

Beyond the Basics: Aeon Tips and Tricks for Efficiency

Session Agenda

- Customizing your Aeon environment
 - Dashboard customizations
 - Grid customizations
- Efficient Routing
 - Using the Route button
 - Batch processing
 - Custom batch processing

Session Goals

At the end of this session, you should have some ideas for how to better organize and find information in Aeon and work with requests more efficiently.



Dashboard Customizations

Customizing your Dashboard can help you to organize your Aeon information in ways that are useful to you.

Events Group
The columns displayed in the Events Group can be modified and the data can be filtered, sorted, and grouped.

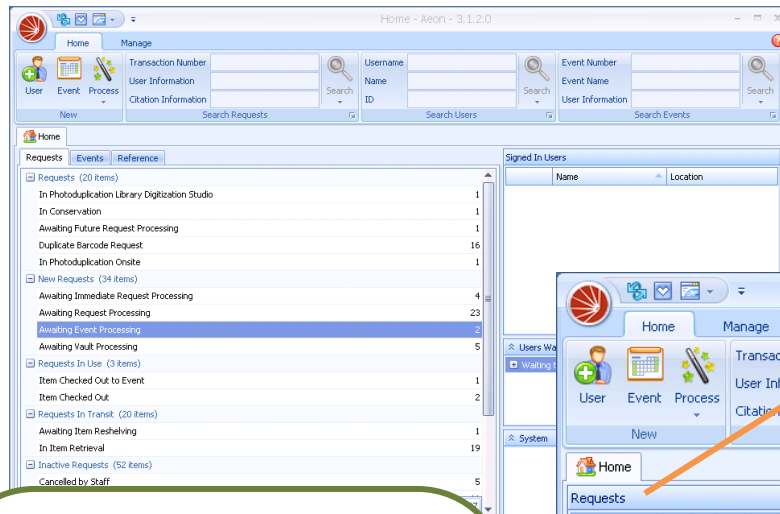
Signed In Users Group
The columns displayed in the Signed In Users Group can be modified and the data can be filtered, sorted, and grouped.

Requests Group
You can organize your requests in a way that is meaningful to you by creating categories for your queues.

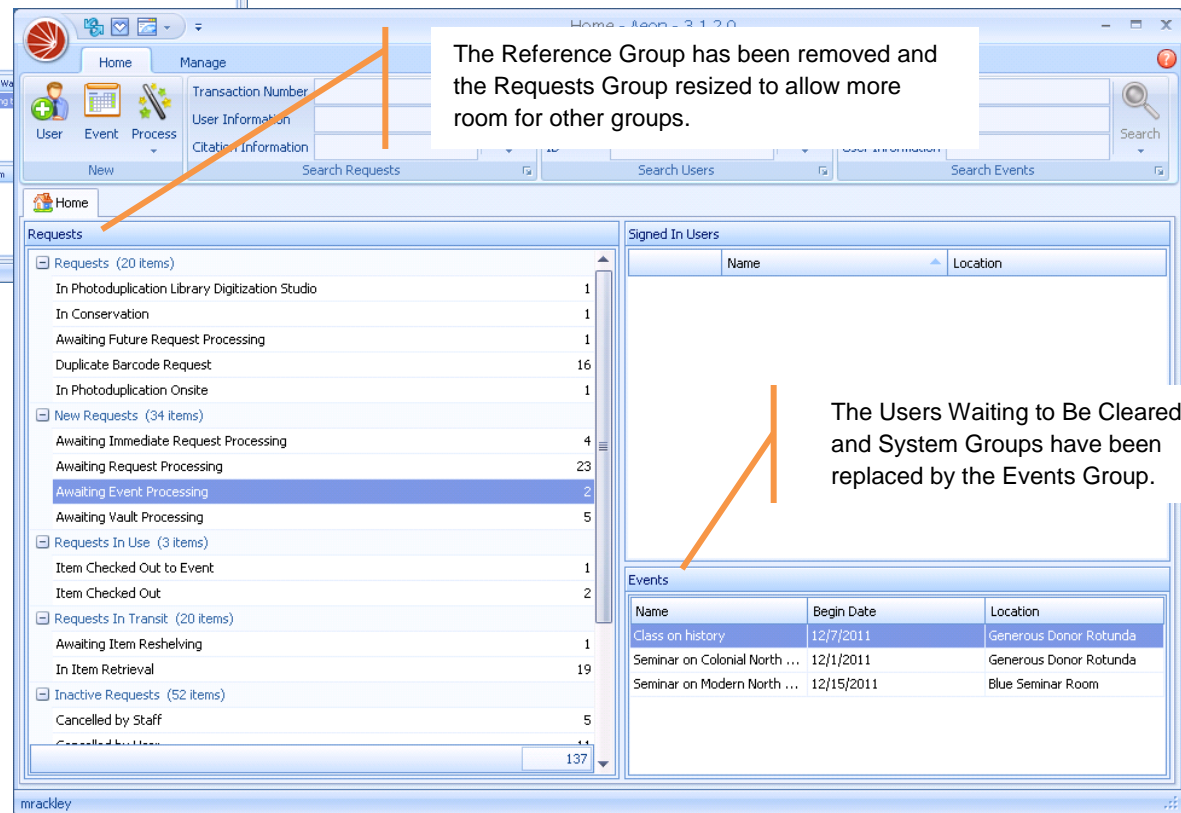
Requests (20 items)	
In Photoduplication Library Digitization Studio	1
In Conservation	1
Awaiting Future Request Processing	1
Duplicate Barcode Request	16
In Photoduplication Onsite	1
New Requests (34 items)	
Awaiting Immediate Request Processing	
Awaiting Request Processing	

