

Ares 5.0 in Focus

Welcome!



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Staff Client Updates

- New primary install method: understanding “per-user” and “per-machine”
 - How to select and what to expect
 - Removal of default addons
 - Cleaning house – file removal, new locations, and best practices
- Update prompts for future versions
- New look with high DPI support & skins
- Required password change for staff
- Multi-Course Item Cloning

Option 1: Per-User Client Install

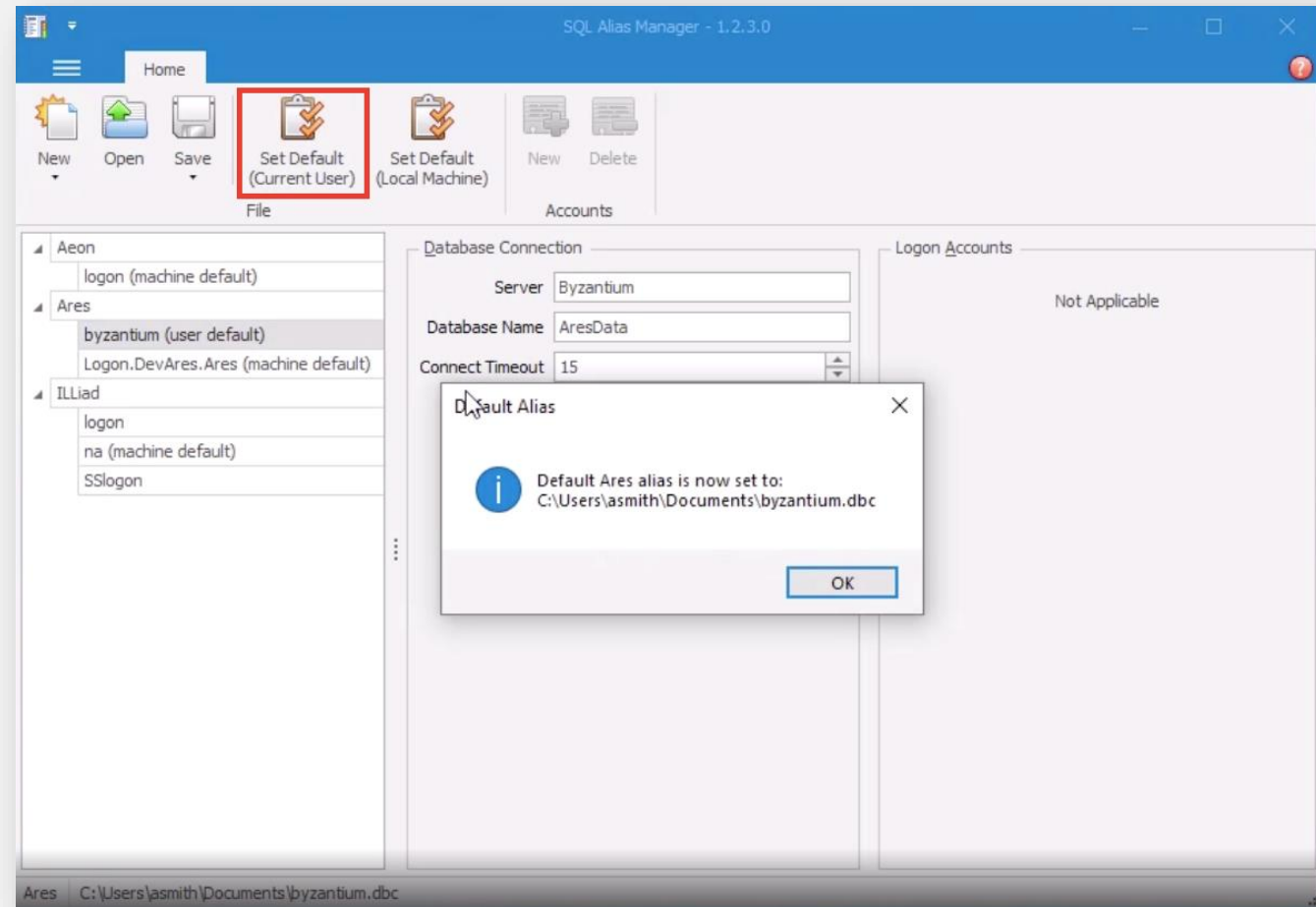
- The recommended method for installation.
- *Will be selected, by default, when running the Ares 5.0 Client installer.*
- Allows each individual user on that machine to install the client for themselves at the user level.
- Allows each individual user to manage their own addons since they're stored in a location-specific to each individual Windows user.
- Addons will need to be backed up and restored to each user's documents directory.
- Will not require administrative-level privileges for Ares 5.0 update or future Client updates.
- Saved, by default, in %USERPROFILE%\AppData\Local\Apps\Ares\Client\.
- Must be run for each user account that requires Client access, which may mean multiple installs per machine, if staff share workstations where Ares is used.
- Recommend uninstalling older versions before running 5.0 installer.
- Future updates will retain the per-user selection automatically.

