

# Ares Power Up.

Boosting Productivity  
Using Custom Layouts



**ATLAS  
SYSTEMS**

*Library Excellence Through Efficiency*

# Welcome!

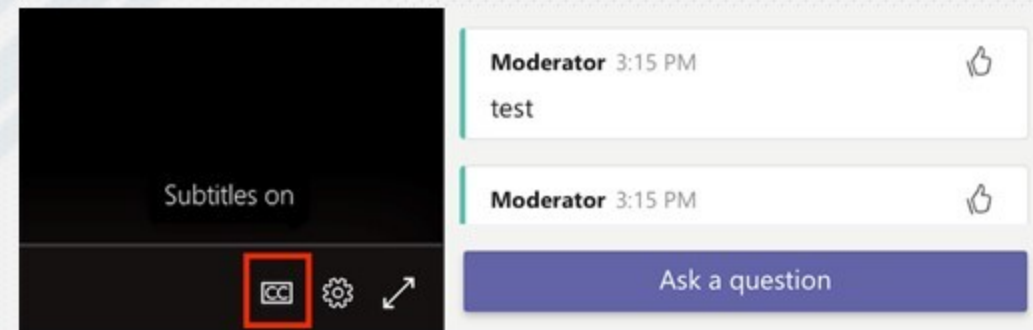
## Kerry Keegan

Training & Library Solutions,  
Ares Product Lead  
support@atlas-sys.com



# Housekeeping

- Microsoft Teams Live Event
  - Only presenters can talk and share video
  - You can type out questions in the Q&A to the right
  - There is a ~30 second delay in the broadcast
  - You can enable closed captioning by hovering in the bottom right of the video and toggling the CC icon
  - Atlas staff will answer questions within the Q&A as well as live as time allows
  - If Q&A doesn't refresh, log out and back in



# Today's Agenda

## I. Design

- Overview, Tools/Actions, Main Page, Queue Lists, Grids, Forms

## II. Management

- Saving, Exporting, Sharing, Regulating

## III. Inspiration

- Acquisitions, Administration, Simplified Lookup, Reporting, Copyright Mgmt.

## IV. Wrap-Up / Q&A

# Design



# Overview

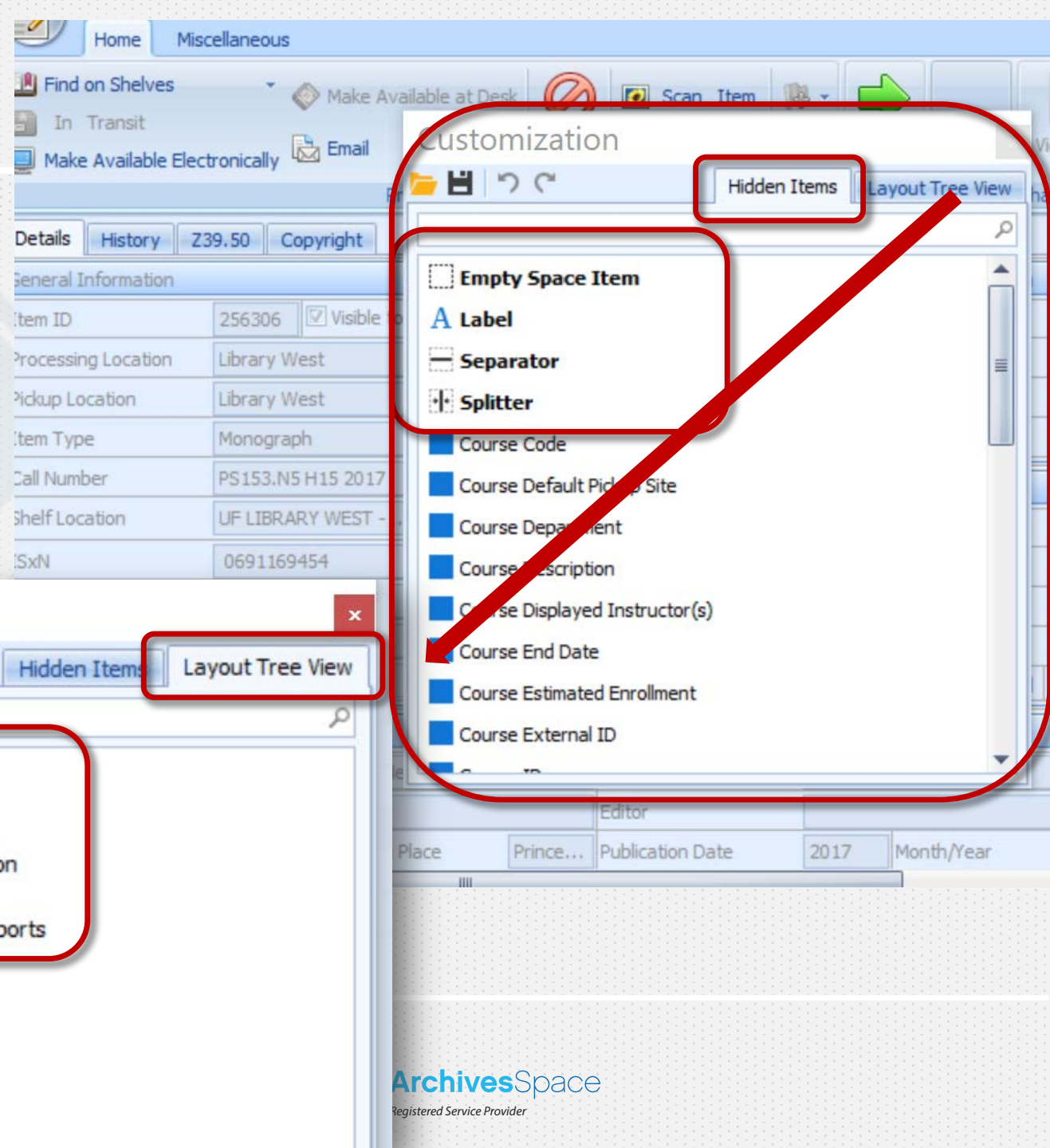
- Staff can customize the layout of the Client main page, forms, grids, queue, and more using the Customization form and Customization window, which are accessible by right-clicking on customizable areas.
- Adjustments are unique to each staff user and saved upon logout.
- Edits remain until a reset to the default view is prompted or layouts are overridden using the Staff Manager.

