



# Aeon Management Training





# What are you hoping to learn from this training?

21 responses

Better understanding of how it all works.

Managing/creating/editing queues

Deeper understanding of Aeon's functionality and options.

Learn more about customizing layouts for all staff

Better understanding on how to update the website portal.

Better management

To learn more about Customization Manager.

Tracking stats

GitHub!





## What are you hoping to learn from this training?

21 responses

I need a refresher! We've been closed for construction so I just need a 'boot camp' reminding me of all the functionality.

I'm hoping to understand GitHub and web testing for troubleshooting.

I would like to learn more to be more proficient and familiar with the app

What options we have to leverage aeon's full suite of tools

overall understanding of the customization manager

Sometimes is hard to keep up with all the updates/changes. So, I'm hoping to learn something new that I may have missed.

I'm hoping to better use aeon to suit my library's needs (example personalizing call slips)

Using Atlas BI, including setting up reports.

I was recently asked to manage this system in IT area, but don't know much about it.





## What are you hoping to learn from this training?

21 responses

Better understanding of the functions in staff manager and how to manage and make changes independently.

potential connections/interactions between Aeon and Archivespace

Editing templates.



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# Agenda

- Introduction
- Using the Staff Manager
- Customization Manager Tips & Tricks
- Managing web pages in GitHub
- Customizing your AtlasBI reports
- Q&A





## Aeon modules

- Web Interface - web pages used mainly by patrons to register and submit requests
- Staff Client - access user records, requests, appointments, activity records, history and tracking entries
- Customization Manager - GUI interface to set keys, populate tables, and manage settings in both the Web Interface and Staff Client
- Staff Manager - used to add/manage staff users and customize client layout templates