Option 2: Per-Machine Client Install

- Allows all users on the machine to access the client; requiring an update/install of the client only once on that machine.
- Require users to select the "Advanced" button and opt to "Install for all users of this machine" after launching the Ares 5.0 Client installer.
- Saved, by default, in C:\Program Files (x86)\Ares.
- Only need to run updates and installs one time to provide access for all users on a machine.
- Will automatically overwrite previous, per-machine versions of the Ares Client (e.g., the 4.7 Client).
- Addons will need to be backed up and restored to each user's documents directory.
- No option to right-click and Run as Admin; Windows' permission prompt appears during install.

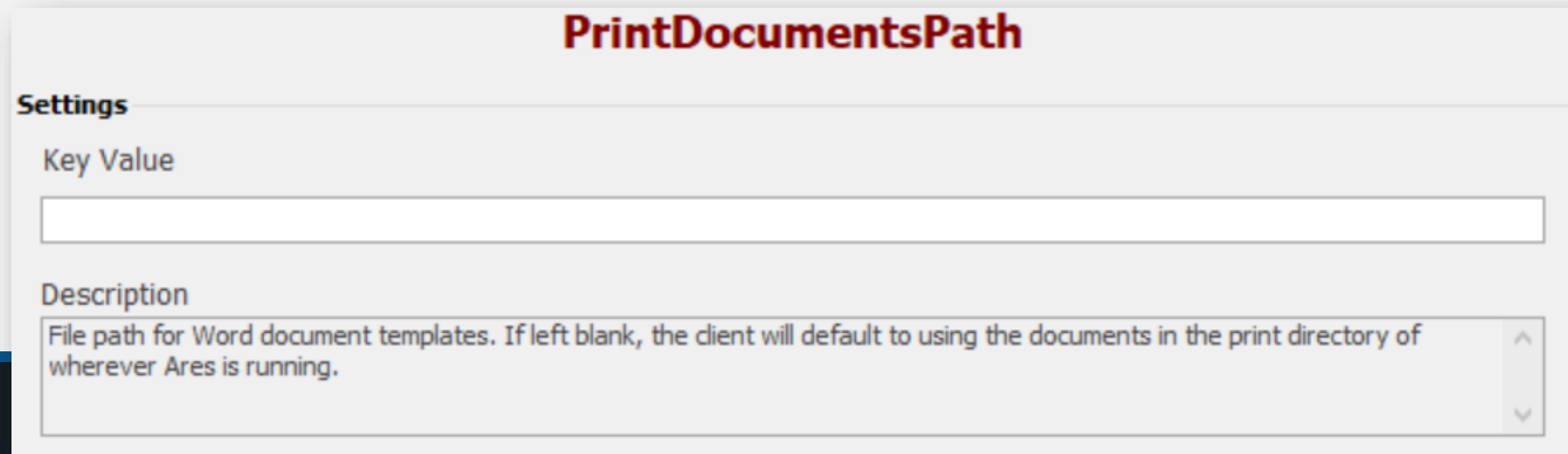
SQL Alias Manager Changes & DBC File Best Practices

- Per-Machine:
 - Use Set Default (Local Machine)
 - Recommend under C:\Users\Public
 - Doesn't require admin privileges
 - C:\Program Files (x86)\Ares
 - Must run SQL Alias Manager as an admin
- Per-User:
 - Recommend under C:\Users\Public
 - Use Set Default (Local Machine)
 - Doesn't require admin credentials and accessible to all users on machine
 - Documents\Ares folder
 - Use Set Default (Current User)
 - Not accessible to other users



Print Templates

- New default directory for for Per-User installs
 - %AppData%\Local\Apps\Ares\Client\Print\
- If NOT using shared template location AND have customized templates AND want to avoid permissions restrictions, should copy from C:\Program Files (x86)\Ares\Print to new location
- Recommend under C:\Users\Public



PrintDocumentsPath

Settings

Key Value

Description

File path for Word document templates. If left blank, the client will default to using the documents in the print directory of wherever Ares is running.

Removal of Default Addons & Atlas Helpers file

- Affects both update options
 - Per-machine only needs to be done once (since update affects all users on the machine)
 - Per-user would need to be done any time updating from 4.7 to 5.0
- No longer included during installation.
- Best practice: Back up before by copying Documents/Ares/Addons folder to Desktop – replace after 5.0 update is complete and all older versions uninstalled.
- Can [download as .zip](#) in docs if forget, is missing, or want for new installs.

Client Update Prompts

- Begins *after* version 5.0 is installed.
- Checks Ares Update Server for new client version each logon.
- Click prompt to begin; the installer will download and execute.
- Update preference set during initial install retained.
- Manual client updates available in Ares Downloads
 - Require username and password
 - Silent installs still possible

Updated Client Look - Supports Higher DPI Settings

The screenshot displays the 'Home - Ares Client' window. The interface includes a top navigation bar with 'Home', 'Process', and 'System' tabs. Below this are search filters for 'User', 'Course', 'Course ID', 'Course Information', 'Instructor Information', 'Username', 'Name', and 'ID'. The main content area is divided into three sections: 'Requests (3 items)', 'System', and 'Daily Processes'.

