

Ares Tools - Quick Guide

This is a very rough manual on how to use the New Ares Tools that is being released.

Please note that the tools themselves are in Beta testing and there may be a few functions that are not active.. If you run into any problem what so ever please let me know and I will try and fix the application ASAP.. Also if there are any requests please let me know as well..

These's tools are meant as a replacement for the Macro Express Macros.

Requirements for installation:

Microsoft NET framework 3.5 Sp1

Microsoft Office, excel and Access 2003+

ODBC connection to Voyager

ODBCE connection to Ares (Set up with org Ares Distribution.)

Section 1 Main Menus

There are 2 main menus used to gain access to all the options of the Ares Tools Suite. This first menu, Figure 1-2, will open automatically and float on your screen. This menu contains most of the tools available in the system, excluding reports.

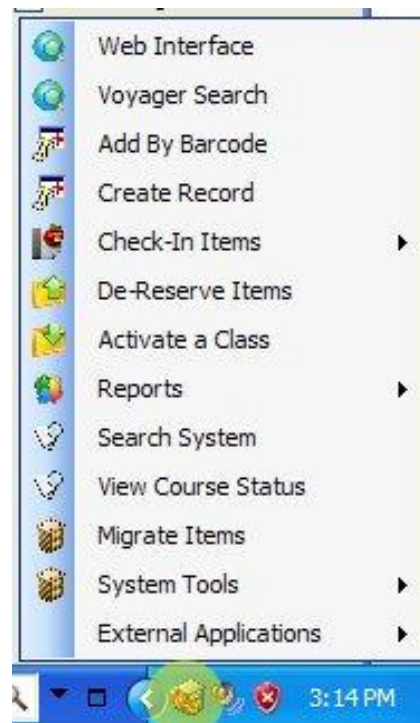
The second menu an icon is located in the system tray, figure 1-1. Right clicking on the menu will allow you to Exit the application, or show or hide the floating menu. Left clicking on the icon will display all the options available on the floating menu plus additional reports.

Note: I don't like screen clutter so I usually close the floating menu and use the system tray menu exclusively. Please feel free to experiment as to which menu you prefer.

1-2 Floating Menu



1-1 System Tray Icon and Menu



Section 2 Web Interface and Searching the catalog

To help hasten the entry of reserve items into the CUL Reserves system I created a few search boxes that allow the user to search a familiar system and send the data from that system directly to a CUL Reserves form.

The first and probably most flexible is the web interface. You can access the web interface by wither clicking its link on the floating menu or on the System tray menu.

The first page that will open is the new Worldcat local catalog for CUL. But before we go into transferring items lets first look at the tools we have available..

- A. Quick links to Library catalogs and reserves resources.
- B. Page navigation buttons –
 - a. Back
 - b. Stop
 - c. Forward
- C. URL Tools
 - a. URL Field
 - b. Go Button
 - c. Copy URL button
- D. Search Resources button.
- E. Web page display.

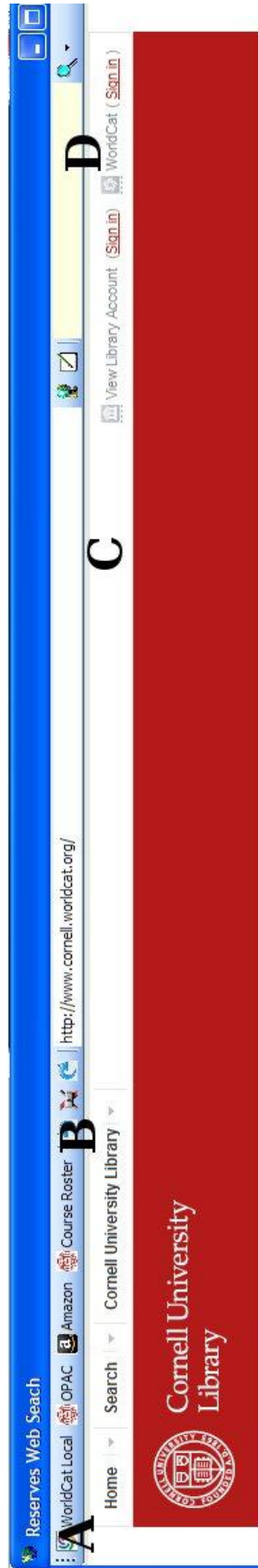
The Quick Links area has some pre programmed links to Worldcat local, The classic OPAC, Amazon, and the CUL Course of Study main page. Click on any of the buttons will navigate the window to that web page.