Signed In Users	
Name	Location

Dashboard Customizations



Customizing the familiar dashboard (seen on the left) can give you the dashboard below.



Some additional ideas for customizing your dashboard (note for some of these, you will need layout customization permissions to be able to implement them):

Removing groups from your dashboard - You can remove groups that you don't use from your dashboard.

Moving groups on the dashboard allows you to see all the information you need at a glance.

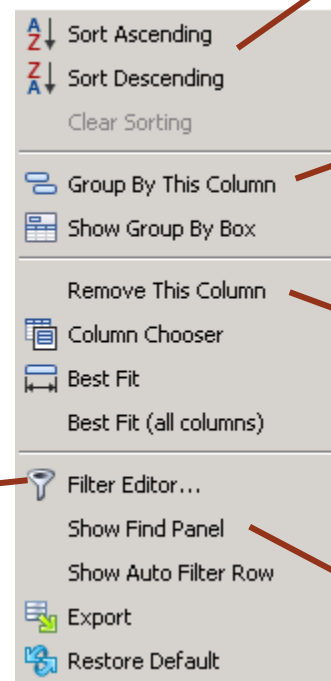
Grid Customizations

Like dashboard customization, using your grid customizations and options can help you find important information more quickly and focus on the work you need to do.

Some things you can do with any grid in Aeon:

- **Moving columns**
- **Resizing columns**
- **Sorting**
- **Filtering**
- **Grouping**
- **Searching**

Filtering - There are a few different grid filtering options in Aeon. The key at the top of each column allows for quick filtering by unique values in the column. From the right-click menu, the Filter Editor option allows you to build a more complicated filter.



Sorting - Any column can be sorted in ascending or descending order by simply clicking on the column header or selecting a sort option from the right-click menu.

Grouping - You can group requests by data in a column or columns by right clicking on a column and selecting the Group By This Column option.

Removing columns - You can remove columns by dragging them off the grid. Or right click on a column header and select the Column Chooser option. A Customization box will appear. You can drag columns from the grid to the Customization box or from the Customization box to the grid.

Searching - You can search data in the grid using the Find Panel. Click on the Show Find Panel option from the right-click menu to access the Find Panel.

