



Version 5.3.4

Last Updated: 30 October 2013

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WELCOME

Welcome to the Amlib VDX ILL Email 5.3.4 Upgrade Installation Guide.

This is a patch release containing updates to the *Amlib VDX ILL Email* application and service. The complete installation time is estimated at less than one (1) hour to complete.

Please Note: This document has been prepared for all libraries that currently have Amlib VDX ILL Email Version 5.3 installed.

UNINSTALL PREVIOUS VERSION

Copy the Existing AmlibConfig.xml File

To avoid unnecessarily having to reconfigure the *Amlib VDX ILL Email* application/service when the updated version is installed, the existing **AmlibConfig.xml** file can be copied to another location, prior to the old application/service being uninstalled.

- 1. Go to Start > Programs (XP) /All Programs (Vista/7)> Amlib VDXILLEmail
- 2. Right-click on **Configuration Manager** and choose **Properties** the <u>Configuration Manager</u> <u>Properties</u> screen will display
- 3. Click the Find Target button (XP) / Open File Location button (Vista/7)
- 4. Locate the AmlibConfig.xml file and copy it to another location for example: the desktop

Uninstall Previous Version

Prior to installing the new version of the *Amlib VDX ILL Email* application or service, the old version must be uninstalled.

If you attempt to install the latest version of the application or service, then a message similar to the following will display:



- 1. From the Start menu:
 - a. Windows NT/XP: Control Panel > Add or Remove Programs
 - b. Windows Vista/7: Control Panel > Uninstall a Program
- 2. Select Amlib VDX InterLibrary Loan Email or Amlib VDX InterLibrary Loan Email Service and:
 - a. Windows NT/XP: Click the Remove button
 - b. Windows Vista/7: Click the **Uninstall** button
- 3. Click **Yes** if prompted

The selected program will then be removed.

INSTALL THE UPGRADE

Option 1: Automatic Email Processing

IMPORTANT: Please ensure that you have **full read/write** access to the **\Amlib** folder on your server (for example: **C:\Amlib**) and that you are logged in with <u>Administrative Privileges</u>.

We recommend installing the Amlib VDX ILL Email Service on the Amlib server.

- The Amlib VDX ILL Email Service 5.3.4 installer is available on the OCLC Website, under Setup <u>Programs>VDX ILL Email</u> <u>https://www.oclc.org/support/services/amlib/downloads-software-updates/version5-3/setup-programs.en.html</u> (contact Amlib support if you require a login to this website)
- 2. Download the AmlibVDXILLEmailService534.msi and save it on your Amlib server
- 3. Double-click the **AmlibVDXILLEmailService534.msi** to launch the installation Wizard the <u>Setup</u> screen will open displaying the **Welcome** message:



4. Click the **Next** button – the <u>Destination Folder</u> screen will display:

😸 Amlib VDX InterLibrary Loan Email Service Setup	
Destination Folder Click Next to install to the default folder or click Change to choose another.	Ð
Install Amlib VDX InterLibrary Loan Email Service to:	
C:\Program Files\OCLC\Amlib VDXILLEmail\	
Change	
Back Next	Cancel

5. Choose where the program is to be installed (generally leave as default) and select the **Next** button – the <u>Ready to Install</u> screen will display:



6. Click the **Install** button – the <u>Installing</u> window will display:



8. When complete, ensure the <u>Launch Configuration Manager</u> is **unticked** and click the **Finish** button

🛃 Amlib VDX InterLibrary	Loan Email Service Setup
Ð	Completed the Amlib VDX InterLibrary Loan Email Service Setup Wizard
	Click the Finish button to exit the Setup Wizard.
	Laurch Configuration Manager
	Back Einish Cancel

Replace the New AmlibConfig.xml File

The newly installed **AmlibConfig.xml** file now needs to be replaced with the version previously copied and saved elsewhere.

- 1. Locate the AmlibConfig.xml file you saved earlier and copy it
- 2. Go to Start > Programs (XP) /All Programs (Vista/7)> Amlib VDXILLEmail
- 3. Right-click on **Configuration Manager** and choose **Properties** the <u>Configuration Manager</u> <u>Properties</u> screen will display
- 4. Click the **Find Target** button (XP) / **Open File Location** button (Vista/7)
- 5. Locate the **AmlibConfig.xml** file and paste the previously saved version into the same folder (overwriting it)

The upgrade is now complete.

Option 2: Manual Email Processing

IMPORTANT: Please ensure that you have **full read/write** access to the **\Amlib** folder on your server (for example: **C:\Amlib**) and that you are logged in with <u>Administrative Privileges</u>.

We recommend installing the *VDX ILL Email* on the ILL officer's PC (or *Amlib* end-user's PC) rather than the server.

