

Ares Version 2.5. Release Notes

These release notes document all feature enhancements and changes included in Ares Version 2.5 (released 1/13/09). The document is organized by component (the Staff Client, the Web Interface, the System Manager, etc.), with updates and enhancements listed beneath the appropriate heading. The current release notes document only additions and changes to the software, and should be used together with the Ares documentation available on the Atlas Systems website. To distinguish clearly between library reserves department staff and the faculty, staff and students working with Ares from the web interface, library staff are referred to as “staff” and the customer utilizing the reserves department via the web interface is termed the “user.”

Both Instructors and students accessing Ares through the web interface (users) can access only the Student Tools options until cleared by library staff in the Client for instructor privileges. Instructor privileges allow the user access to the Instructor Tools options on the web interface. Note that library staff may also access Ares through the web interface, and instructors and students can be given staff permissions (the ability to access the Ares Client, Admin Suite and Reports) if desired.

Several enhancements have been added to Ares Version 2.5, including increased functionality and flow of Blackboard integration, automated course integration through the staff Client, improved class and item cloning capabilities, and additional Hot Key functions.

The Web Interface

- The IClassCreate.html and IClassClone.html pages include an option allowing instructors to enter an external course ID for Blackboard and other e-learning platforms. As most sites will create classes through the CMS and not Ares, this option is commented out by default.
- Instructors can create a class authentication password for cloned classes where the original class did not use the password option.
- Both serial and monograph items automatically route to copyright processing when the CopyrightRequired hidden field (CopyrightRequired = Yes) is added to the IRF[documenttype].html pages.
- All Instructor:Request Items web pages include a default Notes field. If your web pages do not have this HTML you can add it to the IRF[documenttype] and IRFEdit[documenttype].html pages.
- Support for legacy tag, <RequiresCopyright> has been removed. The DLL only checks for the tag <CopyrightRequired> and sets that to Yes or No according to the hidden value on the IRF[documenttype].html pages.

- The Item Request Form offers the option to choose an item pickup site if the corresponding class does not have a designated DefaultPickupSite. This value is saved as both the processing and pickup site values.
- Added enhanced support for Mac users to view PDF reserve items. If the user does not have a plugin capable of displaying the file, the reserve item will have the same filename as the PDF on the server, instead of attempting to download the PDF as ares.dll.
- RSS feeds include only relevant items.
- Settings of the USearch.html and include_header.html pages can be formatted to sort search results by any field(s) from Items. For example, to sort by Course Number/Title, enter

```
<input id="OrderBy" name="OrderBy" type="hidden" value="CourseNumber,Title" />
```

- A new tag is available to display specific information for an item. It is used primarily in customized grids for grouped items (grouping long lists of items in a class by title, location, author, etc.). An HTML example:

```
<#ITEM field="BuildInfoURL" LinkText="View Info" ShowIcon="no" footertext="<br/>" />
```

- An enhanced URL feature creates a hyperlink to the web pages of physical Items with a location field containing a URL. WebLink must equal "true" and the location must start with "http" or the location will not be linked. For example:

```
<#ITEM field="Location" WebLink="true" linkText="OPAC" alt="This is a hyperlink" title="Click Me">
```

produces

```
<a href="http://127.0.0.1/" alt="This is a hyperlink" title="Click Me">OPAC</a>
```

when the Location = http://127.0.0.1/.

- Faculty can import items from previous classes to their new and existing classes via the web interface.
 - **Step 1.** The instructor enters the current class to import items TO and clicks the Add Reserves Items menu button. The web pages need a Class Table tag to an existing IRFMenu page to allow this option. An example of this would be:

```
<#TABLE name="ClassImport" class="instructor-table"
AllowRowClick="Yes" headerText="Previous Classes"
AllowJavascriptHover="True"
column="Semester:Semester"
column="CourseNumber:Course"
column="ClassCode:Section Number"
```

```
column="Name:Name" column="ReserveItems:Reserve  
Items" NoDataAction="ShowMessage"  
NoDataMessage="No classes found"  
orderby="C.StopDate DESC,C.CourseNumber ASC">
```