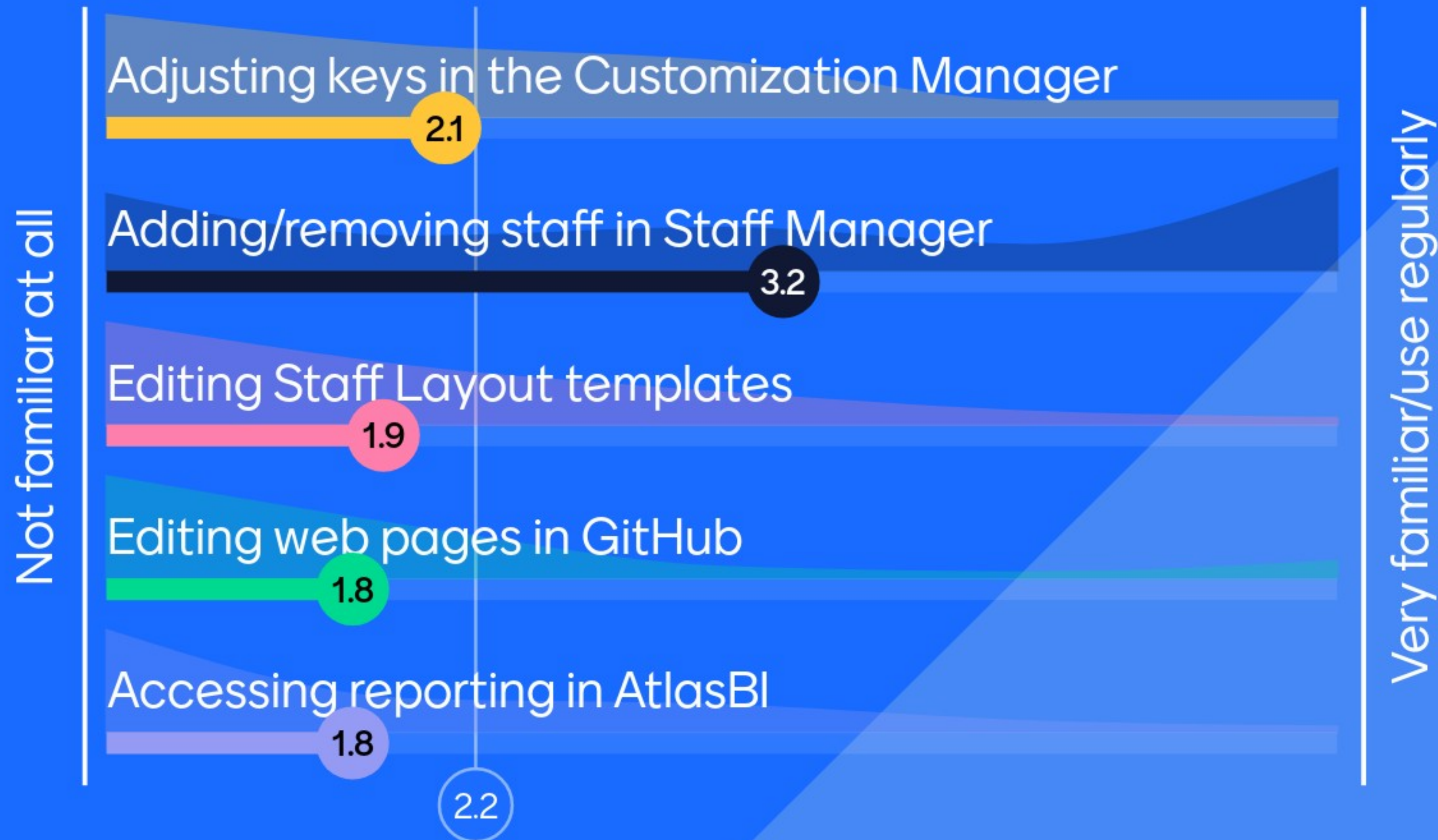
# Other tools used to manage Aeon

- AtlasBI - access statistics and run reports
- GitHub - customize web files, like registration and request forms





# How familiar are you with the following?







# What is something you find most difficult about managing Aeon? 48 responses





# Aeon Staff Manager

Create staff accounts

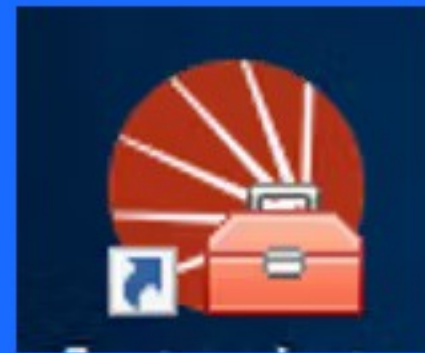
Manage staff passwords

Create Layout Templates\*



\*NOTE: Layouts are customized in the client itself





# Aeon Customization Manager

Set keys to control various settings

Populate drop down fields

Set up Appointments

Customize Email Templates

Create queues, batch processes, and routing rules





# Customization Manager Tips & Tricks

- Search
  - Save favorites
  - View Change History
- Always restart after making a change

Documentation to bookmark:

[Queues](#)

[Web Status Lines](#)

[Customization Manager Docs](#)





# Managing web pages in GitHub

Access, editing pages, how does everything interact?





# How to access GitHub

Every hosted Aeon server has a unique  
GitHub repository





# GitHub - First, some terminology

- Repo/repository - the location where your files are stored
- Fork - independent copy of the contents of a repo
- Branch - copy of the contents of a repo within that repo
- Commit - the changes submitted to the repo
- Pull Request (PR) - the full list of changes made to be approved and made live
- Automated Code Review (ACR) - Atlas-created tool to indicate code issues