- The Amlib VDX ILL Email 5.3.4 installer is available on the OCLC Website, under <u>Setup</u> <u>Programs>VDX ILL Email</u> <u>https://www.oclc.org/support/services/amlib/downloads-software-updates/version5-3/setup-programs.en.html</u> (contact Amlib support if you require a login to this website)
- 1. Download the AmlibVDXILLEmail534.msi and save it on your Amlib PC
- 2. Double-click the **AmlibVDXILLEmail534.msi** to launch the installation Wizard the <u>Setup</u> screen will open displaying the **Welcome** message:



3. Click the **Next** button – the <u>Destination Folder</u> screen will display:

🛃 Amlib VDX InterLibrary Loan Email Setup
Destination Folder Click Next to install to the default folder or click Change to choose another.
Install Amlib VDX InterLibrary Loan Email to:
C:\Program Files\OCLC\Amlib VDXILLEmail\
<u>⊆hange</u>
<u>Back</u> <u>N</u> ext Cancel

4. Choose where the program is to be installed (generally leave as default) and select the **Next** button – the Ready to Install screen will display:

📸 Amlib VDX InterLibrary Loan Email Setup	
Ready to install Amlib VDX InterLibrary Loan Email	
Click Install to begin the installation. Click Back to review or change any of your installation settings. Click Cancel to exit the wizard.	
<u>B</u> ack Install	Cancel

5. Click the **Install** button – the <u>Installing</u> window will display:



6. When complete, ensure the <u>Launch Configuration Manager</u> option is **unticked** and click the **Finish** button:

😼 Amlib VDX InterLibrary	/ Loan Email Setup
Ð	Completed the Amlib VDX InterLibrary Loan Email Setup Wizard
	Click the Finish button to exit the Setup Wizard.
	Laurth Configuration Manager
	Back Einish Cancel

Replace the New AmlibConfig.xml File

The newly installed **AmlibConfig.xml** file now needs to be replaced with the version previously copied and saved elsewhere.

- 1. Locate the AmlibConfig.xml file you saved earlier and copy it
- 2. Go to Start > Programs (XP) /All Programs (Vista/7)> Amlib VDXILLEmail
- 3. Right-click on **Configuration Manager** and choose **Properties** the <u>Configuration Manager</u> <u>Properties</u> screen will display
- 4. Click the **Find Target** button (XP) / **Open File Location** button (Vista/7)
- 5. Locate the **AmlibConfig.xml** file and paste the previously saved version into the same folder (overwriting it)

The upgrade is now complete.

APPENDICES

Appendix 1: Antivirus Email Block

Some antivirus systems may prevent the alert email from being sent. To prevent this you must check the Access protection rules. This example covers how to do this with *McAfee*.

1. Right-click on the *McAfee* icon in the *System* tray and select **VirusScan Console...**



2. The <u>VirusScan Console</u> will display:



3. Right-click on **Access Protection** and select **Properties** – the <u>Access Protection Properties</u> screen will display:

Use access protection rules to protect your	system's access po	iints and prev	rent termination of McAfee processes.
Categories	Block	Report	Rules
Anti-virus Standard Protection Anti-virus Maximum Protection Anti-virus Outbreak Control Common Standard Protection Common Maximum Protection Virtual Machine Protection User-defined Rules	4	4	Prevent registry editor and Task Manager from being disabl Prevent user rights policies from being altered Prevent remote creation/modification of executable and co Prevent remote creation of autorun files Prevent hijacking of EXE and other executable extensions Prevent Windows Process spoofing Prevent mass mailing worms from sending mail Prevent IRC communication Prevent use of ttp.exe
Prevent McAfee services from being stopp	Ded		Edit

4. Click on the tick in the Block column against Prevent Mass mailing worms from sending mail

Categories	Block	Report	Rules
Anti-virus Standard Protection Anti-virus Maximum Protection Anti-virus Outbreak Control			Prevent registry editor and Task Manager from being disab Prevent user rights policies from being altered Prevent remote creation/modification of executable and co
Common Standard Protection Common Maximum Protection Virtual Machine Protection	X	N.	Prevent remote creation of autorun files Prevent hijacking of .EXE and other executable extension Prevent Windows Process spoofing Prevent toos malling worms from sending mail
	N	Ń	Prevent IRL communication Prevent use of tftp.exe
۲			Edit

- 5. Once the tick is *removed* click the **Apply** button
- 6. Then click the **OK** button

The setting changes are complete.

Appendix 2: Enable Logging for Troubleshooting

Logging of errors and exceptions is available for the manual and automatic solutions. It is recommended that logging for the Automated Service is only enabled for troubleshooting purposes to prevent large log files from being created.

Logging of exceptions for the *Amlib VDX ILL Email* manual client occurs automatically, and is recorded in the **AmlibVDXILLEmail.log file** in the folder where the application installed.



