Announcing Docutek ERes v5.0.01

INTRODUCTION
Docutek is happy to announce the v5 release of Docutek ERes! The new release is the most powerful, most versatile version of the de facto standard in electronic reserves. Introduced in 1996, Docutek ERes is now used by over 3.25 million students on more than 400 college and university campuses worldwide. Docutek engineers have upgraded the underlying database architecture to take advantage of recent advances in technology. The software was also re-engineered to Microsoft's .NET technology, widely recognized as the most advanced method of creating powerful, secure, and reliable web-based applications. Docutek ERes v5 includes more than 150 features most requested by Docutek ERes customers, as well as a host of features designed to make every administrative task easier and more intuitive, a hallmark of Docutek's systems.

SYSTEM IMPROVEMENTS
  General
  - Updated look and feel, with improved customization options.
  - Support for external SMTP servers means one less service running on the local server.
  - Improved security and performance via the new .net system architecture.
  - System colors, fonts and email alerts lists can be easily customized by the library.
  - Improved screen structure and navigation make walking through the system more intuitive.
  - Improved "tabbed" coursepage makes finding materials easier.
  - Many labels in the system such as "Department", "Course", "Document" and "Account" can now be customized to match your local terms.
  - Fully customizable account groups allow you to create as many user levels as needed for your faculty, librarians and managers. Each group can be granted as little or as much system access as needed.

  New Copyright Features
  - Students can now view the full bibliographic information when they select a document.
  - MARC records can now be automatically generated.
  - The system can hold an unlimited number of publisher/rights holder letter templates.
  - Copyright for a document can be customized by course. For instance, a document can now be "Claim Fair Use" for one class and "Permission Granted with a charge" for another. This greatly improves the Copyright Management features when re-using materials across terms or courses.

  Automatic Alert Features
  - Document posting control can be limited to select custom groups. An improved email alert system notifies users when materials are pending review.

- Faculty can be automatically notified when materials are added to their coursepage.
- Students can opt to be automatically emailed when new materials are added to a coursepage.

Document and File Management Options
- Each document can contain as many attached files as necessary, instead of only one file per document. As many as five files can be uploaded at one time.
- The library can now set maximum file size limits to block large uploads.
- An unlimited number of subfolders on the coursepage allows for more logical organization of documents. Each folder can now be "hidden" on the coursepage allowing librarians to hide large sections of materials from students with one action.

Easily Integrate the Docutek ERes Coursepage with other Resources
- Each coursepage contains an optional, prominent link to route students to courseware, a faculty homepage or other web resources.
- Each coursepage contains an optional, customizable message from the library at the top of the page, which is useful for important instructions or links.

Improved Operations for Administrators
- Administrative functions now contain "bulk" operations, which allows the user to update or delete many records at once. As the administrator pages forward, items that were checked are remembered by the system to allow for one-click processing. This feature can be used to set expiration dates for many classes at once or to otherwise update several items at one time.
- For improved security, managers can now require course and/or document passwords across the entire system.
- Administrative features allow for searches of several properties at once. Customized views are available for Administrative Features—for example, documents can be viewed by title, author, journal, file size, copyright, etc. The user can sort on any of these fields and can view the documents list in any combination of these elements.
- Data across the system can be easily exported into four formats: Excel, tab delimited, html table or to email.
- New "storage allocation" report allows you to get a breakdown on number of courses, documents, and total disc usage by system, instructor or department.

PREPARING YOUR SERVER
Please do the following to make sure your server is ready for the Docutek ERes v5 update:
- Make sure that you are running Windows 2000/2003 server; if you are still running Windows NT you will need to upgrade your OS as v5 will not run under Windows NT. Please contact Docutek Support for more information.
- Visit the Windows Update Website (http://www.windowsupdate.com) to make sure you have all the latest patches and service packs, as well as the latest ASP.NET framework.
- If your server is more than a few years old this would also be a good time to check its hardware. Check the system and/or data partitions to see how much disc space is free. There are no additional space requirements for Docutek ERes v5, but if you are running low, now may be a good time to add an additional drive to your server. If possible, make sure the system has 512 MB of RAM (or more) as this will help improve response times for the website.