AtlasSystems-Prod / hosting-testing Private

**Main Repo = live pages**



AtlasSystems / hosting-testing Private

forked from AtlasSystems-Prod/hosting-testing

**Fork = Staging**

Prod repo to Forked Repo



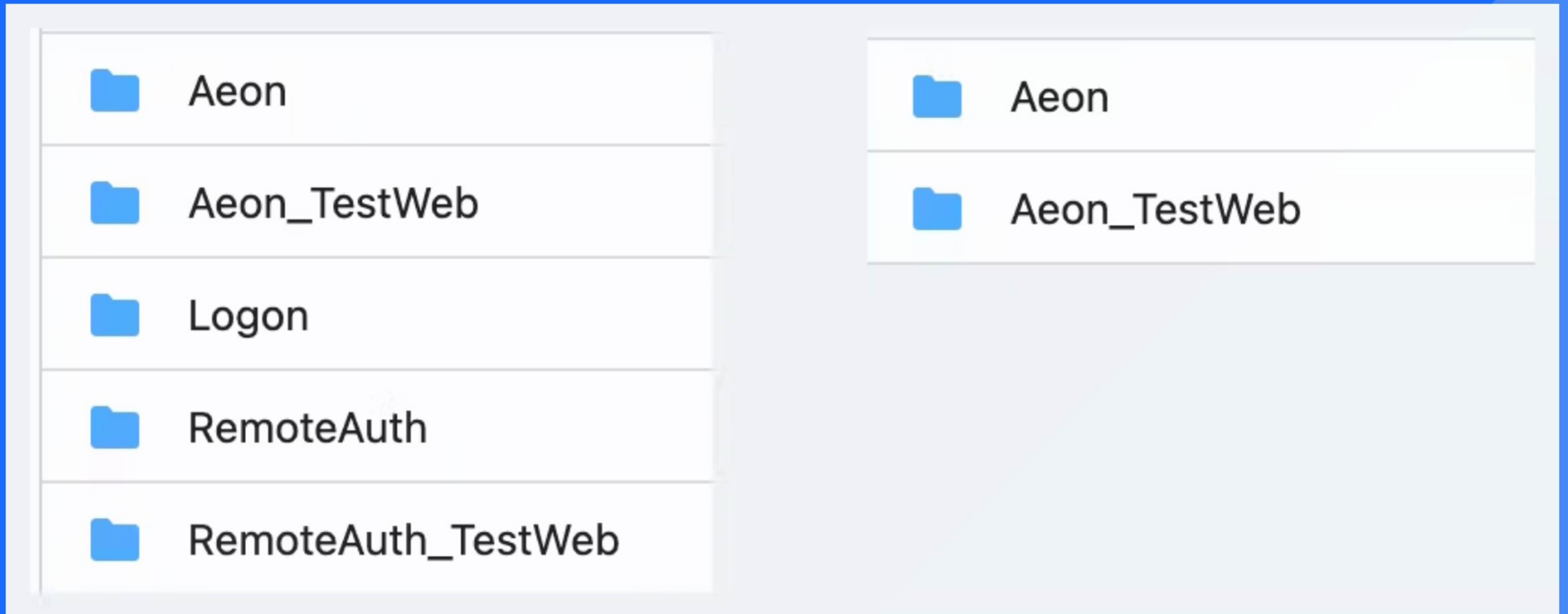




# GitHub - Where do I edit?

- GitHub.com - you can make changes via the web
- GitHub Desktop - program on your computer where you can edit files directly in an HTML editor and open the files directly from a file browser





Examples of GitHub repo layouts





# What's in my Aeon pages?

Registration forms

Request forms

Estimate, invoice, and delivered items pages

Appointment Scheduling

Request detail pages

Navigation

Branding





# Submitting a pull request

After you have completed all your changes, you submit your commits as a pull request.\* Atlas's web dev team will review the pull request and push the pages live.

\*Pull requests are currently only required for PCI-hosted servers. Need to know if you are in the PCI environment? Email [support@atlas-sys.com](mailto:support@atlas-sys.com).





# Helpful Documentation

[Web Action, Form and Type numbers](#)

