



IUG24

TOGETHER WE DRIVE INNOVATION

March 25 - 27, 2024 | Detroit, Michigan

Exploring Aspen Discovery

Pam Skittino, Deerfield Public Library

Tim Mayse-Lillig, Helen Plum Library

Alex Vancina, Helen Plum Library

Good morning, Welcome to Exploring Aspen Discovery! We will be discussing the ways that we use Aspen and some of the the features and benefits it offers over a traditional catalog like Encore



Presenters

Pam Skittino
Deerfield Public Library
Deerfield, Illinois

I'm Pam Skittino, the Head of Support Services at the Deerfield Public Library – Support Services performs the traditional Tech Services functions and I also manage the ILS and related software.

We use Sierra and are a stand-alone library, with a budget around \$4 million, our population is 19,200 residents, we offer over 1.6 million items in our physical and virtual collections.



Presenters

**Alex Vancina, Technology & Metadata Services Manager
Helen Plum Library, Lombard, Illinois**

I'm Alex Vancina, Technology and Metadata Services Manager at Helen Plum Library in Lombard, Illinois. Our department manages technical services, information technology, and ILS management for the Library. Like Deerfield, we are also a standalone Sierra library. We serve a community of 45,000 in the west Chicago suburbs with an annual budget of \$8 million.

About a year ago, we finished construction of a new building and opened to the public last April. We launched our new Aspen Discovery catalog just a few months earlier in December, 2023. I and the rest of our leadership team considered that refresh of our online catalog to be an integral extension of open our new physical space. There's an Aspen sticker on my hardhat from construction, and we've had great feedback from our community on both the new catalog and the new building.



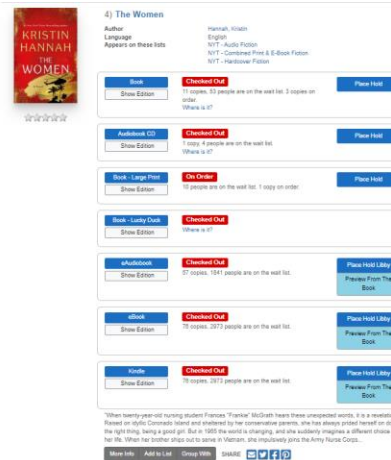
Presenters

**Tim Mayse-Lillig, Cataloging and Systems Librarian
Helen Plum Library, Lombard, Illinois**

Aspen Discovery

Overview

- Can incorporate your entire collection
- Robust indexing for better results
- Grouped record display



The screenshot shows a search result for the book "The Women" by Hannah Kiaton. The interface displays a grid of different editions and formats, each with its own status and availability information. The book cover is visible on the left. The metadata includes the author's name, language, and various identifiers like ISBN and OCLC. The editions listed are: Book (Checked Out, 11 copies, 53 people on the wait list), Audiobook CD (Checked Out, 1 copy, 4 people on the wait list), Book - Large Print (On Order, 10 people on the wait list), Book - Large Print (Checked Out), Audiobook (Checked Out, 17 copies, 1041 people on the wait list), eBook (Checked Out, 11 copies, 2072 people on the wait list), and Kindle (Checked Out, 11 copies, 2072 people on the wait list). Each entry has buttons for "Show Edition", "Place Hold", and "Place Hold Libby". A quote from a review is visible at the bottom of the record.

Aspen
Discovery

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Pam - Aspen discovery is an extremely flexible Discovery system that can incorporate your entire collection, including online resources, program calendar events, local history databases and more. It offers robust indexing (all the MARC fields!), and displays the output in grouped records where different formats of the same title are on the same record.

Aspen Discovery

- Internal concerns around Open Source
- Hosting options
- \$\$



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-Pam For Deerfield, the decision to replace Encore was a multi-year process. When we renewed our Sierra contract, Vega was NOT READY so we were able to look around. The first hurdle to work on administrations acceptance of "open-source" software. I think there is a general sense that Open Source means free, dangerous, and unstable. But the reality of Aspen is it is supported by a strong and growing library community, in active development, advanced enough to include EVERYTHING we offer our patrons now AND additional features, and with ByWater hosting, supported by a company with a proven track record. We try to host software offsite as much as possible. Even though we could install this in house, we prefer not to.

The next part for Deerfield was money – we did get it into our budget but when the Friends of the Library asked for proposals for purchases they could fund, I submitted that proposal and was surprised and delighted when it was accepted. A link to our proposal to our Friends for funding is in the Additional Resources at the end of the presentation. If you use ByWater, the first year you pay for implementation and training, subsequent years are only hosting and support.

Aspen Discovery - Implementation

We chose a 12-week implementation cycle

Aspen Discovery Agenda & Action Items

System Messages [System Messages](#) Create any desired system messages Examples "Welcome to our new Catalog"

Web Builder (1 hour)

[Watch Recording](#)

Agenda	Documentation	Action Items	Complete?
Basic Pages	Basic Pages	Decide what you will be using (if any of these) and start creating!	<input type="checkbox"/> Some Aspen sites using Web Builder
Custom Pages	Custom Pages		<input type="checkbox"/> Marquette Public Library
Custom Forms	Custom Forms		<input type="checkbox"/> Renoir Memorial Library
Quick Paths	Quick Paths		<input type="checkbox"/> Urbain County Library
Web Resources	Web Resources	/WebBuilder/ResourceList	<input type="checkbox"/> Web Resources
Staff Directory	Staff Directory	/WebBuilder/StaffDirectory	<input type="checkbox"/> Salina Public Library
Images / PDFs	Images & PDFs		<input type="checkbox"/> Delphi
Audience / Categories	Audiences & Categories		<input type="checkbox"/> Staff Directory

User Experience (1.5 hours)

[Watch Recording](#)

