archive file.

Importing multiple accounts and courses

ERes now support importing large numbers of accounts into the Accounts list and large numbers of courses into the Course Reserves list. You can import by either a CSV file or, if you have the Blackboard® module, by connecting directly to the Blackboard server.

Online Help

The online help has been updated and revised to include new functionality and to improve accessibility. Student (anonymous) users have access only to those topics that pertain to their functions that they use; they do not have access to topics that describe administrative functions.

Cloning courses

You can duplicate an existing course to use as a template for a new course. The old course is retained as a history of the course settings.

Blackboard integration

If you have the Blackboard module and the associated building block, you can set up the Blackboard to dynamically update document lists within Blackboard.

SMTP password masking

The password field for the SMTP server authentication is masked on the System Settings page to remove a security issue.

SSL support

ERes supports Secure Socket Layer logins. It can be turned on in the System Settings.

Quick Dates

You can now define date ranges and name them (such as Fall Semester, 2009). Users can select them to quickly specify date ranges for a variety of tasks.

Letter editor

ERes now includes a WYSIWYG editor for editing letters that will be sent to publishers for copyright clearance requests.

Exporting data

The data export format has been updated to match the import format; you can easily import any set of data that is exported from ERes 5.5.1.

New Reports

ERes includes four new reports that help analyze how copyrights and materials are being used:

- Summary: Copyright Charge Report
- Summary: Cost vs. Usage
- Summary: Documents On Reserve
- Summary: Unused Documents

Access to course administration

The course reserves page administration has been simplified by adding the Page Management tab and a Course Reserves Page tab to the course reserves page settings page. This allows course page administrators quicker access to all of the course page settings.

Enhanced Copyright Workflow

This version of ERes includes the ability for users to request documents to be placed in course reserves. The library receives the request and can approve or deny the request.

Blackboard Academic Suite™ integration

A module has been added that integrates ERes with Blackboard Academic Suite. It links Blackboard from a course to the reserve documents for the course that are in the ERes system.

Fixed bugs

This section includes a list of all resolved issues, or fixed bugs, for ERes 5.5.1. Resolved issues are problems that SirsiDynix has identified through the testing process and fixed for this version. Each issue is cataloged by a bug number (“key”), and includes a summary of the bug and additional information, where available.

The following table lists the bug fixes.

Key	Component	Summary	Release Notes
DOE-131	General	MOV files don't load properly (they shows as binary data) when loaded outside of document view window via redirect.	
DOE-135	General	The repair operation in the update package is resetting the IP restrictions on the proxy redirect script.	
DOE-194	General	The "Additional Instructors" form on course reserves page settings page displays no data or controls, when viewed by librarian account-type users.	
DOE-196	General	RSS check with Feed Validator fails.	
DOE-208	General	Password generator disappears after trying to modify multiple accounts.	
DOE-209	General	Log in issues when using Internet Explorer	

Key	Component	Summary	Release Notes
DOE-213	General	Confusing layout when modifying multiple accounts.	
DOE-227	Reporting	Reports with date range have an extra day added to them.	
DOE-230	General	Users receive an email confirming subscription to a course reserves site when their names aren't added.	
DOE-232	General	Issues with exporting into Excel format with Office 2007.	
DOE-235	General	Dates for permissions only go to 2010.	
DOE-270	General	Performance issue: screens that display document lists perform OK for admin users, terrible for faculty users.	
DOE-278	General	Hover text does not translate.	
DOE-284	General	There are errors on the document hit report when date values are not supplied to the form.	
DOE-295	General	There is buggy behavior when displaying a course page that has a mis-specified "Courseware Link" setting in the course pages settings.	
DOE-297	General	Incorrect Label on Trusted Sites.	
DOE-300	General	RSS Feed shows documents in password-protected folders.	
DOE-309	Copyright	Copyright ordering is broken with ERes 5.5.	
DOE-314	General	There is a bad text string on the Copyright Acceptance screen of the course reserve page.	