Requests (3 items)

Awaiting Reserves Processing	1
Item Available at Reserve Desk	1
Item In Processing	1

System

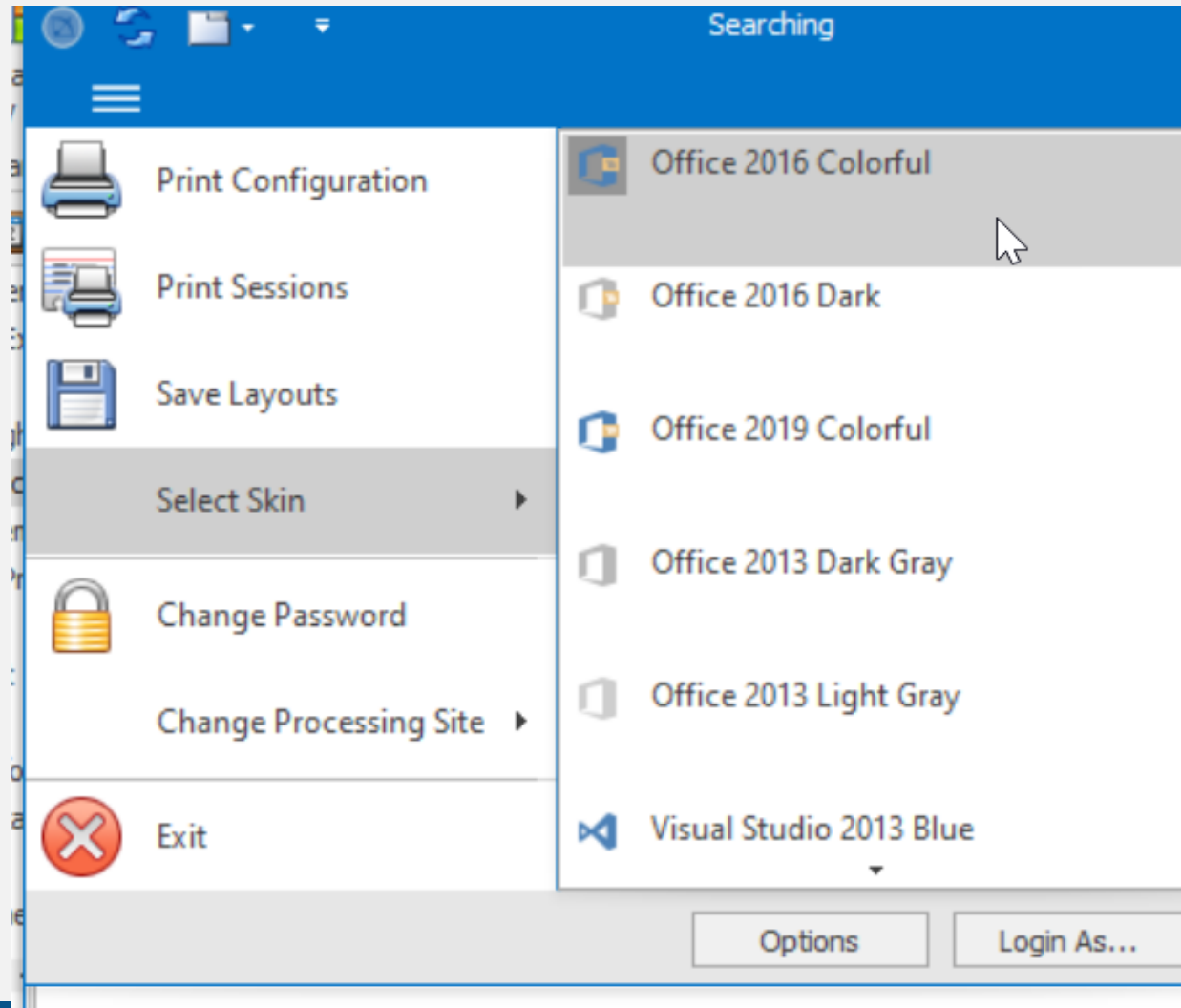
Category	Count
Users to Clear	1
Pending Emails	0
Failed Emails	0
Awaiting Copyright Processing	0
Invalid Links	0

Daily Processes

Process	Run Time
CCC Updater	2/10/2020 8:19 AM
Course and User Load	2/10/2020 8:19 AM
Item Activation	2/7/2020 4:55 PM
Item Cleanup	2/10/2020 8:19 AM
Orphan File Cleanup	2/10/2020 8:19 AM