# Common Actions and Tools

- Order
- Categories
- Hide
- Scroll
- Drag & Drop
- Chooser
- Clear
- Best Fit
- Sort
- Filter
- Group
- Add
- Rename
- Reset
- Export
- Split

# Customizing Form Layouts

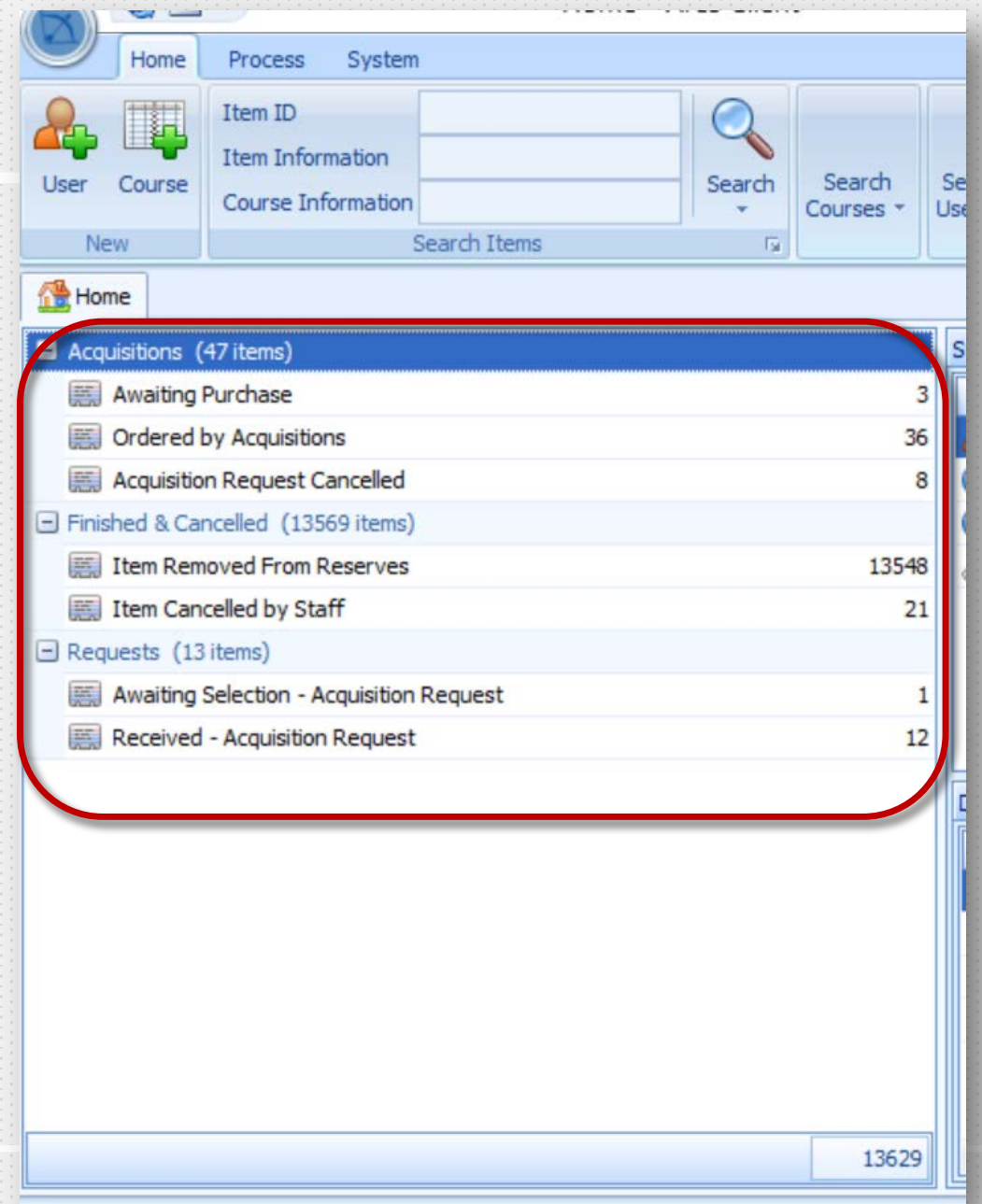
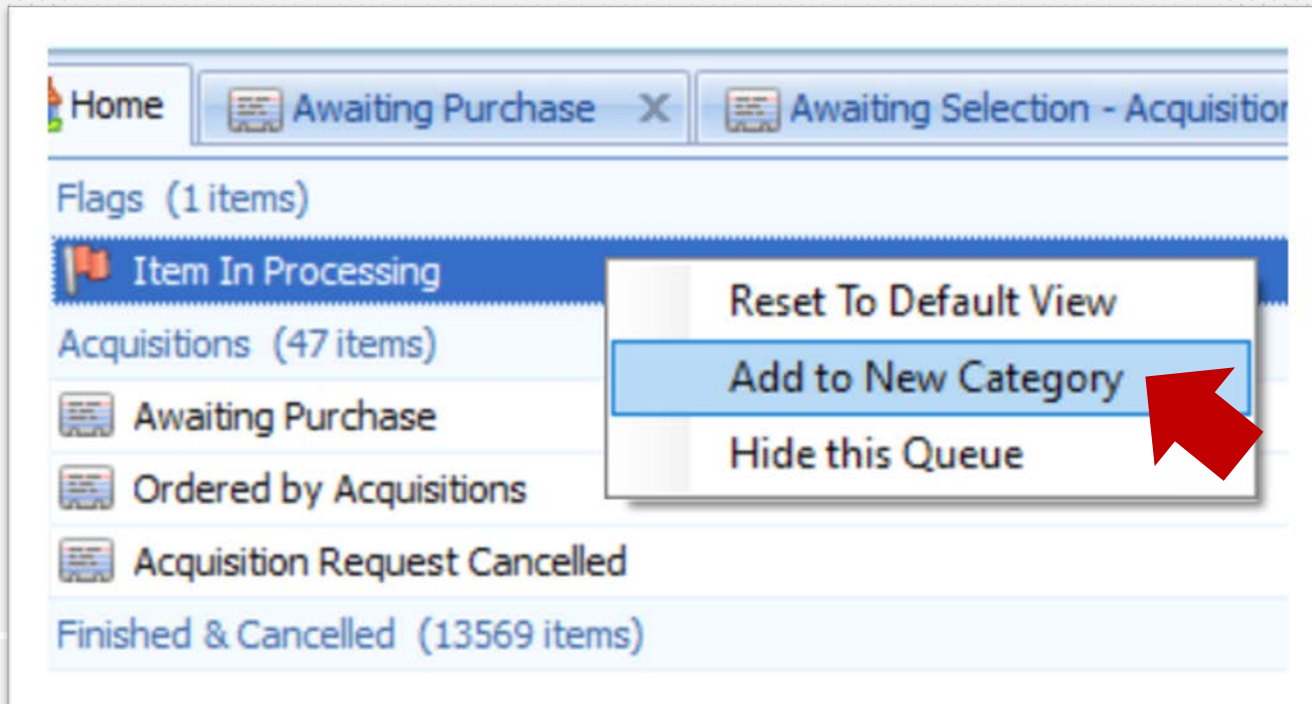
- Right-click in between fields and choose **Customize Form**
  - Background “grays out”
- Customization Form
  - Hidden Items
    - Organization tools
  - Layout Tree View
    - Group names
    - Expand/contract