Enabling Troubleshooting logging for the service:

1. Open the **Services** control panel



2. Right-click on the Amlib VDX ILL Email Service and select Properties



3. The Amlib VDX ILL Email Service Properties screen will display:

reneral	Log On	Recovery Dependencies	
Service	name:	AmlibVDXILLEmailService	
Display	<u>n</u> ame:	Amlib VDX ILL Email Service	
<u>D</u> escrip	tion:		< >.
Pat <u>h</u> to	executabl	e:	
"C:\Pro	ogram Files	VOCLCVAmlib VDXILLEmailVAmlibVDXILLEma	ilService.ex
Startup	typ <u>e</u> :	Automatic	
Service	status:	Started	
Service	status:	Started Pause E	esume
Service	status: tart n specify three	Started Stop Pause Pause Pause Pause Pause	esume
Service	i status: itart n specify t re: irameters:	Started Stop Pause P ne start parameters that apply when you start t	lesume he service

4. Click the Stop button if the service is running

5. Enter -I in the Start parameters and click the Start button

reneral	Log On	Recovery Dependencies
Service	name:	AmlibVDXILLEmailService
Display	name:	Amlib VDX ILL Email Service
<u>D</u> escrip	ition:	
Pat <u>h</u> to	executabl	le:
"C:\Pro	ogram Files	NOCLCVAmlib VDXILLEmailVAmlibVDXILLEmailService.ex
Startup	typ <u>e</u> :	Automatic
Service	status:	Stopped
Service	status:	Stopped
Service	status:	Stopped Stop Eause Besume he start parameters that apply when you start the service
Service Service You can from he Start pa	status: itart n specify t re: arameters:	Stopped Stop Resume he start parameters that apply when you start the service

- 6. Click the **OK** button
- 7. As processing occurs, the event is recorded in **AmlibVDXILLEmailService.log** file on the server where the program is installed

Appendix 3: Switching between Automated and Manual service

Please Note: If the library decides to go from *Automated* processing to *Manual* processing, it is very important to disable the service on the server.

- 1. Launch the Amlib Configuration Manager
- 2. Click on the <u>VDX</u> tab

		ion Service	New	Upen
Database Prefix	153 Test Amlib Operato	r JOHN		Service
Frequency	Daily] Enabled
Day	None 👻		_	
Time	4:50:56 PM 🔛	Advanced		
Start Date	09 Mar 2011 🔛	Day	EveryDay	~
Check Date	and Time of next scheduled run	Every		1.0
Calculate		Repeat	Minute	
		Interval		5 😭

- 3. **Un-tick** the <u>Enabled</u> button
- 4. Click the **Service** button the <u>Service</u> prompt will display:

Service	X
C Service Details	_
Service	
Amlib VDX ILL Email Service	
Service Status	
Running	
Stop Restart	
Close	

- 5. Click the Restart button
- 6. Click the **Close** button when complete

Please Note: Correspondingly, if the library decides to go from Manual processing to an Automated Service, it is best to uninstall the *Amlib VDX ILL Email* program for the library end user's computers.

Appendix 4: Edit Access Control for Amlib VDX ILL Email

Due to the additional extra security measures on *Windows Server 2008, Windows 7* and *Vista,* you may need to edit the installation's access control list settings before being able to customise the **AmlibConfig.xml** file.

- Locate the folder containing the VDX ILL Email utility for example C:\Program Files\OCLC\Amlib VDXILLEmail
- 2. Right-click on the Amlib VDXILLEmail folder and select Properties

@				
→ My Computer → OS (C:) → Prog	gram Files 🔸 OCLC 🔸		Search OCLC	٩
Organize 👻 😭 Open 🛛 Include in library 🔻	Share with Burn New folder			•
Favorites Name	Date modified alib FinTransUpgrade 21/06/2011 2:22 PM	Type Size 1 File folder		
Conception	Image: Construction of the provided in the pr	File folder		
	Create shortcut Delete Rename Properties			

- 3. The Amlib VDXILLEmail Properties screen will display
- 4. Select the <u>Security</u> tab



5. Click the Edit... button - the Permissions for Amlib VDXILLEmail screen will display

- 6. In the Group or user names: pane, click on the Users entry
- 7. Then in the <u>Permissions for Users</u> pane, **check** the <u>Allow</u> checkbox for the <u>Modify</u> setting this will give Users the necessary group permission to apply modifications to files and folders in the **Amlib VDXILLEmail** folder:

Object name: C:\Program F	iles (OCLC (Amilib VDX)	ILLEmail
<u>G</u> roup or user names:		
SCREATOR OWNER		
SYSTEM		
Administrators (TARDIS)	Administrators)	
Kusers (TARDIS\Users)		
Marked Installer		
	A <u>d</u> d	Remove
Permissions for Users	Allow	Deny
Full control	1.00	
Modify		
Read & execute	V	
List folder contents	1	
Lationer contenta		- T
Read	1.7.1	
Read		

8. This action will automatically **check** the <u>Allow</u> checkbox for the <u>Write</u> setting:

Permissions for Users	Allow	Deny				
Read & execute	~		*			
List folder contents	1					
Read	\checkmark		=			
Write	v		_			
Special permissions			Ŧ			
Learn about access control and permissions						
OK Cancel Apply						

9. Click on the **OK** button on the <u>Permissions for Amlib VDXILLEmail</u> and the <u>Amlib VDXILLEmail</u> <u>Properties</u> screens to complete the change of permissions