

SirsiDynix Docutek ERes 5.5.1.1

Release Notes

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This document is compatible with ERes 5.5.1.1. Information in this document may also be compatible with later versions.

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Chapter 1: Installing and Upgrading ERes

For existing ERes installations, the update process takes care of most of the settings you need for your system. For new installations, or to re-install ERes, the process requires the assistance of the SirsiDynix Client Care team.



If your ERes system is hosted by SirsiDynix, contact your support representative to upgrade to a new version.

For more information about installing or upgrading ERes, see these topics:

- [System requirements on page 1](#)
- [Preparing your server for installation on page 3](#)
- [Upgrading to a new version of ERes on page 4](#)

System requirements

ERes 5.5.1.1 requires a certain level of hardware and software in order to function properly. This section describes those requirements

For more information, see these topics:

- [Hardware requirements on page 1](#)
- [Minimum software requirements on page 2](#)

Hardware requirements

ERes is a web service

Minimum hardware	Recommended hardware
Intel or AMD processor capable of running Windows 2000/2003 Server.	Intel Xeon processor, single or dual core, running at 2.x GHz
1 GB SD or DDR memory	2 GB DDR memory
IDE or SCSI based hard drive(s) Note: Hot swappable SCSI drives give the added advantage that they can be removed and replaced (in case of failure) without shutting down the computer.	Three 100GB 10k-15K RPM SCSI hard drives in a RAID-5 configuration. Note: A RAID-5 configuration allows data to be striped across three or more hard disks, which results in quicker access times and redundancy in case of a physical drive failure.
Network interface card	Gigabit (10/100/1000) Ethernet NIC
If DocuFAX module was purchased, any business-class fax modem	If DocuFAX module was purchased, any business-class fax modem

Minimum hardware	Recommended hardware
Tape drive	Network backup

Minimum software requirements

- Windows 2000/2003 Server operating system.
- IIS 5 or IIS 6 Webserver.
- Remote Desktop for the ERes support team to connect to the server to install ERes. (For more information, see [Preparing your server for installation on page 3.](#))
- Microsoft SMTP service or access to an external SMTP server.
- Microsoft .NET Framework version 2.x.
- MDAC Database Drivers version 2.8x.
- Java 1.4 for installing ERes.
- Unique website DNS entry or IP address.
- Regional Settings set to “English (United States)”.

Operating System installation

A standard installation of Window 2003 Server ensures proper operation of the operating system and the Docutek ERes application and utilities. Install the system in the default “C:\Windows” location on the server with the default permissions. If you would like to install additional security applications, or make adjustments to the operating system, do so **after** the Docutek ERes installation is complete.



At this time, ERes does not support installation on a 64-bit operating system.

Dedicated server

We recommend that you install ERes on a dedicated webserver where no other (non-essential) software will be installed. This ensures peak software performance and reduces software conflicts. If a dedicated machine is not available, ERes can run reliably with other software on the server.



The Docutek ERes server must not be used as a workstation for scanning or for any other purposes. Scanning is a very processor-intensive activity, and it may adversely affect webserver performance. In most cases, there is no need for librarians or faculty staff to have any direct access to the server itself.

We do not recommend running ERes on a Windows server that has both IIS and Apache installed. Please let the support team know if you have Apache, or any other web-server, installed on your ERes server. Contact your support representative for answers to questions or concerns you may have regarding dedicated servers or software compatibility.



During installation and maintenance it may be necessary to reboot the Docutek server; this will cause any other systems on the machine to be inaccessible as the machine restarts.

Preparing your server for installation

The SirsiDynix Docutek support team will assist you with the ERes installation. To do so, they will need access to the server where ERes will be installed. This section describes what you need to do to prepare the server for the installation. These steps assume that you have administration rights to create an account on the server where ERes will be installed, and that you have experience creating user accounts.

For more information, see these topics:

- [Installing the latest Microsoft Windows security updates on page 3](#)
- [Setting up remote access for the Eres support team on page 3](#)

Installing the latest Microsoft Windows security updates

Docutek recommends visiting the Microsoft Windows Update website at update.microsoft.com to get the latest information regarding updates for your server.



Please note that you may need to reboot your server and revisit the website several times before all updates are applied.

Setting up remote access for the Eres support team

To complete the ERes installation and provide timely maintenance, the ERes support team will need an administrative level account on the server, to access the server remotely.

Setting up the remote access account

- 1 Create a user account named “docuadmin” in the local computer domain. Your system administrator will know how to do this.

