

Aeon 4.0

Concierge Feature Overview

New Features

- User Record Attachments
- Transaction Flags in Grid Views
- Create New Requests from External File
- Customizing Web Pages-Based on User Status
- Prevent Uncleared Users from Submitting Requests
- Anonymize Users

User Record Attachments

- Signed documents
- Copies of credentials

Transaction Flags in Grid Views

- View Flags on a request in a grid view
- Customize grid view to facilitate viewing

Create New Requests from an External File

- All new requests will be linked to one user
- Only import from Excel
- Columns must be labels with Aeon field names
- One error will cause entire process to fail

Excel Example

The screenshot shows the Microsoft Excel interface with the following data in the spreadsheet:

	A	B	C	D	E	F	G
1	DocumentType	ItemAuthor	ItemTitle	ItemSubTitle	ItemDate	Location	SubLocation
2	Manuscript	Greenfield, Abigail.	Family Correspondence	T. J. Greenfield--Correspondence with	1923	Greenfield Collection	Box 1, Folder 1
3	Manuscript	Greenfield, Abigail.	Family Correspondence	T. J. Greenfield--Correspondence with	1924	Greenfield Collection	Box 1, Folder 2
4	Manuscript	Greenfield, Abigail.	Family Correspondence	T. J. Greenfield--Correspondence with	1925	Greenfield Collection	Box 1, Folder 3
5	Manuscript	Greenfield, Abigail.	Family Correspondence	T. J. Greenfield--Correspondence with	1926	Greenfield Collection	Box 1, Folder 4
6	Manuscript	Greenfield, Abigail.	Family Correspondence	T. J. Greenfield--Correspondence with	1927	Greenfield Collection	Box 1, Folder 5
7	Manuscript	Greenfield, Abigail.	Family Correspondence	T. J. Greenfield--Correspondence with	1928	Greenfield Collection	Box 1, Folder 6
8	Manuscript	Greenfield, Abigail.	Family Correspondence	T. J. Greenfield--Correspondence with	1929	Greenfield Collection	Box 1, Folder 7
9	Manuscript	Greenfield, Abigail.	Family Correspondence	T. J. Greenfield--Correspondence with	1930	Greenfield Collection	Box 1, Folder 8
10	Manuscript	Greenfield, Abigail.	Family Correspondence	T. J. Greenfield--Correspondence with	1931	Greenfield Collection	Box 1, Folder 9
11	Manuscript	Greenfield, Abigail.	Family Correspondence	T. J. Greenfield--Correspondence with	1932	Greenfield Collection	Box 1, Folder 10
12	Manuscript	Greenfield, Abigail.	Family Correspondence	Maye Hummel--Correspondence with	1923	Greenfield Collection	Box 1, Folder 11
13	Manuscript	Greenfield, Abigail.	Family Correspondence	Maye Hummel--Correspondence with	1924	Greenfield Collection	Box 1, Folder 12

Customizing Web Pages-Based on User Status

- Allow customization of options available to a patron according to status
- Example
 - Unaffiliated users can make Photoduplication requests, but view materials in the reading room
- Options for user status (i.e. Faculty, Staff, Affiliate, etc.) and Clearance status (i.e. Cleared, Blocked, etc.)
- Managed via web editing

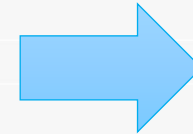
Prevent Uncleared Users from Submitting Requests

- Alternate landing page provided for users who are not cleared
- Opt-in only

Customizing Web Pages-Based on User Status

- Enhance options based user status
- i.e. Faculty, Staff, Affiliate, etc.

Requests <ul style="list-style-type: none">Review RequestsOutstanding RequestsCancelled RequestsHistory RequestsAll RequestsView Notifications	*ID Number 56841654 IRELAND
Orders <ul style="list-style-type: none">Order EstimatesOrder BillingDelivered Items	*E-mail Address bono@u2.com
Events <ul style="list-style-type: none">Events	*Daytime Phone 01-26548
Preferences <ul style="list-style-type: none">Change User InformationChange Password	*Primary Address Line 1 456 Zooropa Drive
About Aeon	Primary Address Line 2
	*Primary Address City Dublin
	*Primary Address State
	*Primary Address Country Choose a country
	*Primary Address Zip
	Alternate Address Line 1
	Alternate Address Line 2
	Alternate Address City
	Alternate Address State
	Alternate Address Country Choose a country
	Alternate Address Zip
	*Status Faculty
	*Department Punk Rock
	Research Topics
	Share Research Topics?
	Submit Information Cancel - Exit to Main Menu



Customizing Web Pages-Based on User Status

- Managed via web editing

Aeon
Choose an option from the choices below.
You currently have 39 active requests from your available limit of 5.

- **Logoff paulh**
- **Main Menu**
- **New Request**
 - Photoduplication
- **Orders**
 - Order Estimates
 - Order Billing
 - Delivered Items
- **Events**
 - Events
- **Preferences**
 - Change User Information
 - Change Password
- **About Aeon**

No Requests

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Options for Unaffiliated Users

Aeon
Choose an option from the choices below.
You currently have 39 active requests from your available limit of 5.

- **Logoff paulh**
- **Main Menu**
- **New Request**
 - Default
 - Monograph
 - Serial
 - Manuscript/Archives
 - Photoduplication
- **Requests**
 - Review Requests
 - Outstanding Requests
 - Cancelled Requests
 - History Requests
 - All Requests
 - View Notifications
- **Orders**
 - Order Estimates
 - Order Billing
 - Delivered Items
- **Events**
 - Events
- **Preferences**
 - Change User Information
 - Change Password
- **About Aeon**

No Requests

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Options for Affiliated Users

Anonymize Users

- Breaks the link between users and their request history
- Transactions maintained
 - Associated with anonymized users (random number rather than username)
 - Statistics and reporting still functional
- Not Reversible
- Not for those with a Shared User Database



New Features

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Update

- Contact us to schedule update
 - Hosted @ Atlas
 - Locally Hosted
- Client update
 - Does require administrative privileges

Contact Us Anytime

support@atlas-sys.com
800-567-7401 x1