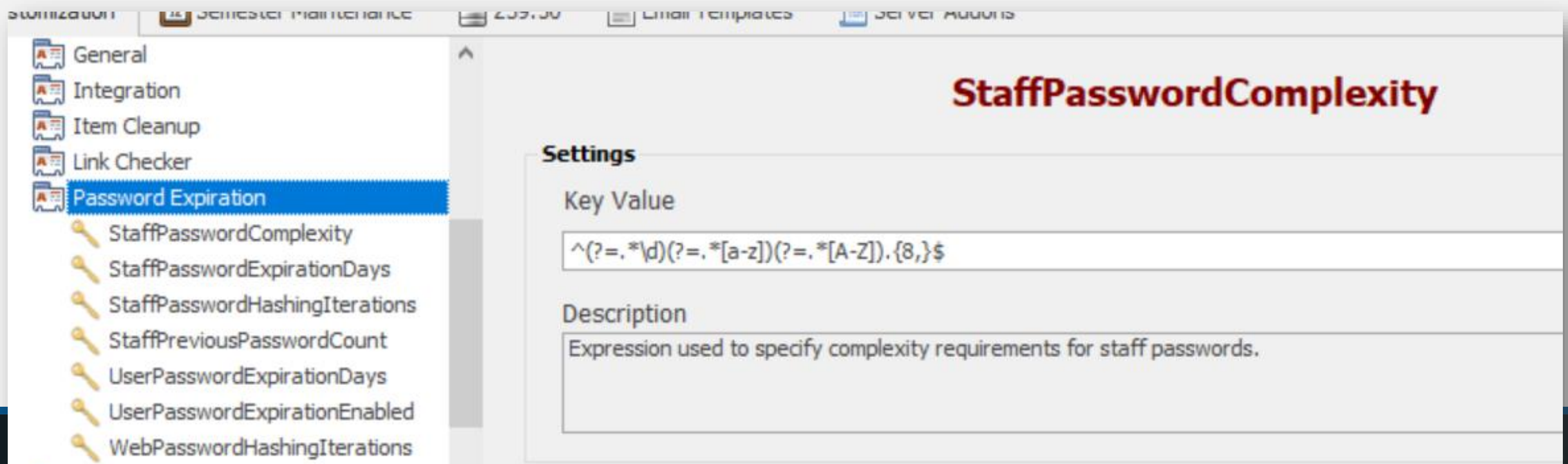
asmith (Secondary Site)

New skin options



Smarter Staff Password Policies

- All staff will need to change their Ares Client password to meet new requirements, upon first post-update login
- 8 characters, with a lowercase letter, an uppercase letter, a number
- Can adjust expiration periods, hashing, and complexity requirements



The screenshot shows the Ares Client settings interface. The left sidebar contains a navigation menu with the following items: General, Integration, Item Cleanup, Link Checker, Password Expiration (highlighted), StaffPasswordComplexity, StaffPasswordExpirationDays, StaffPasswordHashingIterations, StaffPreviousPasswordCount, UserPasswordExpirationDays, UserPasswordExpirationEnabled, and WebPasswordHashingIterations. The main content area displays the configuration for **StaffPasswordComplexity**. Under the **Settings** section, the **Key Value** field contains the regular expression: `^(?=.*\d)(?=.*[a-z])(?=.*[A-Z]).{8,}$`. The **Description** field contains the text: "Expression used to specify complexity requirements for staff passwords."

Multi-Course Item Cloning

The screenshot shows a software interface for managing library items. At the top, there is a toolbar with various icons for actions like 'Find on Shelves', 'In Transit', 'Make Available Electronically', 'Make Available at Desk', 'Email', 'Cancel', 'Scan Item', 'Upload', 'Add Flag', 'Remove Flag', 'Route', 'View Course', 'Clone', 'Import Details', 'Delete', and 'View List'. Below the toolbar, there are tabs for 'Details', 'History', 'Z39.50', 'Copyright', and 'Amazon'. The main area is divided into sections: 'General Information' with fields for Item ID (4), Processing Location (Default Library), Pickup Location (Default Library), Item Type (Monograph), Call Number, Shelf Location, ISxN, Cited In, Reference Number, Instructor Tags, and various checkboxes; 'Availability Information' with fields for Current Status Date (8/14/2020 4:19 PM), Loan Period, Active Date, and Inactive Date; 'Copyright Information' with fields for Page Count, Entire Work Page, % of Work, and Nature of Work; and 'Citation' at the bottom.

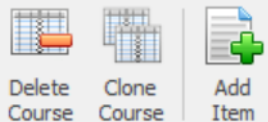
A red-bordered dialog box is overlaid on the right side, titled 'Course' (selected) and 'Shared List'. It contains a search bar and a table with the following data:

Course Id	Name	Course Code	Description	URL	Se
1	Test 1				Ins
2	Test2				Ins
3	Test 3				Ins
4	Test 4				Ins

Below the table is a 'Courses Selected' field with the value '3' and an 'OK' button. A red arrow points from the 'Test 3' row in the table to the 'Courses Selected' field.