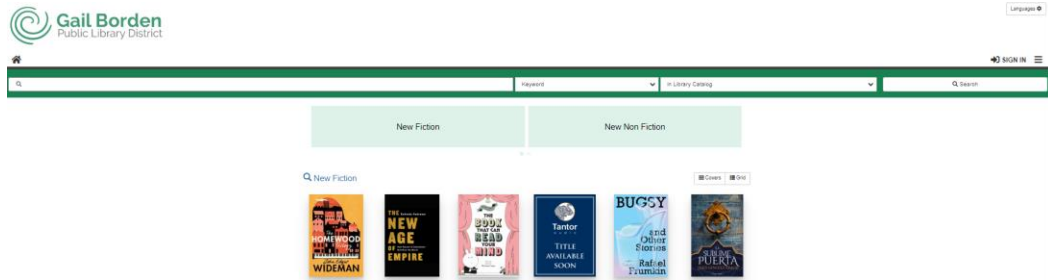
Agenda	Documentation	Action Items	Complete?
Searching & Searching	Search Results		
User Account	Account Settings		
	Checked Out Titles		
	Tags		
	Reading History		
	Fines & Fees		
	Lists		
	Ratings & Recommendations		
	Explore More / Details		
	Purchase Requests		
	Materials Research		

Pam - Deerfield chose a 12-week implementation cycle, starting December 6th and going live on February 26th – you can go longer or shorter. You are provided with a detailed document containing links to help pages on all the topics that will be covered in the live virtual trainings (which are recorded) and you can easily leave questions on the document or mark them complete. As you can see on this screenshot, we were also provided with links to other libraries that were doing specific things that we wanted to do.

ByWater is HIGHLY responsive to both providing help and for accepting and implementing recommendations

Best of all, everything that Sales said Aspen could do, it could actually do.

Aspen Discovery - Nearly unedited



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-Pam AND, it works right out of the box https://gailborden.aspendiscovery.org/?browseCategory=main_new_fiction vs a fully configured view <https://catalog.deerfieldlibrary.org/>
Now Alex will take us thru the development cycle

Development Cycle & Updates

- Feature updates and bug fixes are released monthly
- New features are planned and announced at monthly Aspen Gathering meeting with customers and the development team
 - Meetings are recorded and shared on YouTube
 - Along with detailed release notes, “Aspen Updates in an Instant” videos recap notable changes
- Frequent contributions to the open source project from ByWater Solutions, PTFS Europe, Equinox Open Library Initiative, Theke Solutions, Nashville Public Library, and others
- The source code available on Github:
<https://github.com/mdnoble73/aspen-discovery>



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Alex - Aspen Discovery maintains a steady and consistent development cycle. Feature updates are released monthly with occasional bug-fix patches in between. ByWater Solutions employs the core development team, but as an open source project, there are several companies that contribute code, hosting, and support services. ByWater hosts monthly Aspen Gathering meeting on Zoom to demonstrate upcoming features and discuss the future of the project with the community. I think that open process is one of the key differences between Aspen and anything in the library discovery market. Being able to talk directly with the people designing and developing the software is incredibly helpful.

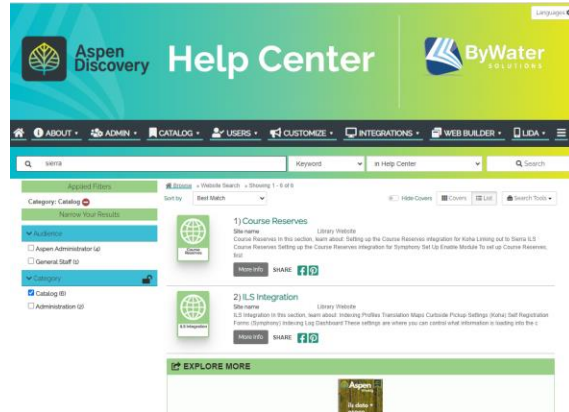
The meeting agendas and recordings are public available. After each monthly release, detailed release notes and a shorter “Aspen Updates in an Instant” video are also published. Because of the steady, incremental pace of changes we’ve always found the upgrade process to be very smooth and not disruptive for staff or patrons. However, some customers choose to maintain a development server to test out new releases before upgrading the production instance of their catalog.

The source code is available on Github. So, if you have some experience with PHP, Java, HTML/CSS, and JavaScript, you can see exactly how Aspen works and even

contribute to the project yourself. For example, the Nashville Public Library is a very active participant.

Documentation

- <https://help.aspendiscovery.org/>
- Comprehensive & Searchable
- Runs on Aspen



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Alex

Marketing, Training and Support



ByWater Training and Support site – available to everyone

VISUAL TUTORIAL VIDEO TUTORIAL



Training Videos <https://www.youtube.com/@bywatersolutions/videos>



Marketing recommendations and Canva templates
<https://help.aspendiscovery.org/marketing>



Library created documentation (To-Do) my Aspen tips of the day

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Pam - The marketing, training, and support are top-notch. ByWater's videos and marketing tools are available to anyone – and they are created in Canva so you can easily copy and then edit them with your style guide and branding – and then change screen shots so your actual implementation is shown. This is what we used to create our Visual Tutorial. Originally I had labeled these as "Help" with the Information "I" but patrons kept asking for a tutorial. Renaming helped a lot!

If you are an Illinois library and have an L2 login, you can see the extensive SWAN documentation and the link is in the slide notes
<https://support.swanlibraries.net/platform/87102>

Main Library Alliance <https://staff.mainlib.org/aspen-hq/>

Aspen tips of the day – daily, during implementation, I sent out information on a feature that staff could explore, this process received lots of positive feedback. The Libraries found it much easier to learn in small bites and when the 1.5 hour training occurred, a lot of the user experience information they were already comfortable with.

Customization

- Aspen is extensively customizable
- We'll review just a few features:
 - Custom themes, JavaScript, and CSS
 - Placards
 - System messages
 - Search facets
 - Website builder, forms, and polls
- There's much more!
 - Resources at the end of our presentation

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Alex: Aspen is very customizable. I'll touch on just a few of the customizations we've used, focusing on search features and branding aspects, but I encourage you to look at the documentation, example sites, and other resources we've included at the end of our presentation for a more complete sense of the available features and what's possible. One of the things that really impressed our implementation team when HPL was evaluating Aspen was how often we asked if Aspen could do something, and the answer was "yes!"