Grid Customizations

The screenshot shows the Aeon software interface with a data grid. The grid has columns for Transaction ID, Site, Username, Researcher, Event ID, Transaction Date, Transaction Type, Request Type, Document ID, Item Author, Item Title, Item Sub Title, and Item ID. The grid contains data for transactions 59, 70, and 71. A 'Find Panel' is visible at the top of the grid, and a 'Group By Box' is located below it. Three callout boxes provide instructions on filtering and sorting, resizing columns, and moving columns.

Transaction ID	Site	Username	Researcher	Event ID	Transaction Date	Transaction Type	Request Type	Document ID	Item Author	Item Title	Item Sub Title	Item ID
59		bperdue			Awaiting Re... 02/01/2012...	Loan		manuscript	creator	title		date
70		jbrown			Awaiting Re... 01/31/2012...	Loan		Default		James Carr...		
71		jbrown			Awaiting Re... 01/10/2012...	Loan		Default		James Carr...		
					Awaiting Re... 03/22/2012...	Loan		PrintedMat...	New York (...)	In Assembl...		1828

Filtering and Sorting – The key icon can be used for filtering and the triangle can be used for sorting.

Resizing columns - You can resize any column by dragging its borders left and right. On the right-click column menu, there are also Best Fit options for individual columns and all columns. These options will automatically resize a column or columns to fit the width of the contents.

Moving columns - You can drag and drop columns to move them from one place on the grid to another.

Grid Customizations

Here are some examples of ways to use grid customization and other grid options to better organize your information or search for specific information:

- In the **Item on Hold** queue, filter requests by **Transaction Date**
- In the **Item Checked Out** queue, group requests by **Username**
- In the **Awaiting Event Processing** queue, move the **Event Name** and **Begin Date** fields to the left on the grid; group requests by **Event Name**
- In the **Awaiting Request Processing** queue, filter requests by the **Status of Faculty** at your institution
- In a **User** record, navigate to the **Requests** tab and search for a specific item requested

Processing Options

Routing Options

Routing a Request from the Request Form

To route a request from the Request form:

1. Click the **Route** button on the Process ribbon.
2. Choose the status that the request should be routed to.
3. You will see that the transaction status on the Request form changes to the new status that was selected.

The screenshot displays the Aeon software interface for processing a request. The window title is "Awaiting Request Processing" and the request ID is "Request 6". The "Process" ribbon is active, and the "Route" button is highlighted with a red box. A dropdown menu is open, showing the following options: Awaiting Faculty Request Processing, Awaiting Item Resheling, Awaiting Request Processing, In Item Retrieval, Item Checked Out, Item On Hold, Item Resheling, Pulling from First Floor Stacks, Pulling from Second Floor Stacks, and Request Finished. The interface also shows fields for Request Information, User Information, and a Notes section.