The navigation buts work the same as those on a standard web browser. It is important to not though that the quick keys, and other navigation features of a classic browser are not available.

The URL tools allow you to navigate to a specific page without having to search one of the provided resource. Clicking the globe icon will navigate to the page specified in the URL box. Clicking the Writing icon will copy the current URI to your clipboard for easy insertion into another document. This tool may be helpful for creating stable links to electronic Resources.

The web search box, a lot like the Google search box on Firefox and internet explore , allows you to enter a search phrase and have it submitted directly to the site. Unlike Standard search box you must specify the search you would like to perform.

2-1 Web Interface



Search Cornell University Library and beyond

Libraries Worldwide

Search

Search with WorldCat®

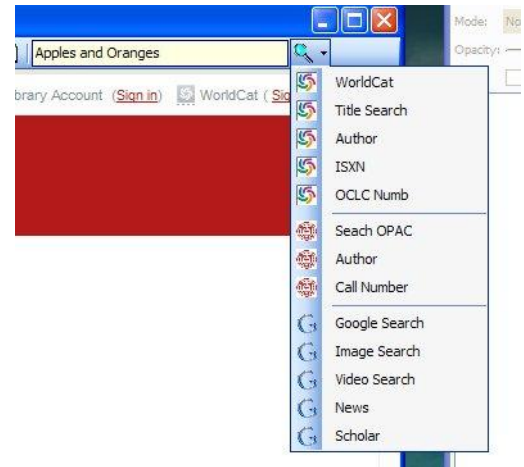
E

1 Searching and importing an Item.

1.1 Searching for items – Web form's Search box

1. If you have not already done so open the Web Search form, figure 2-1.
2. In the Search box, figure 2-1 – D, Enter the item you wish to search for.
3. Click on the magnifying glass to open your search options menu, figure 2-2.
4. In our example we are doing a Title search so we would want to select “Title Search” from the options. You may use any of the options available to you.
5. The system will format your query and submit it to the web service.
6. Navigate the selected site to find the record of the item you wish to import.

2-2 Search Options Menu



1.2 Open Items in Voyager

Items are linked from the web interfaces to the Voyager interface in many different ways. The most useful and accurate is the OCLC number provided in all World cat Local records.

To open an item's detailed record in the Voyager Database:

1. Navigate to the record you wish to import.
2. Select the linking data by highlighting it.
 - a. OCLC Number
 - b. ISSN/ISBN number
 - c. Call Number
 - d. Bib ID
3. Right click and select “Search Voyager” - > and the linking data type.
4. This will open the Voyager record view where the item can be imported.

2-3 Linking Menu



1.3 Voyager Data View, Send records, requesting Items

After an item has been found in the web interface it can then be searched in Voyager's tables using one of the provided search methods.

Please note: The information provided is from Voyager's tables but is NOT being displayed through the Voyager client.

The voyager data screen will show all linked records to the data you provided. You can navigate any of these records by using the buttons at the bottom of the window. Unlike the Voyager item window you have a heads up display of all the items citation information, current status as well as the ability to see a list of all the linked items for quicker navigation.

