Aeon Project proposal

Submitters: Mitch Lundquist, Lisa Wettleson
Possible Sponsors: The Department of Special Collections

Goal or Purpose

To find a 21st century solution to meet the challenges of delivering better service to users, improving collections’ security, facilitating teaching and learning, and gathering meaningful statistics to support the assessment needs of our institution.

The Current Problem

We are still using a paper-based system for many collection usage and inventory control tasks in the Department of Special Collections. This is a slow, inefficient, and unsecure method for managing workflows as well as handling important and sometimes confidential information. The following details about some of our processes describe our greatest concerns.

Visitor registration: Reading room patrons are required to fill out a paper registration form. The form is filed in drawers and updated by the patron when his/her information changes. Registration forms need to be kept indefinitely (cf. RBMS/ACRL guidelines for special collections). A paper-based system is neither the most efficient nor secure method to handle this process.

Requesting items for viewing in our reading room: Patrons fill out one paper request form in person for each item. (Occasionally an item is initially requested in advance via email, the telephone, etc., but the paper form is still required in advance of viewing all materials.) Depending on the number of items requested this can take a lot of patron time, and patrons can become impatient with our system. In addition, staff often need to assist visitors in filling out the forms, clarifying call numbers and other relevant information.

Requesting items for ordering duplication and digital imaging services: Patrons currently request images in person, via the phone, via email to individual staff or askspecial@library.wisc.edu, and via the Request an Image form on our website (http://www.library.wisc.edu/forms/request-an-image/). In addition to fulfilling the reproduction request, considerable staff time is involved in managing communication about a request.

Inventory control: Increased visibility of our collections and increased teaching demands have both triggered greater usage of our materials and raised internal concerns about security. At the same time there is renewed attention to collection inventory and security by risk management on campus and in UW System. We need to accommodate a higher volume of collection access and use, while also properly safeguarding our materials.

Statistics and usage analysis: We currently collect data via a variety of methods. Most of our usage data is collected via paper forms (registration and item request forms) and Word or Excel document lists of items pulled for instruction and exhibit purposes. It then takes a lot of staff time to organize and analyze the information for a variety of purposes.

Possible Solution

Proposal

Implement Aeon – a user and request workflow management software created by Atlas Systems for special collections and archives (http://www.atlas-sys.com/aeon/). Aeon improves patron service and maximizes staff efficiency while providing item tracking, security and statistics.

The Aeon Web Interface enables patrons to request items directly from the online catalog and finding aids (and less directly by keying in call numbers and bibliographical citations as necessary) for viewing in our reading room or ordering duplication and digital imaging services; it also allows them to monitor fulfillment of their requests through a personalized web account. The Aeon Staff Client permits staff to manage every step of every trans-action, from shelf to patron and back again, with full control and ease. The Aeon Web Reports and custom search features provide quick access to complete patron and item request histories and offer a wide array of usage analyses.

Impact

Visitor registration: Instead of a paper-based system, the Aeon online registration system enables better management of patron information. Upon completing an easy one-time online registration process, users gain access to a permanent research account from which they track all of their requests, past and present. They can also export formatted bibliographical citations.

Requesting items for viewing in our reading room: Aeon closes the typical gap between “discovery” and “delivery” by enabling users to place reading room paging requests automatically from library catalogs, archival finding aids, and other online collection management systems, as well as to input manually call numbers and other information as necessary. The system enables visitors to request items 24-7 so that items are pulled for them ahead of their arrival. This can be especially helpful for visitors who are not local.

Requesting items for ordering duplication and digital imaging services: Through their personalized web-based Aeon accounts, users can submit reproduction orders, receive invoices, and connect to a secure payment gateway. Staff can also deliver electronic files directly to users’ accounts to fulfill their orders.

Inventory control: Maintaining consistent and complete user records and accurate request tracking histories is a key factor in maintaining collection security. Aeon enables libraries to fulfill this important need in a far more detailed and efficient manner than any paper-based system or other means of circulation tracking, including attempts to use an ILS to perform some of the circulation functions that Aeon performs. In addition, with Aeon we would have the ability to know at a glance how many items should be in our reading room or seminar room, how many items should be on our hold shelf, how many items are being called from our vaults, and how many items we have ready to be re-shelved.

Statistics and usage analysis: One electronic system to collect data and run usage and other reports on would provide more accurate results and analysis, as well as reduce the number of hours staff spend tabulating statistics with our current practices. Aeon would provide such a system.

Collaboration with campus partners: The Aeon system is designed to facilitate collaborative construction and sharing of lists of relevant materials for class use.
Dependencies
Relevant Systems
What are the relevant systems or applications involved?
Alma, Forward, EAD, ...

Relevant Data
What data or information is available to solve the problem?

Implementation Stakeholders
LTG/SDG and the Department of Special Collections. The plan is to add University Archives as an Aeon client site, and likely other units with special collections such as the Music Library and Ebling, after full implementation for the Department of Special Collections.

Costs
Below is a chart outlining two options for the purchase and annual maintenance costs for Aeon. (The quote provided by Atlas Systems expired in September of 2014 so it is possible that these numbers could change.)

In addition, the following costs and potential savings still remain to be determined:
LTG/SDG costs for implementation and integration
LTG/SDG costs annual
Spec Collections implementation costs
Potential staff savings on the Special Collections side
And any other costs we haven’t identified yet

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<th>Year 2+</th>
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<td>Implementation and Training Services (required):</td>
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User Stories
Robin Rider: I know from personal experience when I’ve conducted my own research at other institutions that Aeon works smoothly and efficiently for researchers. I’ve been able to request research materials both in advance and onsite at other institutions, and have found the Aeon record of my own requests particularly valuable in the research process.