- **Step 2.** The instructor selects the previous class to import items FROM. A new page appears (IClassImportItems.html) displaying course information for the current and new class, and a list of the items in the current class. The list of items displayed is also governed by the CloneItemsRequireUsage Customization Key. This form is similar to the existing Clone Class form in that instructors can select the items they wish to import to the new class and reset the availability dates.
- **Step 3.** After clicking on Import Items a JavaScript “Please Wait...” message displays while items are being copied. Upon completion, the DLL redirects to the main class page. The status line displayed is SLImportItems. Default for the status line is "Imported <#NumItems> Items" where <#NumItems> is replaced with an actual number of items imported. This replacement tag will only work with this status line.
- The DLL now ensures an item’s active date does not surpass the course stop date and the item’s inactive date does not precede the course start date. If the active date is greater than the inactive date, the dates will be switched.
- The Notes field on the edit forms in the default web pages has been updated. If you have customized your request form pages, modify the input tags where name="Notes" and set them to name="ItemNote".
- Items cloned by Instructors retain their original instructor tags by default.
- The DLL sets the LinkColumn to the first displayed column in a table even if the LinkColumn tag is not included in the #TABLE CLASS or #TABLE ITEM parameters. (ex: IClassInfo.html page). Previously this caused an internal error and made the display appear as if no rows were returned from the query.

Blackboard (E-Learning Platform Compatibility)

Ares Version 2.5 includes several enhanced aspects of Ares/Blackboard (e-learning) compatibility:

- The Ares building block is no longer accessible to guests. Every user accessing the Ares building block must be a course user.
- The Ares building block accesses and modifies only Ares course modules.

- New courses can be created directly from the Blackboard. Instructors, course builders and teaching assistants can create courses in Ares by clicking on the Course Reserves link under Class Tools or through the Control Panel, as in the past.
- If a Blackboard user becomes a teaching assistant, instructor or course builder for a course after their account was created in Ares, the Ares account will update to give them instructor permissions for the course.
- Setting the Blackboard's Instructor Display Options or Student Display Options to Class Link takes the user immediately to the Ares course page without having to click a separate link.

The Ares Client

The Main Menu

- The Fulfillment menu includes an “In Transit to Pickup Location” status for items with a pickup site different from the current processing site. This status is located under the batch processing option.
- A new Batch Processing option allows you to batch process three status queues: Scan Items Later, Item Available on Shelf, and In Transit to Pickup Location. Items are processed by entering or scanning the ItemID or barcode.

Cloning Items

- Items cloned from within the Client retain the Copyright Required setting of the original item.
- Digital items cloned through the Client are processed on the server using the aresadmin.dll and no longer require downloading and reuploading of files.
- Staff can clone multiple items to an existing class or classes. The Item Selection grid contains checkboxes allowing staff to choose which items to clone from an original class, and allows the items to have different availability dates.
- Errors in the cloning process display in the Clone Status column on the Cloned Items results grid.
- After cloning the items, staff can double-click on an item in the grid to open it.

Item Processing / The Item Information Form

- The General Information Table contains the following new fields:
 - **TitleID field:** stores a unique identifier for a title.
 - **ItemBarcode:** stores the unique barcode for an item.

- **NeededBy:** text field allows instructors to choose a week of the semester or type in a date.
 - **The PageCount and PagesEntireWork** fields work together to show the percentage of the total work copied.
 - **Nature of Work field:** an editable dropdown box to track the type of works (creative, factual, analytical) being requested.
- The Client verifies that Processing and Pickup Sites exist, translating the names to the codes before saving the item.
 - All dropdowns on the Item Information form are case-insensitive. Previously the Client expected values such as 'HardCopy' and would generate an error if it found 'Hardcopy' in the value.
 - Clicking "In Transit to Pickup Site" on the Item Form saves the current information on the form and routes the item to that status.
 - New Clone menu option allows you to clone an item to one or more existing classes. (Use Ctrl-click to select individual classes on the grid, shift-click to select all classes or consecutive classes.) Clicking the Clone Item icon clones the item and displays the new item and class information in a grid. Double-clicking opens an item row.
 - Active Date Range values limit the item availability dates to any range within the course start and stop dates. No error message is given, but if the dates entered are outside the range, the Client automatically adjusts the date to match the semester dates.

Item Processing / New Items

- If you do not select a specific Loan Period when adding a new item to a class, the Client defaults to "Not a Loan" when the item is saved.

Copyright Processing

- Ares supports the CCC Annual Copyright License. Institutions subscribed to this service should change the CCCAnnualAcademicLicensee customization key to Yes. Ares automatically checks whether copyrights for individual works are covered by the annual license.
- Copyright processing can now be performed on monograph items.

Z39.50 Search

- A new ZSearchSystem Number key determines if the ESPNumber or ReferenceNumber field is copied to the Z39.50 search form from the Item Request form in the Client. Default value is *ESPNumber*.

User Information Form

- If the External ID field is blank, the Client assumes that value to be the same as the Username.

