

The Aeon Client is highly customizable. As with your web pages, you can edit the Aeon client to reflect the fields and workflows you use on a regular basis. Staff with appropriate permissions have the ability to customize the Aeon Client forms and grids, which allows staff to remove unused fields and columns from your site's instance of Aeon.

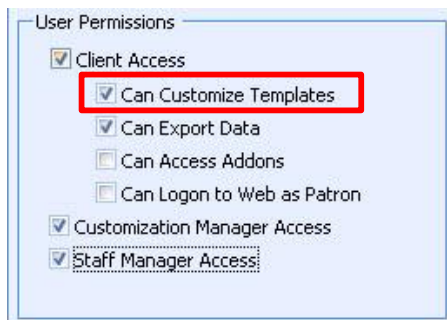
Using the Staff Manager

Before customizing the client, you must first review settings in the Aeon Staff Manager. You will update user permissions for staff that will allow template customizations. Then, you will create a template and rename certain fields, so that they display differently in the Aeon client.

<https://prometheus.atlas-sys.com/display/aeon/Aeon+Staff+Manager>

Users Tab

The Users tab in the Staff Manager controls all logins for the Aeon client. Each user can also be assigned specific permissions, based on what functions they should be able to perform in the client. These include permission to customize the Aeon client templates. To enable editing, you must check the “Can Customize Templates” box.



Once a staff user's permissions are updated, they will be able to create templates and edit Client forms and grids.

Creating Layout Templates

<https://prometheus.atlas-sys.com/display/aeon/Creating+and+Assigning+Templates+to+Staff+Users>

Aeon has a general template to display fields and grids by default, but you can create a new template to customize the layout to fit your institution better. To create a new template, navigate to the Template tab and click the New button. In the Create Template box, give the template a name. Aeon will record the creation date and creator username. You can also add a Description in the Template Details box.

Users Field Customizations Templates Staff Sessions			
Name	Description	Modified Date	Modified By
Archives Staff		10/29/2015 2:12 PM	atlas
Staff		10/7/2015 2:19 PM	atlas

If you want to remove a template, highlight the template in the grid and click the Remove button. *USE CAUTION* when removing a template, as it will change the Aeon client display for all staff users assigned to that template.

Field Customizations

<https://prometheus.atlas-sys.com/display/aeon/Renaming+and+Hiding+Aeon+Client+Fields>

Users Field Customizations Templates Staff Sessions			
Template Name	Field Name	Display Name	Hidden
Click here to add a new row			
Archives Staff	ItemInfo1	Restrictions	<input type="checkbox"/>
Staff	CallNumber	Call Number	<input type="checkbox"/>
Staff	ItemAuthor	Author	<input type="checkbox"/>

Field Customizations control the display labels in your Aeon Client. The Field Name is the database name assigned by Aeon. Creating a field customization allows you to change the name of that field in the Aeon client, based on the templates you have created.

You can find more information about field names here:

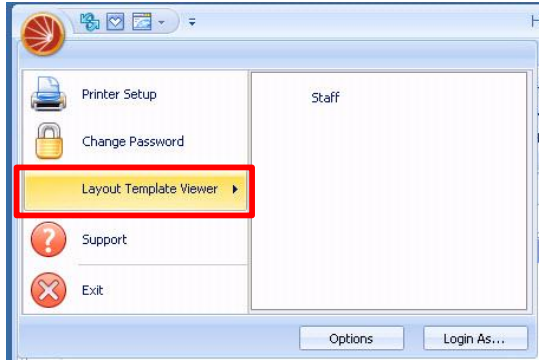
<https://prometheus.atlas-sys.com/display/aeon/Key+Aeon+Data+Tables>

Now that you have completed these steps in the Staff Manager, you are ready to edit the client template.

Customizing Layout Templates

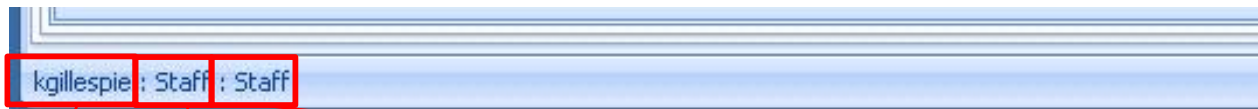
Entering Template Edit Mode

Open the Aeon client (if you had it open already when you were making changes in the Staff Manager, you'll need to restart) and navigate to the Aeon logo in the top left corner. Choose the Layout Template Viewer option and select the template you created in the Staff Manager. Anyone with permissions to edit client templates will have access to edit all templates.



