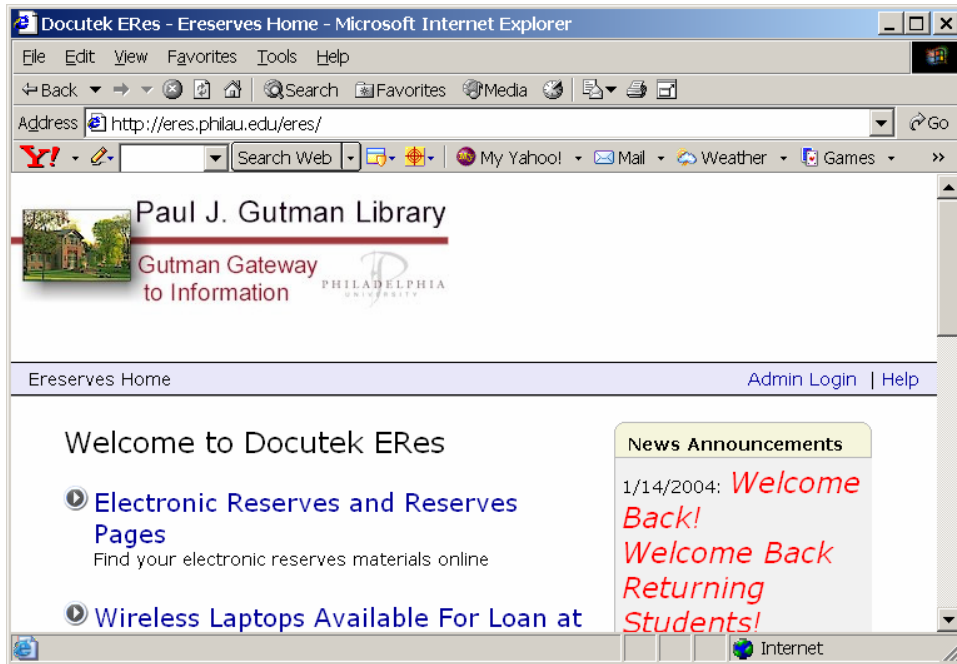


A Guide to Using Docutek ERes v5.0

December 2004

Creating a Course Page

Begin by going to the ERes Home Page (<http://eres.philau.edu>). You may want to bookmark this site for quick, easy access in the future.



Once on the Home Page, click on the **Admin Login** link on the right side of the screen. A new screen will appear asking you to enter your Username and Password. Enter this information and click **Login**.

Admin Login

Username

Password

You are now at the ERes Main Menu.

Hello Kristopher - Please use the links below to access the various management screens within Docutek ERes.

Main Menu	
My Account	Change your account information, such as name, password, and email address.
Course Reserves Pages	Add a new course reserves page or modify/delete an existing one.
Documents	Manage documents in the Docutek ERes system.
Statistic Reports	Run statistic reports to find out how people are using the system.

Click on **Course Reserves Pages**.

Course Reserves Page List

Default View
 Show Search Options
 Show Display Options

Add Course Reserves Page
 Modify Selected
 Delete Selected
 Export Data

Displaying of 0 Matching Course Reserves Pages
 << Page of 1 >>

<input type="checkbox"/>	Course Number	Course Name	Instructor
--------------------------	---------------	-------------	------------

Click on **Add Course Reserves Page**. A new screen will appear requesting information about your course.

Step 1: Enter Required Information

Department	<input type="text" value="Architecture"/>	Term	<input type="text" value="Fall"/>
Course Number	<input type="text"/>	Year	<input type="text" value="2004"/>
Course Name	<input type="text"/>		

Step 2: Enter Optional Information

Description	<input type="text"/>	Courseware Link	<input type="text"/>
Announcement	<input type="text"/>	<input type="checkbox"/> Check this box to redirect students to above address automatically	
Password	<input type="text"/>	Section Number	<input type="text"/>
Assistants	<input type="text"/>	# Students	<input type="text"/>
		Visibility Date Range	<input type="text"/> - <input type="text"/> - <input type="text"/> (MM/DD/YYYY) to <input type="text"/> - <input type="text"/> - <input type="text"/> (MM/DD/YYYY)
		Document Ordering	<input checked="" type="radio"/> Custom <input type="radio"/> Alphabetic

- Department:** Select a department from the list. If you don't see your department listed, contact the ERes Administrator (wiemerk@philau.edu).
- Course Number:** Enter the two or three digit number of your course. The letter part of your Course Number will automatically be entered based on the department you selected.
- Course Name:** Enter your course name.
- Term & Year:** Enter the semester and year of your course.