Multiple Instructor Support

- Staff Client changes for courses
 - Instructor username moved from Course Detail tab to Course Users
 - Illustrated relationships, easier searching, switching user roles
 - Display name generation & override
- Courses without Instructors alert
- Expanded role mapping for LTI
- New email tags
- ValidationUser deprecated
- Web search adjustments



Options

Details Cross Listings Course Users Course Items (0/0)

Course Details

Course Name	<input type="text"/>	Course ID	113243
Description	<input type="text"/>	Course Code	<input type="text"/>
URL	<input type="text"/>	Course Number	<input type="text"/>
Department	Select a department <input type="text"/>		
Default Pickup Site	<input type="text"/>		
Course Password	This course currently does not use a password.		
Max Copyright Cost	<input type="text"/>	Current Course Copyright	\$0.00
External Course ID	<input type="text"/>		
Registrar Course ID	<input type="text"/>		

Semester Details

Semester	Spring 2021	<input type="checkbox"/> Override Semester Start/Stop Dates?
Start Date	1/11/2021	<input type="text"/>
Stop Date	5/31/2021	<input type="text"/>

User Information

Instructor Name Override	<input type="text"/>	Estimated Enrollment	<input type="text"/>
This field will be automatically generated when instructor changes are saved.		Registered Users	0
Displayed Instructor(s)	<input type="text"/>		



Search
 Add Instructor
 Add Course Proxy
 Add Enrolled User
 Add Authorized User
 Delete
 Change User Type

Search for Users to Add Course User Management

Username	Last Name	First Name	Library Id	Address1	Address2	Address3	City	State	Zip
admin	Administrator		admin						

User Information






Instructor Name Override

Displayed Instructor(s)

Smith, John

New System Category

System

	Category	Count
	Courses Without Instructors	10029
	Users to Clear	0
	Pending Emails	0
	Failed Emails	0
	Invalid Links	4

Email tags

The screenshot shows the 'Email Templates' interface in 'Ares Customization Manager'. The window title is 'Email Templates - Ares Customization Manager'. The interface includes a ribbon with 'Home' and 'Email' tabs, and a toolbar with icons for New, Edit, Copy, Save, Delete, and Cancel. Below the toolbar are navigation tabs for Customization, Semester Maintenance, Z39.50, Email Templates, and Server Addons. The main content area is titled 'Template Details' and contains the following fields:

- Name: ItemCancellation
- Type: Item
- Description: This template is used when cancelling items from reserves. [System Template]
- System Template:
- From Name: <#Customization.EmailFromNameInstructor >
- From Address: <#Customization.EmailFromAddressInstructor >
- Recipient Name: (empty)
- Recipient Address: <#Course.InstructorsEmail >, <#Course.FullProxiesEmail >, <#Course.
- CC Address: <#Customization.EmailFromAddressInstructor >
- Subject: Ares: Item Cancelled

The email body content is as follows:

Dear <#User.Firstname> <#User.Lastname>,

Title: <#Item.Title >
Author: <#Item.Author >

New LMS Mapping Options

LTICongsumers				
Consumer Key	Shared Secret	Instructor Roles	Course Proxy Roles	Ares Web URL
██████████...	Tjé██████████	Instructor		https://ares.library██████████u/aresauth/

Ares API – new keys, new behaviors

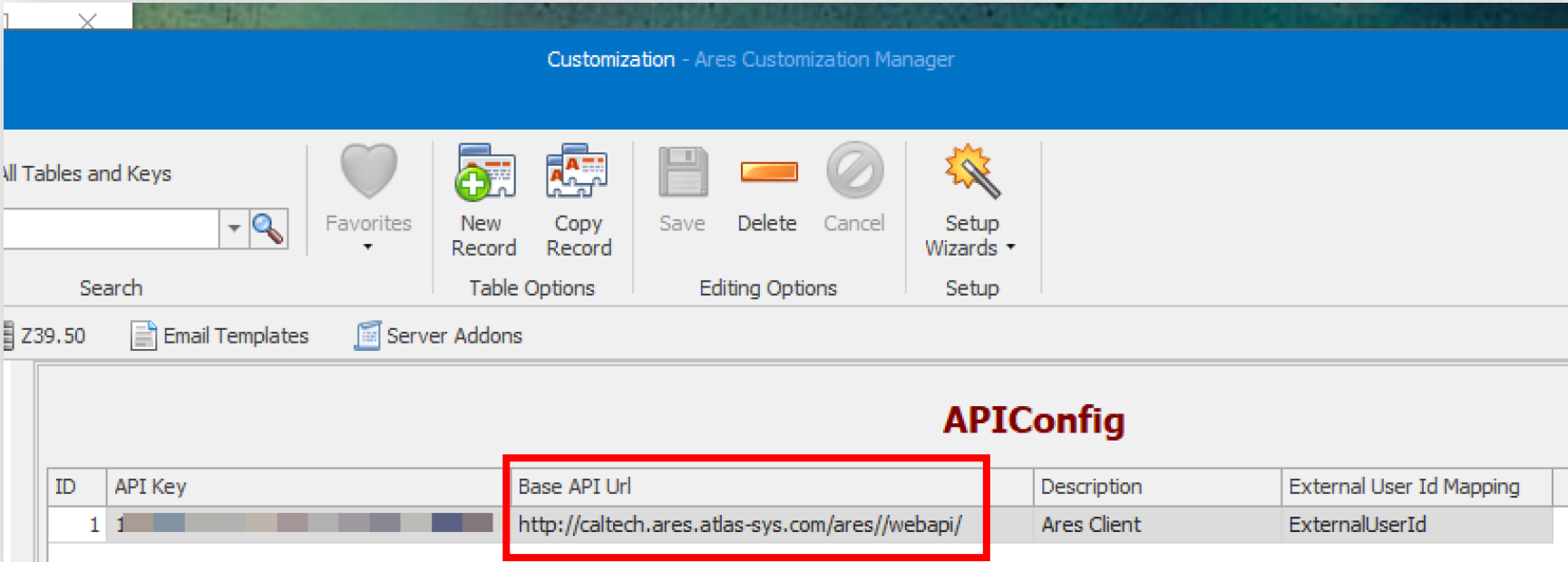
- Server update requires IIS to have default Ares folder set as an application
 - Would have purposefully edited defaults if missing
- Atlas Support happy to assist with updates