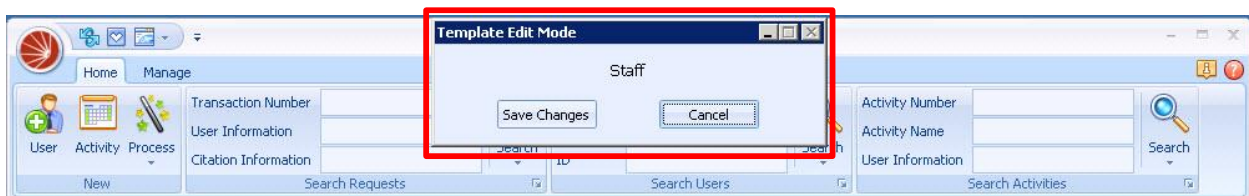
Once you choose the template you want to edit, Aeon will display a pop-up asking if you want to save layout changes for your username. If you have not made any changes to your individual client during the current session, choose no. If you choose cancel, you will exit the template editing process.

In all versions of Aeon, once you enter Template Edit Mode, in the bottom left corner of the screen, you'll see a status line with your username : template : template. This defines the username logged into the client, the template applied to that username, and the template currently in edit mode.



Username : Template applied to username : Template being edited

In Aeon 3.8, there is a new feature that makes Template Edit Mode more visible. A box will appear on top of the client with the name of the template you have chosen to edit in the center. This box will remain open until you have made all changes and click Save Changes. You can move the box anywhere you want on the screen, but it must remain open while you are editing the template. Once you click Save Changes (or Cancel if you do not want to save changes), you will exit Template Edit Mode.

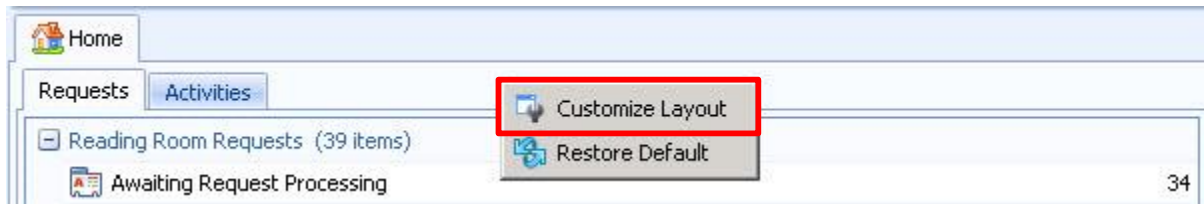


Editing the Dashboard

<https://prometheus.atlas-sys.com/display/aeon/Working+with+the+Aeon+Home+Page>

On the Aeon Dashboard, you cannot edit the ribbons or buttons, but you can add groups as boxes or tabs or remove any group you do not want displayed.

To edit the Dashboard layout, right click at the top near the Requests and Activity tabs and select Customize Layout.



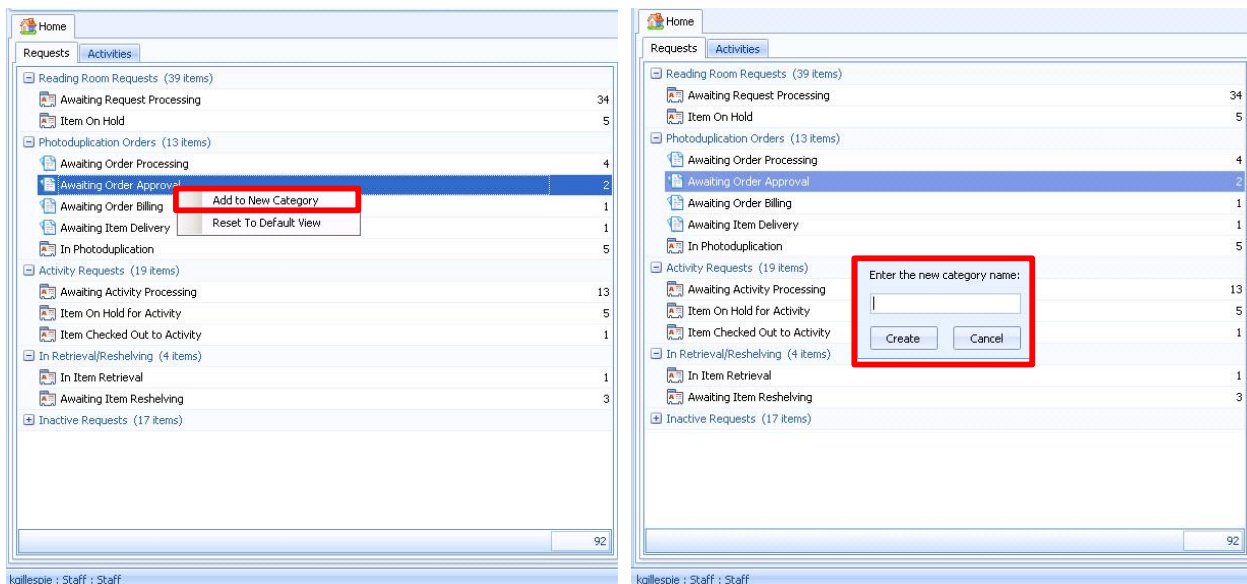
The editable area will be grayed out and a Customization box will display. The Hidden Items tab lists the groups you can add to the dashboard. If you want to add one, click it with your mouse and drag it to the location you want to add it. Black lines will act as guides to show where you can add the group. To remove a group, select it from the Dashboard and drag it to the Customization box.