Optional Information: You may wish to complete some, or all, of the areas within this section.

Password: In order to be compliant with the TEACH Act and other copyright laws, you **must** password protect any copyrighted materials that are made available to your students electronically. Choose a Password that will be easy to remember and be sure to tell your students at your first class meeting.

Document Ordering: By default, ERes adds new titles to the bottom of your document list. By selecting **Custom**, you can re-order the documents in any fashion that fits your course (e.g., chronological, alphabetical). By selecting **Alphabetic**, all documents will be ordered alphabetically and you will NOT have the option to re-order them.

Click **Save** when you have completed this page. This will return you to the **Course Reserves Page List**. You will see your new Course Reserves Page listed.

Adding Documents and Folders

The term document in ERes refers to any number of file formats including, but not limited to, Microsoft Word, Microsoft PowerPoint, images, text, and Adobe Acrobat. In addition to the ability to upload files, ERes has the ability to receive documents via DocuFax. DocuFax allows you to take a hard copy of a document and fax it into the ERes server where it is converted to Adobe Acrobat format (.pdf). You can then post the document to your Course Reserves Page. **If you wish to fax documents to the ERes server, use the following fax number: 215-951-6857 (from on-campus use x6857).**

From the **ERes Main Menu**, select **Course Reserves Pages**.

Course Number	Course Name	Instructor
<input type="checkbox"/> H001	Demo	Wiemer

Click on the **Course Number** next to the course into which you wish to add documents. Click **Accept** on the Copyright Notice screen that appears. A new screen will appear with three tabs across the top:

H001 - Demo (Fall 2004) - Wiemer

Course Info Documents Page Management

This course reserves page does not have any visible documents at this time.

Course Info: This tab will provide you with an overview of the information you added when you created your course page.

Documents: This tab will display a list of all the documents currently associated with your course.




Page Management: This tab will provide you with the tools necessary to add/remove/edit documents and other settings for your Course Page.

Click on the **Page Management** tab.

Setting	Description
Course Reserves Page Settings	Manage the basic properties of this course reserves page, including course number, course name, term, year, etc.
Crosslistings	List this course reserves page under another name or department.
Documents & Copyright	Add, modify and delete documents and manage copyright information.
Re-order Documents on Course Reserves Page	Change the position of documents and folders on your course reserves page. Note: this feature is disabled if your course reserves page is using "Alphabetic" ordering.
Manage Folders	Add folders to your course reserves page, or manage existing folders.
Student Email List	View the list of students currently receiving Email Alerts about this course reserves page. Send bulk or individual emails to students who have provided their email address.

If you wish to use folders to organize your content, it is recommended that you add them first. To add folders to your Course Page, click on **Manage Folders**.

Folder List

 Add Folder
  Modify Selected
  Delete Selected


Displaying of 7 Matching Folders

 << Page of 1 >>

<input type="checkbox"/>	Title	Password
--------------------------	-------	----------

Select **Add Folder**.

Step 1: Enter Information

Folder Title
 Password (optional)
 Location 
 Limit Visibility Dates? - -
 - -

Step 2: Save or Cancel Changes





Enter a Title for your folder. Passwords at this level are optional since you have already set a Course Reserves Page Password. If you plan to have your new folder inside an existing folder, select the **Location** for your new folder.

Click **Save** to create your folder with settings you entered.

Repeat this process for each folder that you wish to create. Once you have completed creating your folders, click on **Close Window**.

From the **Course Reserves Page Main Menu**, click on **Documents & Copyright**. A new window will appear.

Document List

 Add Document
  Modify Selected
  Delete Selected
  Export Data

Displaying of 0 Matching Documents

 << Page of 1 >>

<input type="checkbox"/>	Document Title	Password
--------------------------	----------------	----------

Click on **Add Document**.

Please select from one of the following options:

- [Add a new Document](#) and associate it with this Course Reserves Page.
- [Select one or more existing Documents](#) to associate with this Course Reserves Page.