Key	Component	Summary	Release Notes
DOE-327	General	Cannot download files from the 'Attached Files' tab of file management when viewed through page management of course page.	
DOE-328	General	Using persistent URL, users able to get around course visibility settings if course is expired.	
DOE-378	Copyright General Globalization	Translating CCC fields breaks CCC ordering.	
DOE-386	General	Hard copy documents don't show as hard copy.	
DOE-387	Reporting	Reports should not count staff views as hits.	
DOE-401	Copyright General	Variable is displayed instead of value when including copyright status in letters to publisher.	
DOE-416	General Reporting	Report crashes when no items are found within the specified date range.	
DOE-419	General	Cannot edit multiple documents from a course page.	
DOE-459	General	Email being sent to bad address: "shoudn.t@see.me".	
DOE-466	General	Managing multiple instructors on a course page is buggy.	
DOE-467	General	Splitting lines of emails with over 1000 characters occasionally will merge two lines.	
DOE-492	General	Emails sent are HTML-compatible only.	
DOE-513	General	Before version 5.5 the application supplied default values for SMTP server and SMTP host and now it does not, causing email to break routinely	

Key	Component	Summary	Release Notes
DOE-525	General	A document attached to a course, with the "Approval Status" of "Pending: Hide" is listed for non-staff users.	
DOE-536	General	Can't change visibility dates when modifying multiple courses.	
DOE-538	General	Modifying multiple courses incorrectly enables discussion board and chat room.	
DOE-543	UI (User Interface)	Tab borders do not display properly in Firefox & Safari	
DOE-575	General	Account password boxes go side-by-side.	
DOE-576	Copyright Globalization	Linking a document to a course sets the approval wrong if not in default English.	
DOE-581	Security Vulnerabilities	Password Confirmation box is not being checked.	
DOE-614	General	Password confirmation box appears when editing multiple accounts.	
DOE-617	Copyright	CCC ordering doesn't take you to success screen on IE7	
DOE-618	UI (User Interface)	Course Info tab provides a link to the email instructor even if no email address is set.	
DOE-622	DocuFax	DocuFax cover sheet does not print from "modify document".	
DOE-642	Reporting	The "Summary: Document Associations" report seems to show several inconsistencies related to the defined purpose - "show active document associations".	

Key	Component	Summary	Release Notes
DOE-663	Copyright	The variable is displayed instead of the value when including copyright status in letters to the publisher.	
DOE-741	General	Bulk updating of any kind causes the Discussion Board and Chat Room to "Turn on".	

Known issues

This section includes information about known issues in this version of the software. Known issues are reported issues that either do not affect the software or have not been fixed in this version.

Browser display

The appearance of the ERes interface can vary based on the specific web browser that you are using. This is cosmetic only and will not affect ERes functionality.

Importing courses

Importing courses from CSV files only work with one faculty member.

Internet Explorer 6 and Reserve Workflow

When modifying a reserve workflow form with IE6, when you press the save button the form on the screen reverts back to how it was before the changes. This is a display issue with IE6 - the changes were saved. Please leave the area and come back to see the changes, or use a different browser.

Installation

Install does not work on 64-bit versions of Windows.

Instructor names

Instructors with last name of "True" have their last names displayed as a green dot. (This is a symptom of a more complex problem)

Deleting items

"Success" message is shown when attempting to delete an item that cannot be deleted, even though the item is not deleted.

System copyright visibility

Changes to System Copyright Visibility rules do not have any visible effect.

Login page translation

Occasionally, the login page will not fully translate into the selected language.

Editing multiple accounts

When modifying multiple accounts, changing the password is confusing.

Document passwords

It is possible to link a document to a course without requiring a password, even if the system setting to require a password is set.

Course page pop-ups

When working with course pages, pop-ups do not check to see if the appropriate window already exists, thus creating multiple windows with the same content.

Reserve request instructions

Instructions when creating a reserve request need to be set appropriately.

Trusted sites and Internet Explorer

When using trusted sites, a scenario exists where the browser will show an error when it should download a file. This is only known to occur with Internet Explorer. Two workarounds exist. Use another browser, or change the system setting for "Always show the info window when viewing a Document" to "Yes".