Includes:

- APIConfig table population
- Integrated Client Uploads
- New Customization Manager keys

APIConfig Table Pre-population

- Requires review post-update
- Server update requires IIS to have default Ares folder set as an application
 - Would have purposefully edited defaults if missing
- Atlas Support happy to assist with updates

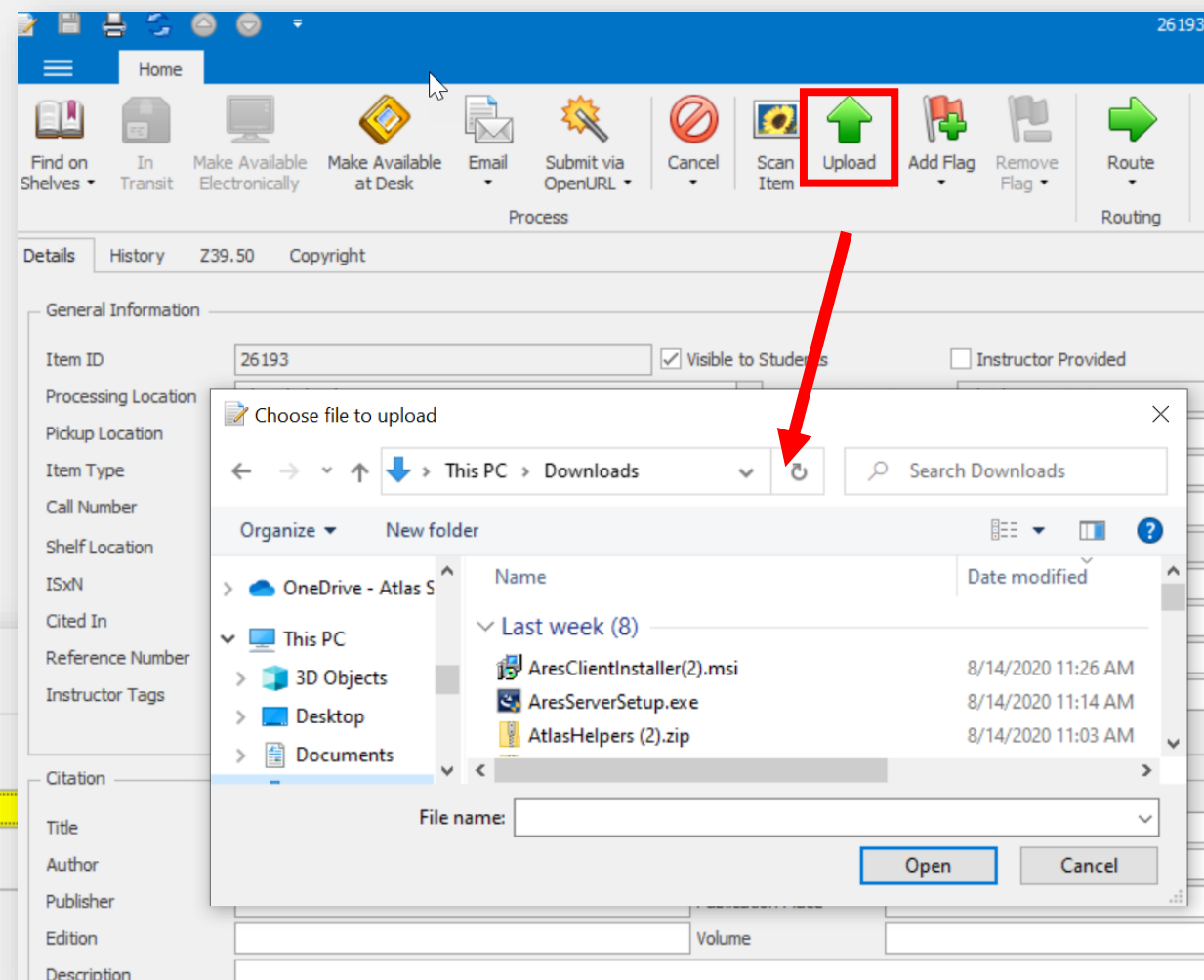


The screenshot shows the 'Customization - Ares Customization Manager' window. The interface includes a search bar, a 'Favorites' icon, and a toolbar with 'New Record', 'Copy Record', 'Save', 'Delete', 'Cancel', and 'Setup Wizards' buttons. Below the toolbar, there are tabs for 'Z39.50', 'Email Templates', and 'Server Addons'. The main area displays a table titled 'APIConfig' with the following data:

ID	API Key	Base API Url	Description	External User Id Mapping
1		http://caltech.ares.atlas-sys.com/ares//webapi/	Ares Client	ExternalUserId

Integrated Staff Client Uploads

- More secure than FTP & Share
- New default for all Atlas servers
 - Removing docsuser FTP account
- Options to control file size and concurrent uploads



ClientUploadMethod

Settings

Key Value

API

Description

Method used for staff clients to upload files to the server. This value is either Share (for a file share), FTP, or API.

New Options to Control API Uploads

APIFileUploadSessionLimit

Settings

Key Value

10

Description

Maximum number of concurrent uploads.

APIFileUploadSessionExpiration

Settings

Key Value

240

Description

Number of minutes before an API upload session expires.

APIUploadTempPath

Settings

Key Value

C:\Ares\AresDocs\tempUpload\

Description

Temporary path on the Ares server used when uploading documents via the API.

MaxUploadSize

Settings

Key Value

150

Description

Maximum filesize permitted for uploads, in MB

ClientUploadAPIConfig

Settings

Key Value

1

Description

If using ClientUploadMethod of API, the APIConfig to be used

Endpoints for Users, Loan Periods, Sites, Items, Shared Lists

- Documentation available with use cases, calls, and details
- Used for item uploads.
- Opens options for integration with other products and insertion into local discovery layers.
- Submit requests for other functions in UserVoice.

Web Updates

- Free-text Markdown
- Adjustments to support Multiple Instructors
- New pages still being developed

Smarter User Password Policies

- All patrons w/ AuthType = AresAuth or PatronAPI will be required to reset password upon first post-update login
- Does NOT affect LMS, RemoteAuth, or LDAP users
- Minimum of 8 characters, with a lowercase letter, an uppercase letter, a number
- Can adjust expiration periods
- Can adjust minimum security requirements (Regex)

STANDARDIZATION SEMESTER MAINTENANCE

- General
- Integration
- Item Cleanup
- Link Checker
- Password Expiration**
 - StaffPasswordComplexity
 - StaffPasswordExpirationDays
 - StaffPasswordHashingIterations
 - StaffPreviousPasswordCount
 - UserPasswordExpirationDays
 - UserPasswordExpirationEnabled
 - WebPasswordHashingIterations