Select **Add New Document**.

Title

Pages

Description

Step 2: Provide Optional Information

[Bibliographic Information](#)

[Web Link](#)

[Hard Copy Information](#)

[Quick Text](#)

Enter a **Title** for your document. **# Pages** and **Description** are optional. Indicating the number of pages can be very useful to the students so they can plan for the number of printed pages they will be needing.

In **Step 2**, you have the option to include **Bibliographic Information**, a **Web Link**, **Hard Copy Information** or **Quick Text**. These can be added in place of or in addition to an uploaded file or faxed document. To add any of these items, click on the appropriate link and fill in the text boxes that appear on the screen.

Title

Pages

Description

Step 2: Provide Optional Information

[Bibliographic Information](#)

[Web Link](#)

✓

In the case of a **Web Link**, add the URL to your website in the box indicated. Be sure to include the **http://** in the address or the link will not function properly. If your Web Link is to one of the Gutman Library Databases, be sure to include the proxy server prefix (*https://ezproxy.philau.edu/login?url=*).


When you are done, click **Save**.

The next two sections discuss adding faxed documents and files to your document. Each assumes that you have just clicked **Save** after completing your document information.

Adding a Faxed Document

A new screen will appear giving you the opportunity to attach a file to your document. At the lower left corner of the window will appear a list of documents in the **DocuFAX Staging Area**. Faxed documents are listed according to the date and time received. When you fax your document to the Server, be sure to take notice of the time the document was sent. This will make the identification process easier. You may also click on the document to preview it.

Document InfoAttached FilesPage Specific InfoPermission RequestsCopyright & Fees

 [Transfer File\(s\) To Server](#)




File(s) Attached to this Document:

There are no files attached to this Document.

File(s) in User Staging Area (Private):


There are no files in your personal staging area; use the link at the top of the page to upload files to the server.

File(s) in the DocuFAX Staging Area (Shared):


Attach Filename	Filesize	Delete
 fax09_09_2004_09_23_00_am.pdf	910 KB	✖
 fax09_09_2004_09_27_15_am.pdf	327 KB	✖
 fax09_09_2004_09_32_07_am.pdf	445 KB	✖

To attach a DocuFAX file to your document, click on the paperclip next to the file name.

Document InfoAttached FilesPage Specific InfoPermission RequestsCopyright & Fees

 [Transfer File\(s\) To Server](#)



File(s) Attached to this Document:

Return Filename	Filesize	Delete
 fax09_09_2004_09_32_07_am.pdf	445 KB	✖

File(s) in User Staging Area (Private):

There are no files in your personal staging area; use the link at the top of the page to upload files to the server.

File(s) in the DocuFAX Staging Area (Shared):

Attach Filename
 fax09_09_2004_09_23_00_ar
 fax09_09_2004_09_27_15_ar

If you are not using folders to organize your documents, or if you wish to have this document in the Root Level of your Course Reserves Page, click on **Close Window**, which will return you to the **Page Management** Screen. If you wish to place this document in a folder, click on the **Page Specific Info** tab.

Document Info Attached Files Page Specific Info Permission Requests Copyright & Fees

Password

Place in Folder

Limit Visibility Dates? - - (MM/DD/YYYY) to - - (MM/DD/YYYY)


Check box to automatically remove from course reserves page on end date.

From this screen you can set a Password for the individual document. If you have used a Password for your Course Reserves Page, it is not necessary to enter a Password here. To place your document in a folder, click on the drop box next to **Place in Folder** and select the folder into which you would like to place your document. Click **Save** when you are done and then **Close Window**.

Adding a File from Your Computer

A new screen will appear giving you the opportunity to add a file to your document. At the top middle of the screen you will see a link that says **Transfer File(s) To Server**. Click on this to upload files from your computer to the ERes Server.