- find these in the URL

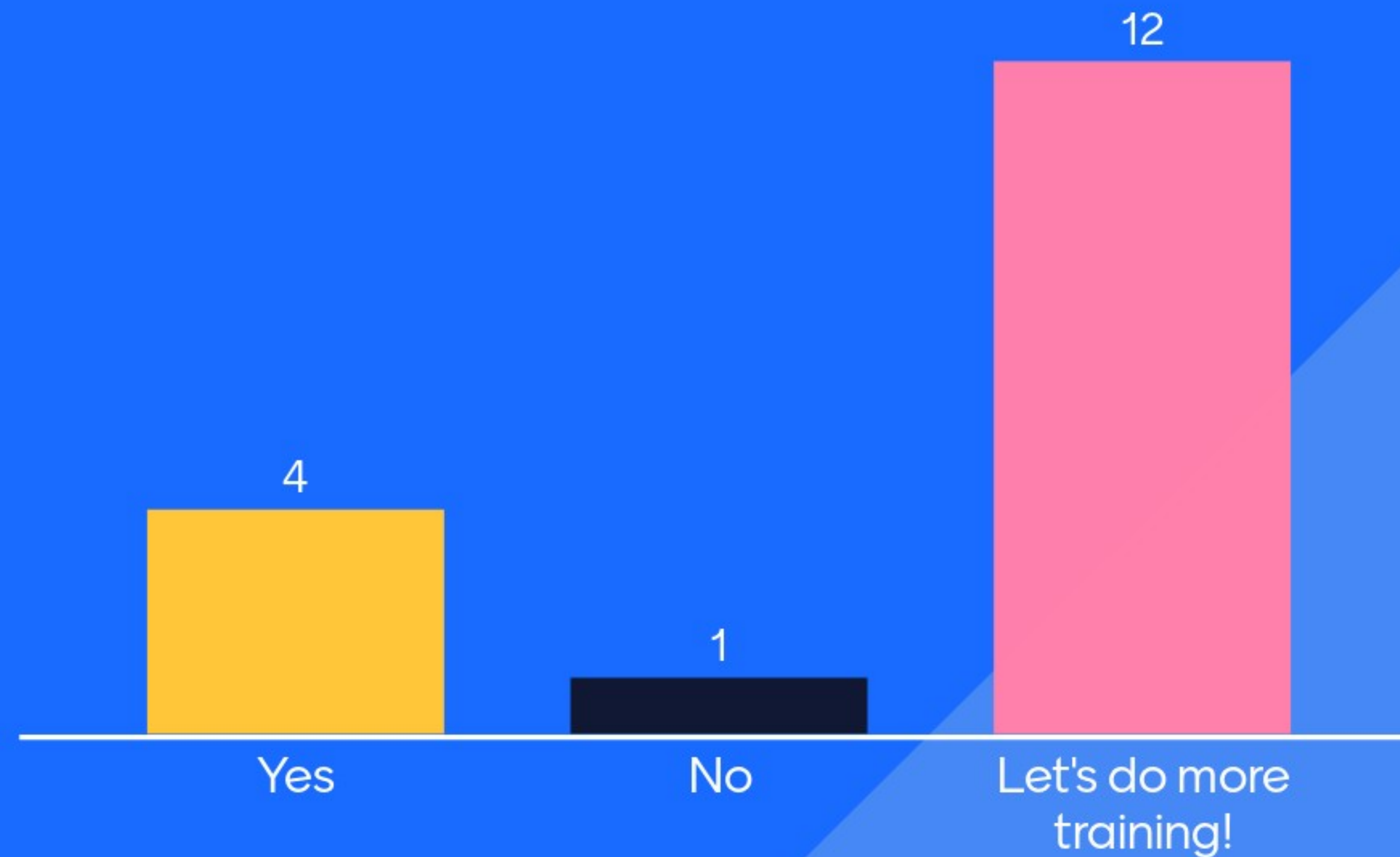
[Editing Atlas-Hosted Aeon Web Pages in GitHub](#)

[Web Page Customizations](#)