Customization: Themes



HPL Website
www.helenplum.org



HPL Catalog
catalog.helenplum.org

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Alex: A few years ago, we completed a website redesign and rebranding project in partnership with Library Market. Our Marketing Department has put a lot of work into developing a consistent, recognizable brand identify for the Library, and they were very happy with the extent to which we were able to make Aspen look and feel like a natural extension of our website, including not just our logo and brand colors, but fonts and other style elements.

Customization: Themes, CSS, JavaScript

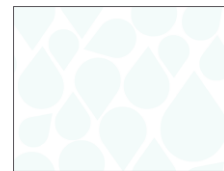
- Theme settings and custom CSS can be used to match the library's website and branding



The screenshot shows a settings interface with the following sections:

- Custom Heading Font:** A dropdown menu is set to "Barlow-Medium.ttf". To the right, it lists supported languages: English, Español, 中文(简体), עברית. Below the dropdown is a "Remove" button.
- Body Font:** A dropdown menu is set to "Open Sans". To the right, it lists supported languages: English, Español, 中文(简体), עברית. There is a checkbox labeled "Use Default" which is currently unchecked.
- Custom Body Font:** A dropdown menu is set to "Select a font...". To the right, it lists supported languages: English, Español, 中文(简体), עברית.
- Additional CSS:** A text area containing the CSS snippet:

```
body {  
  background: url(https://helenplum.aspendiscovery.org/WebBuilder/ViewImage?id=1) repeat;  
}
```
- Additional CSS Application:** A dropdown menu set to "Append to parent css".



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Alex This is just a small snapshot from the Theme settings page. In addition to a default set of fonts, you can upload your own, and we chose to use our brand font, Barlow. Colors can be selected for almost every UI element of Aspen, so we were able to closely match those to our website. Beyond the extensive built-in theme settings, you can add CSS snippets to further customize the look and feel. For example, we used CSS to add the same tiled background image used on the Library's website, which includes the petal motif from our logo, which appears throughout our branding. (The background pattern's contrast is subtle, so it may be faint on some screens.)

Customization: Themes, CSS, JavaScript

- Multiple theme templates can be created, copied, shared, and switched easily
 - Individual consortia members
 - Kids catalogs
 - Seasonal / Special events
- Customizable elements include:
 - Site logo
 - Favicon
 - Fonts
 - UI element and text colors
 - Header & footer width (full or fixed)
 - Format category images
 - Menu links and icons
 - And more

Themes

[Documentation](#)

[Return to List](#) [History](#) [Copy](#) [Share with Community](#) [Delete](#)

Search for a Property

Id [🔗](#) [🔒](#)

1

Theme Name [🔗](#) [🔒](#)

helen plum

Display Name [🔗](#) [🔒](#)

helen plum

Extends Theme [🔗](#) [🔒](#)

None

Make Header & Footer Full Width [🔗](#) [🔒](#)

High Contrast Theme [🔗](#) [🔒](#)

🔒 Enabling this option will add accessibility and styling enhancements to a High Contrast theme. Not recommended for your default/primary theme.

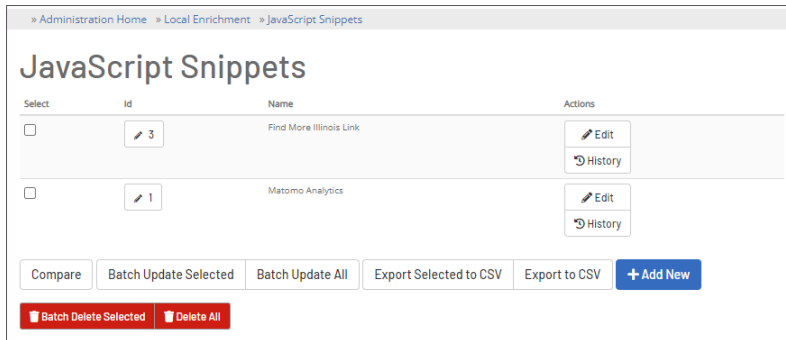
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Alex: Multiple theme templates can be created, copied, and shared within the system. For example, consortia using Aspen could create a base template for their members, but each individual library could further customize the look at feel of their own catalog. You might create a separate theme for a Kids Catalog interface, use special themes for different seasons, holidays, or special events. This also makes it easy to develop and test theme changes without affecting the production theme until you're ready to deploy it.

Customization: Themes, CSS, JavaScript

- JavaScript snippets can add or extend functionality



The screenshot shows a web interface for managing JavaScript snippets. At the top, there is a breadcrumb trail: » Administration Home » Local Enrichment » JavaScript Snippets. Below this is the title "JavaScript Snippets". The main content is a table with columns for "Select", "Id", "Name", and "Actions".

Select	Id	Name	Actions
<input type="checkbox"/>	3	Find More Illinois Link	Edit History
<input type="checkbox"/>	1	Matomo Analytics	Edit History

Below the table, there are several action buttons: "Compare", "Batch Update Selected", "Batch Update All", "Export Selected to CSV", "Export to CSV", and a blue "+ Add New" button. At the bottom left of the interface, there are two red buttons: "Batch Delete Selected" and "Delete All".

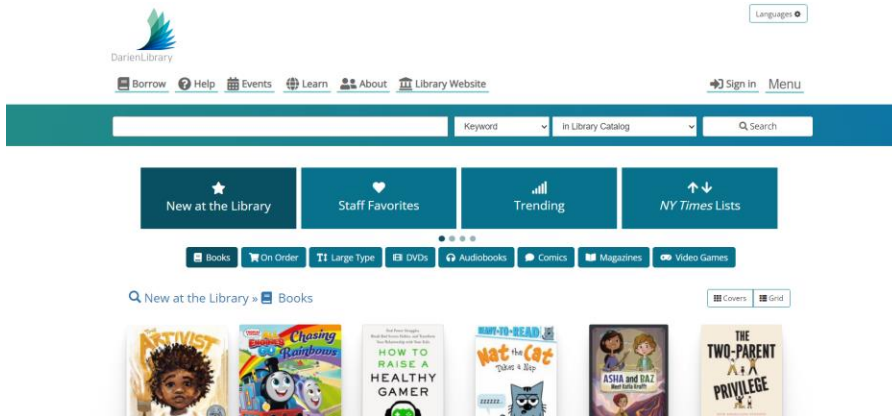


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Alex: JavaScript snippets can be used to add or extend functionality. Helen Plum uses JavaScript to add Matomo Analytics tracking code to our site. Matomo is an open source, privacy-oriented alternative to Google Analytics which we are more comfortable using in our catalog. We also use JavaScript to add build links to Find More Illinois, our SHAREit-based ILL platform, so patrons can easily click to repeat their Aspen search terms in Find More Illinois.