Document Info Attached Files Page Specific Info Permission Requests Copyright & Fees

 [Transfer File\(s\) To Server](#)

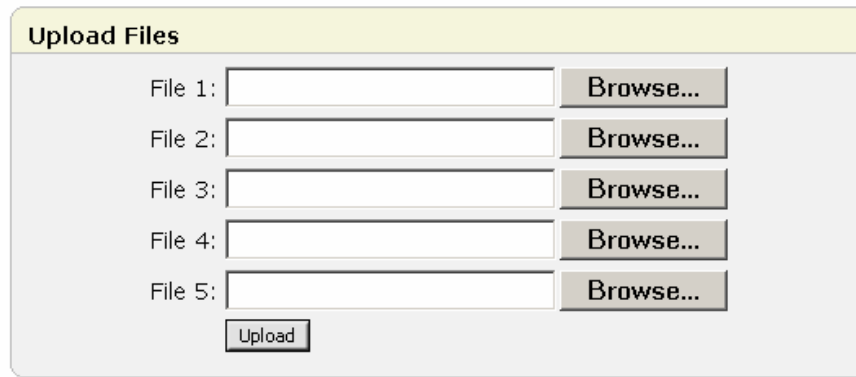
File(s) Attached to this Document:
There are no files attached to this Document.

File(s) in User Staging Area (Private):
There are no files in your personal staging area; use the link at the top of the page to upload files to the server.

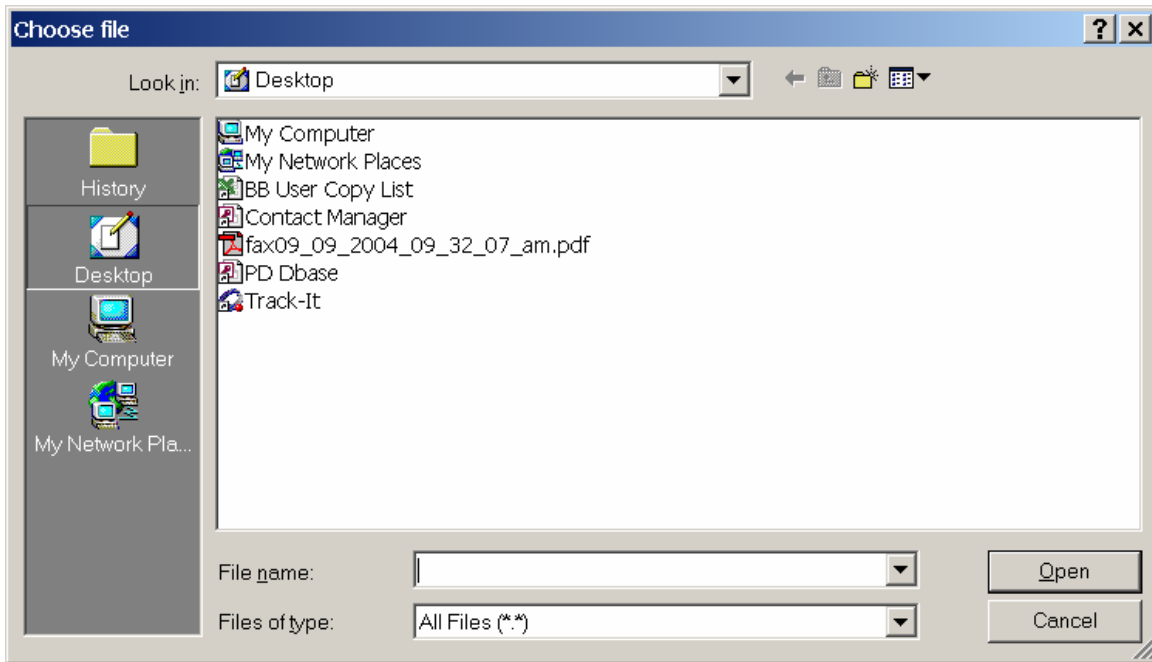
File(s) in the DocuFax Staging Area (Shared):

Attach	Filename	Filesize	Delete
	fax09_09_2004_09_23_00_am.pdf	910 KB	
	fax09_09_2004_09_27_15_am.pdf	327 KB	
	fax09_09_2004_09_32_07_am.pdf	445 KB	

