

Aeon Print and Email Templates

Session Agenda

Email Templates

- ◆ Web and Client Templates
- ◆ Editing Templates
- ◆ Creating New Templates

Print Templates

- ◆ Default Templates
- ◆ Mail Merge Fields

Session Goals

At the end of this session, you should be able to edit any of the default email templates and create a new email template, as well as edit the default print templates.



Email Templates

There are two types of email templates:

Web templates – these email templates are usually located within your Aeon web files and are sent out based on some action taken by the patron user in the web interface
ex. password reset email

Client templates – these email templates can be accessed in the customization manager and are sent out based on some action taken by the staff user in the staff client
ex. merge user email, request cancellation email

Web Templates

Aeon comes with two web email templates – a new user registration template and a forgot password template. These templates are not accessed through the Customization Manger, but are accessed on the Aeon web server with the web files. The location of these templates on your site's server is determined by the **DLLEmailLocation** customization key. (The most common location for these files is within an Email directory in your web files.)

The subject lines for each of these emails is determined by customization manager keys: **DLLEmailNewUserSubject** and **DLLEmailPasswordResetSubject**.

The body of each email is contained in a .txt file in the directory specified in the **DLLEmailLocation** key.

```

DEAR <#USER field='FirstName' /> <#USER field='LastName' />,

Thank you for registering to use the <#LOCALINFO field='SystemName'>.

Upon your first visit to the library, please be prepared to present government-issued identification including a photo and exp

In the meantime, you may place requests to view materials in our reading room through our online catalog and finding aids. Yo

To access your research account at <#LOCALINFO field='LibraryName'>, you may login with the username (<#USER field='Username

A summary of the information you provided during the registration process is included at the end of this message for your con

Should you have any questions or comments about this service, please feel free to contact us at:

<#LOCALINFO field='GeneralEmailAddress'>

or

<#LOCALINFO field='GeneralPhone'>

We look forward to serving you.

Yours sincerely,

<#LOCALINFO field='LibraryName'>
<#LOCALINFO field='InstitutionName'>

Research Account Summary:
Username: <#USER field='Username'>
Status: <#USER field='Status'>
Organization: <#USER field='Organization'>
Phone: <#USER field='Phone'>
Email Address: <#USER field='EmailAddress'>
Address:
<#USER field='Address'>
<#USER field='Address2'>
<#USER field='City'> <#USER field='State'> <#USER field='Zip'>
Research Topics:
<#USER field='ResearchTopics'>

```

Sample text from NewUserRegistration.txt

The template can contain plain text as well as Aeon fields. Fields should be entered using the following format:

<#[Aeon Table Name] field='[Field Name]'>

Because the web templates are user-related templates, transaction and event fields cannot be included.

Client Email Templates

Aeon comes with a default set of email templates for transactions, users, and events that correspond to specific actions in the client. These templates are:

User Templates

- **DisavowUser:** used when disavowing a user in the User Information and Users Waiting to be Cleared forms
- **MergeUser:** for notifying a user via email that they have registered for a duplicate Aeon account and the accounts have been merged

Transaction Templates

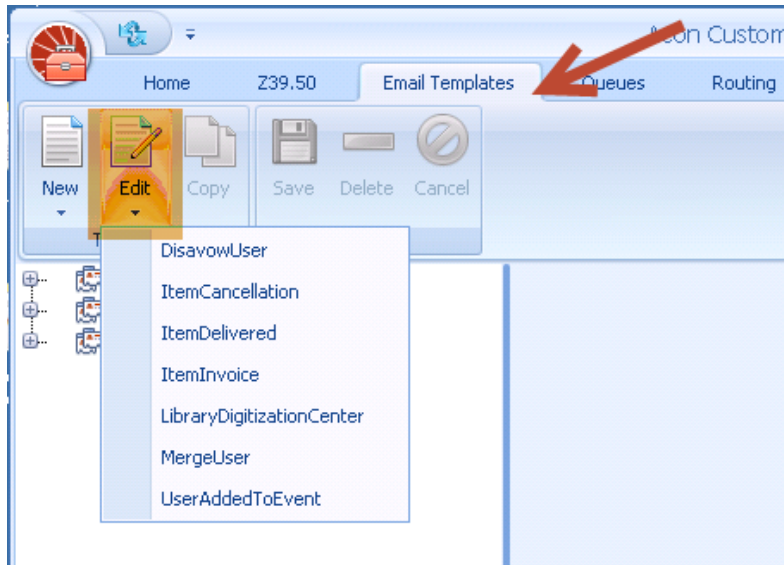
- **ItemCancellation:** for notifying a user via email that a request has been cancelled
- **ItemDelivered:** for notifying a user via email that a photoduplication request has been delivered
- **ItemInvoice:** for notifying a user via email that a photoduplication request they have placed has been invoiced