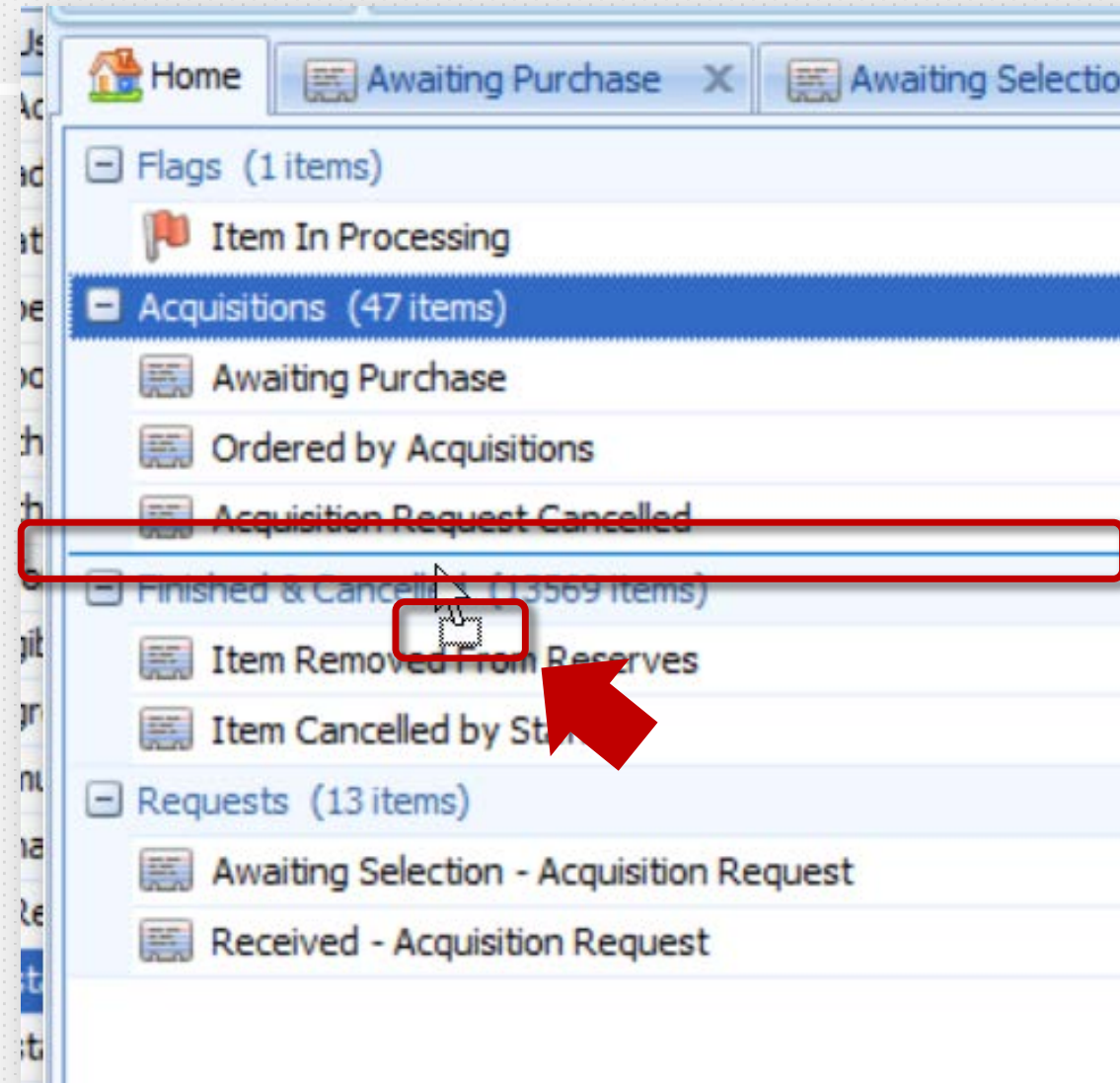
# Main Page

- Display all statuses that have at least one item in that queue.
- Right click on any queue in Statuses Group to show options



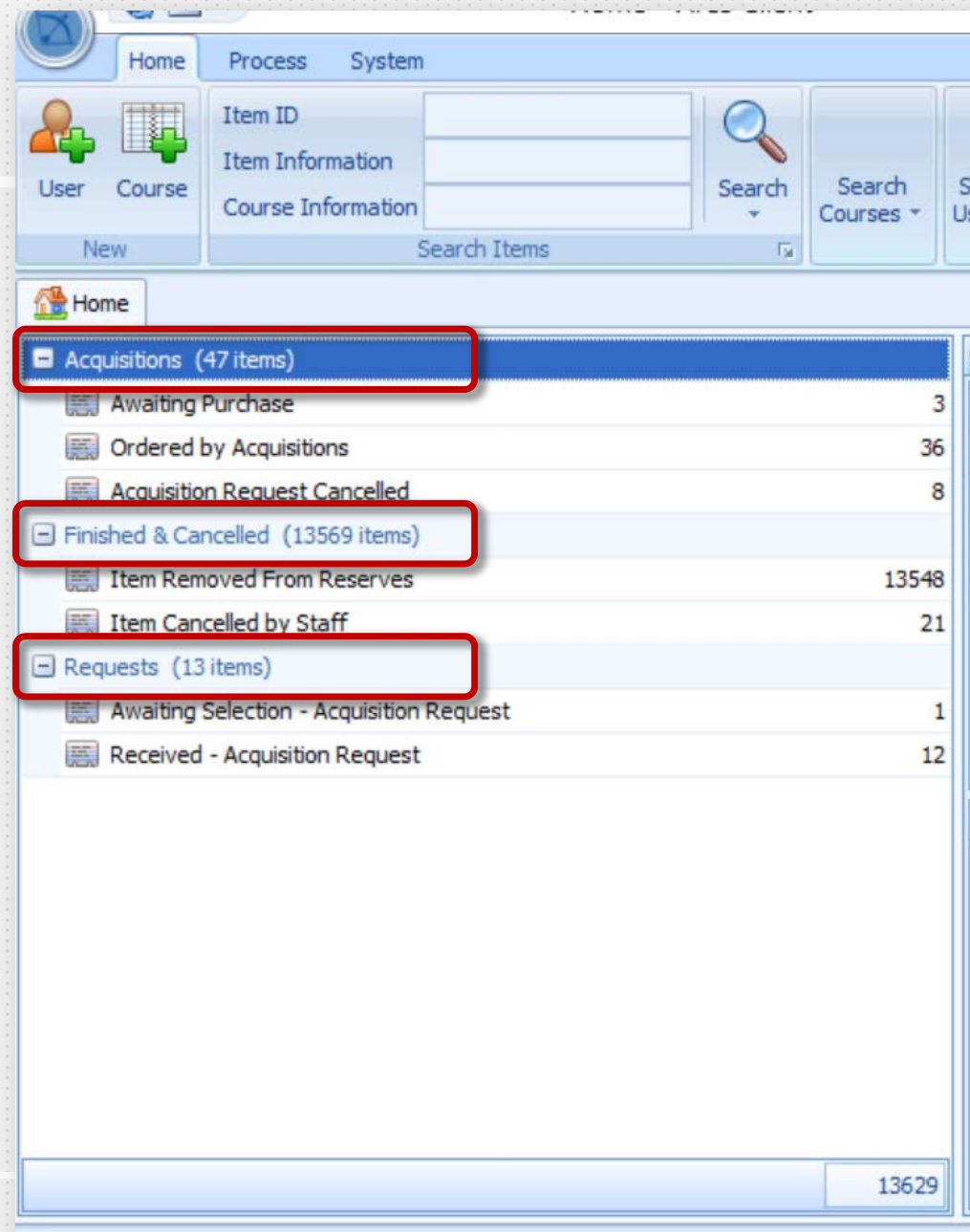
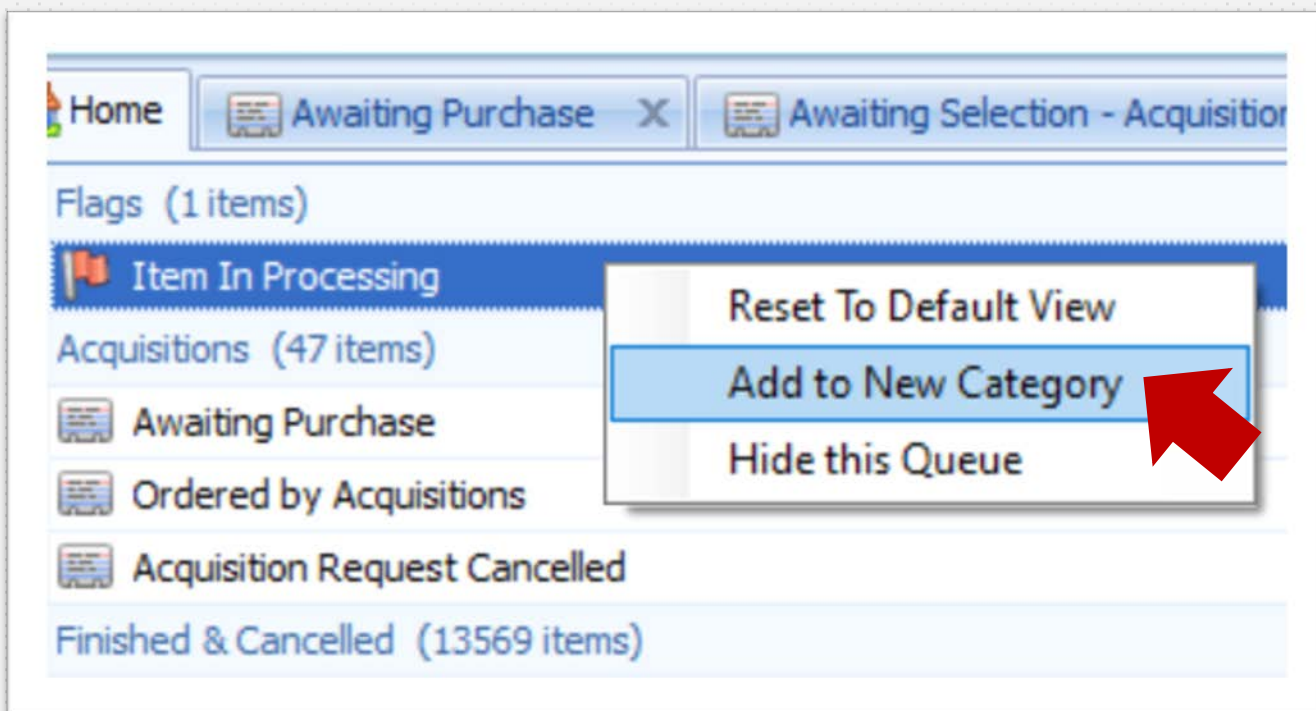
# Drag & Drop Ordering