Add / Edit Class Forms

- Leaving the Department field blank when editing a class causes the field name to highlight in red; the class can be saved but there will be no corresponding department.
- The grid on the Class Items tab no longer applies an automatic best fit. Manual adjustments can be made by clicking and dragging the grids individually or right-clicking for grid organizing options.
- If a URL with a proxy prefix matching the value in Customization is inserted into the URL field, the prefix is removed and the proxy checkbox is checked.
- Typing in the Instructor Username textbox activates a grid showing matching users based on username, firstname or lastname. Select a highlighted user by pressing the Enter or Tab key. Use the up and down arrows to cycle through the list. Moving the mouse outside the grid selects the current highlighted row.

Searching Items

- Standard customizing options in the Search Item: General Search results grid allow you to create custom views. Right clicking on a column header displays grid organizing options. Headers can be moved and rearranged by clicking and dragging. Changes to the grid layout are automatically saved upon closing the Client. Right-clicking on items within the grid allows quick routing of selected items to a new status.
- Items routed to a status by right-clicking on Search Item results retain tracking and history information.
- Added the ability to search for items using the Class ID.
- Added the ability to search for loan periods without a pickup location.

Searching Classes

- Class Search results can be customized to specific criteria using the “and/or” radio buttons.

Searching Classes, Items, or Users

- Results of a class, item or user search display in an active grid and open by double-clicking.

Hot Keys

- Below are new enhanced Hot Key features within the Client:
 - **Edit Class Form:** Ctrl-Alt-I adds an item.

- **Edit Class Form and Item Form:** Ctrl-S saves the form (in addition to the default Alt-S menu shortcut).
 - **Item Form:** Ctrl-Alt-M switches to the Monograph tab and Title text box. Ctrl-Alt-S switches to the Serials Tab and Journal Title textbox.
 - **Main Menu:** Ctrl+S switches to the General Search form.
- The Enter key functions widely as a Hot Key to open forms and perform searches. When focused on a grid, it initiates the same action as double-clicking a row. The following table illustrates the role of the Enter key when used on the specified forms:

Client Form	Enter Key Function
Main Menu: status queues	Opens the focused queue
Reserves Processing: results grid	Opens the item form (or specialized form if the status is Awaiting Scanning or In Stacks Searching)
Search Item: results grid	Opens the focused item
Search Users: search fields	Performs the search and opens the user form in edit mode if one result is found
Search Users: results grid	Opens the user form in edit mode
Search Users: user validation results grid	Opens the user form in add mode
Search Class: search fields	Performs the search and opens the class form in edit mode if one result is found
Search Class: results grid	Opens the class form in edit mode
Search Class: class validation results grid	Opens the class form if there is a class with an associated registrar course id. Otherwise opens the course validation form asking the user to verify the class details and choose the primary instructor
Edit User: Classes tab	Opens the class form of the focused record
Edit Class: Class Items tab	Opens the Item form of the focused item
Clone Item: item selection grid	Opens the original item record
Clone Item: cloning results grid	Opens the new item record
Clone Item: class selection grid	Opens the class form for the focused class record
Clone Class: item selection grid	Opens the original item record
Clone Class: cloning results grid	Opens the new item record
Z39.50 Search: results grid	Switches to the Record Details tab
Process Copyright: items in copyright processing	Opens the Item form of the focused record

Search Results Grids

- Grid sorting is case-insensitive.

Link Checker

- Formatting changes made to the grid layout automatically save upon closing the form.

Semester Maintenance

- Enhanced Semester Maintenance table allows staff to create past or future semesters with no date restrictions. Previously, the Client would not allow semesters more than 5 years in the past.

The Client Installer

- The Client Installer updates a BDE setting increasing the print capacity from 64 items to 500.

The Web Service

- Only active items are returned in the web service results for class items.
- User authorization type is set to default by the web service rather than Ares.
- Additional WebMethods allow staff to verify user existence and search for an Ares username for a given external user id.

The System Manager

- Ares 2.5 connects with the institution's registrar system to upload current course data (i.e., course, user and enrollment data) provided by the institution. Sites manually manage the data with their own tasks or let the Ares System Manager parse tab delimited files placed in a path on the server defined by the CourseUserValidationDataPath key.
- Sample tab delimited files have been included in the c:\Ares\ValidationData folder on the server during fresh installations and updates to Ares 2.5. The Fields files (CourseFields.txt, EnrollmentFields.txt and UserFields.txt) define the order of the items being inserted into the respective tables. The fields should match with field names in the database tables. The data files are Courses.txt, Enrollment.txt and Users.txt.