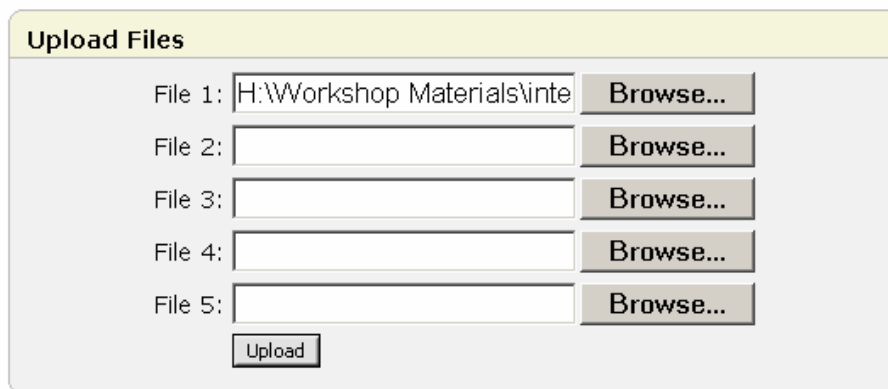
A screen will appear giving you the option to choose which file(s) you wish to upload. You can upload a maximum of 5 files.



Click on **Browse** next to **File 1**. A new window will appear allowing you to search your computer and network drive for the appropriate file.



Once you find the file, select it and click on **Open**. This will add the file to the **Upload Files** window in ERes.



Click on **Upload** to add the file to your ERes staging area. Then click **Close Window** to return to your document. When you return to the document, you should see your recently uploaded file listed on the left side of the window under **Files in User Staging Area**.

Document Info Attached Files Page Specific Info Permission Requests Copyright & Fees

Transfer File(s) To Server

File(s) Attached to this Document:
There are no files attached to this Document.

File(s) in User Staging Area (Private):

Attach	Filename	Filesize	Delete
	integrating.ppt	262 KB	

File(s) in the DocuFax Staging Area (Shared):

Attach	Filename	Filesize	Delete
	fax09_09_2004_09_23_00_am.pdf	910 KB	
	fax09_09_2004_09_27_15_am.pdf	327 KB	
	fax09_09_2004_09_43_41_am.pdf	633 KB	

Click on the paperclip next to your file to attach it to your document.

Document Info Attached Files Page Specific Info Permission Requests Copyright & Fees

Transfer File(s) To Server

File(s) Attached to this Document:

Return Filename	Filesize	Delete
integrating.ppt	262 KB	

File(s) in User Staging Area (Private):
There are no files in your personal staging area; use the link at the top of the page to upload files to the server.

File(s) in the DocuFax Staging Area (Shared):

Attach	Filename	Filesize	Delete
	fax09_09_2004_09_23_00_am.pdf	910 KB	
	fax09_09_2004_09_27_15_am.pdf	327 KB	
	fax09_09_2004_09_43_41_am.pdf	633 KB	

If you are not using folders to organize your documents, or if you wish to have this document in the Root Level of your Course Reserves Page, click on **Close Window**, which will return you to the **Page Management** Screen. If you wish to place this document in a folder, click on the **Page Specific Info** tab.

Document Info Attached Files Page Specific Info Permission Requests Copyright & Fees

Password

Place in Folder

Limit Visibility Dates? - - (MM/DD/YYYY) to - - (MM/DD/YYYY)

Check box to automatically remove from course reserves page on end date.

From this screen you can set a Password for the individual document. If you have used a Password for your Course Reserves Page, it is not necessary to enter a Password here. To place your document in a folder, click on the drop box next to **Place in Folder** and select the folder into which you would like to place your document. Click **Save** when you are done and then **Close Window**.

Moving a Document Between Folders

From the **Page Management** tab,

The screenshot shows a navigation bar with three tabs: "Course Info", "Documents", and "Page Management". The "Page Management" tab is active. Below the tabs is a list of options:

Course Reserves Page Settings	Manage the basic properties of this course reserves page, including course number, course name, term, year, etc.
Crosslistings	List this course reserves page under another name or department.
Documents & Copyright	Add, modify and delete documents and manage copyright information.
Re-order Documents on Course Reserves Page	Change the position of documents and folders on your course reserves page. Note: this feature is disabled if your course reserves page is using "Alphabetic" ordering.
Manage Folders	Add folders to your course reserves page, or manage existing folders.
Student Email List	View the list of students currently receiving Email Alerts about this course reserves page. Send bulk or individual emails to students who have provided their email address.

Select **Documents & Copyright**.