- Click & drag queues or categories
- Box under the mouse shows movement
- Blue line illustrates end location



# Status List

- Right click on any queue in Statuses Group to show options



# Categories

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- Right-click on a queue and add it to a new category on the grid. For example, if you have certain queues that are a priority, right-click on a queue and create a “Acquisitions” category.

## Quick Tip:

- Group and minimize infrequently used queues
  - Easier to get at and less tricky than hiding, then resetting to default

# Categories Cautions

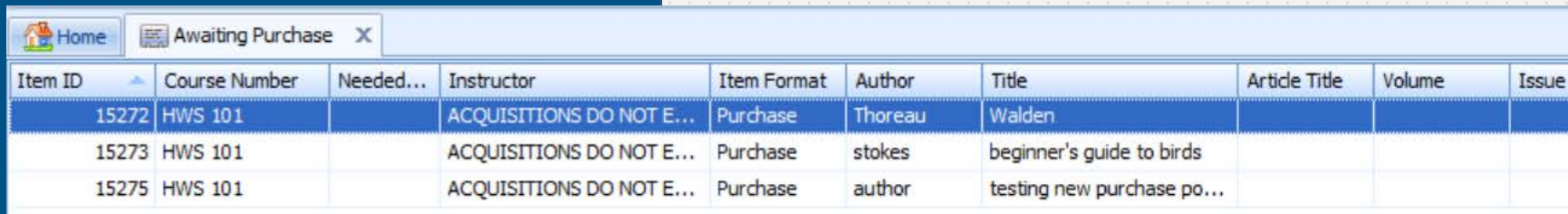
- Custom categories will disappear when empty and re-appear when an item is in an encompassing status
- Right click a category or queue and select "Reset to Default View."



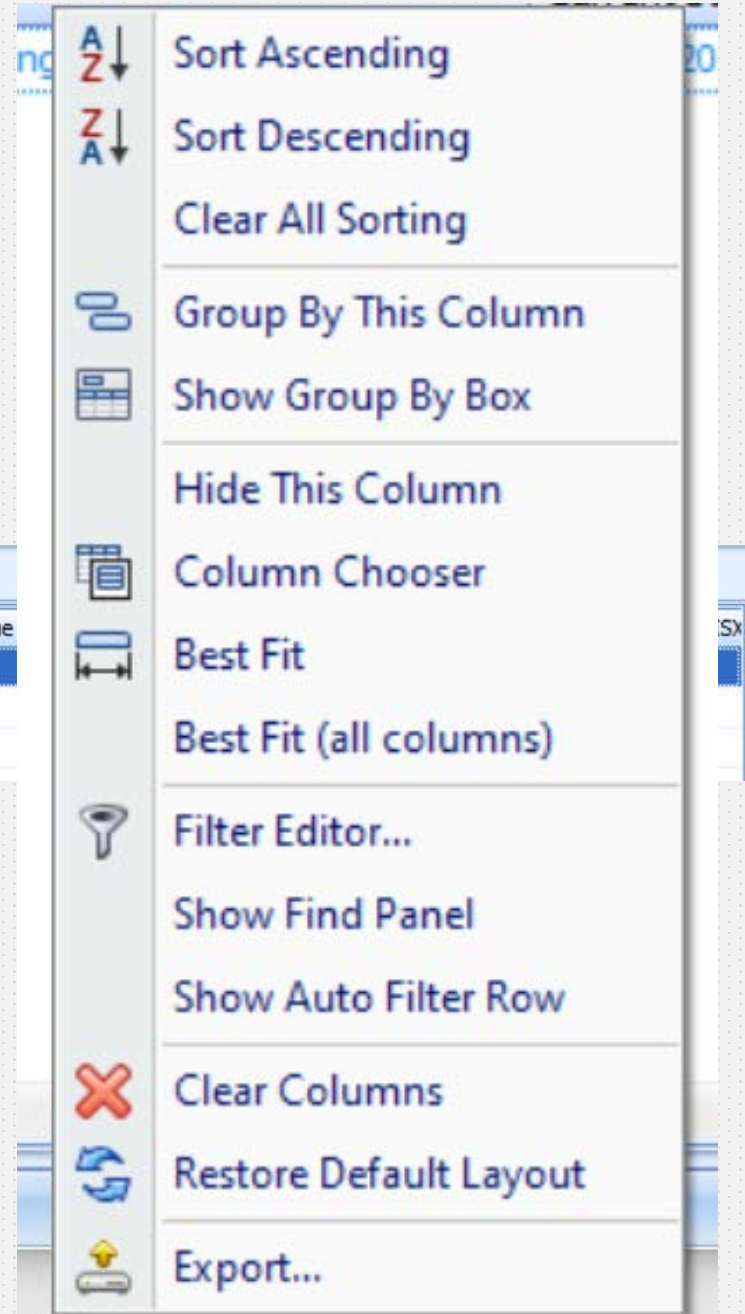
The screenshot displays a hierarchical view of request categories. The top section, titled "Requests (2599 items)", lists various processing stages with their respective counts. The bottom section, titled "Requests (187 items)", shows sub-categories for the current semester.