Event Templates

- **UserAddedToEvent:** for sending Event registration emails to users associated with events.

Editing a Default Template

In the **Customization Manager**, access the **Email Templates** ribbon. Click on the **Edit** button and select the template you want to edit.



In the body of the email, you can type text and as well as insert fields from the user record, request record, local info table, etc. To insert a field, right click in the body of the email, select the type of field you want to insert, and then select the specific field to insert.

***Note: For the default templates, do not change the template name or type.*

System fields refer to the **LocalInfo** table in the **Customization Manager**.

The screenshot shows the 'LocalInfo' table in the Customization Manager. The table has the following columns: Type, System Name, System URL, Institution Name, Library Name, General Contact Name, and General Phone. The data row shows: Default, Research Account, http://216.54.57.229/aeon, Voth Library, Voth Library, and 757-467-7872.

Type	System Name	System URL	Institution Name	Library Name	General Contact Name	General Phone
Default	Research Account	http://216.54.57.229/aeon	Voth Library	Voth Library		757-467-7872

The screenshot shows an email template editor interface. On the left, there are fields for 'Name' (ItemCancellation), 'Description' (Cancellation e-mail), 'Recipient Name' (<#User.FirstName> <#User.LastName>), 'Recipient Address' (<#User.EmailAddress>), 'CC Address', 'BCC Address', and 'Subject' (Your Voth Library Request). Below these is a large text area for the 'Template Body' containing a personalized message with placeholders like <#User.FirstName>, <#Request.ItemTitle>, <#Request.CallNumber>, <#Request.ReasonForCancellation>, <#System.GeneralEmailAddress>, <#System.GeneralPhone>, <#Request.TransactionNumber>, <#System.InstitutionName>, and <#System.LibraryName>. On the right, a 'Field Selector' dropdown menu is open, listing various fields such as Document, ItemAuthor, ItemTitle, ItemSubTitle, ItemDate, ItemEdition, ItemVolume, ItemIssue, ItemPages, ItemISxN, ItemCitation, ItemNumber, EADNumber, ReferenceNumber, PageCount, CallNumber, Location, SubLocation, ReasonForCancellation, Maxcost, InternalAcctNo, InvoiceNumber, WebRequestForm, and CancelNote. A secondary menu is also visible, listing System, User, Researcher, Request (highlighted), Queue, and Billing. Callout boxes with arrows point to the 'Name' field (labeled 'Template Name and Type'), the 'Recipient Address' field (labeled 'Template Address'), the 'Request' option in the secondary menu (labeled 'Field Selector'), and the main text area (labeled 'Template Body').

Creating a New Email Template

You can create email templates to cover specific situations in your library.

Steps to Create a New Template

1. Under the Email Templates ribbon, click **New** and choose **Transaction Template**, **User Template**, or **Event Template**.
2. A blank template will open. The Type field will be labeled Transaction or User, depending upon which template type you chose.
3. Complete the Template Details and address lines, using static information or field tags.
4. Draft the body text of the email, using the supplied field tags by right clicking and selecting from the field tables.
5. When you are finished, click the **Save** button in the Email Templates ribbon.
Your new template now appears under the Edit button on the Email Templates ribbon and is ready to use.