PREPARING YOUR DATA

Docutek will migrate data from your existing v4 system during the update process. If you would prefer to start with a clean v5 system please be sure to mention that when scheduling the update with Docutek Support. Assuming you would like to keep your v4 data please do the following to ensure the update process runs as smoothly as possible:

- Since statistics tend to take up the most space in the database we strongly recommend that you purge this data before the update. To do this please login to your v4 system as an admin and run any stats reports you wish to keep. This information can be saved as an HTML report or copied-and-pasted into a spreadsheet program like Excel. Once your reports have been saved return to Admin Functions: System Statistics and click the purge link at the bottom of the page. We recommend you clear out as much data as possible, but you are welcome to select whatever date range you choose.
- Now is also be a good time to remove any outdated courses or documents from the system. A good place to start is with your archived coursepages…since these are no longer visible to students they may be safe to delete. You can use the "Email Users" function to send a bulk email to instructors asking them to clean out old data; or you can let them know that certain materials (all 2002 courses, all unused documents, etc) are going to be removed.
- Please make note of any system customizations that Docutek or your local admins may have made to the system. In most cases these customizations will not be moved into the v5 system automatically, so we will need to recreate them for you. These customizations include any special authentication methods, image maps, custom header/footer information, etc. Please note that any customizations made to the code by local programmers will not be supported in v5.
- Before you schedule the update please verify with your server admin that they have a recent backup of the system. During the update process we will be changing the format of the database significantly so it is vital that you have a backup before we begin. PLEASE DO NOT SCHEDULE YOUR UPDATE UNTIL YOU HAVE VERIFIED THAT A COMPLETE AND CURRENT BACKUP EXISTS.

PREPARING YOUR STAFF

Docutek has setup a v5 demo site at http://eres.docutek.com/eres if you would like to get a preview of the new system. Since the system has an updated look-and-feel we strongly recommend you login to the demo site and become familiar with the new system before requesting the update. Please send an email to support@docutek.com to request a login and password to the demo site.

The online help system, http://eres.docutek.com/eres/help_frame.aspx, contains instructional videos that will help you get a feel for the new admin interface for the system. In addition Docutek will also be offering free online training for a limited time; please see http://www.docutek.com/support/Docutek_ERes_Online_Training_Schedule.pdf for a schedule of available dates/times. In order to make the update as easy as possible for your users we highly recommend that your system administrators attend one of the training sessions so that they can provide instruction to other users.

SCHEDULING THE UPDATE

After you have completed all the "preparation" actions above you are ready to contact Docutek Support to schedule your update. We expect the update to take between 1-4 hours for most systems; during this time all websites on the server may be inaccessible. In addition we may need to reboot the server one or more times during the update process. Please send an email to support@docutek.com with the following information:

- School name and website URL.

- Would you like us to move existing accounts, documents, courses, etc into the new version, or would you prefer a clean system?
- Would you like us to move existing copyright information, communication letters and document history into the new version?
- A specific date/time you would like the update applied, or a date/time range that will work. The Docutek Support team will be available for updates M-F starting at 6am PST. Due to the length of the update process we will not schedule any updates starting later than 3pm PST.
- One or more emergency contacts to reach in case we lose our remote connection, or have a problem with the update. Please include at least one person who has physical access to your server in this list.

Docutek is still working on the updates to the Electronic Document Delivery (EDD) module. For those of you using EDD you may want to wait until its released in a few weeks time.

JOIN THE DOCUTEK ERES USER GROUP
If you have not yet joined the Docutek ERes Usergroup, we would recommend doing so. It is the best place to discuss the real-world application of your electronic reserves system, and get recommendations from other users. To join, send an email to ereserves@docutek.com with the word 'Subscribe' in the Subject field.

CLOSING
As always, thank your for your support of Docutek ERes, and for the user feedback that helps improve our system! If you have any comments, questions or suggestions please send them to support@docutek.com.

-Docutek Support
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Docutek Information Systems, Inc.
http://www.docutek.com

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SUBSCRIPTION INFORMATION
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«Contact_Name»

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