



US006625265B2

(12) **United States Patent**
Kesten et al.

(10) **Patent No.:** **US 6,625,265 B2**
(45) **Date of Patent:** **Sep. 23, 2003**

(54) **AUTOMATED ELECTRONIC RESERVES SYSTEM AND METHOD**

6,040,920 A * 3/2000 Ichiriki 358/403

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* cited by examiner

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(*) Notice: Subject to any disclaimer, the term of this patent is extended or adjusted under 35 U.S.C. 154(b) by 183 days.

(57) **ABSTRACT**

A system and method automating the placement of paper documents in electronic reserves system. A document to be placed on reserve is faxed to a network server. The network server automatically receives the faxed document and converts it to a pre-determined file format, such as PDF. The converted document is placed in a staging directory including a list of faxed documents pending to be placed on electronic reserve. The network server provides a graphical user interface that the transmitting user accesses over the Internet to access the staging directory. The user selects the faxed document from the staging directory, and indicates that it be moved to a particular reserves area. The particular reserves area may be a course page for a course offered by an educational institution.

(21) Appl. No.: **09/886,670**

(22) Filed: **Jun. 21, 2001**

(65) **Prior Publication Data**

US 2002/0196917 A1 Dec. 26, 2002

(51) **Int. Cl.**⁷ **H04M 11/00**

(52) **U.S. Cl.** **379/100.11**; 379/100.01;
358/403

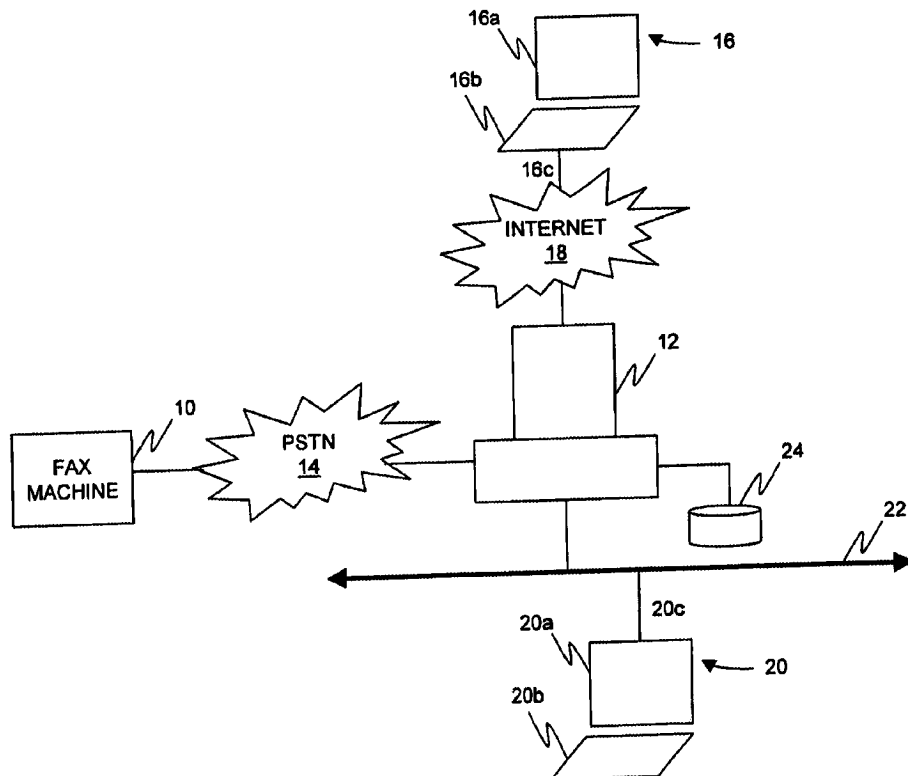
(58) **Field of Search** 379/100.11, 100.01,
379/100.09, 100.12, 100.13; 358/400, 401,
403, 442

(56) **References Cited**

U.S. PATENT DOCUMENTS

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16 Claims, 13 Drawing Sheets



