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# "Change or Perish: Implementing Aeon in the University of South Florida Tampa Library's Special Collections"


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# THE Oracle

Semiannual advice and good tidings from Atlas Systems

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- National Maritime Museum
- University of Georgia
- University of Kansas



Learn more about Aeon and Ares  
at ALA Midwinter Booth #2450

## Atlas At ALA Midwinter in San Diego

It's cold in Virginia Beach, but not in San Diego! We're headed west for the ALA Midwinter Meeting this week (January 7-11). Atlas will be exhibiting in Booth #2450 as well as participating in a number of other events. Stop by, chat, watch a demo, learn about the new ILLiad Tune-Up Service and see what's new with Ares and Aeon ~ including the new Aeon iPhone App!

**You could win a one-year Training Subscription!** Visit the Atlas booth to sign up for a drawing for a one-year Atlas Training Subscription - registration is limited to one entry per person so make sure all of your ILL staff stop in to signup. Want to extend your odds? Invite your reserves staff to stop by and have them sign up as well.

**Talk about training or support.** John Brunswick, one of our Training and Library Solutions experts, will be available on Sunday from 12:00 - 3:30pm to talk with you about the ILLiad Tune-Up and our Training Subscription. Plan to visit and talk to him about how Atlas Training and Library Solutions can help you get the most out of your Atlas software.

**Learn what's new with Atlas products.** While you're in San Diego, attend one of our Users Group meetings. These meetings are open to everyone - not just current users - and are a great opportunity to meet with fellow ILLiad, Aeon and Ares users to gather and dispense knowledge.

- [Ares Users Group Meeting](#). Saturday, January 8, 4:00 - 5:30 pm, Hilton Gaslamp, Corona Room. (Circulation and Special Reserves)
- [Aeon Users Group Meeting](#). Sunday, January 9, 5:30 - 7:00 pm, Hilton Gaslamp, Corona Room. (Special Collections and Archives)
- [OCLC Resource Sharing Users Group Meeting](#). Sunday, January 9, 4:00 - 5:30 pm, San Diego Convention Center, Room 24A. (Resource Sharing and ILL)

## 2011 ILLiad International Conference

Mingle. Network. Share. Learn.

**Pre-Conference: March 23, 2011**

**Conference: March 24-25, 2011**

**Deadline for Poster Session Submissions: January 28, 2011**

The Hilton Virginia Beach Oceanfront is once again the setting for the annual ILLiad International Conference, where more than 300 ILLiad users come together to see what's new and learn tips and tricks from colleagues and Atlas staff. We have a great program lined up and, recognizing how tight budgets are, we've held the line on registration fees again this year. Mark your calendar now and plan to join us in March! Registration for the pre-conference and conference will open this month.

The 2011 pre-conference features a session you won't want to miss—*Data, not numbers: Making your resource sharing statistics into management data*, presented by Collette Mak, Head of Resource Access and Delivery at University of Notre Dame. Atlas staff will also give detailed workshops on ILLiad cleanup and error processing, exception processing, addon development, and implementing Document Delivery. The registration fee for Pre-Conference is \$300.

(Continued on page 4)

Promoting Library Excellence Through Efficiency

# Change or Perish: Implementing Aeon in the University of South Florida Tampa Library's Special Collections

By Barbara I. Lewis and Mark I. Greenberg

**“He who rejects change is the architect of decay.  
The only human institution which rejects progress is the cemetery,” Harold Wilson (1916-1995).**

For libraries, change is a matter of survival, yet Special Collections Departments can harbor staff and patrons least known for their adaptability. Paper-based guest books, registration forms, and call slips offer comfort for the many “Luddites” that have graced special collection reading rooms and closed stacks for generations. With this in mind, USF adopted Aeon after careful consideration, and it took the implementation phase quite seriously.

During initial discussions, USF Special Collections staff articulated several concerns. They worried about learning a new software system. They asked if longstanding workflows would change. They feared patrons would balk using a computer to register and request materials. They wondered if Aeon would improve operations rather than merely change the status quo.

With these concerns in mind, a small implementation team set about constructing a path forward. The group established several goals. 1) Train “just in time” in order to keep knowledge fresh. 2) Train in pairs and provide effective coaching. 3) Write, distribute, solicit feedback, and revise detailed but easily digestible step-by-step user documentation. 4) Prepare patrons for the change. 5) Don't rush. Go live when ready.

