

Patrons can use the web interface to export request information about their research in several ways. These exports may help your patrons better organize and retain their request, citation, and activity information.

As staff, you have the ability to define and organize how this information is exported to make it more useful to your patrons.

Exporting Requests to Excel

In Aeon 3.8, a new Export link was added by default to the All Request table in the web interface.



Exporting Requests

From the All Requests table in the web interface, click the Export link at the top right corner of the table. An Excel file will download with the title RequestTN.xls (the TN will be the transaction number of the request). Each request will display on a separate row and will contain all information associated with that request.

Customizing Exported Excel Workbook

<https://prometheus.atlas-sys.com/display/aeon/Adding+Export+Request+Button>

By default, the list is quite long. To customize the columns that display, you can create a file to override the Aeon default export. You will create this file and save it on your Aeon server as a .sql file that will query the Aeon database for the field included in the .sql file.

The default query below will fit most site's needs. To create the .sql file, open a text or code editor (like Notepad, Notepad++, TextWrangler, etc). Paste the default query below, add or remove desired columns, and save using the naming convention "Export[TableName].sql".

There is documentation that defines the field and table names needed in the query:

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

The View All Requests table query would be called "ExportViewAllRequest.sql". Save this file on your Aeon server in: C:\ProgramFiles(x86)\Aeon\Web\sql

DEFAULT SQL QUERY:

```
SELECT
    Transactions.TransactionNumber AS "TN"
    ,Transactions.Username as Username
    ,Transactions.TransactionDate as "Transaction Date"
    ,Transactions.ItemTitle AS Title
    ,Transactions.ItemAuthor AS Author
    ,Transactions.ItemDate AS "Date"
    ,Transactions.ItemEdition AS Edition
    ,Transactions.Location AS Location
    ,Transactions.CallNumber AS "Call Number"
    ,Transactions.ItemVolume AS "Volume/Box"
    ,Transactions.ItemInfo2 AS Folder
    ,Transactions.ItemIssue AS "Issue/Copy"
FROM Transactions
WHERE Username = @Username OR ResearcherUsername = @Username
```

Adding the Export Link to Other Tables

Additionally, you can add this Export link to other tables in the web interface by adding the 'exportable' attribute to the TABLE tag in the page's html code. This would look like this:

```
<#TABLE name="ViewAllRequests" headerText="All Requests" noDataAction="ShowMessageRow"
noDataMessage="No Requests" sortable="true" exportable="true"
```

You can also define the link text by adding a second attribute after the exportable attribute called exportLinkText and defining link text. Ex: exportLinkText="Export This List"

Then create a sql file (as above) to define the fields you want to export in the Excel file. You can simply rename the ExportViewAllRequests.sql file if you want to use the same fields.

***While this feature is available to add to other tables in the web interface, it requires additional information in the SQL query. If you want to add this feature, please contact service@atlas-sys for more information.*

Exporting Activity Information

Exporting Activity Details, Users, and Requests

Exporting Activity information can create a useful record for users associated with an activity. This is especially helpful, for example, to faculty/staff instructors who want to retain information about activities. First, you must make sure to add the user to the activity. Once added, they will have access to create requests for the activity and to view the activity information in the web interface.

There are two ways to export Activity information to an Excel spreadsheet. Patrons can click the XLS link from the Activity table or click the "Download Excel workbook with all Activity details" link from the Activity Information page.

Activities						
Download	ID	Name	Description	Status	Begin Date	End Date
XLS, Calendar	4	U.S. Presidents	Exhibition of U.S. Presidents	Created	2/1/2016 12:00:00 AM	2/29/2016 12:00:00 AM

Export from Activities table

Download Excel workbook with all Activity details

Download iCalendar file

Activity Information						
----------------------	--	--	--	--	--	--

Export from Activity Information detail page

Clicking either export link will download an XLS spreadsheet with three tabs. A details tab that provides the title, begin and end dates, and other information about an activity. The users tab lists all users associated with that activity. The requests tab lists all requests associated with the activity.

Customizing the Activity Export

<https://prometheus.atlas-sys.com/display/aeon/Downloading+Activity+Information+to+an+Excel+Workbook>

You can customize the information exported in this file by creating .txt files that will override the default export from Aeon.

To do this, create a new text file (in Notepad, Notepad++ or another text or code editor). Name the file after the tab you want to override:

- Details tab - ActivityDetailExportQuery.txt
- Users tab - ActivityUsersExportQuery.txt
- Requests tab - ActivityRequestsExportQuery.txt

Create a query in the text file to pull the desired information. For example, if you want to change the information exported to the Users tab to only display Username, First Name, and Last Name, your query would look like this:

```
SELECT
    Username AS UN
    ,FirstName AS First
    ,LastName as Last
FROM Users
WHERE Username IN (SELECT Username FROM ActivityLink WHERE ID= <#ActivityID>)
```

This query is selecting the Username, FirstName, and LastName fields from the Users table where the Username is in the Activity selected to export. You can find more information about the tables and field names here: <https://prometheus.atlas-sys.com/display/aeon/Key+Aeon+Data+Tables>

Exporting Citation Information

Researchers can export citation information from requests in their Aeon account to an RIS file using the Export Citation link. The feature allows researchers to easily add citation information to bibliographic management tools, like RefWorks, Zotero, EndNote, etc.

And RIS file is a format for information providers who deliver bibliographic information – such as Google Scholar, Web of Knowledge, Ovid, and OCLC.

Citation Export

<https://prometheus.atlas-sys.com/display/aeon/Exporting+Transaction+Citation+Information>

Choose the request for which you want to export citation information. Click the “Export Citation” link at the top of the information detail page.



When the file downloads, save it on your local machine (or click save if a popup dialog box displays). The RIS file will save as Request#.ris (the # will be the transaction number, ex: Request78.ris)

In your bibliographic management tool (RefWorks, EndNote, Zotero, etc), import the RIS file to your citation list.

Customizing the Citation Export

On your Aeon server (C:\ProgramFiles(x86)\Aeon\Web) is an RIS folder that contains 2 files.

- RIS_Default.html – defines the document type in the RIS file
- RIS.html – contains citation information that will be exported

Open the RIS.html file in a text or code editor (Notepad, Notepad++, TextWranger, etc).

- You can change the DP (Database Provider) and DB (Name of Database) fields to be specific to your archives or special collection
- Add or remove citation information based on your requests

When finished, save the RIS.html file in C:\ProgramFiles(x86)\Aeon\Web\RIS. The next citation export will read from this file.

There is more documentation on the citation fields here:

http://refman.com/sites/rm/files/m/direct_export_ris.pdf