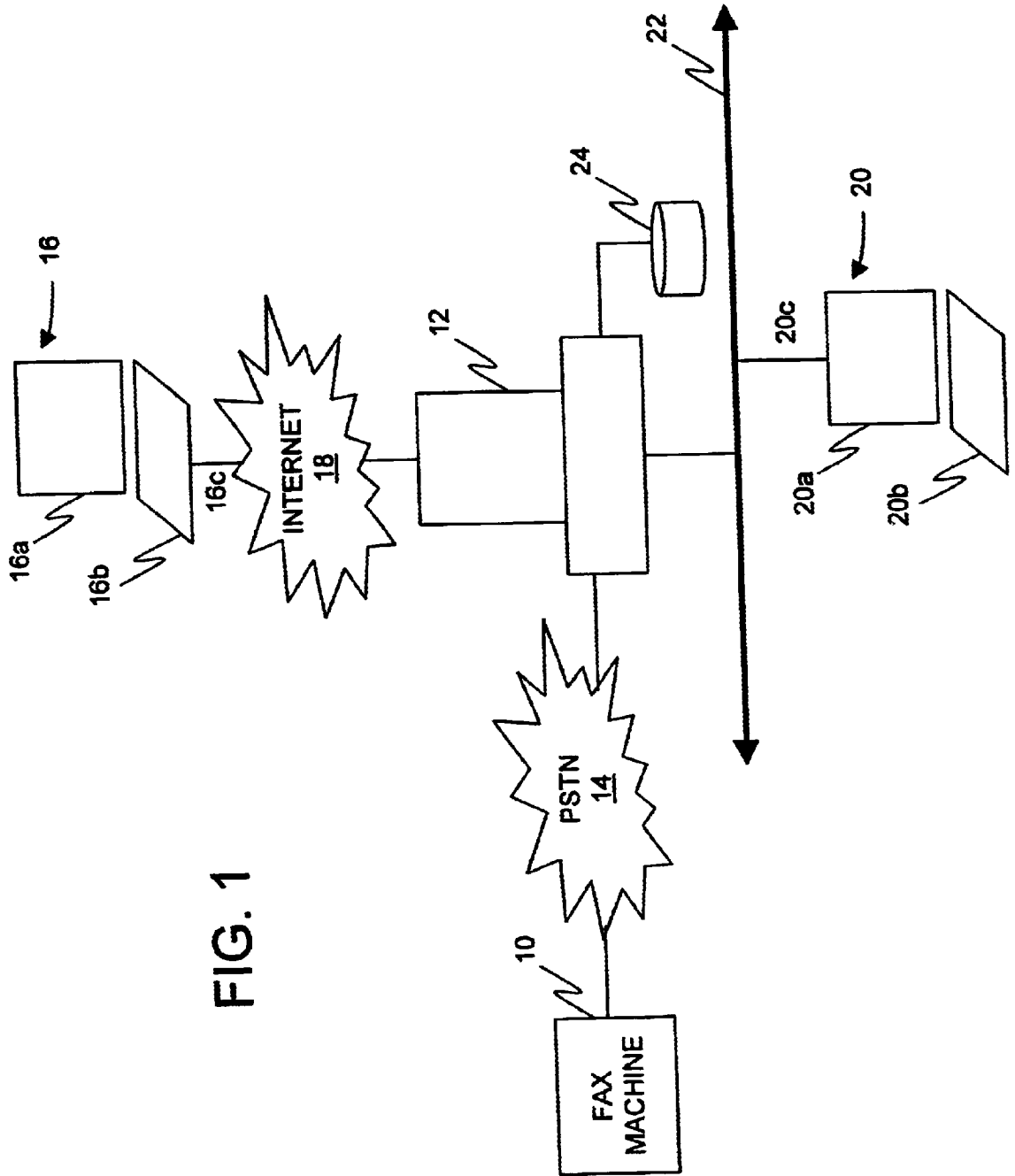


FIG. 1

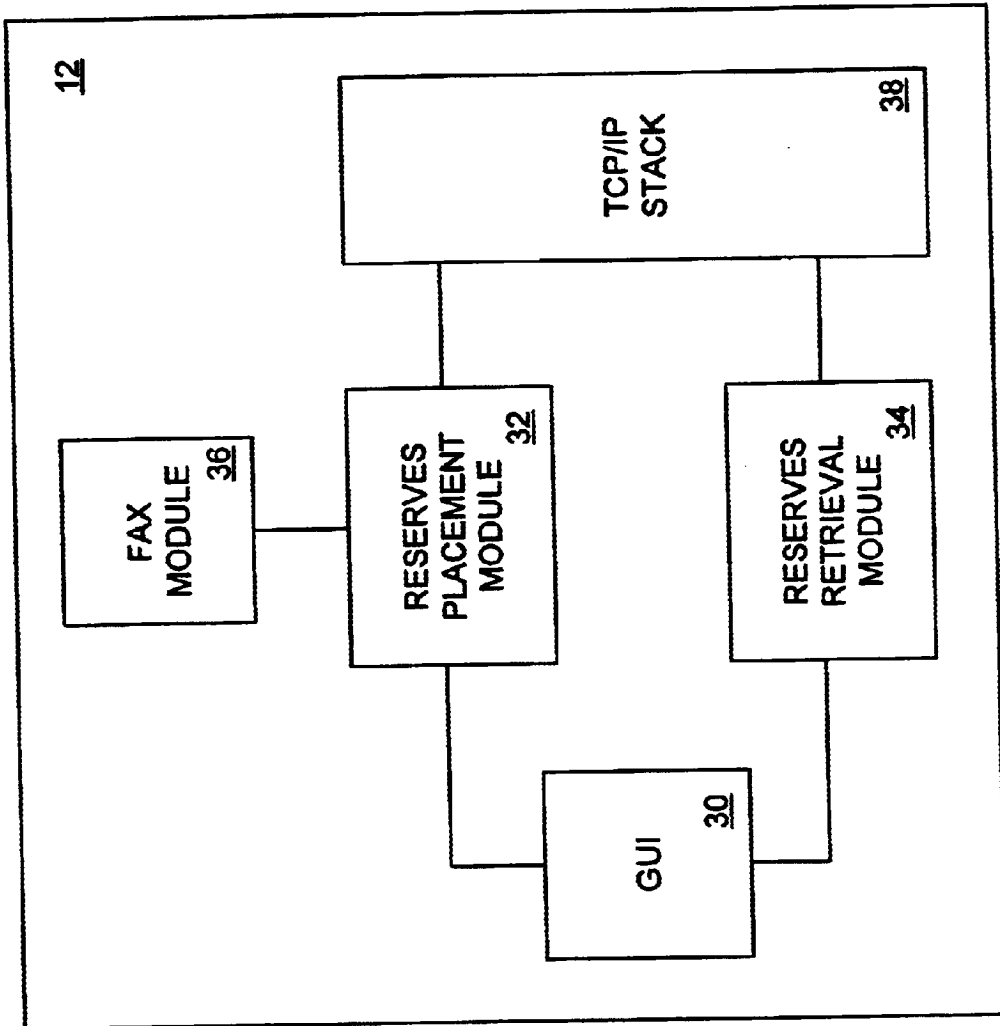


FIG. 2

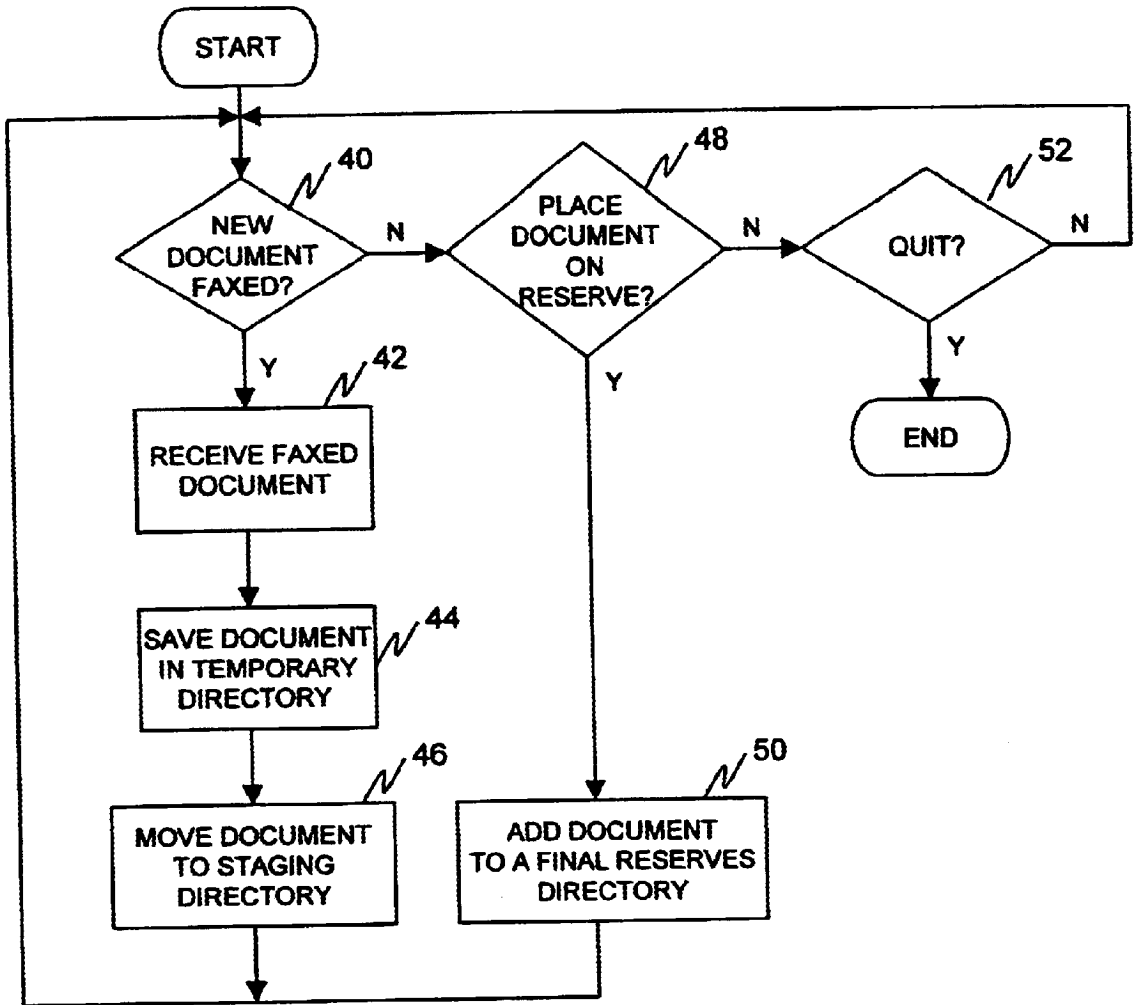


FIG. 3

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YOU CAN LOOK UP A COURSE PAGE BY LISTING COURSES BY DEPARTMENT, BY INSTRUCTOR'S LAST NAME, OR USE ERes QuickSearch.

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SELECT AN INSTRUCTOR: 72

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FIG. 4A

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COURSE NUMBER	COURSE NAME	INSTRUCTOR	82	84	86	TERM
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LAW100	PATENTS	CHANG				SUMMER 01
LAW1010	EU LAW	ALLEN				FALL 00
LAW1234	CONSTITUTIONAL LAW	GULNAC				FALL 00
LAW240	ANITRUST	GULNAC				SPRING 01
LAW328	SPORTS LAW	GULNAC				SPRING 01
LAW450	VOTERS RIGHTS ACCORDING TO THE CONSTITUTION	COLSON, COMBERIAT				WINTER 01

FIG. 4B

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COURSE PAGE LINKS

--CHAT ROOM
--DISCUSSION BOARD 96
--PAGE MANAGEMENT

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--LAW RESOURCES
--COURSE INDEX
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Electronic Reserves

LAW100 COURSE PAGE (HELP NAVIGATING THIS PAGE)

INSTRUCTOR(s): JOSEPHINE CHANG

DOCUMENTS: (PROBLEMS VIEWING PDF OR OTHER FILE FORMATS? READ THIS!)

