

SirsiDynix Docutek ERes 5.6

Release Notes

June 2009



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This document is compatible with ERes 5.6. Information in this document may also be compatible with later versions.

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Chapter 1: ERes 5.6 Release Notes

This document provides information about enhancements and fixed issues in version 5.6 of SirsiDynix Docutek ERes®.

This document includes these sections:

- [Enhancements on page 1](#)
- [System requirements on page 2](#)
- [Installing and upgrading ERes on page 4](#)

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.

Copyright Clearance Center update

The Copyright Clearance Center (CCC) is upgrading their Application Programming Interface (API) to be more robust. ERes has been updated to work with the new API.

MIME type management

A MIME type manager has been added to the System Configuration pages that lets you edit and create the MIME types used in ERes. This lets you assign icons and descriptions to better help students identify the programs associated with files and for the browser to work with files better.

Improvements to user interface

The interface has been improved by including a window-inside-a-window design. Where a new browser window would open so you could set options, now a window opens within the same browser window to reduce the number of windows open and to prevent the same page from opening in two different windows.

Also, the System Configuration pages have been modified to make navigation easier.

Include streaming media

ERes now allows faculty to attach sound and video media files to a document that students can stream directly through a streaming media player. The System Manager can configure which files can be streamed and can include an option for downloading the file in addition to streaming.

Error handling

System errors are now identified by a page that explains what caused the error. These error messages will help you and Client Care remedy the problem in the system.

Direct uploading of attachments

Attachments now bypass the staging area and are attached directly to the document. Files can still be managed in the Attachments page and moved to the staging area if needed.

Increased security

Authentication cookies are now encrypted to reduce the risk of attacks using stolen or forged cookies.

System requirements

ERes 5.6 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 2](#)
- [Minimum software requirements on page 3](#)

Hardware requirements

Because ERes is a web service, the only hardware requirements that should concern you are for the server.

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

Minimum hardware	Recommended hardware
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
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 [Installing and upgrading ERes on page 4.](#))
- 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.

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.

This section includes these topics:

- [Preparing your server for installation on page 4](#)
- [Upgrading to a new version of ERes on page 6](#)

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 5](#)
- [Setting up remote access for the ERes support team on page 5](#)

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
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 5.6

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	Specifies the code you received from SirsiDynix to enable you to download a beta version of ERes. If you have been contacted about installing a beta version, enter the code here.
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 5.6 issues

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

This document includes these sections:

- [Known issues on page 9](#)
- [Fixed bugs on page 12](#)

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.

Key	Summary	Release Notes
DOE-155	The ERes installation does not work on 64-bit versions of Windows.	
DOE-193	A "Success" message is shown when attempting to delete an item that cannot be deleted, even when the item is not deleted.	
DOE-261	Occasionally, the login page will not fully translate into the selected language.	
DOE-512	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.	
DOE-613	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.	
DOE-615	The System Copyright Visibility rules in the System Configuration are not currently operational.	
DOE-740	Importing courses from CSV files only imports one faculty member per course.	

Key	Summary	Release Notes
DOE-744	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".	
DOE-923	Web Update for 5.5+ can fail if the website is running in IIS 5 isolation mode.	You can upgrade ERes by downloading the installer and running it manually.
DOE-924	On the Document Info page, the setting to automatically remove the document when the course visibility ends does not work. The document is not removed from the course when the date passes.	
DOE-979	You currently cannot search on the Languages page because the search panel has no search button.	
DOE-983	Searching in Homepage Item or News Announcements displays the results in each language instead of just the selected language. This results in the same Item or Announcement being displayed several times	This only happens if you have multiple languages enabled. Languages are enabled on the Language system configuration page.
DOE-991	When you Rename a file in the Attached to Document or the User Staging Area, ERes takes you through a loop of refreshing your browser.	
DOE-996	When batch updating Bibliographic Information on for multiple documents, the Bibliographic Information areas closes each time you click a check box to make a change.	Click Bibliographic Information to open the area and make the changes. You will need to do this each time you click a check box.

Key	Summary	Release Notes
DOE-1014	While creating or editing a Reserve Workflow request, if you save before selecting a course, ERes reports that there is an error on the form, but does not indicate which field is not correct. There should be a red icon next to the Course drop-down list.	
DOE-1025	If you add or modify a document from within a course (Main Menu > Course Reserves Page > Course > Documents & Copyright), ERes will not allow you to enter or edit a Publisher.	Enter or edit the Publisher for a document at Main Menu > Document > Add Document or Modify Selected .
DOE-1037	You can save a Reserve Request without all of the Required Information	When you save the information on the Request Details Tab your Request is saved and you are taken to the Item Details Tab. You can then cancel your request, but it is still saved with only the information from the Request details tab.
DOE-1042	In Reports, if you select Numbers and Charts and select to export the report, the bar chart displays incorrectly.	
DOE-1055	When running the "Documents on Reserve" report, if you try to narrow the report by date range, there appears to be no effect.	The Documents on Reserve report displays all documents which existed in the system at some point during the specified date range. This is occasionally confusing, as the displayed "Date Created" may be before the date range and the "Date Deleted" may be after. Additionally, documents are displayed whether or not they were associated with a course during that time. Finally, the different groupings (Course, Instructor, Department, etc.) are based on all of the document's course associations, not just those that were active during the specified date range.
DOE-1088	When you change languages on an item list, the "Save Current View" command doesn't always change.	Refresh the page to display the translation of the "Save Current View" string.

Key	Summary	Release Notes
DOE-1106	When editing text strings in the Language module, searching and replacing a period (“.”) causes each character in any text field that contains a period to be replaced with the contents in the Replace field.	
DOE-1114	Saving System Configurations while a Non-English language is selected in the language drop-down list results in the language changing to English while navigating to a subsequent page.	Simply change the language in the drop-down list to the language you want displayed.

Browser display

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

Fixed bugs

This section includes a list of all resolved issues, or fixed bugs, for ERes 5.6. 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	In 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-771	ERes does not currently run well in the Safari browser on Apple OS X.
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.

Key	Summary
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.
DOE-882	When cloning a course, any documents that were attached to the course but then deleted are linked to the new course.
DOE-964	When modifying a document, the instructions at the top of the page read "To manage the files attached to this document click the 'Attached Files' tab." However, the Attached Files <i>tab</i> was removed and replaced with Attached Files <i>section</i> .