# Do you feel like you have a better understanding of GitHub and the Aeon web pages now?



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# AtlasBI

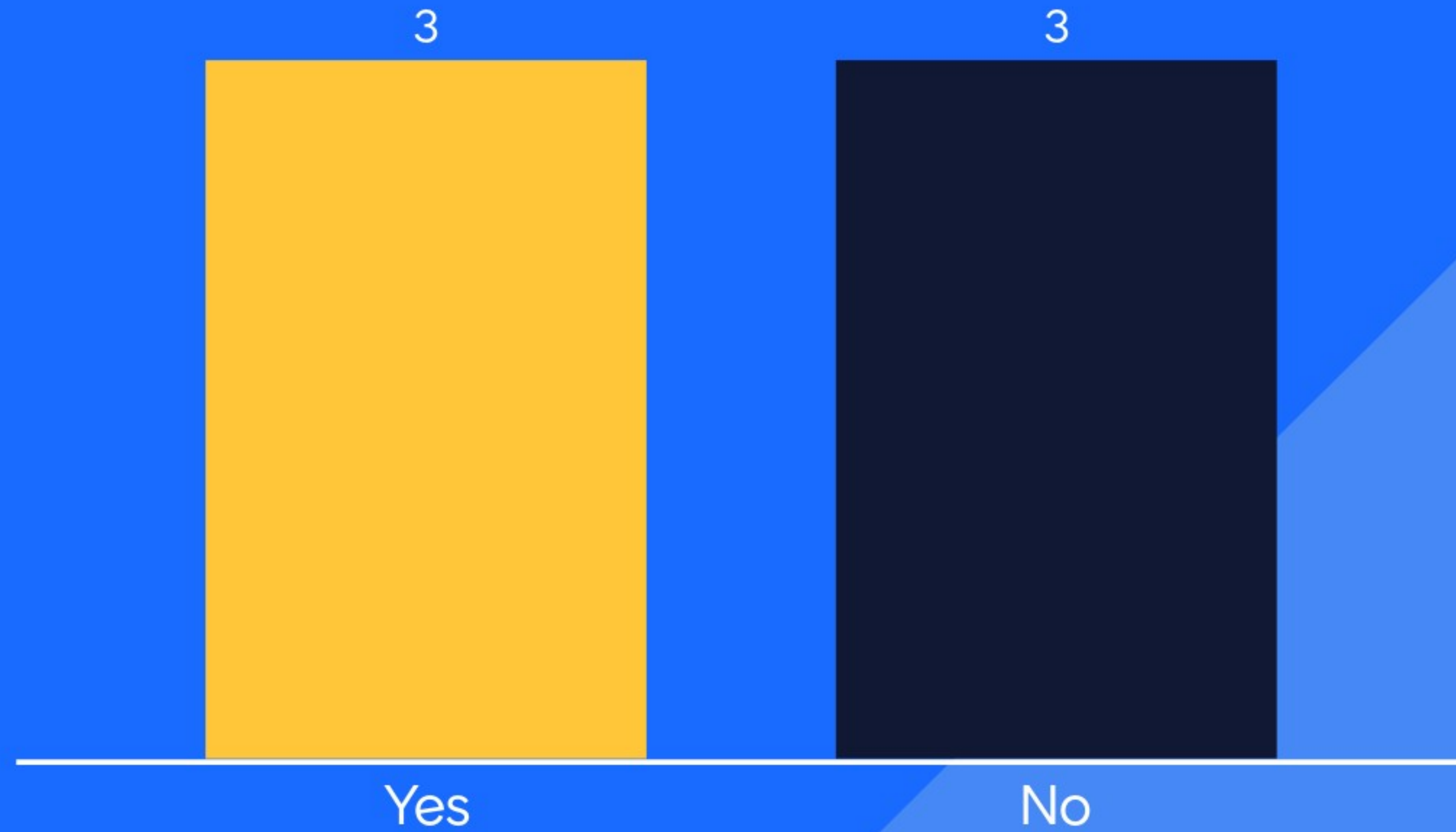
Reporting and Statistics

URL: [yoursitename].bi.atlas-sys.com





# Have you ever customized a BI report?



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# AtlasBI Terminology

- Dashboard: a series of reports grouped by theme
- Viewer Mode: run and export reports
- Designer Mode: edit, create and import reports





EVERY USER HAS TO HAVE AN AEON CLIENT ACCOUNT TO LOG IN

## Atlas BI - Staff Access

- Viewer - can only view reports and export data
- Contributor - can view and edit reports
- Administrator - highest level - can change user roles, edit, and view; automatically anyone with staff manager and customization manager access
- None - no access





## AtlasBI - useful tips

- Designer mode to edit existing reports or add new
- Import from gallery to start from a default report
- View Data Source to see SQL Query
- Check parameters for default filters
- Each report is customizable on its own - use the small menu that appears when you select the box
- When in doubt, contact support!





<https://support.atlas-sys.com/hc/en-us>

One place for all the info you need to know:

Access Documentation

Submit an Enhancement

Watch training videos and webinar recordings





# Thank you!

Questions? [kgillespie@atlas-sys.com](mailto:kgillespie@atlas-sys.com)