TITLE	FORMAT	# OF PAGES
90	PDF	14
92	HTML	10
94	PDF	10

FIG. 4C

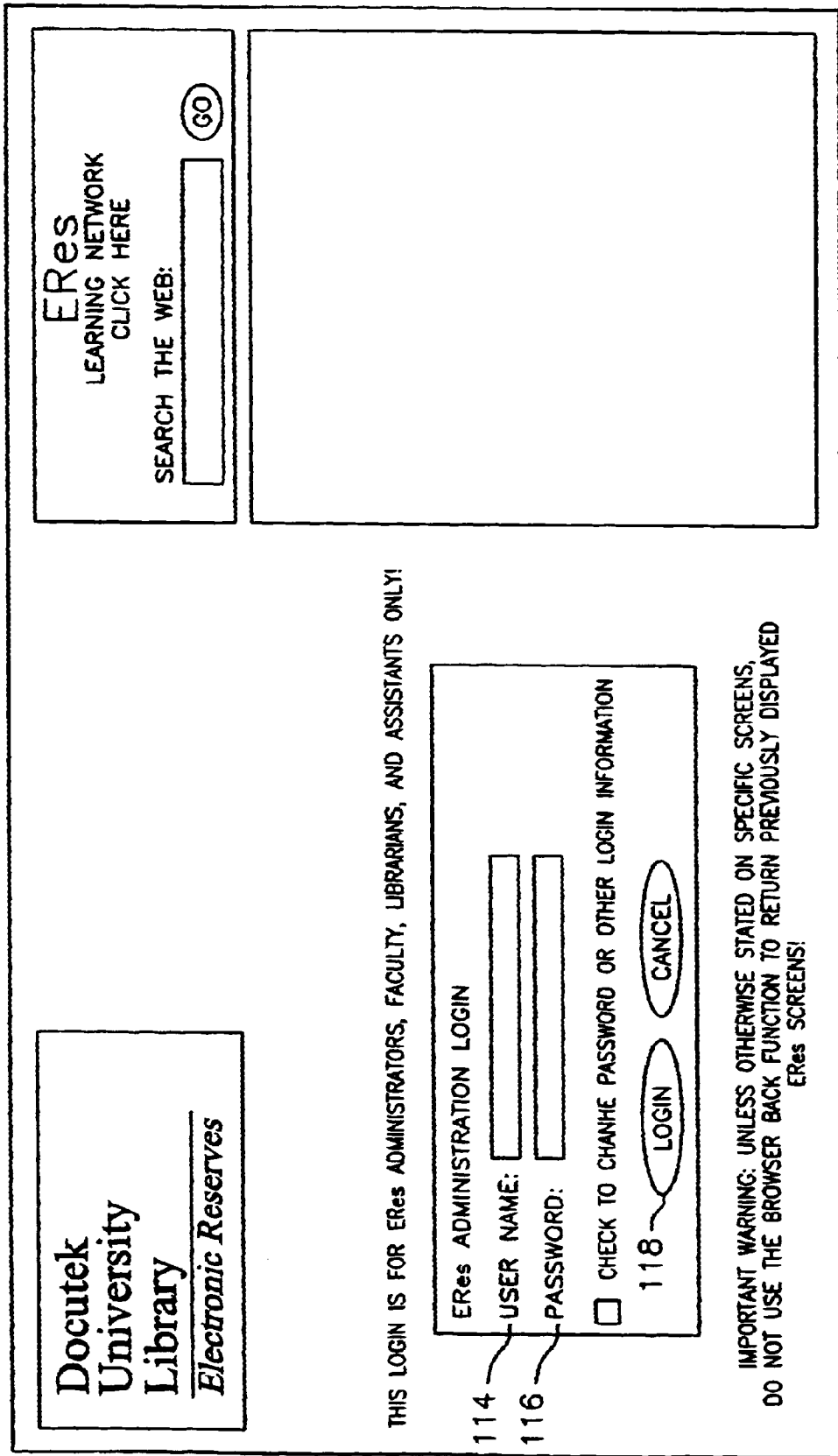


FIG. 4D

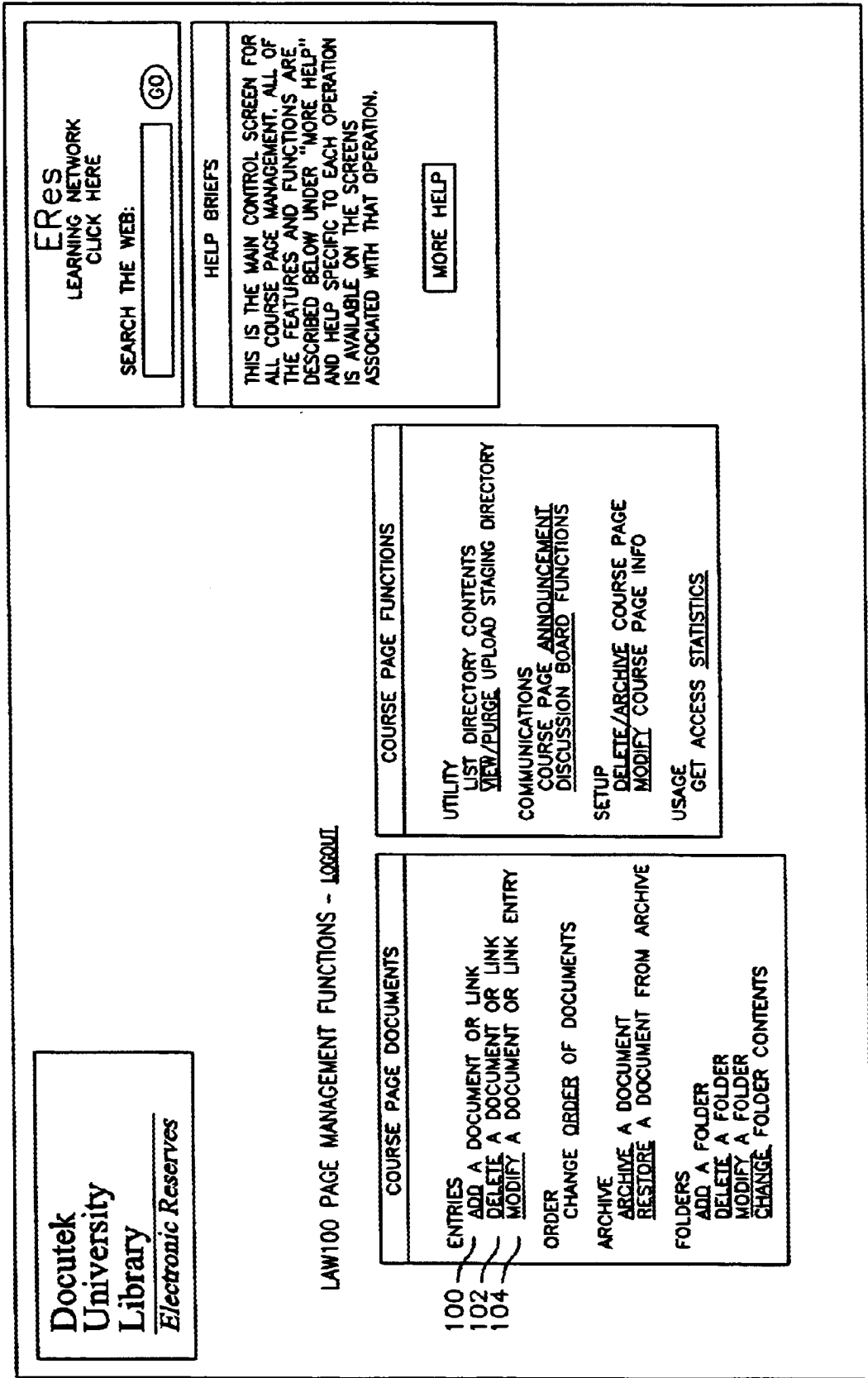


FIG. 4E

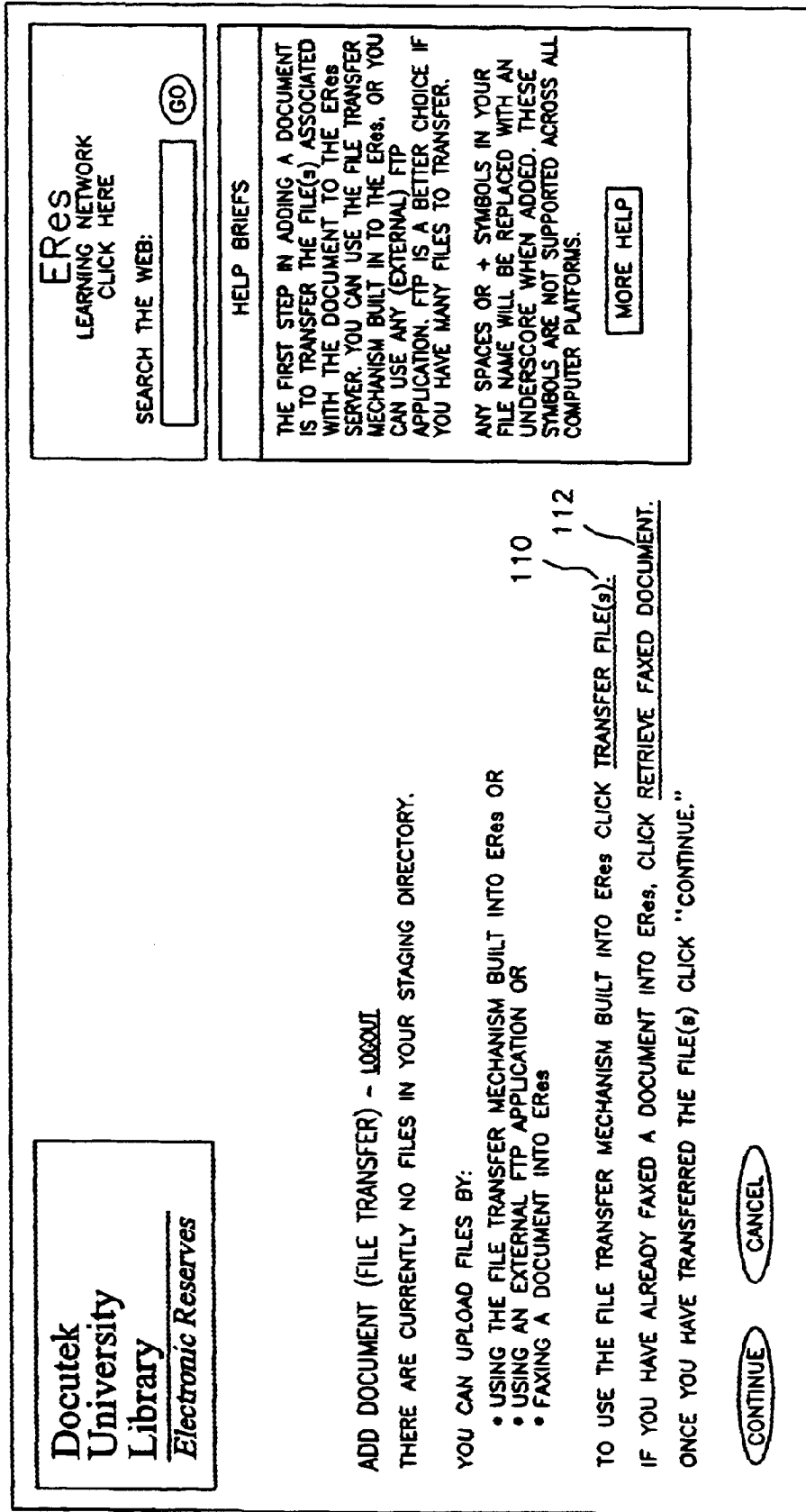


FIG. 4F

**Docutek
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Electronic Reserves

ADD A FAX DOCUMENT TO LAW100 - 108801

SELECT A FAX TO TRANSFER:

