

## Announcing Docutek VRLplus v3.1.01

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### INTRODUCTION

Docutek is pleased to announce the availability of the latest version of our virtual reference software, Docutek VRLplus v3.1.01. Please see below for more information, as well as instructions on how to apply or request the update for your system.

### SPECIAL NOTE FOR VERSION 2.x CUSTOMERS

Customers currently using any of the v2.x versions of Docutek VRLplus will be prompted for a password before they can receive this update. We ask that before you request this update you review the training videos located at [http://www.docutek.com/support/training\\_vrlplusv3.html](http://www.docutek.com/support/training_vrlplusv3.html). These short videos will provide you with some basics you will need before using Docutek VRLplus v3.x as a librarian or administrator. Once you are comfortable with the changes please follow the instructions at the bottom of this email to have the update applied to your system.

### SPECIAL NOTE FOR VERSION 3.0.x CUSTOMERS

Customers currently using any of the v3.0.x versions of Docutek VRLplus will be prompted for a password before they can receive this update. **Due to changes in the way statistics data is captured, Live Chat statistics will not be available for dates prior to the date of the upgrade.** We ask that before you request this update you run the necessary reports and save the data for future reference. Once you are comfortable with the changes please follow the instructions at the bottom of this email to have the update applied to your system.

### CHANGES AND IMPROVEMENTS

#### Live Chat

- Popup-less patron chat
  - No longer is a new browser window opened when the patron logs in to Live Chat; the chat window is loaded into the same browser window in which the login takes place.
- Single-window CLASSIC mode
  - Patrons and operators in CLASSIC mode will now have browse content loaded into the same frame as the PRO mode co-browse content instead of opening a new browser window.
- Enhanced CLASSIC mode
  - Increased web site compatibility when navigating in CLASSIC mode; a higher percentage of sites will render correctly.
- Link to FAQ
  - Operators can now open the FAQ interface by clicking the "Open interface" link on the new Knowledgebase/FAQ tab.

- URLs Integrated into Chat Messages
  - URLs are now displayed within the chat messages window and are hyperlinked.
  - There is no longer a separate section for URLs on the Session Transcript screen.
  - URLs are displayed as hyperlinks on Session Transcript screen.
- Operator VM Version and Browse mode Displayed
  - The operator's VM Version and Browse mode are now displayed beneath the transcript information on the Transcript details page as well as with the Operator info when online in Live Chat.
- Online/Offline Log
  - Users can now filter the Online/Offline log by Operator, Date Range, and Site (collaborative installs only).
  - Operator's Display Name and Title are now displayed for easier user recognition.
- Report Technical Issue
  - Administrators can report a technical issue with a particular Session Transcript by clicking on the "report technical issue" link on the Transcript details screen.
  - Clicking on the link brings up an email form pre-populated with information about the Session Transcript.
- Operator Account Information
  - A new Subject Area field has been added to each account. This field is displayed in Live Chat on the operator info pop-up.
  - A new personalized default chat message has been added to each account. This field allows users to specify text for the initial chat message a patron sees after being accepted.

## General

- Enhanced Search/Filtering Capability for Object Listing Screens
  - All listing screens (for example Questions, Session Transcripts, Knowledgebase/FAQ, etc.) now allow the user to filter lists by appropriate column values.
  - Administrators will now have the last search/filter saved to their session. When they return to a listing page the search and filter parameters from the last visit to the page will be used.
  - Administrators can also save default filters so they are loaded on subsequent logins by clicking on the "set defaults" link. The "restore defaults" link is useful when a search/filter has been performed and the settings are cached on subsequent page loads; clicking the link will reset the search/filter form based on the defaults saved as a result of using the "set defaults" link.
  - Collaborative Installs Only
    - Ability to filter transcripts by Virtual Desk.
- Session Transcript/Questions Cross-Referencing
  - Links on Session Transcript and Question details pages allow users to quickly reference related Questions/Transcripts.
- Patron FAQ/Knowledgebase Interface
  - The same filtering mechanism used in the admin interface has been applied to the patron FAQ search page. Patrons can search by Title and Keywords and filter by Category.
  - Search terms are logically OR'd.
- Statistics/Reporting enhancements
  - New Reports:
    - Live Chat Browse Entry/Exit Mode
    - Live Chat Question status at end of session
    - Patron form data
  - Average/percentage display
  - Daily/Monthly date grouping
  - Data export:

- Users can choose to export each report to file, then open as HTML or Excel format.
- Deleting Questions Does Not Affect Reports
  - Reports will still show data for Questions that have been deleted.
- Manual Question Entry
  - Administrators can now create questions manually.
  - New question origin types:
    - Walk-up, Phone, IM, Other
- Form Customization
  - The option to specify select lists as required has been added to the form customization section. When set to required, patrons will get a pop-up message asking them to select an item from the list if they have not already done so.
  - A two-column layout can now be specified allowing form fields to be displayed side-by-side.
- Surveys
  - All Installs
    - Survey questions can now be re-ordered by clicking on “up/down” arrows.
  - Collaborative Installs Only
    - Administrators can specify that a particular local survey be administered at a Virtual Desk on Live Chat logout. Along with configuring this setting on the Survey details page the patron must have logged in with library\_code and library\_name querystring parameters (contact Docutek support for further information).

## **UPDATE INSTRUCTIONS**

To install this update ask your server admin to run the “WebUpdate-VRL” icon from the server desktop. If you receive a warning message during the download please wait a minute and try once more, as the download servers may be busy. Follow the instructions that are displayed, and reboot the server if prompted to do so. After each update it’s a good idea to run “WebUpdate-VRL” again to make sure there are no other available updates; when you are completely updated you will see a message that says “no sites will be updated”. If you are prompted for a password, or if you need help, please contact Docutek Support via our online support form at <http://www.docutek.com/support>.

## **MAINTENANCE REMINDER FOR HOSTED SYSTEMS**

On the first and the third Monday of each month Docutek will have an open maintenance window between 11:00 am and 1:00 pm PST for our hosted systems. During this time you may not be able to connect to your Docutek VRLplus website if you are using our hosting service. In addition, if you are using a Docutek cobrowse server you may not be able to configure properly while we are performing maintenance.

## **DOCUTEK COMMUNITY FORUMS**

Docutek would like to invite you to become a member of our forums community, Docutek Community Server! These forums serve as a venue for both Docutek Clients as well as the Docutek Support and Development Teams to interact with each other in a constructive and supportive manner, discussing a wide range of product and industry specific topics. It also serves as a channel to find out the latest information regarding Docutek ERes and Docutek VRLplus. To sign up, please visit the Docutek Community Server site at <http://communityserver.docutek.com> and click on the ‘Create Account’ image. Once your account

has been approved, you will receive an email that explains how you can sign-in and join the conversation!

**CLOSING**

Thank you for choosing Docutek VRLplus as your virtual reference system! We are always looking to improve our product, so please send any comments or suggestions to your regional sales manager or Docutek Support using our online support form at <http://www.docutek.com/support>.

-Docutek Support  
support@docutek.com  
<http://www.docutek.com/support>