1.3.1 Sending a Citation to CUL Reserves System

1. Using the navigation buttons at the bottom of the screen move to the item you would like to use for reserves.
2. In the CUL Reserves, Ares, client ensure that the course you would like to add the item to is open. (Edit -> course).
3. On the Record Detail window click on "Send to Ares".
4. The system will pull all the data from the window, open a new Item Record in Ares and send over the information.
5. Click on Save in Ares, and place in the correct queue.

1.3.2 Placing a request in Voyager.

1. Using the navigation buttons at the bottom of the screen move to the item you would like to use for reserves.
2. Ensure the Voyager circulation client is open and has no open windows.
3. Click on "Request" and then on the type of request you wish to place.
4. Ares Tools will automate the Voyager Circulation Client and place your request. The request maintenance window will open when it has finished.

1.3.3 Placing an item "On Reserve"

1. Using the navigation buttons at the bottom of the screen move to the item you would like to use for reserves.
2. Ensure the Voyager circulation client is open and has no open windows.
3. Change the Temp Info on the Record Detail window to your desired settings.
4. Click "Update Voyager"
5. Ares Tools will automate the Voyager Circulation Client and update the items information.

Record Detail

Send To Ares

Request

Create Voyager Record

☒ Update Voyager

Title

Author

Copy

Call Num.

Publisher

Location

Item Type

Chron

ISXN

Pub Date

Pub Place

Location

Item Type

Enum

Barcode

Temp Info

Status

Date

Perm Info

0

of {0}

0

of {0}

Call Numb

Call Numb

Copy

Barcode

1.4 Usage Scenarios

1.4.1 Print list submitted for processing.

1. If not open, open the Web search form.
2. Search for the items being requested in the catalog, Worldcat.
3. Select the OCLC number and right click .
4. Select Search Voyager -> OCLC Numb.
5. Change the Temp Info on the Record Detail form.
 - a. *This step is optional but it will set the reserve type for you in Ares.*
6. Click Send to Ares, this will add the item to your Ares reserves list.

1.4.1.1 Item is charged.

1. Click Request -> Recall.
2. Save Ares record and click Fulfillment -> Recall Item.

1.4.2 Item is located at another library

1. Click Request -> Call Slip.
2. Save Ares record and click Fulfillment -> Recall Item.

1.4.3 Item is in the stacks

1. Save Ares record and click Fulfillment -> Find on Shelf

Section 3 Voyager Search

The Voyager search function is a lot like the Web Search function but searches Voyagers' Databases directly. The benefit is that it bypasses the need to use the web interfaces and drops a step from the search and import process.

You will also notice that the Voyager search window has the same menu options as the Voyager Record Details window. These options work in the same way.

Please note: The search functions in this form are a recreation of the search functions in the Voyager Circulation Client. At the time of the writing of this guide the Cal Number search doesn't work reliably. The pattern used for creating the Normalized cal number used in Voyager has to be recreated, but will hopefully be fixed in the first update.

3-1 Voyager Search

Search Voyager

Search

Sy

Title

Author

Call Numb

Send To Ares

Request

Create Voyager Record

☒ Update Voyager

Title

Author

Copy

Call Num.

Publisher

Location

Item Type

Enum

Barcode

Edition

Pub Place

Location

Item Type

Chron

ISXN

Pub Date

Temp Info

Perm Info

Status

Date

Location

Item Type

0 of {0}

1

2

3

4

Title

Call Numb

Chron

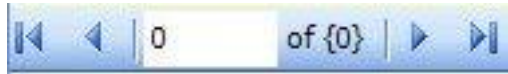

Copy

Barcode

1.1 Placing a search

1. Enter the search string in the first box at the top of the form.
2. Select the type of search to perform.
3. Click “Search”.
4. The system will search Voyager’s database and return the first 1000 records.

1.2 Navigating the search screen

- Double clicking an item in the top data grid will retrieve that records items.
- Item details are displayed in the fields below the data grid. 
- You can navigate through different items using the button provided at the bottom of the screen..
- Clicking on the Expand icon,  will expand the widow and open a second data grid showing all items linked to the record. Clicking on any of these items will show it’s detailed record in the fields above.