Category	Count
Item Activation Pending	12
In Recall Processing	1
Item In Processing	1
Item Available at Reserve Desk	354
Awaiting Acquisitions Fulfillment	23
Item Available on Electronic Reserves	2199
Pending Finalization	8
Awaiting Supply by Instructor	1
<b>Requests (187 items)</b>	
Fall 2020	162
Fall 2020 Purchasing	25

# Grids





Item ID	Course Number	Needed...	Instructor	Item Format	Author	Title	Article Title	Volume	Issue
15272	HWS 101		ACQUISITIONS DO NOT E...	Purchase	Thoreau	Walden			
15273	HWS 101		ACQUISITIONS DO NOT E...	Purchase	stokes	beginner's guide to birds			
15275	HWS 101		ACQUISITIONS DO NOT E...	Purchase	author	testing new purchase po...			





-  Sort Ascending
-  Sort Descending
- Clear All Sorting


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-  Group By This Column
-  Show Group By Box




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- Hide This Column
-  Column Chooser
-  Best Fit
- Best Fit (all columns)

---

-  Filter Editor...
- Show Find Panel
- Show Auto Filter Row

---

-  Clear Columns
-  Restore Default Layout
-  Export...

# Form layouts

- Not all forms are customizable
- Can right-click and change field name – will be changed on label only – remains original name in database and in all queries

The screenshot displays a complex web form for library cataloging, organized into several sections:

- General Information:** Includes fields for Item ID (256306), Processing Location (Library West), Pickup Location (Library West), Item Type (Monograph), Call Number (PS153.N5 H15 2017), Shelf Location (UF LIBRARY WEST - General Collection), ISxN (0691169454), Cited In, Reference Number, and Instructor Tags. It also features checkboxes for 'Visible to Students', 'Instructor Provided', and 'Web Proxy', and a 'Current Status Date' (5/26/2020 8:23 AM).
- Availability Information:** Contains fields for 'Needed By', 'Loan Period' (Not a loan), 'Active Date' (8/17/2020), and 'Inactive Date' (12/21/2020).
- Copyright Information:** Includes 'Page Count', 'Entire Work Pages', '% of Work', 'Nature of Work', and checkboxes for 'Copyright Obtained' and 'Copyright Required'.
- Citation:** A detailed section for bibliographic data, including Title (Reaping Something New), Author (Hack, Daniel), Publisher (Princeton University Press), Publication Place (Princeton, New Jersey), Publication Date (2017), Edition, Volume, Issue, and Pages. It also has fields for 'Additional Title' and 'Editor'.
- Notes:** A table at the bottom with columns for 'Added By', 'Note Type', 'Note Date', and 'Note'.