Customization Example: Darien Library



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Alex: Darien Library is one of my favorite examples of a Polaris site that has done an excellent job of customizing a clean, attractive, and well-integrated theme. You can find a link to their catalog at the end of the presentation.

Next, we'll look at some functional feature beyond theming to customize an Aspen site.

Customization: Placards






- Placards are keyword-based triggers to include notices or advertisements in search results
- Useful for promoting related resources, events, readalikes, or staff curated lists
- Can include start and end dates

Placards

[Documentation](#)

Sort by

Filters

Select	Id	Title	Start Date to Show	End Date to Show	Dismissable	Triggers	Actions
<input type="checkbox"/>	 13	Auto Repair Source	No start date	No end date	Yes	4	 Edit  History
<input type="checkbox"/>	 15	BookFix	No start date	No end date	Yes	5	 Edit  History
<input type="checkbox"/>	 71	Boundless	No start date	No end date	No	3	 Edit  History
<input type="checkbox"/>	 16	Britannica ImageQuest	No start date	No end date	Yes	4	 Edit

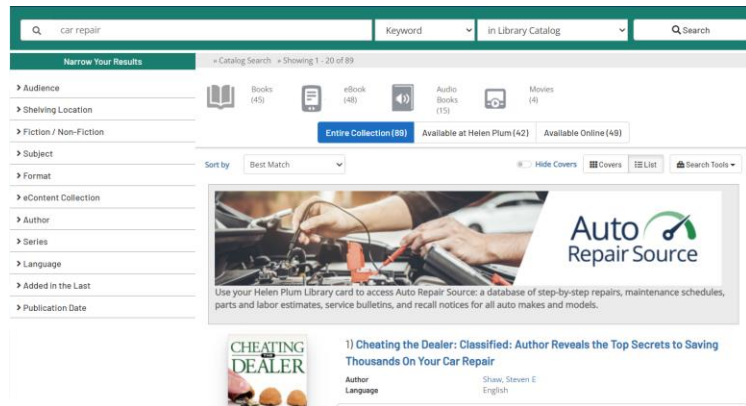
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Alex: Placards allow you to define keywords that will add a notice or advertisement to search results based on specific keywords. These are a great way to highlight database, events, or staff-curated lists related to a user's search terms which would not normally be discoverable through an online catalog. Placards can also be limited to be shown only during a range of dates or at locations for multi-branch libraries and consortia.

Customization: Placards

- Auto Repair Source placard shown for the keywords:
 - Auto parts
 - Auto repair
 - Auto repair source
 - Car repair



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Alex: Here's an example showing a search for "car repair." We've created a placard for our Auto Repair Source database that appears when patrons search for related keywords. Clicking on the placard takes the user to that resource.

Customization: System Messages

- Displayed at the top of the page, system messages are useful for notifying patrons of closures or software issues
- Can include start and end dates for scheduled messages

Viewing hold lists in the HPL and Aspen LiDA apps

Due to a system issue, viewing your place on individual hold lists is temporarily unavailable from within the library app on iOS devices. To view your hold list status, visit the browser version of our catalog at catalog.helenplum.org and log in to your account, click "Titles on Hold" and navigate to "Pending Holds"

Thank you for your patience as we work to resolve this issue.



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Alex: System Messages can be used to display a message above the site header. We've used these to notify patrons of software issues, upcoming holidays, staff in-service days, and weather closures. These can also be scheduled or limited by location.

Customization: Search Result Facets

The screenshot displays a library search interface. On the left, a 'Narrow Your Results' sidebar lists various facets such as Audience, Shelving Location, Fiction / Non-Fiction, Subject, Format, eContent Collection, Author, Series, Language, Added in the Last, and Publication Date. The main search area shows 'Catalog Search' with 'Showing 1 - 20 of 5,663' results. A 'Sort by' dropdown is set to 'Best Match'. The search results for 'Baking' by James Peterson are shown, including the book cover, author information, and a 'Place Hold' button. A facet menu is open on the right, showing the 'Subject' and 'Format' sections. The 'Format' section is expanded, showing options for Book (899), eBook (4,311), eAudiobook (859), eVideo (258), and eMagazine (75). The 'Book' option is selected.

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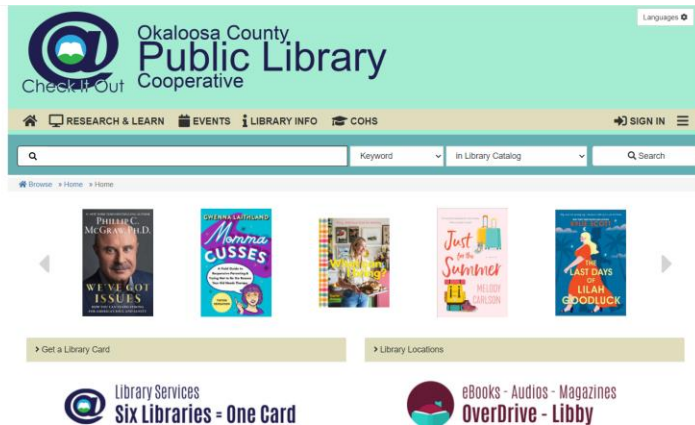
Alex: Aspen offers over 40 facets that can be used to narrow search results. You can choose which ones are displayed in search results, the order that they appear, and whether they are expanded or collapsed by default. Facets also give you a quick way to see how many results will match that criteria. Once a facet is used, you can also “lock” that selection so it will apply to additional searches during your session.