When you finish editing the Dashboard groups, close the Customization box (Aeon 3.8 users – do not close the Template Edit Mode box until all edits have been made).

Editing Queues

On the Requests tab, you can create new queue categories and reorganize the queues.

To create a new category, select a queue you want to add to the category and right click. Choose “Add to New Category” and in the pop-up box, enter the name of the new category. Click “Create” and the new category will be added with the queue to the bottom of the queue list.



To reorganize categories or queues, select the queue name or category and drag it up or down. A thin blue line will follow your mouse to show where you can drop the queue or category you are moving. Drag and drop it in the desired location.

You cannot delete a queue or category from this tab, but if you remove the queues associated with a category (drag them somewhere else), the category will no longer display, as there are no queues associated.

NOTE: Only queues with requests associated will display on your Dashboard in Template Edit Mode. You may need to route requests to different queues temporarily to ensure all queues are visible to edit.

Editing Forms

<https://prometheus.atlas-sys.com/display/aeon/Customizing+Form+Layout>

In Template Edit Mode, you can edit the User, Request, and Activity forms. You can add or remove fields and reorganize the boxes on these forms.

To edit a form, right click at the top of any box (like on the Dashboard) and choose Customize Layout. The Customization box will display over the grayed out form. Move fields between the form and the box to add or remove, using the black guidelines. You can resize the fields and boxes using your mouse by hovering over the outline of the grid until the mouse turns into a double-sided arrow.

The screenshot displays the 'Detail - Request 56' window. The interface includes a top navigation bar with icons for Home, Email, and Bundle. Below this is a toolbar with various actions like Print Callslip, Cancel, Add Flag, Remove Flag, Route, Print Request, Reprint Callslip, Clone Request to Current User, Clone Request to Another User, Search, Add Attachment, View Attachment, View, Sign In, Sign Out, Away, and Initialize Photoduplication. The main content area is divided into sections: Request Information, Order Information, User Information, and Notes. The Request Information section contains fields for Transaction Number (56), Bundle ID, Scheduled Date (10/23/2015 12:00 AM), Request For, Special Request, Title (Historical and Moral View of the French Revolution), Author (Mary Wollstonecraft), Place of Publication, Publisher, Date (1794), Edition, Barcode, Bib ID, Call Number, Location, Issue/Copy, and Volume/Box. The Order Information section includes Pages, Page Count, Format, For Publication checkbox, Service Level, and Shipping Option. The User Information section shows Name (John Adams), Organization, Address (Peacefield Quincy, MA 02169 US), Clearance Status (Cleared), Research Topics, and Research Topics Sharing. A 'Customization' panel is overlaid on the User Information section, showing a list of items to be added to the form: Empty Space Item, Label, Separator, Splitter, Additional Location, User Address 1, User Address 2, User Alt ID, User Alt ID Type, User Auth Type, and User Billing Category. The status bar at the bottom indicates 'Awaiting Request Processing'.