1.3 Sending a Citation to Ares

6. Using the navigation buttons at the bottom o the screen move to the item you would like to use for reserves.
7. In the CUL Reserves, Ares, client ensure that the course you would like to add the item to is open. (Edit -> course).
8. On the Record Detail window click on “Send to Ares”.
9. The system will pull all the data from the window, open a new Item Record in Ares and send over the information.
10. Click on Save in Ares, and place in the correct queue.

1.4 Placing a request in Voyager.

5. Using the navigation buttons at the bottom o the screen move to the item you would like to use for reserves.
6. Ensure the Voyager circulation client is open and has no open windows.
7. Click on “Request” and then on the type of request you wish to place.
8. Ares Tools will automate the Voyager Circulation Client and place your request. The request mainitance window will open when it has finished.

1.5 Placing an item “On Reserve”

6. Using the navigation buttons at the bottom o the screen move to the item you would like to use for reserves.
7. Ensure the Voyager circulation client is open and has no open windows.
8. Change the Temp Info on the Record Detail window to your desired settings.
9. Click “Update Voyager”

10. Ares Tools will automate the Voyager Circulation Client and update the items information.

1.6 Usage Scenarios

1.6.1 Print list submitted for processing.

7. If not open, open the Voyager search form.
8. Search for the items being requested.
9. Double click the record of the time you wish to import.
10. Change the Temp Info on the Record Detail form.
 - a. *This step is optional but it will set the reserve type for you in Ares.*
11. Click Send to Ares, this will add the item to your Ares reserves list.

1.6.1.1 Item is charged.

3. Click Request -> Recall.
4. Save Ares record and click Fulfillment -> Recall Item.

1.6.2 Item is located at another library

3. Click Request -> Call Slip.
4. Save Ares record and click Fulfillment -> Recall Item.

1.6.3 Item is in the stacks

2. Save Ares record and click Fulfillment -> Find on Shelf

Section 4 Add by Barcode

The add by barcode function will be the most useful when an instructor drops a batch of items that are already in the system but there is no request in Ares. This function can also be used to update all the Ares information to make sure that the citations in Ares and Voyager Match.

1.1 Searching for an item.

1. Click on the Add By Barcode option on one of the Main Menus.
2. Enter the barcode of the item you wish to add, change and click "OK".
 - a. *If you are using a barcode scanner the Enter at the end of the barcode will automatically submit the request.*
3. The Record detail screen will open containing all the information for that item.

1.2 Importing the record into Ares

1. In the CUL Reserves, Ares, client ensure that the course you would like to add the item to is open. (Edit -> course).
2. On the Record Detail window click on "Send to Ares".
3. The system will pull all the data from the window, open a new Item Record in Ares and send over the information.
4. Click on Save in Ares, and place in the correct queue.

1.3 Updating an Ares Record

1. In the CUL Reserves, Ares, client ensure that the item you wish to update is open. (Edit -> course).
2. On the Record Detail window click on "Send to Ares".
3. The system will pull all the data from the window, open a new Item Record in Ares and send over the information.
4. Click on Save in Ares, and place in the correct queue.

1.4 Usage Scenarios

1.4.1 New requests

An instructor drops a batch of books they would like added to their course

1. Click on Add By Barcode.
2. Enter the barcode of the item and click on "OK".
3. Change the Temp Info to the desired loc/reserve period.
4. Ensure Ares is open to the correct course.
5. Click "Send to Ares"
6. Once transferred, in Ares, click Save, then Fulfillment -> Available at Desk.
7. Ensure Voyager is open.
8. On Record Detail, click Update Voyager.
9. Close record Detail.

Section 5 Creating Records.

The Create Records option of the Ares Tools give you a central for to enter information into which can then be transfer to both Ares and Voyager.