You probably wouldn’t choose to display all, or even most, of the 40+ facet in your catalog. However, you can choose to include a larger subset of them on an advanced search page. For example, we include Accelerated Reader levels and point values, and Awards on our advanced search page, since our Youth Services staff and teachers find these helpful.

Customization: Web Builder, Forms, and Polls

Some libraries have built their entire library website in Aspen.

Here's an example from Okaloosa County:



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Alex: Aspen Discovery includes features for building custom web pages, forms, poll, and hosting files inside the catalog. As Tim mentioned earlier, the Aspen Discovery help site itself runs on Aspen. A library could potentially build their entire website in Aspen if they didn't have another content management system. We're not currently using these features, but it's a nice option to have.

Okaloosa County is a great example of this. There's a link to their site and a couple of others in the Resources slide at the end of the presentation.

Accessibility and Language

- Accessibility Contrast Ratio 6.47
- Languages Contrast Ratio 6.47
- Themes Contrast Ratio 5.17

Minimum contrast required for

- 4.5 (Default, WCAG 2.0 AA) Contrast Ratio 5.17
- 4.5 (Default, WCAG 2.0 AA) Contrast Ratio 3.83
- 7.0 (WCAG 2.1 AAA compliance) Contrast Ratio 3.83

Scan results for alpha.aspendiscovery.org

Compliant

Great work! alpha.aspendiscovery.org meets the Web Content Accessibility Guidelines (WCAG) and is ADA-compliant.

Your website is accessible!

WCAG & ADA COMPLIANT

3%

Congratulations!
Your website is among the 3% of inclusive and accessible websites globally. Well done!

● Inclusive websites ● Not inclusive websites

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Pam When we are implementing, I was curious if they were as accessibility compliant as they claimed,

Aspen Discovery’s goal is to comply with level 2.1 AA standards of the Web Content Accessibility Guidelines (WCAG).

I ran our catalog thru an accessibility testing website and ByWater either fixed or are going to fix issues.

"We've gone through the report and fixed everything that we can before go live and when we run the accessibility checker again, Aspen is showing as compliant (see attached). The one significant area we were not able to make fully compliant has to do with the Browse Categories. This feature uses an older component that is not being updated to meet current accessibility standards, so we'll be investigating how to replace this component soon, but that will be a larger project. These fixes will be a part of the 23.03 release that you'll get later this month."

Aspen Weekly - link to Accessibility document <https://drive.google.com/file/d/1-e3dhpyczXtDWU-Z23TGMd506QDyoNri/view>

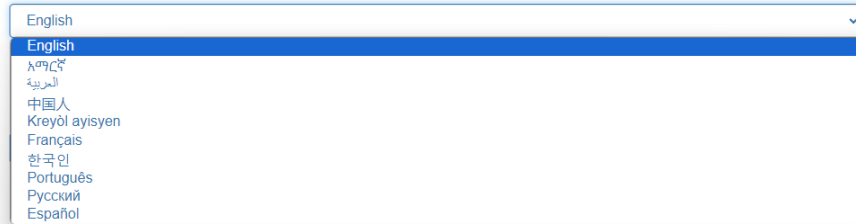
Inside of Aspen Admin – you also have built in accessibility ratings for things like

contrast ratios and you can also choose what level you would like to be compliant

You can also create or download a community-created high-contrast theme, or a dark-mode theme

Accessibility and Languages

Language to display catalog in



- English
- English
- አማርኛ
- العربية
- 中国人
- Kreyòl ayisyen
- Français
- 한국인
- Português
- Русский
- Español

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Pam: Another benefit of Open Source is that if you are really adamant about the availability of a language, you can add the translations yourself AND you can make them available the entire Aspen community. We make the entire current list of languages available to our patrons and we will add more as the become available but as a small library we are unlikely to be able to translate to another language on our own. You can also pick and choose the languages you offer. click

Accessibility and Languages



Balance beam set

Series
Language

Toy collection
English

Toy

Show Edition

There's a wait ...

4 copies, 26 people are on the wait list.

Show me where!

Place Hold



Colorful sections are covered with smooth, rounded bumps providing tactile stimulation and help to improve the sense of balance when walked on.

Translate a term ³¹⁰⁸

Translation ²⁶⁰⁷

Physical Materials

Close ⁴³

Update Translation ³¹⁰⁹

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Aspen Administration ¹¹

Your Account ²⁰

Checked Out Titles ²⁴²⁴

» Physical Materials ²⁴²⁶ ¹¹

» 3 Overdue ²⁴³⁰

» Libby ⁰

» Hoopla ⁴³⁵ ⁰

Titles On Hold ²⁴²⁵

» Physical Materials ²⁴²⁶ ¹²

» Libby ⁰

Fines ²⁴³² ^{\$0.00}

Your Library Card ²⁴²⁷

Recommended For You ⁶²

» Titles You Rated ⁶³ ¹²

» Not Interested In Titles ²⁵² ⁰

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Pam: In addition to translating to other languages, you can change the wording on anything that exists, simple login as admin, click "Start translation mode" and see, onscreen, the text fields you are translating. (balance beam shot)

Accessibility and Languages

2670 %1% of %2%

%1% of %2%

/GroupedWork/4081c1a-
2af8-14ef-a0df-
f2ab06a9edb4-
eng/AJAX?
method=getCopyDetails&for
2af8-14ef-a0df-
f2ab06a9edb4-
eng

Save Translations

1 2 3 4 5 Next » [1451]

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Pam: If you prefer to translate in a more orderly fashion, you can switch to the "Languages and Translations" menu in Admin and work thru all 1451 pages of unique terms. click

Grouping & Ungrouping

Grouped Work Display
» Grouped Work Facets
Manual Grouping Authorities
Author Authorities
Records To Not Group
Hidden Series
Hidden Subjects