FILENAME	TIME SINCE FAXED	REMOVE FAX
<input checked="" type="radio"/> FAX2001-04-27 13-55-51.PDF	6 DAYS 3 HOURS 36 MINUTES	<u>DELETE</u>
<input type="radio"/> FAX06 02 2001 06 02 30 PM.PDF	4 DAYS 19 HOURS 34 MINUTES	<u>DELETE</u>
<input type="radio"/> FAX06 01 2001 11 19 19 AM.PDF	6 DAYS 2 HOURS 18 MINUTES	<u>DELETE</u>

CONTINUE CANCEL

ERes
LEARNING NETWORK
CLICK HERE

SEARCH THE WEB:

HELP BRIEFS

SELECT A FAX DOCUMENT TO ADD TO THE ERes SYSTEM. THIS SCREEN DISPLAYS THE FILENAME OF TIME ELAPSED SINCE THE FAX WAS RECEIVED.

YOU MAY PREVIEW A DOCUMENT BY CLICKING ON THE FILENAME.

YOU MAY DELETE A DOCUMENT BY CLICKING ON THE "DELETE" LINK NEXT TO IT'S FILENAME.

ONCE YOU HAVE LOCATED THE CORRECT DOCUMENT, SELECT IT USING THE RADIO BUTTON, THEN CLICK CONTINUE.

FIG. 4G

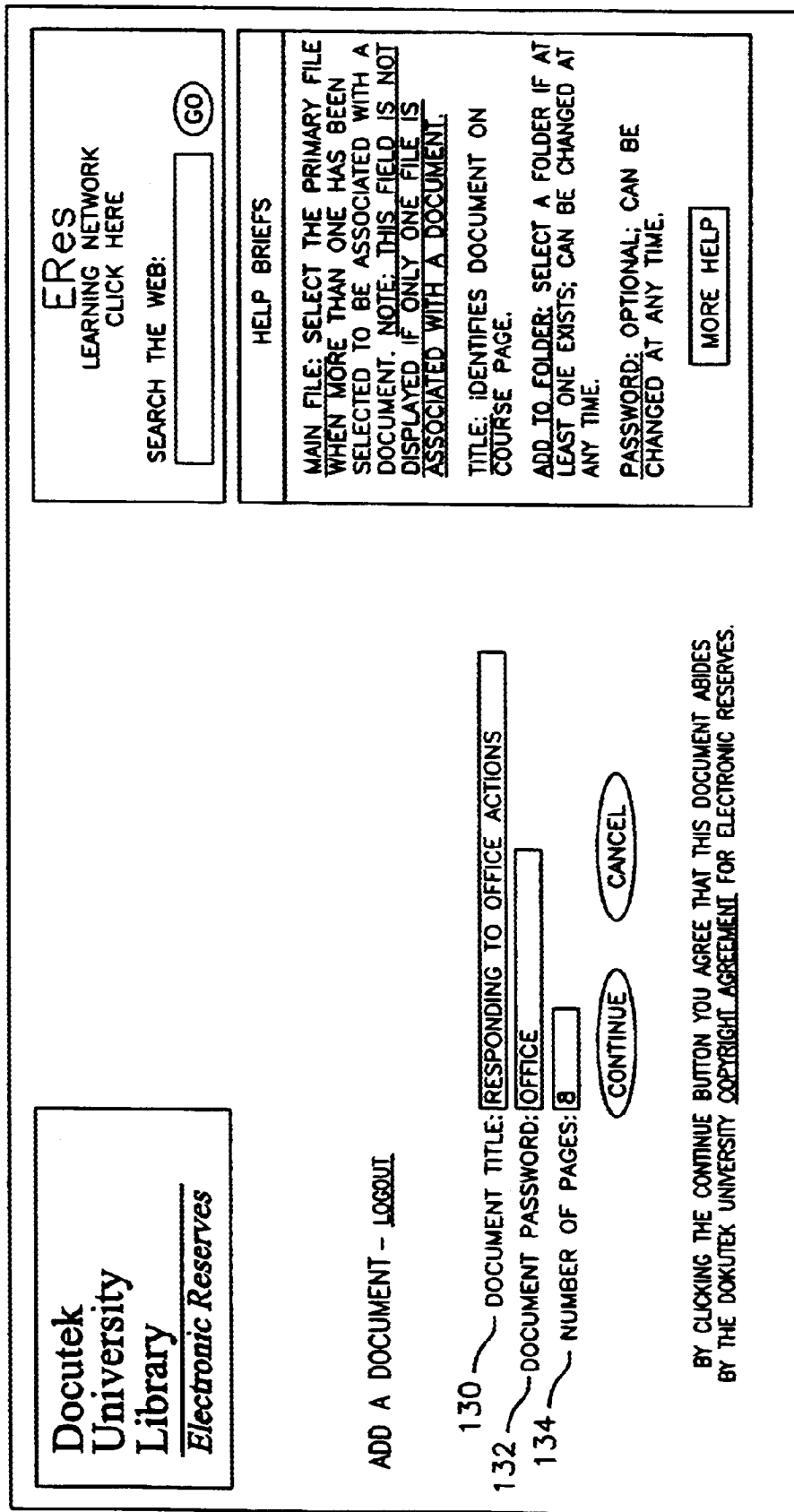


FIG. 4H

**Docutek
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PATENTS (SUMMER 01)

INSTRUCTOR(s): JOSEPHINE CHANG
DOCUMENTS: (PROBLEMS VIEWING PDF OR OTHER FILE FORMATS? READ THIS!)