# Management



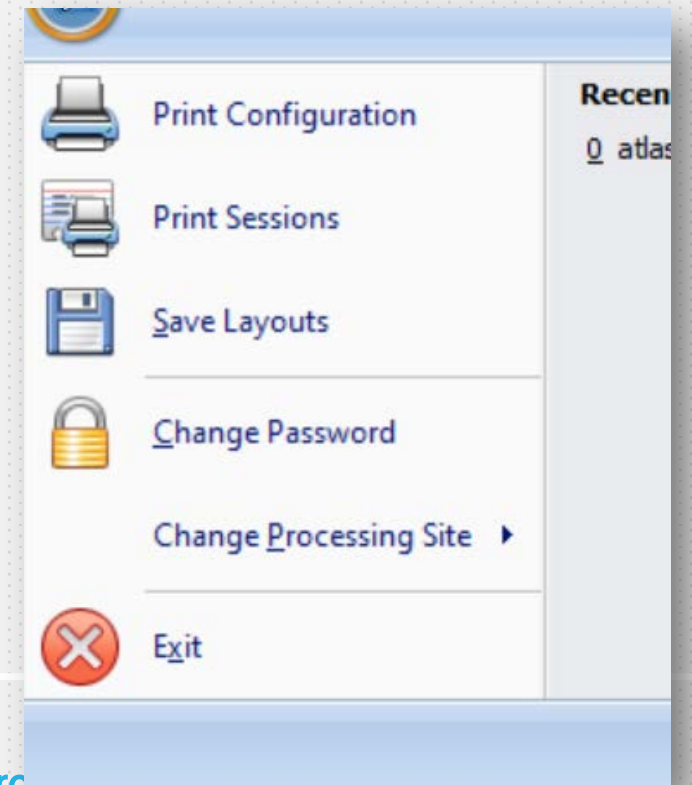


# Saving

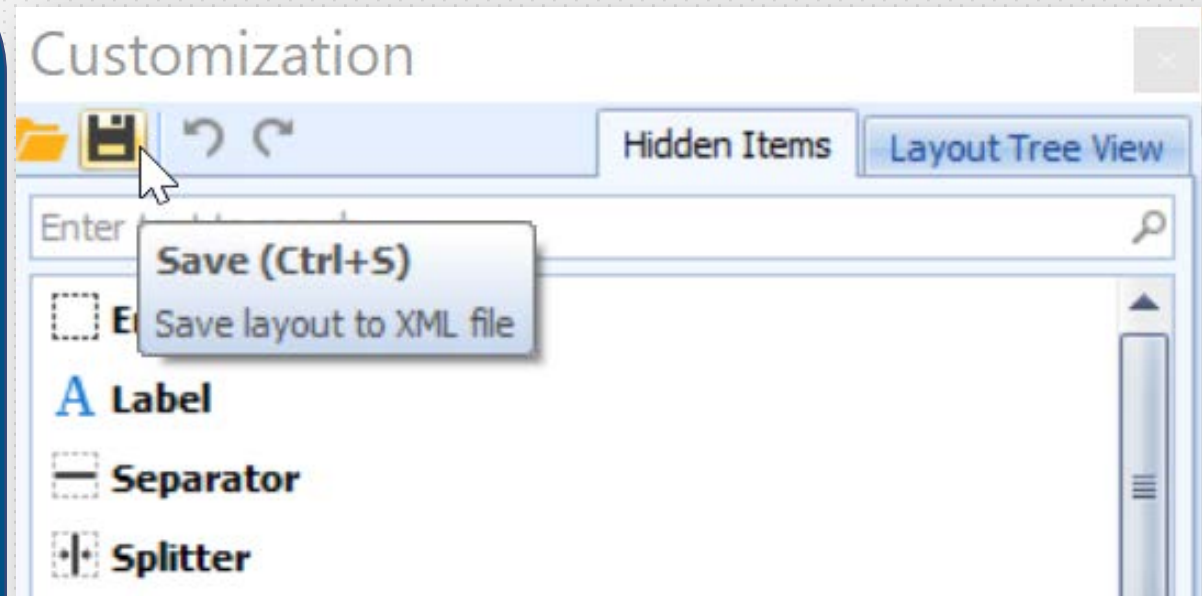
- Ares menu
- Exit prompt

## Quick Tip:

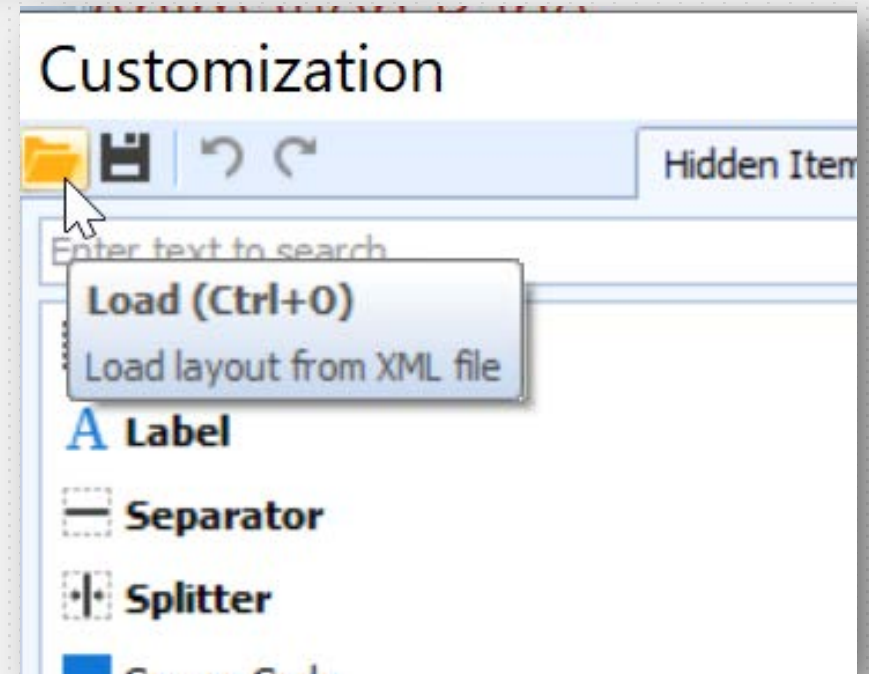
- Messed up? Exit immediately and **UNCHECK** the Save Layouts box



# Exporting and Importing

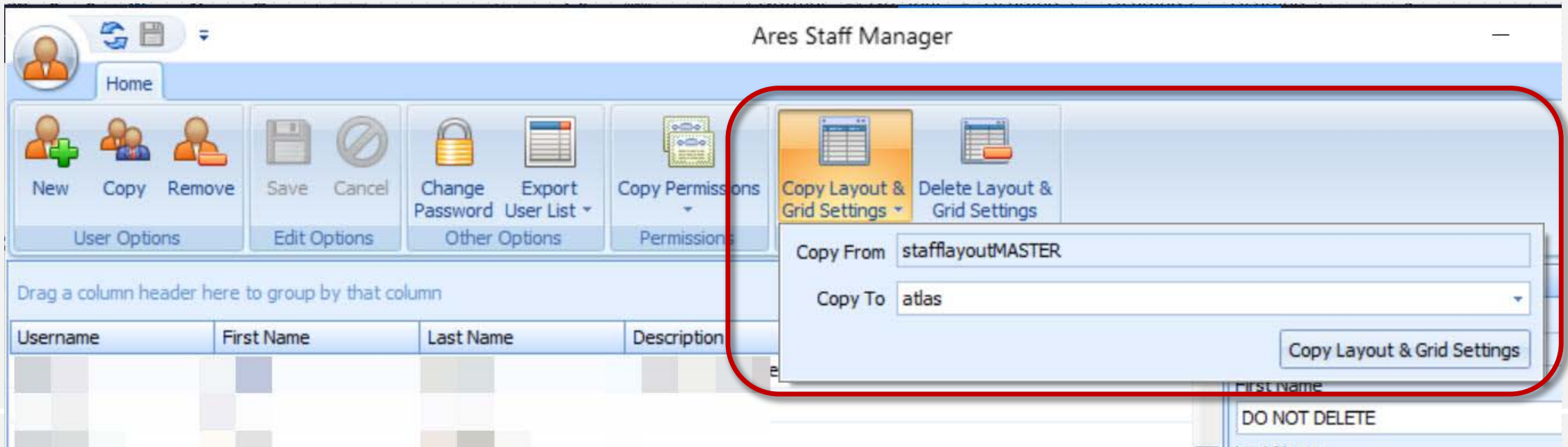


- Saved as XML file for easy transfer



# Sharing

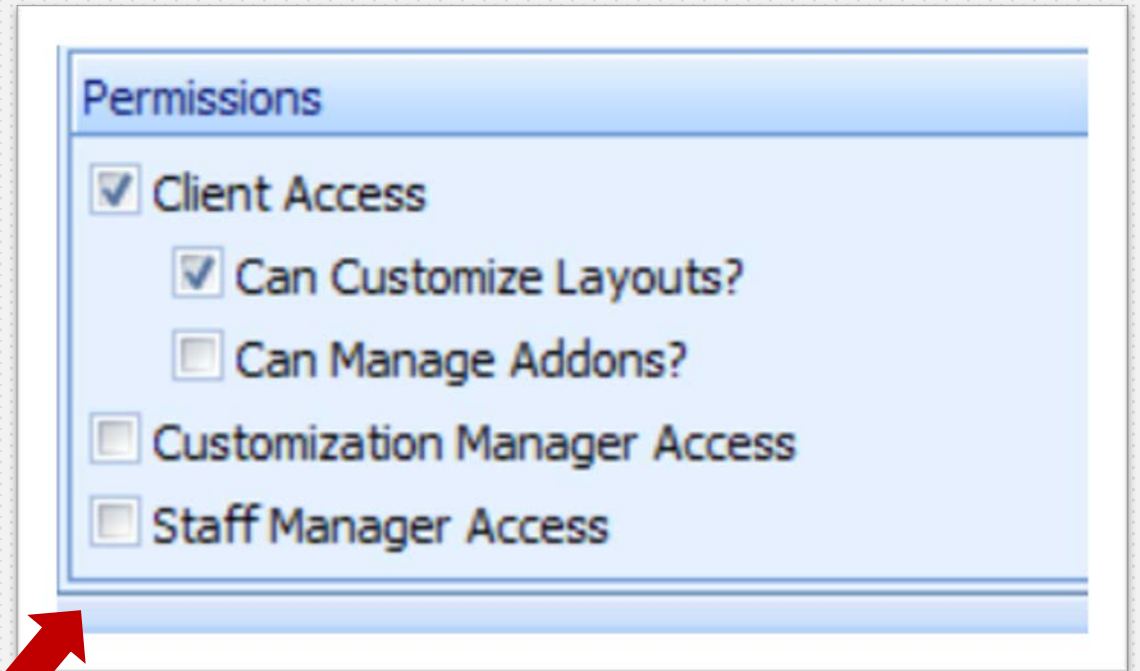
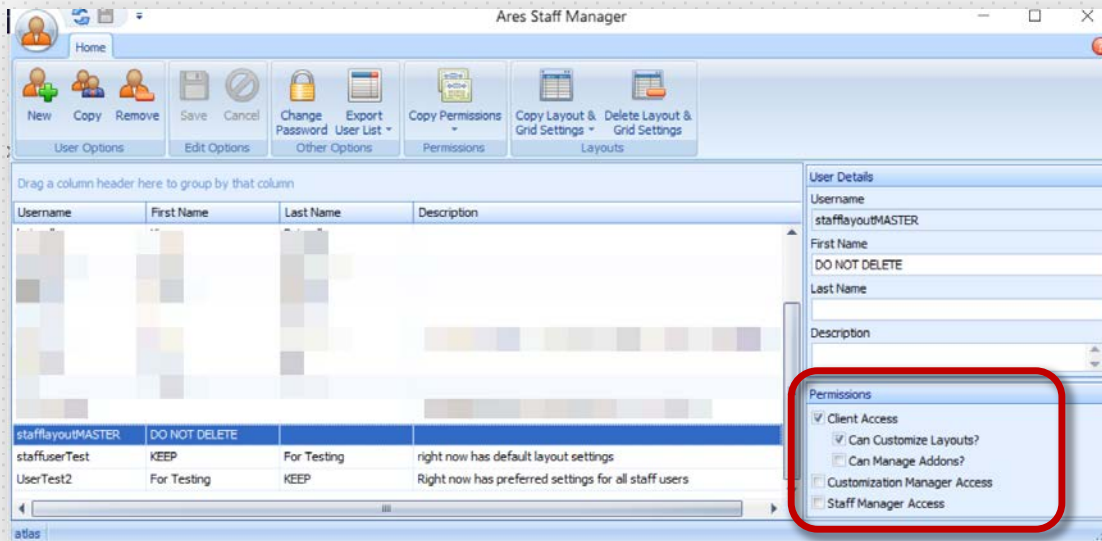
- Use Staff Manager to copy permissions and layout settings from a selected user and apply them to another existing user or create new user with same settings