1.1 Creating a new record.

1. Select Create record on one of the main menus.
2. A blank record detail form will open.
3. Enter all the citation information into this form including location and item type.
4. Send the record to Ares using the “Send to Ares Button”
5. In Ares, select Save and then Fulfillment-> Available at Desk.
6. On the Record Detail form select “Create Voyager Record”
 - a. Select New Bib and Holdings if this is the first or only copy being provided.
 - b. Select New Holdings if this is an addition personal copy.
7. Follow the prompts provided.

Section 6 Batch Reserving / De-reserving

The Batch Reserve and De-Reserving process can be dangerous and should be used with cautions.

The process is simple. Once you click on either the Reserve or De-reserve buttons you will be prompted with a dialog asking what items you would like to place on or off reserve. The criteria can be as wide as a full semester or as specific as an individual course.

There are a few points to consider.

- The Batch Reserve application will only place items that are marked as “Available” in Ares “On Reserve”
- The batch remove will remove all items containing barcodes from reserves.
- The batch processing uses Voyagers Pick and Scan Function. The process should not be interrupted while running, or errors could accrue.

Please Note: this function was added to help in the processing of reserve but you should use extreme caution when using it. For instance if you batch de-reserve a course with cross listed items the system will not take this into account.

Section 7 System Search

The system search function is meant as a quick search of the Ares system. The system search allows you to search for an instructor, course number or course title. Unlike the Ares course search this function will also search all cross listings and co-instructors.

To perform a search:

1. Click on the System Search option on one of the Main Menus.
2. Enter the string you wish to search for.
3. Select the type of search you would like to perform.
4. Uncheck "Active" if you would like to search past and future courses.
5. Click "Search". The system will return your matching results.
6. Double click the Course you wish to view. This will open the course detail window, figure.

The Course Items screens displays a lot of information from both the Ares and Voyager Client. This display allows you to see the exact status of all items related to your course.

- A. This Section displays the course information provided in Ares. This is equivalent to the information on the Class Info tab of the Add/Edit Course window.
- B. This area shows all cross listings provided for the current course
- C. This area displays all request for a course no matter what their current status is in Ares. Some points of interest are:
 - a. Item type is displayed.
 - b. Current Voyager Status
 - c. Current Due date if charged.
- D. This area provides a detailed view of the selected record in section C.

Like Record Detail and Voyager Search windows this window also contains options to recall, place call slips, or holds on items.. There is also function to update Ares, and open the items record in the Ares Client.

Course Items

Recall Item

Place Callslip

Place Hold

Ares Functions

Course Number:

Course Name:

Class Code:

Instructor:

Semester:

CourseNumber

Name

ClassCode

Item Type

Title

Article Title

Author

Call Number

Copy

Due

Current Status

Title:

Article Title:

Author:

Call Num.:

Volume:

Journal Month:

Pages:

Issue:

Journal Year:

Barcode

Copy

Perm Info

Temp Info

Processing Status

Location

Item Type

Location

Item Type

Section 8 View Course Status

The view course status is a lot like the Search System, but instead allows you to view all course for a selected location and Semester. Unlike the Search System option the current Voyager status is not included in this view. There is a button that will open any item in the Record Detail window.

Reserves Status

Open Item in Ares

Item Detail - Voyager

Numb.	Desc	Semester	Instructor

Course Number:

Course Name:

Class Code:

Instructor:

Semester:

Item Type

Title

Author

Edition

Copy

Article Title

Status

Status Date

Pickup Loc

OK

Section 9 Ares Item Toolbar

There is a special toolbar which is part of the Ares Tools package that only opens when the Add/Edit Item window is open in Ares.

The toolbar aides in the processing of reserves by giving you some of the same options that are found on the Record Details and Voyager Search Windows.

It is important to note though that the Hold, Recall, and Callslip functions will only work if there is a barcode present in the Item's record.

Section 10 Migration Tool Kit

Part of the Ares Tools system is a set of tools called the Migration toolkit. The Migration toolkit has an snapshot of the Voyager reserves system form last Spring. This tool kit can be used to move over al the item that where on reserve for a course into an new Ares Course.