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<input type="checkbox"/> DRAFTING PATENT APPLICATIONS	PDF	14
<input type="checkbox"/> INTRODUCTION TO PATENT LAW	HMTL	10
<input type="checkbox"/> RESPONDING TO OFFICE ACTIONS	PDF	8

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COURSE PAGE LINKS

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--LAW RESOURCES
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FIG. 4I

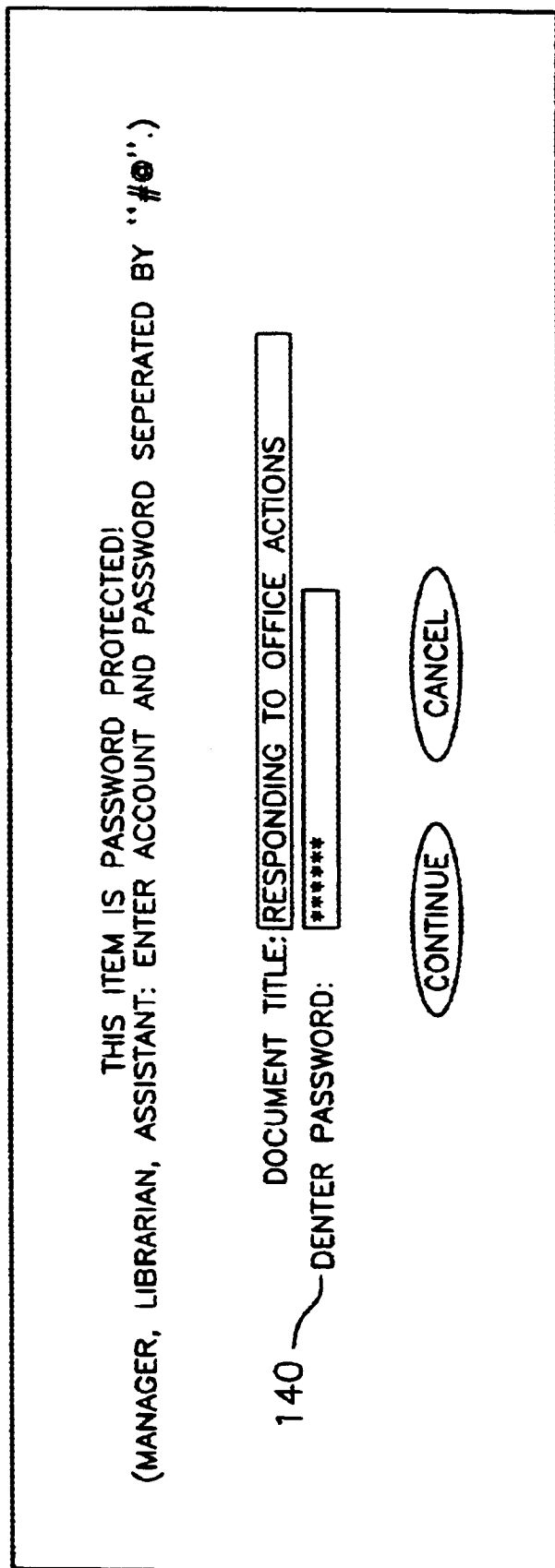


FIG. 4J

AUTOMATED ELECTRONIC RESERVES SYSTEM AND METHOD

FIELD OF THE INVENTION

This invention relates generally to electronic document management systems, and more particularly, to automating the placement of documents in an electronic reserves system.

BACKGROUND OF THE INVENTION

Course materials, for example, documents and other information resources that instructors make available to students, are traditionally kept in binders on a "reserve shelf" of a library. Typical reserve materials consist of copies of previous exams, articles from scientific and trade journals, homework solutions, excerpts from books, and the like. Generally, there is only one copy of a document placed on reserve. Furthermore, such document is traditionally available only for in-library use, on a short-term loan basis.

An emerging solution to the limitations presented in traditional reserve mechanisms involve placing reserve materials on electronic reserve. In fact, with the growth of the Internet, electronic document delivery and storage now extends far beyond course reserves to make all types of documents available electronically. A significant fraction of the documents added to electronic databases, however, exist in an ink-on-paper format. Those who administer such systems, for example, librarians, college faculty, and school teachers, are thus faced with the task of first converting these paper copies to electronic formats, and then transferring the computer file(s) to an Internet server used to house an electronic documents database.

The current two-step process for placing printed materials on electronic reserve is unsatisfactory for many users in that the process may be time-consuming and potentially confusing to an average (non-technical) teacher, librarian, or administrator. Both the scanning and the file transfer steps require some, if not considerable, technical expertise. Even someone skilled in the use of a scanner may sometimes struggle to create output files that are both of manageable size and of high display quality. Many times, post-scanning image processing may be necessary to either reduce the size of the output files and/or make them more legible. Such post-scanning image processing is time consuming and also requires some technical knowledge.

Accordingly, there is a need for a system and method for automating the placement of documents into an electronic reserves system. Such a system and method should preferably cater to the needs of people with little or no technical expertise to facilitate the electronic placement of such documents.

SUMMARY OF THE INVENTION

The present invention is directed to a network server in an electronic reserves system. In one embodiment of the invention, the network server includes an input, a storage device, and a processor. The input allows the automatic receipt of a facsimile transmission of a document to be placed on electronic reserve. The processor is coupled to the input and the storage device, and includes logic for automatically formatting the received document into a predetermined file format, assigning a password to the formatted document, and saving the formatted document into the storage device for later retrieval upon receipt of the assigned password.

In a further embodiment of the invention, the network server includes a processor with logic to include the received document into a list of documents pending to be placed on electronic reserve. The processor further provides a graphical user interface for allowing a user to view the list of documents pending to be placed on electronic reserve, select the received document from the list, assign a password to the selected document, select a particular reserves area, and move the selected document to the selected reserves area.

It should be appreciated, therefore, that the present invention helps simplify the placing of paper documents in electronic reserve. The users need no longer struggle with scanners, post-scanning devices, and manual file transfers which may be confusing and time-consuming for people with little or no technical expertise. Instead, a faxed document is automatically received by the network server, formatted, and placed on reserve. The graphical user interface further provides ease and convenience in placing a document on electronic reserve.

DESCRIPTION OF THE DRAWINGS

These and other features, aspects and advantages of the present invention will be more fully understood when considered with respect to the following detailed description, appended claims, and accompanying drawings where:

FIG. 1 is a schematic block diagram of an automated electronic reserves system according to one embodiment of the invention;

FIG. 2 is a more detailed block diagram of a network server in the electronic reserves system of FIG. 1 according to one embodiment of the invention;

FIG. 3 is a flow diagram of a process for receiving, processing, and retrieving faxed documents on electronic reserve according to one embodiment of the invention; and

FIGS. 4A-4J are a series of graphical user interface displays allowing a user to interact with the network server of FIG. 2.

DESCRIPTION OF THE INVENTION

FIG. 1 is a schematic block diagram of an automated electronic reserves system according to one embodiment of the invention. The system preferably includes a facsimile machine **10** connected to a network server **12** over a public switched telephone network (PSTN) **14**. The network server **12** preferably resides in a high school, university, college, or another institution where printed materials are either kept on a reserve shelf or placed on electronic reserve.

The system preferably includes a personal computer (PC) **16** connected to the network server **12** via a wide area computer network, such as, for example, a public internet **18**. The network server **12** and PC **16** and may be connected via cables or other transmission media, and may support various data communication protocols such as, for example, an Internet Protocol (IP), Asynchronous Transfer Mode (ATM), or the like.