The screenshot shows the "Document List" interface. At the top, there are four buttons: "+ Add Document", "Modify Selected", "Remove Selected", and "Export Data". Below the buttons, it says "Displaying 10 of 3 Matching Documents" and "Page 1 of 1". The list contains the following items:

<input type="checkbox"/>	Document Title	Password
<input type="checkbox"/>	BBC World News - Middle East	
<input type="checkbox"/>	Donovan, Z. (1992)	
<input type="checkbox"/>	Wiemer, K. (2003)	

Check the box next to the document you wish to move.

This screenshot is identical to the previous one, but the checkbox next to "BBC World News - Middle East" is now checked.

<input type="checkbox"/>	Document Title	Password
<input checked="" type="checkbox"/>	BBC World News - Middle East	
<input type="checkbox"/>	Donovan, Z. (1992)	
<input type="checkbox"/>	Wiemer, K. (2003)	

Click on **Modify Selected**.

Document Info Attached Files Page Specific Info Permission Requests Copyright & Fees

Password

Place in Folder - Islam

Limit Visibility Dates? - -
 - -

Check box to automatically remove from course reserves page on end date.

From the **Place in Folder** drop-down menu, select the new location for your document. If you choose to not have the document in any folder, select **Root Level**.

Document Info Attached Files Page Specific Info Permission Requests Copyright & Fees


Password

Place in Folder Root Level

Limit Visibility Dates? - -
 - -

Check box to automatically remove from course reserves page on end date.

Click the **Save** button to move the file to its new location.

 Success! Your changes have been saved in the system. Use the tabs provided to make additional changes, or the link at the bottom of the page to return to the list.

Document Info Attached Files Page Specific Info Permission Requests Copyright & Fees

Password

Place in Folder Root Level

When the **Success Banner** appears, click on **Close Window** to return to the **Page Management Tab**.

Deleting a Document

From the **Page Management** tab,

Course Info Documents **Page Management**

Course Reserves Page Settings	Manage the basic properties of this course reserves page, including course number, course name, term, year, etc.
Crosslistings	List this course reserves page under another name or department.
Documents & Copyright	Add, modify and delete documents and manage copyright information.
Re-order Documents on Course Reserves Page	Change the position of documents and folders on your course reserves page. Note: this feature is disabled if your course reserves page is using "Alphabetic" ordering.
Manage Folders	Add folders to your course reserves page, or manage existing folders.
Student Email List	View the list of students currently receiving Email Alerts about this course reserves page. Send bulk or individual emails to students who have provided their email address.

Select **Documents & Copyright**.

Document List

[+ Add Document](#) [Modify Selected](#) [Remove Selected](#) [Export Data](#)

Displaying 10 of 3 Matching Documents << Page 1 of 1 >>

<input type="checkbox"/> Document Title	Password
<input type="checkbox"/> BBC World News - Middle East	
<input type="checkbox"/> Donovan, Z. (1992)	
<input type="checkbox"/> Wiemer, K. (2003)	

Check the box next to the document you wish to remove from your Course Reserves Page.

Document List

[+ Add Document](#) [Modify Selected](#) [Remove Selected](#) [Export Data](#)

Displaying 10 of 3 Matching Documents << Page 1 of 1 >>

<input type="checkbox"/> Document Title	Password
<input checked="" type="checkbox"/> BBC World News - Middle East	
<input type="checkbox"/> Donovan, Z. (1992)	
<input type="checkbox"/> Wiemer, K. (2003)	

Click on **Remove Selected**.

Step 1: Verify Items to be Deleted

By clicking the 'Remove' Button below you will remove the listed documents from this course reserves page; the documents will not be deleted from the system.

- BBC World News - Middle East

Step 2: Delete Items or Cancel

Remove Cancel

When the **Verification Screen** appears, click on **Remove** to confirm that you wish to remove the document.

 Success! The selected items have been removed from the system.

Document List

[+ Add Document](#) [Modify Selected](#) [X Remove Selected](#) [Export Data](#)

Displaying 10 of 2 Matching Documents << Page 1 of 1 >>

<input type="checkbox"/>	Document Title	Password
<input type="checkbox"/>	Donovan, Z. (1992)	
<input type="checkbox"/>	Wiemer, K. (2003)	

When the **Success Banner** appears, click on **Close Window** to proceed.