1 Migrating a course

1. Click on Migrate Items on either Main Menu
2. Select the course you would like to migrate in the data gird provided.
3. In Ares ensure all instructors are in the system.
4. Create a new course using Voyager's linking information as a guide.
5. Save the new course.
6. Add any cross listings / Co-instructors indicated.
7. Save the course.

1.1 Migrating single items.

1. Using the navigation button provided move to the item you wish to migrate to Ares.
2. Click Send To Are - > This item.
3. A New item will be created and all the information imported.
4. In Ares, Save the new record and place in the correct Queue.

1.2 Migrating all Items.

1. Using the navigation buttons move to the first record for the course.
2. Click Send to Ares -> All Items.
3. Wait for the system dialog to close.

The Ares tools system will open new record forms send over the information stored in Voyager and continue until all items have been moved to the new Ares course.

Please Note: The migration tools was mainly meant for creating archives in Ares so instructors could then use them in creating future course, of staff could clone them over to create new courses. If the system is used in this capacity and the semester for the Ares course is set in the past you do not have to move the requests to the archive manual. Ares will automatically move the entire course t the archive that night when it runs its batch processes..

Section 11 Reporting functions / System Tools

1 Reports

1.1 End Semester Cleanup

This report will print a list of all items that should be removed from your selves at the end of a semester. If you wish this report will also include the hold over report which will flag any time that is on a list for a semester of your choice.

1.2 Desk Sheets

This reports generates a list suitable for desk binders, if your location uses them.

1.3 Oversized Files

This is an on-screen report that shows any files that are greater than 2mb on the server. These files can then be downloaded recompressed and re-uploaded to the server, saving server space and increasing response time for patrons.

1.4 Crosslinks / Proxies

No Active

1.5 Reserve Stats

Not Active

1.6 Usage Status

Print usage stats for a give location and semester

1.7 Instructor Letters

Not Active

1.8 Overdue Reserves

This on-screen report lists all items with a location of reserve that are currently overdue. The report lists when it was charged, due and the patron that has the item charged.

1.9 Reserve Fines

This on-screen report shows fines, within the last 7 days, that have been generated against an item with a reserves location. Charge date, due date, and patron information is also displayed.

2 System Tools

2.1 Stale request report

This on-screen report flags all items that have been sitting in a queue for over 15 days. Its main purpose is to flag items that may have been lost in transit, or not returned..

There are still some filters that have to be added to this report, to ignore start queues and holding queues that will normally have items sit in them for an extended period of time.

2.2 Duplicate Course

This on-screen report compares the course listed in Ares and find any duplicate Course numbers in the system. It also compares Semester to make sure that the course is a true duplicate and not a roll over.

2.3 Duplicate External IDs (BlackBoard Moodle)

This on-screen report looks at the External ID field in Ares to see if more than one course shares the same ID.. If more than one course has the same ID this will cause problems with Blackboard.

2.4 Duplicate Barcodes

This on-screen report checks course for duplicate barcodes. This is only at the course level where no item should have the same barcode as another item in the same course.

2.5 Proxy Requests / Mismatched Names

This on-screen report searches the Ares tables and returns if anyone has placed text in the Course Description field, for proxy TA requests, or if the instructor in the system does not match the instructor listed in the Course Instructor field.

This report also runs automatically at startup and every 20 minutes. If there are items that should be addressed a balloon will appear in the system task bar.

2.6 Hold Over Report

This is an on-screen version of the Hold Over Report incorporated with the Semester End Report. The onscreen version currently looks at all course no matter the semester. This will be changed to only look at different semester in the final release.

Section 12 To Do..

The system is fairly complete as is but there are a few things that still need to be completed or added. Most of these includes reports and for working with archive courses in Ares..

If you have any suggestions or problems please contact me.

Tom Trutt