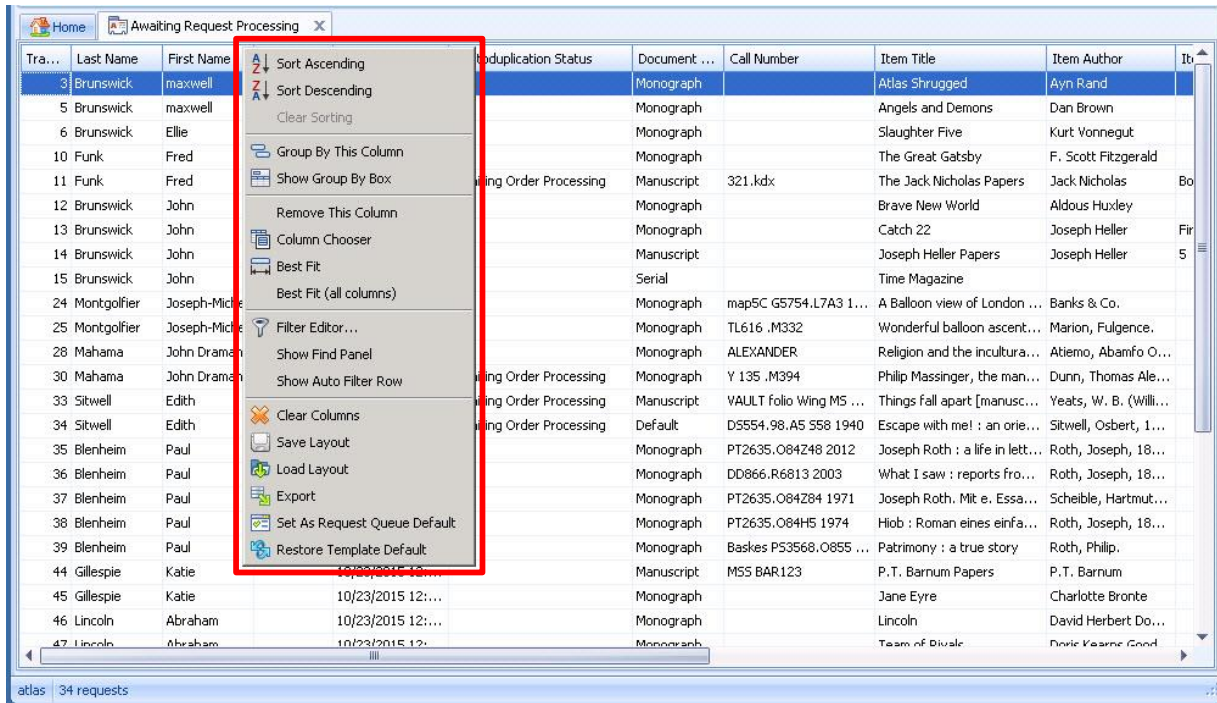
To create a new group (in this example, Request Information, Order Information, and User Information are all groups), select the fields you want to add to a group, right click and select Group.

Editing Grids

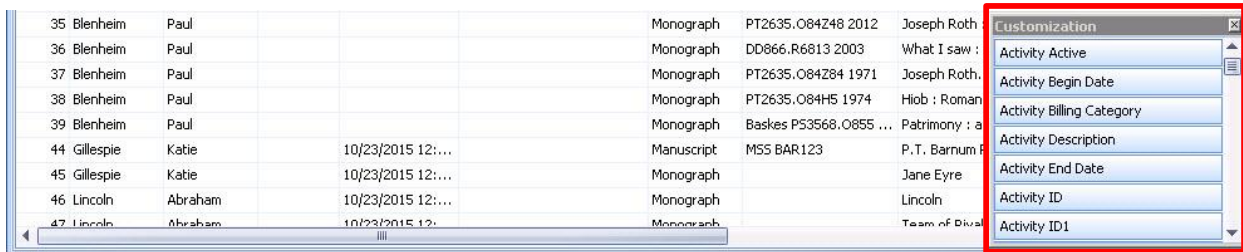
<https://prometheus.atlas-sys.com/display/aeon/Customizing+Grid+Layout>

In Template Edit Mode, you can edit any grid in the Aeon client. Any display with light colored grids, including the Search tab displays, the Queues, the Activities tab, and the Requests tab on a User form are editable.

Open the grid you want to edit and right click on the column headers.

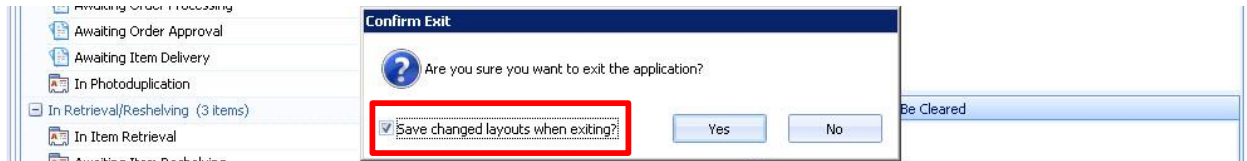


The drop down menu provides many options. The Column Chooser option opens a customization box similar to ones from previous examples above. The box contains columns that can be added to the grid. To remove a column, drag it to the Customization box.



Saving your Edits

When you are finished editing your dashboard, queues, forms, and grids, close all forms and tabs and navigate back to the dashboard. If you are using Aeon 3.8, click Save Changes in the Template Edit Mode box. Then, exit the client. Aeon will display a pop up to confirm exit. Make sure that the “Save changed layouts when exiting?” box is checked – this will save all changes made to the template you edited.



NOTE: Aeon will automatically launch with whichever tab on the Dashboard is selected when saved. If you save with the Activities tab selected, the client will always show that tab when launched. So, if you want to see Requests first when you open the client, be sure to save with the Requests tab selected.



Applying Templates

After you have edited the template, you can assign it to staff to use. Open the Staff Manager. On the Users tab, select the staff to whom you want to assign the template and select the template from the Layout Template dropdown in the User Details box. The next time the staff member logs in to Aeon, they will see all information displayed using the template you created and edited.