Select	id	Grouped Work ID	Alternate Title	Alternate Author	By	Date Added	Actions
<input type="checkbox"/>	485	829a840d-988c-5575-7aa0-8bec34edccdd-eng	enchanted april with linked table of contents	arnim v elizabeth	TIM M.	03/20/24 08:46:45	Edit History
<input type="checkbox"/>	484	829a840d-988c-5575-7aa0-8bec34edccdd-eng	enchanted april	von arnim elizabeth	TIM M.	03/20/24 08:46:30	Edit History
		-5575-7aa0-eng	enchanted april the	arnim elizabeth von	TIM M.	03/20/24 08:46:14	Edit History
		7-9ad6-6f4c-eng	i survived the nazi invasion 1944 issue 3	tarshis lauren	TIM M.	03/04/24 08:49:52	Edit History
		-c504-32db-eng	exchange	grisham john	TIM M.	02/28/24 15:35:27	Edit History
		-1c9d-a5dd-eng	lace widow	cox mollie ann	TIM M.	02/12/24 14:20:55	Edit History

- Customizable
- Review and update previous decisions
- Cataloging actually matters
- Leader fields matter!
 - language codes
 - literary form
 - audience

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Tim

APIs, Sideloading, Events Integrations, and 3rd Party Enrichment

- APIs
 - Direct integration with content and features from Boundless, cloudLibrary, hoopla, Libby, and the Palace Project
- Sideloading
 - Easily import MARC records from any content provider without having to manage these records in the ILS
- Events Integrations
 - Communico, Springshare, Library Market
- 3rd party enrichments
 - Content Café, Syndetics, NoveList Select, StackMap, NYT Lists, GoodReads, Wikipedia, DPLA, and more:

<https://help.aspendiscovery.org/help/integration/enrichment>



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Alex: Aspen supports integration with many popular content providers, including Boundless, cloudLibrary, hoopla, Libby, and The Palace Project. Titles from these services are directly indexed via their APIs, and checkouts, holds, renewals, and returns can be managed from within Aspen.


Pam adds - For sideloading your MARC records only need to have a unique 001 field
Communico - events calendar

ECOMMERCE

▪ ECOMMERCE

With these settings, you can:

- Set up fine payments within the user account
- Link out to an external payment site within the user account




Aspen Discovery has integration with the following vendors for eCommerce:

- ACI Speedpay
- Certified Payments By Deluxe
- Comprise
- FIS WorldPay
- InvoiceCloud
- PayPal Developer
- PayPal Payflow
- Square
- Stripe
- Xpress-pay

If you do not see your payment processor and you currently accept payments through your ILS, you can also choose to link out to your current ILS payment processing page. This link will still appear within the user account.

Completed?	Cancelled?	Error?	Message	Re
Yes	No	No		htp
No	No	No	Your payment was received, but was not cleared in our library software. Your account will be updated within the next business day. If you need more immediate assistance, please visit the library with your receipt. Could not record fine payment.	htp

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Pam: 10 choices

Easy to configure, we chose Square so we could get rid of the PayPal account with monthly charge – most vendors offer a sandbox so you can test your settings and then move over to full production.

With Sierra, you'll have the same issues with locking records (shameless plug for voting in the MEEP process) but you can see if there are error messages in the Ecommerce reports – Example here

Yes, you can also accept donations.

Patron Accounts

The screenshot displays a library website's 'Your Account' page. At the top, there are navigation links for 'BROWSE', 'LIBRARY WEBSITE', and 'NEED HELP?'. A search bar contains the text 'python programming'. Below the search bar, there's a navigation menu with 'Aspen Administration' and 'Your Account'. The 'Your Account' section is expanded, showing a sidebar with links to 'Checked Out Titles', 'Titles On Hold', 'Fines', 'Your Library Card', 'Your Lists', 'Your Searches', 'Your Events', and 'Reading History'. The main content area is titled 'Your Account Account Summary' and features four summary cards: 'CHECKED OUT TITLES' (2), 'OVERDUE' (0), 'TITLES ON HOLD' (5), and 'READY FOR PICKUP' (0). At the bottom left, there's a '#IUG2024' hashtag, and at the bottom right, the 'IUG24' logo is visible.

Alex: The Account page includes all the features you'd expect: information about checkouts, titles on hold or ready for pickup, overdue items, and fines. You can also find saved lists, saved searches, events from calendar integrations, and Reading History.

Since I'm logged in to my staff account here, there's also a link to Aspen Administration functions. Patrons won't see this option.

Patron Accounts: Checkouts

Checked Out Titles

Helen Plum Library is open today from 9:00 AM to 5:00 PM

All 2 Physical Materials 1 Libby 3 Hoopla 1 Boundless 3

Sort by Due Date Asc Last Loaded 03:28 PM Refresh

Hide Covers

Select/Deselect All

1) The complete beans & grains cookbook : a comprehensive guide with 450+ recipes

641.6565 COMPLETE
Book
Mar 27, 2024 **[Due in 4 days]**
Renewed 2 times

2) Die With Zero

Bill Perkins
Mar 9, 2024
eAudiobook - Hoopla
Mar 30, 2024

[Renew](#)
[You Might Also Like](#)

[Access Online](#)
[Return Now](#)
[You Might Also Like](#)

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Alex: Checked Out Titles include physical material as well as integrated econtent collections. You can see the number of checkouts for each of these collections at the top of the page and click these to filter the list accordingly. Econtent loans can also be renewed, returned, and accessed here.

Patron Accounts: Holds

Your Account

- Checked Out Titles
 - Physical Materials 1
 - Libby 0
 - Hoopla 1
 - Boundless 0
- Titles On Hold
 - Physical Materials 1
 - Libby 0
 - Boundless 0
- Fines 100
- Your Library Card
- Your Lists
- Your Searches
- Your Events
- Reading History 0

Account Settings

Masquerade

Titles On Hold

Helen Plum Library will be open tomorrow from 9:00 AM to 5:00 PM

All 1 Physical Materials 1 Libby 0 Boundless 0

Holds Ready For Pickup

These titles have arrived at the library or are available online for you to use.

You do not have any holds that are ready to be picked up.

Pending Holds

These titles are currently checked out to other patrons. We will notify you when a title is available.

Sort by Position Hide Covers

<input type="checkbox"/>		1) Tahini and turmeric : 101 Middle Eastern classics-made irresistibly vegan
	Author	Cohen, Vicky, 1967-
	Format	Book
	Pickup Location	Helen Plum Library Lobby
		Cancel Hold
		Change Pickup

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Alex: Holds for physical material and econtent are accessed the same way. Holds Ready For Pickup and Pending Holds are clearly separated.