admin - User

Home

Change Password Logon To Web Delete User Email

Instructor Cleared Not Cleared Blocked Disavowed Courses

Trusted Permissions Cleared Status

Details History Courses Proxies

Course ID	Name	Start Date	Stop Date
113244		1/11/2021	5/31/2021

Change Password

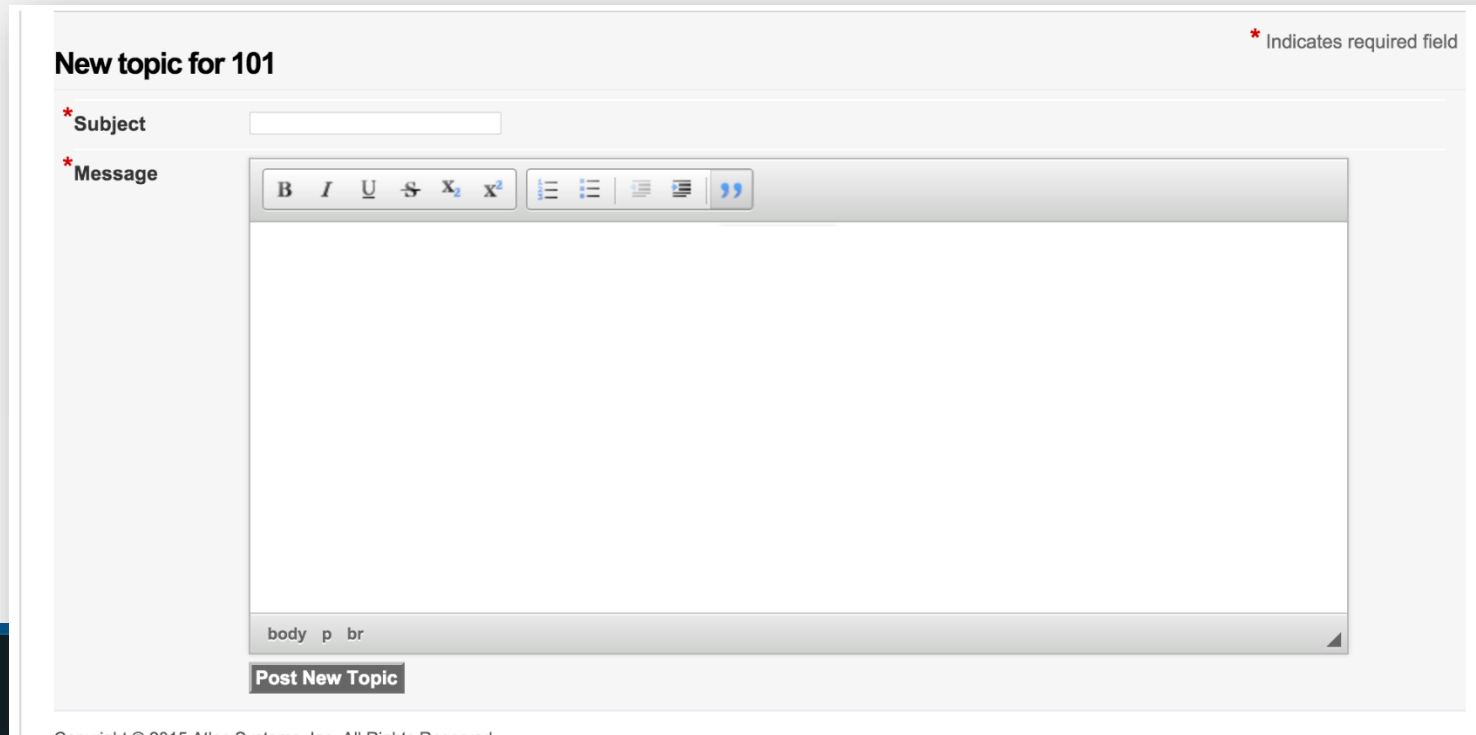
New Password:

Confirm Password:

Force Reset on Login

Free-text Conversion

- Free-text items and message board posts are now converted from HTML using the **Html To Markdown Conversion Utility** and saved in the Markdown format.
 - Contact Atlas Support for assistance with swap after update.



The screenshot shows a web form titled "New topic for 101" with a red asterisk icon and the text "Indicates required field" in the top right corner. The form contains two main sections: a "Subject" field with a red asterisk and a text input box, and a "Message" field with a red asterisk. The "Message" field features a rich text editor toolbar with icons for bold (B), italic (I), underline (U), strikethrough (ABC), link (x), and unlink (x²), as well as list (bulleted and numbered), indent, and quote (double quotes) buttons. Below the editor is a scrollable text area containing the text "body p br". At the bottom of the form is a "Post New Topic" button. A copyright notice "Copyright © 2015 Atlas Systems, Inc. All Rights Reserved." is visible at the very bottom of the page.

Multiple Instructor Adjustments

- **CourseSearch** page will now display a text field search option for new installs. Existing installs will include both the text search and a drop-down option featuring all instructors listed in the CouseUsers table.
- New **InstructorDisplayName** field will display in the Courses table.
 - If no value in the instructor field, a `<#COURSE name="Instructor">` tag will use the auto-generated value in the InstructorDisplayName field.