**Just in Time:** With excellent ongoing support from USF IT and Joshua Greben at the Florida Center for Library Automation, the implementation team began working with Aeon in August 2009 and spent much of the fall semester on system configuration and workflow issues. By January 2010 team members felt comfortable with the product, and they set an April 1 go-live date. But how to get the rest of the staff up to speed? Rather than begin training four months before launch, the implementation team held off and focused instead on writing robust documentation and developing a four-week training schedule in order to maximize knowledge retention.

**Training in Pairs:** Atlas Systems offered to train all department employees, but USF decided upon an alternative strategy. Implementation team members divided the department into pairs, carefully selecting based upon individual strengths. Implementation members served as coach to one or more teams and met regularly to track progress. Armed with USF's Aeon user manual (<https://prometheus.atlas-sys.com/display/AeonUserForum/Home>), team members took turns acting out a variety of reading room scenarios, first in the role of patron and then as staff member. By understanding Aeon workflows from multiple perspectives, implementation members believed that staff could more effectively identify and resolve unforeseen issues and provide better patron service.

**User Documentation:** Two implementation team members began user documentation with input from their colleagues. First, they established the manual's “look and feel” in order to aid in user comprehension. The use of bold typeface to identify user actions, bullet points, and Aeon client screen shots with added red arrows reduced reliance on extensive text-based instructions (Figure 1). Second, the manual writers identified thirteen step-by-step processes for documentation, from patron account creation through processing patron requests (Figure 2). Each process received its own brief manual, with copies printed for each trainee, placed in the reading room, and made available on the Department Intranet. Third, the writers solicited feedback from trainees and periodically modified documentation to incorporate suggestions for improvement.

*(Continued on page 3)*

**Prepare Patrons:** Fully aware of the significant impact on patrons, the implementation team took steps to ease users' transition from USF's paper-based system to Aeon. In January, team members placed information on the Special Collections Department web site announcing the pending changes, describing benefits to patrons, providing links for more information, and seeking feedback. Several patrons made inquiry, none protested, and most seemed to take the news in stride.

**Live When Ready:** The user documentation phase took longer than expected and a last-minute opportunity to implement single sign-on for USF affiliates convinced implementation members that an April 1 go-live date was overly ambitious. In mid March, members met to recalibrate the launch schedule. They realized that with May came USF's lighter summer course offerings and fewer patrons in the reading room. Summer semester offered a less stressful time to roll out a dramatic transformation in staff and patron workflow. With May 10 firmly established, coaches and trainees set upon their intensive four weeks of activity. Late Friday afternoon on May 7, USF formally brought up its Aeon patron registration and log-in screen, cleared test data from the database, released open-URLs in the OPAC, and re-tested operability.

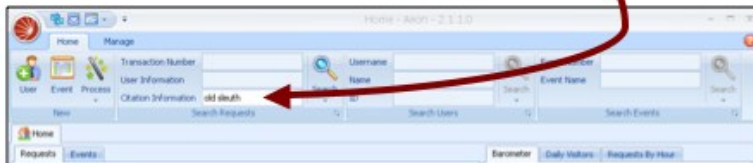
May 10 went off without a hitch. Staff, for the most part, was ready. Patrons adjusted to the registration and request processes without complaint. As the summer progressed, USF wondered how it had ever operated without Aeon. The closest we came to a cemetery was our collection of local funeral home records!

Figure 1.

Figure 2.

In the situation where several students from one course are requesting the same item, the best way to find a request to clone is to search for a previous request by Citation Information.

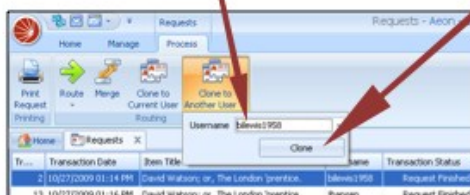
- Using the Search Ribbon on the Aeon homepage, enter a word or phrase from the title of the item or enter the author name in the Citation Information search box, then click on the search magnifying glass.



- Aeon returns the list of requests that match the search. If the patron's item is found, highlight that item in the list, then click on the Clone to Another User button.