Patron Accounts: Holds

Pending Holds

These titles are currently checked out to other patrons. We will notify you when a title is available.

Sort by

Hide Covers

-  **1) Tahini and turmeric : 101 Middle Eastern classics-made irresistibly vegan**
Author Cohen, Vicky, 1967-
Format Book
Pickup Location Helen Plum Library Lobby
Status On hold
Position 1 of 1
[Cancel Hold](#)
[Change Pickup Loc.](#)
[While You Wait](#)
-  **2) Ultra-Processed People**
Why We Can't Stop Eating Food That Isn't Food
Author Tulleken, Chris van
Source Libby
Format Libby MP3 Audiobook,OverDrive Listen
Date Placed Jan 28, 2024
Position 1 out of 16
[Cancel Hold](#)
[Freeze Hold](#)
[Preview From The Book](#)
[While You Wait](#)
-  **3) How Infrastructure Works**
Inside the Systems That Shape Our World

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Alex: For Pending Holds, you can cancel, freeze and unfreeze, and change pickup locations, and see your position in the queue, if these are supported. You can even access previews of econtent for sources that provide them, like Libby.

Patron Accounts: Lists

The screenshot displays a library patron's account interface. On the left, a 'Your Account' sidebar lists various account features with item counts: Checked Out Titles (1), Titles On Hold (1), Fines (\$1.00), and Reading History (28). The main 'Your Lists' section features a 'Sort by Title' dropdown, buttons for 'Create a New List', 'Delete Selected Lists', and 'Import From Old Catalog', and a 'Hide Covers' checkbox. Two lists are shown: '1) Cook Books' with 1 title, created on January 29, 2024, and '2) To Read' with 4 titles, created on November 4, 2022. Each list entry includes a book cover image and a 'Private' button.

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Alex: Patrons can create their own title lists. These can be created in Aspen or imported from legacy supported catalogs. For Sierra libraries, this include WebPAC/Encore.

Patron Accounts: Lists

Your Account

- Checked Out Titles
 - Physical Materials 1
 - Libby 4
 - Hoopla 1
 - Boundless 0
- Titles On Hold
 - Physical Materials 1
 - Libby 4
 - Boundless 0
- Fines **\$1.00**
- Your Library Card
- Your Lists
- Your Searches
- Your Events
- Reading History

To Read

Created on November 4, 2022, 9:24 am Last Updated March 22, 2024, 11:25 pm

Edit Add Multiple Titles Email List Print List Export List to CSV Export List to RIS Generate Citations Sort by Delete List Hide Covers

1) **Proving ground: the untold story of the six women who programmed the world's first modern computer**
Author: Kleiman, Kathy

Book On Shelf Place Hold
Show Edition Biographies BIOG KLEIMAN 1 available

"After the end of World War II, top-secret research continued across the United States as engineers and programmers rushed to complete their confidential assignments. Among them were six pioneering women, tasked with figuring out how to program the world's first general-purpose, programmable, all-electronic computer - a machine built to calculate a single ballistic trajectory in twenty seconds rather than forty hours by human hand - even though there..."

More Info Add to List SHARE

2) **When the heavens went on sale: the misfits and geniuses racing to put space within reach**
Author: Vance, Ashlee

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Alex: Titles can be added to lists from Aspen's search results, or you can add multiple items by entering a list of ISBN numbers, which is particularly useful for staff users. Anyone can make a list public and shareable with a static URL. Staff, with the appropriate permission, can make public lists to be displayed in the catalog and search results.

Lists can be emailed, printed, exported to a CSV, or as APL, MLA, or Chicago citations. Though, as usual with automatic citation generators, your mileage may vary. Tell students to check their work!

Patron Accounts: Fines

Your Account

- Checked Out Titles
 - Physical Materials 1
 - Libby 0
 - Hoopla 1
 - Boundless 0
- Titles On Hold
 - Physical Materials 1
 - Libby 0
 - Boundless 0
- Fines **\$1.00**
- Your Library Card
- Your Lists
- Your Searches
- Your Events
- Reading History 28

[Account Settings](#)

Fines

<input checked="" type="checkbox"/>	Details	Fine/Fee Amount	Amount Outstanding
<input checked="" type="checkbox"/>	Manual Test charge	\$1.00	\$1.00
Total		\$1.00	\$1.00

PayPal

Debit or Credit Card

Powered by **PayPal**

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Alex: As Pam mentioned, Aspen supports ecommerce integration with many payment processors. Helen Plum is fine-free, but we use PayPal to accept payment for lost or damaged material, and to collect annual card fees for non-resident users outside of our district. Here's an example of a test charge added to my own account. The amount owed is easily spotted in the red badge on the left-hand menu, and users can select one or more charges to pay directly within the catalog.

Patron Accounts: Reading History

My Reading History (What's This?)

Export To CSV Delete All Stop Recording My Reading History

Sort By Last Used Filter Hide Covers

- 1) Die With Zero**
Author: Bill Perkins
Format: eAudiobook
Last Used: In Use
[Delete](#)
You Might Also Like
- 2) The complete beans & grains cookbook : a comprehensive guide with 450+ recipes**
Format: Book
Last Used: In Use
[Delete](#)
You Might Also Like
- 3) The New Chicago Diner Cookbook**
Author: Jo A. Kaucher
Format: eBook
Last Used: Jan 2024
[Delete](#)
You Might Also Like

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Alex: Reading History is something that Aspen handles very well. In addition to integrating with the ILS-native reading history for past checkouts, you also see your borrowing history for API-integrated econtent collections. If you're library has enabled Reading History, patrons can opt-in or out, and delete individual entries.

The "Last Used" date shows the most recent checkout for each title. This date is also displayed in catalog search results, so you can easily tell if you've read a title already. We've found this to be particularly helpful for assisting patrons participating in our homebound delivery program, since staff often assist with managing their requests.

Patron Accounts: Reading History

My Reading History (What's This?)