***Note: Only the default templates are sent out automatically based on an action in the web or in the client. Any new email templates will need to be sent out manually by staff as appropriate.*

For more information, see the section entitled **Configuring Email Templates** in the Aeon online documentation - <https://prometheus.atlas-sys.com/display/Aeon/Configuring+Email+Templates>

Sample Template

For instance, if you want to send an email to your library's digital reproductions group when a patron has paid for a photoduplication order and the order will be sent to the reproductions group to be completed, you could create a template that would be sent to a specific address each time and would contain details of the photoduplication order.

Template Details			
Name:	<input type="text" value="PhotoduplicationOrder"/>	Type:	<input type="text" value="Transaction"/>
Description:	<input type="text" value="Email to send to digital reproductions group when an Aeon order will be sent to them for processing."/>		
Recipient Name:	<input type="text" value="Digital Reproductions Group"/>		
Recipient Address:	<input type="text" value="reproductions@vothlibrary.org"/>		
CC Address:	<input type="text"/>		
BCC Address:	<input type="text"/>		
Subject:	<input type="text" value="New Specical Collections Order"/>		
<p>A new Voth Library Special Collections Order is being sent to you.</p> <p>The order is for: <#Title> <#CallNumber> <#ItemPages></p> <p>Please refer to order <#TransactionNumber> in Aeon for more information.</p> <p>Thanks, Voth Library</p>			

Print Templates

Aeon print templates are all Word mail merge documents using information from Aeon as a data source. Consequently, you can do a lot to alter the look and feel as well as the content of all the templates. Any formatting and display options available to you in **Word** can be used to customize your templates.

Default Print Templates
Loan Request Templates <ul style="list-style-type: none"> • PrintCallslipLoan • PrintRequestLoan
Copy Order Templates <ul style="list-style-type: none"> • PrintCallslipCopy • PrintRequestCopy • PrintDigitizationRequest
User Templates <ul style="list-style-type: none"> • PrintUser • PrintInvoice

The location Aeon uses to find your print templates is determined by the **PrintDocumentsPath** key in the **Customization Manager**.

Mail Merge Fields


Fields that will be filled in by your data source will have «» around them. To remove a field, simply delete the entire field name, including the brackets. To add a field, however, you cannot simply type in the brackets and the field name. You will need to access the **Mailings** ribbon in Word. Click on the **Insert Merge Field** button to see a dropdown list of all Aeon field available in that template. Select a field from the dropdown to add it to the template.

For more information, see the section entitled **Customizing Printer Templates** in the Aeon online documentation - <https://prometheus.atlas-sys.com/display/Aeon/Customizing+Printer+Templates>

Tips and Tricks


- You can decrease the page margins to get more information on the page.
- If you want certain information to always appear at the bottom of the callslip, put it in the document footer – that way the information will not get pushed onto a second page if the item information is very long.
- Barcode 3 of 9 is just a font! You can turn any information into a barcode.
- Use normal Word formatting options to change the way text is displayed

Voth Library
Voth Library



TN: **108**
Date: 4/6/2012 9:15:36 AM

Username: jbrown
Brown, Jerry

User ID: CA 9801936


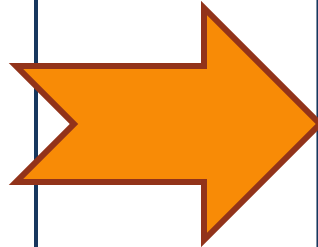
E-mail: mrackley@atlas-sys.com
Phone: 916-445-2841

Call Number: **PR 21**
Location: **Cass Gilbert Collection**


Author:

**Title: Cass Gilbert Collection;
Series VII. Scrapbooks**

Item Number: 12345678



Simple formatting changes and the addition of a few fields changes the callslip on left into the callslip on the right.



TN: 108
Date: 8/21/2012

Brown, Jerry

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Location: Cass Gilbert Collection
Call Number: PR 21
Volume/Box: 689
Issue/Copy:

Title: Cass Gilbert Collection; Series VII.
Scrapbooks
Author:
Date: 1890-1903
Catalog ID:
Barcode #: 12345678