What can we help you with?

Search



UserVoice

Help decide future features of all your favorite Atlas products!



Video Training Library

Visit the Video Training Library for bite-sized video tutorials on specific topics!



Community

Need help? Browse through the topics and posts for an answer or login and take part in the community.



Submit a request

Do you have a question and can't find an answer? Are you having technical issues? Submit a ticket to our support team!

Knowledge base

Atlas Addons

Addons allow you to add extra functionality to...

ILLiad

A knowledge repository on everything ILLiad.

AtlasBI

Intelligence and reporting analytics system docs.

Ares

Learn how to use and troubleshoot Ares.

Aeon

Aeon documentation and tips and tricks.

Promoted articles

★ ILLiad Downloads

Client Installer For your convenience, below...

★ Ares Downloads

Ares Client Installer This file includes...

★ Aeon 4.1 PCI Release FAQ

The 4.1 update has not been released yet. The L...

★ ILLiad 9.0 FAQ

In this article, we will go over frequently ask...

★ Ares 4.7 Release Notes

Released 30 May 2018 Support for Ares 4.5 en...

★ Aeon 4.1 PCI Security Release Notes

Important Update Information Release Date: 20 M...

★ ILLiad 9.0 Release Notes

Release Date 26 November 2018. Support for IL...

★ Aeon Downloads

Client Installer For your convenience, belo...

★ Aeon 4.0 Release Notes

Aeon 4.0 Highlights Staff can choose to remove...

Support Center

Please visit <https://support.atlas-sys.com> to view product documentation and training videos, connect with colleagues in community forums, and submit support and enhancement requests.

Can't find what you're looking for?

Let us help you right now!

Submit a request

Thank You!