The system may further include a local PC **20** connected to the network server **14** over a network signal bus **22** configured to support and operate as a local area network. The particular configuration of the local area network may be any one of a number of conventional network configurations, whether serial or parallel, such as token-passing architectures, RS-232-type serial daisy-chains, serial arbitrated loops, and the like.

The PCs **16**, **20** are configured to include at least a display screen **16a**, **20a**, some form of I/O device **16b**, **20b**, such as

a keyboard, keypad, and the like, and a network connection **16c**, **20c** for bi-directional communication with the network server **12**. In alternative embodiments, the PCs **16**, **20** may be replaced or used in conjunction with other end devices such as, for example, mainframes, file servers, workstations, business computers, personal digital assistants, television/set-top-box units, or the like.

The network server **12** preferably includes a mass storage device **24**, such as a hard disk drive, or drive array, which stores documents placed on electronic reserve as well as other information and/or documents used by the network server. The documents placed or to-be-placed on electronic reserve are preferably arranged in one or more directories, including a temporary directory, a staging directory, and one or more final reserves directories. The mass storage device **24** preferably maintains for each document placed on electronic reserve, a document title, a total number of pages contained in the document, a document file format, an associated password, and the like.

The mass storage device **24** further includes user databases storing user authentication information, such as, for example, usernames and passwords, for allowing access to particular parts of the system. Preferably, the user database indicates whether a user is an administrator, and provides administrative rights, such as creating course pages and placing documents on reserve, to such administrative users.

In general terms, an authorized administrative user of the system transmits a document to the network server **12** for being placed on electronic reserve, preferably through the facsimile machine **10**. The document includes but is not limited to library documents, faculty and course materials, copies of previous exams, articles from scientific and trade journals, homework solutions, excerpts from books, and/or any other type of printed material.

Alternatively, the document is a file residing in a remote location in PC **16** or in a local area network in PC **20**. The file may be uploaded to the network server **12** via the internet **18** or network signal bus **22**, respectively. If the file resides in PC **16**, the document is preferably transmitted using a TCP/IP based file transfer protocol (FTP). A third-party FTP application or an internal FTP code may be involved to transfer the file to the network server **12**. Alternatively, PC **16** or **20** is equipped with a facsimile modem which allows a document to be faxed to the network server **18** using the PC.

The network server **12** receives a faxed document and stores it into the temporary directory. The document is then preferably converted to a pre-determined file format, such as, for example, a portable document format (PDF), and moved to the staging directory under a new file name. The user may access the faxed document in the staging directory via a graphical user interface (GUI) provided by the network server **12** for moving the document from the staging directory to a final reserves directory. The user may, prior to moving the document to the final reserves directory, use the user interface to view the document to verify that the transmission was successful. The final reserves directory may be a general directory or a directory associated with a particular course page.

Once the documents have been placed in a final reserves directory, an authorized user may access the documents using PC **16** or **20** through the internet **18** or local area network. Preferably, the user may select, view, and/or print a document placed on electronic reserve via the GUI provided by the network server **12**.

FIG. 2 is a more detailed block diagram of the network server **12** according to one embodiment of the invention.

The network server **12** preferably includes a processor including a GUI module **30**, reserves placement module **32**, reserves retrieval module **34**, fax module **36**, and TCP/IP stack **38**. The GUI module **30** is coupled to the reserves placement and retrieval modules **32**, **34**, and provides various interactive screens for allowing a user of the PC **16** or **20** to interact with the network server **12** to place or retrieve documents on reserve and perform various administrative functions. One such administrative function includes the creation of course pages to which a reserved document may be added.

The reserves placement module **32** preferably processes a received document for placing it in electronic reserve. Preferably, the reserves placement module **32** converts a faxed document into a pre-determined file format, such as for example, PDF, and stores it in the staging directory. The reserves placement module **32** may include commercially available third party software such as, for instance, Adobe® Acrobat® Distiller®, manufactured by Adobe Systems Incorporated, of San Jose, Calif., for formatting the faxed document. The reserves placement module **32** preferably further renames the faxed document for easy identification and access by the transmitting user. The reserves placement module also allows an authorized user to move faxed documents from the staging directory into a final reserves directory.

The reserves retrieval module **34** allows a user to retrieve a document from a final reserves directory. The reserves retrieval module **34** receives a user-selection of a particular document placed on electronic reserve and determines if the user is authorized to access the selected document. If the user is authorized, the reserves retrieval module **34** retrieves the document from the mass storage device **22** for display on the display monitor **16a** or **20a**.

The reserves placement and retrieval modules **32**, **34** are each coupled to the TCP/IP stack **32** for communicating over the Internet. The TCP/IP stack **32** processes packets received and transmitted between the PC **16** and network server **12** according to conventional methods. The TCP/IP stack preferably includes a built-in FTP code for allowing the uploading of a document to be placed on reserve using FTP.

The reserves placement module **32** is also coupled to the fax module **36**. The fax module **36** preferably allows the receipt of fax documents transmitted by the facsimile machine **10**, PC **16**, or PC **20**. The fax module may be implemented using a commercially available third-party software such as, for instance, WinFax PRO™, manufactured by Symantec Corporation of Cupertino, Calif.

It is understood, of course, that FIG. 2 illustrates a block diagram of the network server **12** without obfuscating inventive aspects of the present invention with additional elements and/or components which may be required by the network server. These additional elements and/or components, which are not shown in FIG. 2 are well known to those skilled in the art.

FIG. 3 is a flow diagram of a process of receiving, processing, and retrieving faxed documents on electronic reserve according to one embodiment of the invention. The process starts, and in step **40**, the fax module **36** in the network server **12** determines whether a new document has been faxed. If it has, the fax module **36**, in step **42**, proceeds to receive the faxed document. In step **44**, the network server **12** stores the received document in a temporary directory in the mass storage device **24**. In step **46**, the network server **12** invokes the reserves placement module **34** for converting the faxed document to a predetermined file format, renaming the

converted document, and saving the document in the staging directory of the mass storage device **24**. Preferably, the document is renamed based on a date and time of receipt of the faxed document for allowing the transmitting user to easily identify the document.

In step **48**, the network server **12** determines if a received document is to be placed on a final reserves directory. If it is, the network server **12**, in step **50**, places the document into the final reserves directory.

In step **52**, the network server **12** determines whether the user has decided to log out or otherwise quit or cancel a particular task. If the answer is YES, the user is logged out or a particular task is canceled, and the process ends.

FIGS. **4A-4J** are a series of graphical user interface displays allowing a user to interact with the network server **12**. The graphical user interface displays are preferably web pages associated with a website hosted by the network server. The user preferably connects to the network server via the internet **18** using the PC **16** to access the website and the various web pages.

FIG. **4A** illustrates a course index display allowing a user to search for a particular course. The user may search for the course by selecting a particular department **70** and/or instructor **72**, if known, or directly entering the name of the desired course **74**. If the user searches by a particular department or instructor, a list of courses offered by such department or instructor is preferably displayed.