Note Date	Note	Username	Note Type

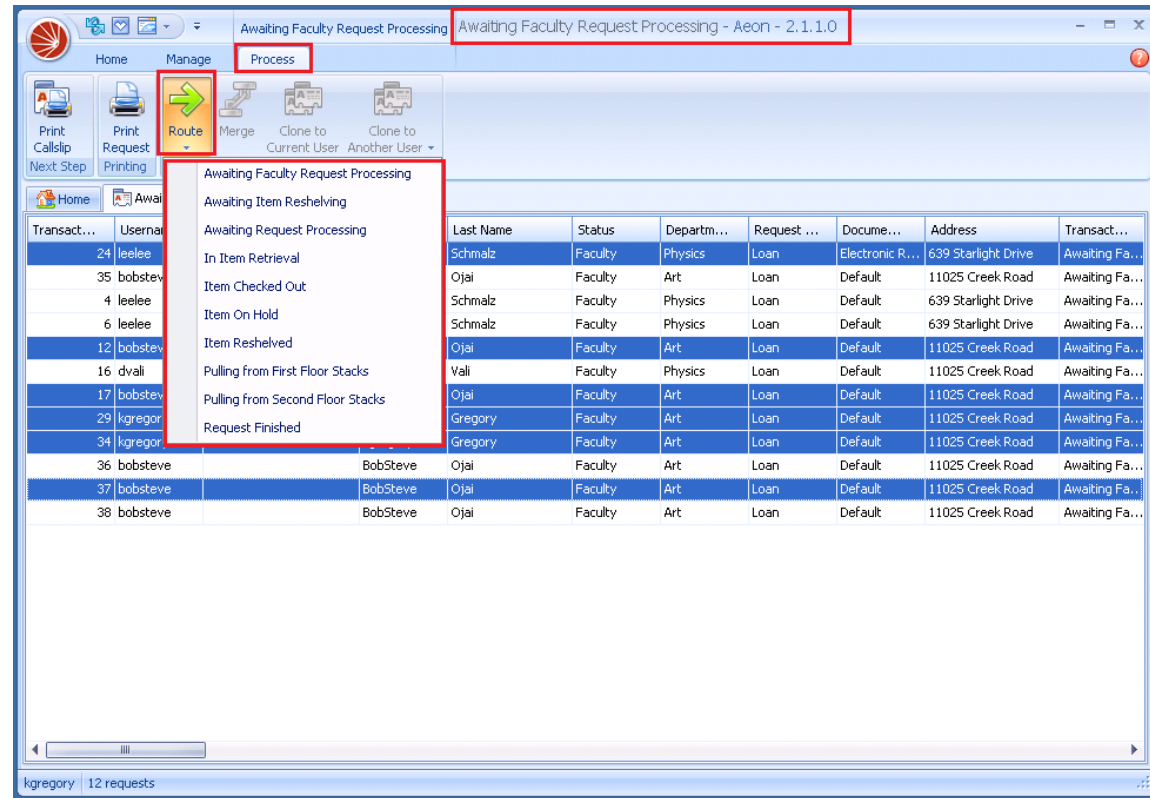
Processing Options

Routing a Request from the Request List

You can select and route several requests at once when routing from a Queue grid.

To route requests from the Queue grid:

1. Choose the Request(s) from the grid.
2. Click the Route button on the Process ribbon.
3. Choose the status that the request(s) should be routed to.
4. The request(s) will disappear from the grid after being routed because they have moved to the chosen status queue.



Processing Options

The Next Step Routing Options

Many Aeon statuses have a logical *Next Step* associated with them.

These Next Step options are located on the Request form on the Process ribbon.

Next Step buttons also display a submenu showing all custom queues based on the system queue for that button.

Clicking on the top half of the button routes requests to the default next step, but the bottom half of the button can be used to route to a custom next step option.

The screenshot displays the Aeon software interface for 'Detail - Request 44'. The 'Process' ribbon is active, showing several buttons: 'Check Out Item', 'Place On Hold', 'Cancel', 'Route', 'Print Request', 'Clone Request to Current User', 'Clone Request to Another User', 'Z39.50', 'View', 'Sign In', and 'Sign Out'. The 'Check Out Item' button is highlighted with a red box, and its dropdown menu is open, showing four options: 'Item Checked Out', 'In Conservation', 'In Processing', and 'Item Checked Out Overnight'. The interface also includes a 'User Information' section with fields for Username (dpatrick), Name (Deval Patrick), and E-mail (merackle@hotmail.com). The 'Item Information' section shows details for the request, including Site (mudd), Call Number (AC202), Volume (ALL), and Title (Administrative Planning Committee Records, 1968-1969).

Processing Options

Batch Processing

The default batch processing options allow you to move one or more requests from any beginning status to a specific ending status such as:

- Item Checked Out
- Item on Hold
- Awaiting Item Reshelving
- Item Reshelved

*Note: If the beginning status of a request is not the expected beginning status, you will see a warning message, but you will be able to proceed.

Custom Batch Processing

You can also create a custom batch process to move one or more requests from any beginning status to a specific ending status.

You can set one up in the Customization Manager on the Batch Processing tab.

1. Select a Name for the process.
2. Select the likely Starting Statuses for the requests.
3. Select the End Status that you want all requests to be put in when using the process (if the status is a custom status, you will need to make sure the custom queue has already been created).