The screenshot displays the Ares Staff Manager interface. The title bar reads "Ares Staff Manager". Below the title bar is a navigation bar with a "Home" button. The main toolbar is divided into several sections: "User Options" (New, Copy, Remove), "Edit Options" (Save, Cancel), "Other Options" (Change Password, Export User List), and "Permissions" (Copy Permissions). A red box highlights the "Copy Layout & Grid Settings" button in the Permissions section. A dialog box is open over this button, showing "Copy From" set to "stafflayoutMASTER" and "Copy To" set to "atlas". A "Copy Layout & Grid Settings" button is also visible in the dialog box. Below the toolbar is a table with columns for Username, First Name, Last Name, and Description. The table is currently empty.

# Regulating

- Ability to edit layouts is set in Staff Manager
- Restrict to prevent overwriting or undesired navigation



# Recommendations

- Agree on some common customization
- Create a staff template
  - Create a staff template user account in the staff manager. Log into the client as the staff template user account
- Make the desired customizations in the client
- Save the layout and log out of the client
- Back in the staff manager, apply the staff template to other user accounts.
  - Highlight the staff template account, and then use the **Copy Layout and Grid Settings** button to apply the template to each of the other user accounts
- Click on the two blue arrows in the top left-hand corner to save your changes

# Inspiration



# Copyright: Reserves History Grid

## Customized Column Display

The screenshot displays a library system interface with a navigation bar at the top containing 'Home', 'Process', and 'System' tabs. The 'Process Copyright' tab is active, showing a search for 'Journal of Interlibrary Loan, Document Delivery & Information' with ISSN 1072303X. A toolbar includes icons for 'Route', 'Add Flag', 'Cancel', 'Auto Search', 'Search', 'Refresh Fees', 'Copyright Not Required', 'Copyright Obtained', 'Submit Order', 'Special Order', and 'Annual License'. The main area is divided into two panes. The left pane, titled 'Awaiting Copyright Processing', contains a table with columns: Item ID, Username, Pages, Pickup Loc..., Processing..., Current St..., Current St..., Item Type, and Digital. The right pane, titled 'Reserves History', contains a table with columns: Pages, Page ..., Pages E..., and Current Status. Below these panes is a detailed view of the selected record, showing fields for Title, Author, ISSN, Edition, Publisher, Pages (11), Students (25), ISSN (1072303X), Annual License (Pay Per Use), Right (GRANTED), and Terms.

Item ID	Username	Pages	Pickup Loc...	Processing...	Current St...	Current St...	Item Type	Digital
45	Instructor	125-128	DEFAULT	DEFAULT	Item Remo...	1/12/2011	MON	
46	Instructor	117-127	DEFAULT	DEFAULT	Item Remo...	1/12/2011		
47	Instructor	25-46	DEFAULT	DEFAULT	Item Remo...	1/12/2011		
48	Instructor	63-76	DEFAULT	DEFAULT	Item Remo...	1/12/2011	MON	
49	Instructor	75-93	DEFAULT	DEFAULT	Item Remo...	1/12/2011	MON	
50	Instructor	21-25	DEFAULT	DEFAULT	Item Availa...	2/18/2011	MON	
51	Instructor	21-25	DEFAULT	DEFAULT	Item Remo...	1/12/2011	MON	
52	Instructor	21-25	DEFAULT	DEFAULT	Item Remo...	1/12/2011	MON	
53	Instructor	21-25	DEFAULT	DEFAULT	Item Remo...	1/12/2011	MON	
54	Instructor	21-25	DEFAULT	DEFAULT	Item Remo...	1/12/2011	MON	
59	Instructor	21-25	DEFAULT	DEFAULT	Item Remo...	1/12/2011	MON	
63	Instructor	z	DEFAULT	DEFAULT	Item Remo...	1/12/2011	SER	

Pages	Page ...	Pages E...	Current Status
141-152	12	0	Item Removed From Reserves
63-76	14	0	Item Removed From Reserves
75-93	19	0	Item Removed From Reserves

Title	Author	ISSN	Edition	Publisher
Journal of interlibrary loan, document delivery & informat...		1072303X		HAWORTH PRE...

Pages: 11    Students: 25  
ISSN: 1072303X  
Annual License:  Pay Per Use  
Right: GRANTED  
Terms:

hblack (Default Library) 1 of 1 results displayed    ISSN Search

# Acquisitions-Specific

15271 - Item

Home Miscellaneous

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 View List

Process Routing Options Shared Lists

Details History Z39.50 Copyright

General Information				Availability Information			
Item ID	15271	<input checked="" type="checkbox"/> Visible to Students	<input type="checkbox"/> Instructor Provided	<input type="checkbox"/> Web Proxy	Semester	Acquisitions	
Current Status Date	4/7/2020 1:28 PM	Reason for Cancellation				Loan Period	Not a loan
Item Type	Monograph	Document Type	Hard Copy Reserve Item			Active/Inactive Dates	8/15/2050 8/15/2059
Call Number		Digital Location					
Shelf Location		File Size					
ISxN	9780142410707	Barcode					
Classroom Screening?		Item Format	Purchase			Page Count	
Instructor Tags	bekauri						
Copyright Information				Nature of Work		X	
<input type="checkbox"/> Copyright Obtained				<input type="checkbox"/> Copyright Required			

Citation					
Book/Journal Title	An abundance of katherines			Article/Chapter Title	
Author(s)	John Green			Editor(s)	
Publisher	Speak	Publication Place		Loan Publication Date	2012
		Journal Month/Year			
Edition		Volume		Issue	
		Pages			

Course Information			
Course Name	Purchase Portal Requests DO NOT EDIT	Course Number	HWS 101
Instructor / Requestor	ACQUISITIONS DO NOT EDIT OR DELETE		

Notes			
Added By	Note Type	Note Date	Note

Legacy Information		Acquisitions Information			
Legacy Notes		Price		Supplier	
Legacy # Copies		Fund Code			
		POL Number		OCLC Number	
		Format		Book	

Awaiting Selection - Acquisition Request



Details History Z39.50 Copyright

General Information

Item ID: 256306  Visible to Students  Instructor Provided  Web Proxy

Processing Location: Library West Current Status Date: 5/26/2020 8:23 AM

Pickup Location: Library West Barcode:

Item Type: Monograph Document Type: Web Page Link

Shelf Location: UF LIBRARY WEST - General Collection Item Format: EBook

Call Number: PS153.N5 H15 2017 Cited In:

Location: <https://ebookcentral.proquest.com/lib/uf/detail.action?docID=4756762>

Course Displayed Instructor(s): Gilbert Powell

Course Number: ENL6256 ISxN: 0691169454 File Size:

DOI:

Availability Information

Semester Name: Fall 2020

Loan Period: Not a loan

Active Date: 8/17/2020

Inactive Date: 12/21/2020

Copyright Information

Page Count:

Entire Work Pages:

% of Work:

Nature of Work: Copyright Note

Copyright Obtained  Copyright Required

Instructor Tags

Citation

Title: Reaping Something New Additional Title:

Author: Hack, Daniel Editor:

Publisher: Princeton University Press Volume: Issue:

Publication Place: Princeton, New Jersey Month/Year:

Publication Date: 2017 Edition:

Pages:

Personal Copy Handling Notes:

Description

Notes

Staff Note: Unlimited UF ebook

Acquisitions Staff Note:

Reason for Cancellation:

Added By: Note Type: Note Date:

General Information

Item ID: 256306  Visible to Students  Instructor Provided  Web Proxy

Processing Location: Library West Current Status Date: 5/26/2020 8:23 AM

Pickup Location: Library West Reason for Cancellation:

Item Type: Monograph Document Type: Web Page Link

Call Number: PS153.N5 H15 2017 Location: <https://ebookcentral.proquest.cc>

Shelf Location: UF LIBRARY WEST - General Collection File Size:

ISxN: 0691169454 Barcode:

Cited In: OCLC Number:

Reference Number: DOI:

Instructor Tags: Item Format: EBook

Availability Information

Needed By:

Loan Period: Not a loan

Active Date: 8/17/2020

Inactive Date: 12/21/2020

Copyright Information

Page Count:

Entire Work Pages:

% of Work:

Nature of Work:

Copyright Obtained  Copyright Required

Item Activation Pending

Course Name: ENL6256-3A85(13074) - Victorian Literature

Citation

Title: Reaping Something New Additional Title:

Author: Hack, Daniel Editor:

Publisher: Princeton University Press Publication Place: Princeton, New Jersey Publication Date: 2017 Month/Year:

Edition: Volume: Issue:

Description:

Course Name: ENL6256-3A85(13074) - Victorian Literature

Notes

Added By: Note Type: Note Date: Note:

- Add Course Information
- Internal versus External Notes

# Q&A



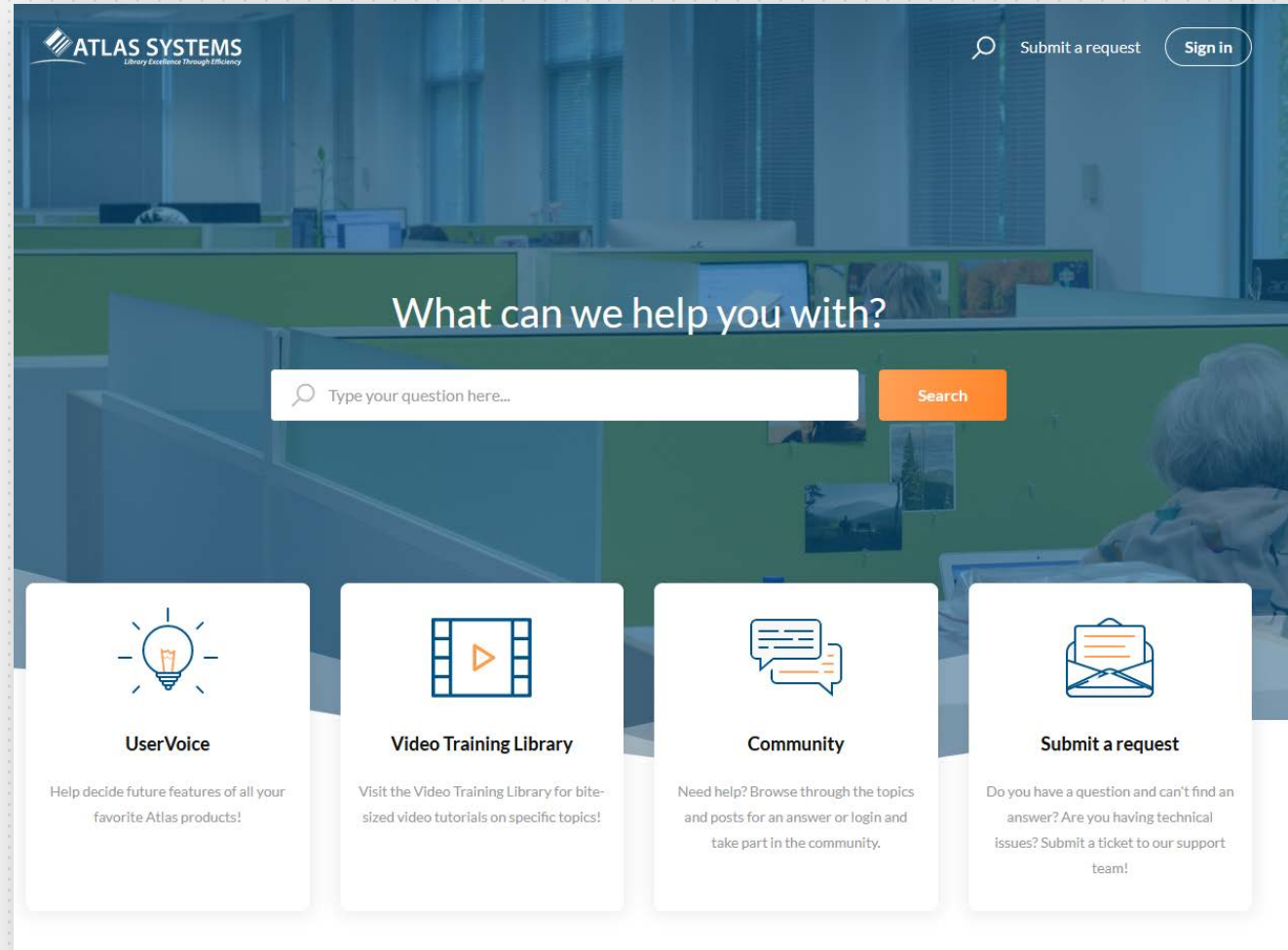
# Final Remarks



# support.atlas-sys.com

Easy access to:

- Ares Knowledge base
- Atlas Community
- UserVoice
- Video Training Library



# Ares 5.0 development wrapping up THIS WEEK

## Product Road Map

- Track the main features for upcoming release
  - Make development process more transparent
- Provide regular updates as release draws closer
- Features will link to documentation, as completed
- Always available at <https://atlas-sys.com/ares-roadmap>

Looking for  
Ares 5.0  
Early  
Adopters

- Are you interested in being one of the first sites to update to Ares 5.0?
- Are you itching to see some .JSON?

Send an email to  
[support@atlas-sys.com](mailto:support@atlas-sys.com)  
to discuss scheduling update

# Access Services Newsletter

- Published quarterly
- Includes news, events, product announcements, partnerships, contests, awards, and more.
- Subscribe here:  
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# Ares Power Up

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Boosting Productivity  
Using Custom Layouts



# Thank You!

Kerry Keegan