- Select the patron from the Username list, and then click on the Clone button.



Aeon  Print Page

## USF Documentation

-  01 - Patron Registration And Logon
-  02 - Patron Request Submission
-  03 - Staff Logon
-  04 - Homepage Review
-  05 - Creating a User
-  06 - Clearing a User
-  07 - Finding Patron Requests
-  08 - Signing a User In and Out
-  09 - Processing Patron Requests
-  10 - Creating Patron Requests
-  11 - Editing Patron Requests
-  12 - Adding Notes
-  13 - Creating an Event

**Does your ILLiad system need a tune-up?  
Looking to increase productivity but not sure how?  
Would you like to be up and running with ILLiad 8 yesterday?**

Atlas Systems Training and Library Solutions experts are available to get you on the road with the latest ILLiad has to offer. Mix and match from the following available services for a 2 day (approximately 16 total hours) onsite visit:

- Assistance installing and configuring the ILLiad 8 client on your local workstations
- ILLiad 8 borrowing and lending processing overview for your staff
- Standby assistance as you process your first requests in ILLiad 8
- Instruction in custom searching and data export from ILLiad 8
- Discussion of currently available ILLiad 8 addons with addon implementation assistance and training
- Workflow review and recommendations for process streamlining or customer service enhancements
- Plenty of time for general Q & A
- Remote follow-up via Livemeeting

Please contact Stephanie Spires at [training@atlas-sys.com](mailto:training@atlas-sys.com) to schedule your ILLiad Tune-Up with one of our experts and relax while we do the driving to destination ILLiad 8.

### *2011 ILLiad International Conference. (Continued from page 1)*

The full conference kicks off Wednesday March 23 with a meet-and-mingle reception at 5:00 p.m., followed by dinner with Atlas staff at Virginia Beach's great oceanfront restaurants. On Thursday we get down to business with presentations from ILLiad users and Atlas staff. Presentations include: tips for new users, tackling textbook requests, raising the profile of your ILL department, purchase on demand and ILLiad 8, handling OpenURL requests, and much more. Watch the conference page for details on these sessions and more. Be sure to check the site frequently for updates. <https://www.atlas-sys.com/conference/>.

Thursday's Wine and Cheese social will feature Poster Sessions from your ILLiad colleagues. Enjoy refreshments while learning how others are enhancing service and increasing productivity with ILLiad.

Have a great story to share with your colleagues? Consider a Poster Session. Need an idea for a poster session? Check out the form on the conference website. **But don't delay--the deadline for submitting a Poster Session proposal is January 28.**

[https://www.atlas-sys.com/conference/2011\\_ILLiad\\_International\\_Conference\\_Proposal\\_Submission\\_Form\\_distributed.pdf](https://www.atlas-sys.com/conference/2011_ILLiad_International_Conference_Proposal_Submission_Form_distributed.pdf)

Plan now to join us in Virginia Beach in March. We can't promise warm weather, but we can guarantee you will leave full of ideas on how to enhance your library's use of ILLiad. Watch the conference webpage <https://www.atlas-sys.com/conference/> for more information.

Atlas Systems is a software development company founded in July 1995 with the mission of developing library automation to "Promote library excellence through efficiency." Atlas is best known for the creation and development of the ILLiad interlibrary loan management software, in use in over 1000 libraries and now exclusively distributed by OCLC. However, Atlas has a growing stable of library automation products designed to meet library needs not currently addressed by standard library software services.

Atlas is a process driven software development company. This means working with librarians to first understand the underlying environment to be automated and then designing the software to automate the process. Once the software has been created, Atlas provides implementation assistance, training, and ongoing support of the product, continually upgrading the software in response to our clients needs and suggestions. This workflow review approach to software design sets Atlas apart in the library automation market.

Atlas Systems is based in Virginia Beach and currently has a staff of 23, split almost equally between development, customer support/training, and administration/marketing. If you are interested in joining the growing Atlas team, send an email to [hr@atlas-sys.com](mailto:hr@atlas-sys.com).

The Oracle Newsletter is published semiannually by Atlas Systems, Inc. and edited by Karal Gregory. Please send comments and suggestions to [kgregory@atlas-sys.com](mailto:kgregory@atlas-sys.com).



**Promoting Library Excellence Through Efficiency**