Use these settings for the account:

Option	Setting
Username	docuadmin

Option	Setting
Password	Send the password to your support representative at installation time. Note: To ensure system security, we will change the password on the “docuadmin” account once we have made our first connection.
User Must Change Password at Next Login	unchecked
User Cannot Change Password	unchecked
Password Never Expires	checked
Account Disabled	unchecked
Groups	Administrators & Users

- 2 If your server is behind a firewall, you will need to open up several TCP ports so that patrons can access ERes and so the ERes support team can access your machine for the install and for maintenance. Set up the ports with the following settings:

Option	Setting
Web Server	80 (in/out)
SMTP Mail Delivery	25 (out)
Microsoft Remote Desktop	3389 (in/out)



When possible, the ERes website should be configured to run over port 80, which is the standard port for HTTP traffic. If your webserver is already running another website over this port the ERes support team can provide you with information about how to configure a second website on the machine using host-headers and/or an additional IP address.

If neither of these options are available to you, the website may be configured to run on any available port on the server (81, 82, and so forth). It is important to note that many utility products (such as personal firewalls, spyware scanners, and website accelerators) are designed to handle traffic over port 80 and even block traffic over other ports. These third-party products may affect the operation of the ERes software if the server has been configured to use a non-standard port for HTTP traffic.

Upgrading to a new version of ERes

You can use the Web Update to download the most recent version of ERes. As part of the upgrade download, SirsiDynix also downloads a new Web Update program.

To download ERes 5.5.1.1

- 1 Back up your ERes data.

- 2 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.
- 3 Choose **Yes**.

A warning message prompts you to back up the ERes data. If you have not done so, do it now.
- 4 Choose **OK**.

You may be prompted to select a site to update. If more than one version of ERes is installed on the server, you can choose which one to upgrade. Web Update displays in sequence each version that it finds installed.
- 5 Click **Cancel** until the version you want to upgrade displays.

The next ERes version found displays.
- 6 When the ERes version you want to upgrade displays, choose **OK**.
- 7 Choose **OK** to start the update.

The ERes Installer wizard opens. The wizard guides you through the steps for installing the upgrade.
- 8 Choose **Next**.

The Release Notes for the upgrade version open. These include the enhancements and other notes that will help you as you use ERes.
- 9 Choose **Next**.

The installation page displays a summary of what will be installed.
- 10 If you want to view the progress of the installation, choose **Show Details**.
- 11 Choose **Install**.

Note: Depending on what information you provided for previous updates, you may be prompted for information as part of installation process. Enter that information as prompted.

You may be prompted to delete unused folders. Doing this maintenance clears disk space so the server will have more storage and ERes can run more efficiently. However, it may take a few minutes to perform the task, depending on the size of your system.
- 12 Choose **OK** or **Cancel**.
- 13 When the installation has finished, choose **Finish**.

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

The new ERes Update has the following options that you can use when you upgrade to the next version of ERes:

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. If you have not been contacted about installing a beta version, leave this field blank.
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.

Chapter 2: ERes 5.5.1.1 Release Notes

This document provides information about fixed issues in this version of the software.

This document includes these sections:

- [Fixed bugs on page 7](#)
- [Known issues on page 8](#)

Fixed bugs

This section includes a list of all resolved issues, or fixed bugs, for ERes 5.5.1.1. 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.

Key	Summary
DOE-265	When an account is created where the last name is "True", a green dot icon appears in place of the name at multiple locations in the application.
DOE-658	Microsoft Internet Explorer only the original form shows even after you have modified the form
DOE-682	The discussion board displays "N/A" instead of the thread count and post date.
DOE-684	The instructions that appear on the screen when a user creates a reserve request need to be updated.
DOE-750	The Check Cost function in Reserve Workflow does not open unless the user has full "Manage Copyrights" permissions.
DOE-772	When you sort the Reserve Workflow list by username, ERes returns a system error. You can sort by any other column without problem.
DOE-786	The task completion message for cloning a course is misspelled.
DOE-802	If you attempt to open the ERes Homepage with a browser in which the language is set to anything other than en-US, you will receive an error message.
DOE-821	Reserve Workflow link appears on the Page Management tab of the Course Reserves Page even when the Reserve Workflow module is not enabled.
DOE-845	If ERes runs on a non-standard port (not 80), or if the port is specified in the "URL of this Website" option of the System Settings, the "Require secure (SSL) login?" option won't work properly.

Key	Summary
DOE-882	When cloning a course, any documents that were attached to the course but then deleted are linked to the new course.

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 may vary based on the specific web browser you are using. This is only cosmetic and does not affect ERes functionality.

Importing courses

Importing courses from CSV files only imports one faculty member per course.

Installation

The ERes installation does not work on 64-bit versions of Windows.

Deleting items

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

System copyright visibility

The System Copyright Visibility rules in the System Configuration are not currently operational.

Login page translation

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

Editing multiple accounts

When you edit multiple administration user accounts, it appears that the password confirmation field is editable when it is actually the password field that is editable.

Document passwords

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

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.

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 a different browser, or change the setting in the ERes System Configuration for "Always show the info window when viewing a Document" to "Yes".