NOTE: The previous steps remove a document from your Course Reserves Page. The document is still in the ERes system under your account. If you wish to retain the document for potential future use, stop here. If you wish to delete the document permanently, continue with this tutorial.

Click on the **Main Menu** link in the upper right corner of your screen.

Hello Kristopher - Please use the links below to access the various management screens within Docutek ERes.

Main Menu

- [My Account](#) Change your account information, such as name, password, and email address.
- [Course Reserves Pages](#) Add a new course reserves page or modify/delete an existing one. You can also go to the Page Management section for an existing course reserves page by clicking a link below.
 - [H001 - Demo \(Fall 2004\) - Wiemer](#)
 - [L001 - Comparative Religions \(Spring 2005\) - Wiemer](#)
- [Documents](#) Manage documents in the Docutek ERes system.
- [Statistic Reports](#) Run statistic reports to find out how people are using the system.

Select **Documents**.

Document List

Default View
 Show Search Options
 Show Display Options

[+ Add Document](#)
[MARC Records](#)
[Modify Selected](#)
[Delete Selected](#)
[Export Data](#)

Displaying of 6 Matching Documents << Page of 1 >>

<input type="checkbox"/>	Title	File Size (KB)
<input type="checkbox"/>	BBC World News - Middle East	0
<input type="checkbox"/>	BBC World News - Middle East	0
<input type="checkbox"/>	Donovan, Z. (1992)	24
<input type="checkbox"/>	Integrating Multimedia Presentation	262
<input type="checkbox"/>	Wiemer, K. (2003)	29
<input type="checkbox"/>	Wiemer, K. (2004)	125

Check the box next to the document you wish to permanently delete.

Document List

Default View
 Show Search Options
 Show Display Options

[+ Add Document](#)
[MARC Records](#)
[Modify Selected](#)
[Delete Selected](#)
[Export Data](#)

Displaying of 6 Matching Documents << Page of 1 >>

<input type="checkbox"/>	Title	File Size (KB)
<input checked="" type="checkbox"/>	BBC World News - Middle East	0
<input type="checkbox"/>	BBC World News - Middle East	0
<input type="checkbox"/>	Donovan, Z. (1992)	24
<input type="checkbox"/>	Integrating Multimedia Presentation	262
<input type="checkbox"/>	Wiemer, K. (2003)	29
<input type="checkbox"/>	Wiemer, K. (2004)	125

Click on **Delete Selected**.

Step 1: Verify Items to be Deleted

By clicking the 'Delete' Button below you will permanently remove the listed Documents from your system.

- BBC World News - Middle East

Step 2: Review Warning Messages

The following documents are still being used on the listed course reserves pages. Clicking the "Delete" button will permanently remove these active items from the system.

Step 3: Delete Items or Cancel

When the **Verification Screen** appears, click on **Delete** to confirm that you wish to permanently delete the document.

Click on **Main Menu** to return to the **ERes Main Menu** and to continue modifying your Course Reserves Page.

Adding ERes Links to Blackboard or a Website



ERes provides durable links to the various documents within the system. A durable link is a URL from an online database, like ERes, that will not change. To find the durable link for a document on your Course Reserves Page, click on the **Documents** tab.

H001 - Demo (Fall 2004) - Wiemer

Course Info

Documents

Page Management

Title	Size (KB)
 Wiemer, K. (2004)	125 KB
 Integrating Multimedia Presentation	262 KB

Click on the document for which you need the durable link. A new window will appear with three tabs.


Document Info

Document History

Current Associations

Document Information

Title: Wiemer, K. (2004)
Date Added: 9/9/2004 9:41:14 AM
Pages: 5

Filename	File Type	File Size	Dial-up*	Broadband*
 fax09_09_2004_09_34_30_am	Adobe Acrobat (PDF)	125 KB	0.3 min	0.0 min

* Download estimates assume a dial-up connection at 56 kbps and a broadband connection at 1024 kbps.

Click on **Current Associations** to view the durable link to the article.

Document Info

Document History

Current Associations

Course Number	Course Name	Term	Year	Instructor	Persistent URL for Document
H001	Demo	Fall	2004	Wiemer	http://eres.philau.edu/eres/documentview.aspx?associd=3551

You can then copy this link into your Blackboard or web site. Click **Close Window** to return to your Course Reserves Page.