FIG. **4B** illustrates a display of various courses offered by a particular department. Preferably, the courses are organized based on a course number **80**, course name **82**, instructor name **84**, and school term **86** offering the course. A user may select a particular course for placing or viewing a document on electronic reserve for the course.

FIG. **4C** is an illustration of a particular course page including a list of documents placed on reserve for the course. Preferably, the documents are identified by a title **90**, file format **92**, and a total number of pages **94**. An administrative user of the system, such as, for example, a faculty member or librarian, may select a course to place a document on reserve upon actuation of a page management link **96**.

FIG. **4D** illustrates an administrative login screen display allowing the administrative user to access the system for placing documents on reserve for the selected course. In this regard, the administrative user enters his or her username **114** and password **116**, and actuates a login radio button **118**, causing the information to be transmitted to the network server **12** over the internet **18**. The reserves placement module **32**, or alternatively, a separate authentication module, determines if the transmitted information may be verified. If the information is verified, the user allows access to the system to perform document management functions.

FIG. **4E** is an illustration of a screen providing access to the various document management functions according to one embodiment of the invention. The management functions may include adding, deleting, or modifying a document or link entry in the course page upon actuation of an add link **100**, delete link **102**, and modify link **104**, respectively.

FIG. **4F** illustrates a screen display upon actuation of the add link **100** for allowing the administrative user to place a document on electronic reserve. The administrative user may upload the document to the network server **12** over the internet by actuating a transfer file link **110** on the displayed screen. If a particular document has previously been faxed, it is stored in the staging directory and the user may retrieve the faxed document by selecting a retrieve faxed document link **112**.

FIG. **4G** is an illustration of a screen display including a list of faxed documents in the staging directory. Preferably, each document in the staging directory adheres to a pre-determined file format. Each document is further identified by a filename **120** indicating the date and time in which the document was received. The display further indicates the time that has elapsed **122** since the document was received. The document may be removed **124** from the staging directory or selected for transferring to a final reserves directory associated with the course page. The user may further preview the document prior to transferring it to the final reserves directory.

FIG. **4H** is an illustration of a screen display upon a user selection of a document in the staging directory for transferring it into a final reserves directory associated with the selected course. The administrative user preferably provides a document title **130** by which the document is to be identified on the course page, and the number of pages **134** contained in the document. In addition, the administrative user provides a document password **132** that is to be used for accessing the document once it is placed on reserve.

FIG. **4I** is an illustration of a screen display with an updated list of documents that have been placed on electronic reserve. Selection of one of the documents preferably causes the display of a display screen as illustrated in FIG. **4J** for allowing the user to enter a password **140** to access the document. The password is transmitted to the reserves retrieval module **34** which preferably verifies that the appropriate password has been provided. If the password is verified, the reserves retrieval module **34** retrieves the document from the mass storage device **24** and displays it on the user's display **16a** or **20a**.

It should be appreciated, therefore, that the present invention helps simplify the placing of paper documents in electronic reserve. The users need no longer struggle with scanners, post-scanning devices, and manual file transfers which may be confusing and time-consuming for people with little or no technical expertise. Instead, a faxed document is automatically received by the network server, formatted, and placed on reserve. The graphical user interface further provides ease and convenience in placing a document on electronic reserve.

Although this invention has been described in certain specific embodiments, those skilled in the art will have no difficulty devising variations which in no way depart from the scope and spirit of the present invention. It is therefore to be understood that this invention may be practiced otherwise than is specifically described. Thus, the present embodiments of the invention should be considered in all respects as illustrative and not restrictive, the scope of the invention to be indicated by the appended claims and their equivalents rather than the foregoing description.

What is claimed is:

1. A network server in an electronic reserves system comprising:
 - an input for automatically receiving a facsimile transmission of a document to be placed on electronic reserve;
 - a storage device storing a plurality of electronic reserve documents; and
 - a processor coupled to the input and the storage device, the processor including logic for:
 - automatically formatting the received document into a pre-determined file format;
 - assigning a password to the formatted document; and
 - saving the formatted document into the storage device for later retrieval upon receipt of the assigned password.

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2. The network server of claim 1, wherein the processor further includes logic for associating the formatted document with information on when the facsimile transmission was received.

3. The network server of claim 1, wherein the processor further includes logic for:

saving the formatted document into a particular directory of the storage device;

displaying the list of documents in the particular directory;

receiving a user selection of the formatted document from the list;

receiving a user selection of a particular reserves area; and moving the formatted document from the particular directory to the selected reserves area.

4. The network server of claim 3, wherein the particular reserves area is associated with a course offered by an educational institution, and the document is a material associated with the course.

5. The network server of claim 1 further including a network connection for receiving the document over a computer network.

6. A network server in an electronic reserves system comprising:

an input for automatically receiving a facsimile transmission of a document to be placed on electronic reserve;

a storage device for storing a plurality of electronic reserve documents; and

a processor coupled to the input and the storage device, the processor including logic for including the received document into a list of documents pending to be placed on electronic reserve, the processor further providing a graphical user interface for allowing a user to:

view the list of documents pending to be placed on electronic reserve;

select the received document from the list;

assign a password to the selected document;

select a particular reserves area; and

move the selected document to the selected reserves area.

7. The network server of claim 6, wherein the processor further includes logic for:

associating the formatted document with information on when the facsimile transmission was received; and

displaying the information in the list.

8. The network server of claim 6, wherein the particular reserves area is associated with a course offered by an educational institution.

9. The network server of claim 6 further including a network connection for receiving the document over a computer network.

10. An automated electronic reserves method comprising the steps of:

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automatically receiving a facsimile transmission of a document to be placed on electronic reserve;

automatically formatting the received document into a pre-determined file format;

assigning a password to the formatted document;

saving the formatted document into the storage device; and

retrieving the formatted document upon receipt of the assigned password.

11. The method of claim 10 further comprising the step of associating the formatted document with information on when the facsimile transmission was received.

12. The method of claim 10 further comprising the steps of:

saving the formatted document into a particular directory of a storage device;

displaying the list of documents in the particular directory;

receiving a user selection of the formatted document from the list;

receiving a user selection of a particular reserves area; and

moving the formatted document from the particular directory to the selected reserves area.

13. The method of claim 12, wherein the particular reserves area is associated with a course offered by an educational institution, and the document is a material associated with the course.

14. An automated electronic reserves method comprising the steps of:

automatically receiving a facsimile transmission of a document to be placed on electronic reserve;

including the received document into a list of documents pending to be placed on electronic reserve

providing a graphical user interface for allowing a user to: view the list of documents pending to be placed on electronic reserve;

select the received document from the list;

assign a password to the selected document;

select a particular reserves area; and

move the selected document to the selected reserves area.

15. The method of claim 14 further comprising the steps of:

associating the formatted document with information on when the facsimile transmission was received; and

displaying the information in the list.

16. The method of claim 14, wherein the final particular reserves area is associated with a course offered by an educational institution, and the document is a material associated with the course.

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