Check Cost

The Check Cost function in Reserve Workflow does not open unless user has full "Manage Copyrights" permissions.

Sorting the Reserve Workflow list by username

When you sort the Reserve Workflow list by username, ERes returns a system error. You can sort by any other column without problem.

Discussion board thread counts and posting dates

In the discussion boards, the thread counts and post dates do not display. "N/A" displays instead.

View Other Accounts permissions

The group permission "View other accounts" does not work for the general release of ERes 5.5.1. Groups that have this permission will not see other accounts where they are intended to.

Non-US English browsers

Logging in to ERes with a browser that is set to a language other than English (en) or US English (en-us) produces an error. You must change the browser's language to log in and use ERes.

Chapter 2: Upgrading and Installing ERes

For existing ERes installations, the update process takes care of most of the settings you need for system. For new installations the process is somewhat different.

For more information about updating and installing ERes 5.5.1, see these topics:

- [System Requirements on page 11](#)
- [Upgrading to ERes version 5.5.1 on page 12](#)

System Requirements

ERes 5.5.1 requires a certain level of hardware and software in order to function properly. This section describes those requirements

For more information, see these topics:

- [Minimum Hardware Requirements on page 11](#)
- [Minimum Software Requirements on page 11](#)

Minimum Hardware Requirements

- Intel or AMD processor capable of running Windows 2000/2003 Server. Intel Xeon processor, single or dual core, running at 2.x GHz is recommended.
- 1GB SD or DDR memory. DDR is recommended.
- IDE or SCSI based hard drive(s). Three 100GB 10k RPM SCSI hard drives in a RAID-5 configuration recommended.
- Network interface card. Gigabit (10/100/1000) Ethernet NIC recommended.
- Any business-class fax modem, if DocuFax module was purchased.

Minimum Software Requirements

- Windows 2000/2003 Server operating system.
- IIS 5 or IIS 6 Webserver.
- Microsoft .NET Framework version 2.x.
- MDAC Database Drivers version 2.8x.
- Java 1.4 for installing ERes

Upgrading to ERes version 5.5.1

If you have a previous version of ERes, you can use the Web Update to download version 5.5.1. As part of the upgrade download, SirsiDynix also downloads a new Web Update program.

To download ERes 5.5.1

- 1 From the desktop of the server where ERes is installed, double-click **Web Update - ERes**.

Web Update checks for a new version of ERes. When it finds one, it prompts you to update to the newer version.
- 2 Choose **Yes**.

A warning message opens. If you have not backed up yet, you should do so before continuing with the update.
- 3 Choose **OK**.
- 4 You may be prompted to select a site to update. If more than one is installed on the server, you should cancel each installation until the one you want to update appears. At that point, choose **OK**.
- 5 Choose **OK** to start the update.

The ERes Installer opens.
- 6 Choose **Next**.

The Release Notes for version 5.5.1 open.
- 7 Choose **Next**.

The installation page opens.
- 8 If you want to view the progress of the installation, choose **Show Details**.
- 9 Choose **Install**.

Note: Depending on what information you provided for previous updates, you may be prompted for information as part of installation process.
- 10 You may be prompted to delete unused folders. Doing this maintenance can help ERes run more quickly, but may take a few minutes, depending on the size of your system. Choose **OK** or **Cancel**.
- 11 When the installation has finished, choose **Finish**.

Note: As part of the update and installation, a new Web Update program is installed and the old program is deleted.

Related topics

- [Fields: ERes Update on page 13](#)

Fields: ERes Update

The ERes Update searches for and lists any updates that are available for you to download and install.

You have these options:

Option	Description
list	Displays each update that you can download and install to update to the most recent version of ERes.
Access Key	Enter the code you received from SirsiDynix to enable you to download a beta version of ERes.
Update	Downloads and begins the installation process for the selected update.
Refresh	Repeats the search and loads the results to the list to include any newly added or removed updates.

Related topics

- [Upgrading to ERes version 5.5.1 on page 12](#)