Export To CSV Delete All Stop Recording My Reading History

Sort By Last Used Filter Clear Hide Covers

- 1) Blood in the machine : the origins of the rebellion against big tech**
Author: Merchant, Brian
Format: Book
Last Used: Oct 2023
[More Info](#) [Add to List](#) [SHARE](#) [📧](#) [🐦](#) [📘](#) [📌](#) [Delete](#) [You Might Also Like](#)
- 2) The Chaos Machine**
Author: Fisher, Max
Format: eAudiobook
Last Used: Oct 2023
[More Info](#) [Add to List](#) [SHARE](#) [📧](#) [🐦](#) [📘](#) [📌](#) [Delete](#) [You Might Also Like](#)
- 3) The Genesis Machine**
Author: Webb, Amy
Format: eBook
Last Used: Dec 2022
[More Info](#) [Add to List](#) [SHARE](#) [📧](#) [🐦](#) [📘](#) [📌](#) [Delete](#) [You Might Also Like](#)

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Alex: The Reading History is sortable by Last Used, Title, Author, and Format. You can also filter the list by title keywords if you're trying to locate a specific entry, and you can export the list as a CSV file.

Patron Accounts: Your Library Card

▼ Your Account

Checked Out Titles

- » Physical Materials 1
- » Libby 0
- » Hoopla 1
- » Boundless 0

Titles On Hold

- » Physical Materials 1
- » Libby 4
- » Boundless 0

Fines \$1.00

Your Library Card

Your Lists

Your Searches

Your Events

Reading History 23

» Account Settings

Library Card



21502001615913
Expires Dec 31, 2026

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Alex: From the account page, you can view a scannable barcode for your library card. Our patrons love using this at our self-checkout stations. You can access this through both the website and the LiDA mobile app, which we'll cover shortly.

Patron Accounts: Linked Accounts

▼ Your Account

Checked Out Titles
• Physical Materials 2 **1 Overdue**
• Libby 1
• Hoopla 1
• Boundless 0

Titles On Hold
• Physical Materials 1
• Libby 0
• Boundless 0

Fines **\$1.00**
Your Library Card

Your Lists
Your Searches
Your Events
Reading History 28

▼ Account Settings

Your Preferences
Contact Information
Linked Accounts
Security Settings

Linked Accounts

Linked accounts allow you to easily maintain multiple accounts for the library so you can see all of your information in one place. Information from linked accounts will appear when you view your checkouts, holds, etc in the main account.

Additional accounts to manage

The following accounts can be managed from this account.

- JOE S. - Helen Plum Library **Remove**

[Add an Account](#)

Other accounts that can view this account

The following accounts can view checkout and hold information from this account. If someone is viewing your account that you do not want to have access, please contact library staff.

- None

[Disable Account Linking](#)

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Alex: For parents managing accounts for kids, they can link multiple accounts so they can be managed without having to login to each one separate. To link an account to yours, you need to know both the account number and PIN/password. For privacy and security, the linkee receives an in-app notification that someone else has access to their account and can choose to delete the link and, optionally, change their password to prevent it from being re-linked.

Here I've linked one of our test patrons, Joe Schmoie, to my own.

Patron Accounts: Linked Accounts

Checked Out Titles

Helen Plum Library is open today from 9:00 AM to 5:00 PM

All 3 Physical Materials 2 Libby 0 Hoopla 1 Boundless 0

Sort by Due Date Asc Last Loaded 10:24 AM Refresh

Hide Covers

Select/Deselect All

1) **Tahini and turmeric : 101 Middle Eastern classics-made irresistibly vegan**
Author Cohen, Vicky, 1967-
Call Number 641.5956 COHEN
Format Book
Checked Out To JOE S. - Helen Plum Library
Due Mar 6, 2024 **OVERDUE** [Renew](#)
[You Might Also Like](#)

2) **The complete beans & grains cookbook : a comprehensive guide with 450+ recipes**
Call Number 641.5565 COMPLETE
Format Book
Checked Out To ALEX V. - Helen Plum Library
Due Mar 27, 2024 [Due in 4 days](#) [Renew](#)
[You Might Also Like](#)

Your Account

- Checked Out Titles
 - Physical Materials 2 **1 Overdue**
 - Libby 0
 - Hoopla 1
 - Boundless 0
- Titles On Hold
 - Physical Materials 1
 - Libby 0
 - Boundless 0
- Fines **\$1.00**
- Your Library Card
- Your Lists
- Your Searches
- Your Events
- Reading History 28

Account Settings

Masquerade

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Alex: Once an account is linked, you can see a combined list of checkouts. Each entry shows which card is the owner of a checkout, hold, etc.

Patron Accounts: Linked Accounts

Place Hold on The fifth season

Holds allow you to request that a title be delivered to your home library. Once the title arrives at your library you will receive a notification informing you that the title is ready for you. You will then have 7 days to pick up the title from your home library.

I want to pick this up at
Helen Plum Library Drive-Up Window

Place hold for the chosen location using account
ALEX V. - Helen Plum Library
JOE S. - Helen Plum Library

Log me out after requesting the item.

Close Submit Hold Request

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Alex: When placing holds, you are prompted to choose which account it is for.

Staff Access & Permissions

- Aspen has a very granular permission system
- Permissions can be assigned to specific staff roles
- Staff roles can be assigned to specific users by library cards or patron types
- Examples:
 - Masquerade as patron accounts
 - Editing cover images, placards, and system messages
 - Creating public lists and browse categories
 - Managing record grouping
 - Manually override display information for record groups, including title, series names and numbers, etc.
 - Administering econtent integrations and sideloading

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[All Presenters]

Alex: At Helen Plum, all our reference librarians have access to the Masquerade feature to assist patrons with their Aspen accounts. Our Marketing staff have access to scheduling system message, creating placards, and editing cover images. For example, Marketing takes photos of learning games and kits created by our Youth Services staff, and they can add those images to those records in Aspen without having to involve our catalogers. However, only catalogers can manage record grouping and override display information.

Pam: we use Single Sign On for our staff – and all of our staff are able to Masquerade, upload cover images, group and ungroup, and set display

Staff Access & Permissions: Masquerade

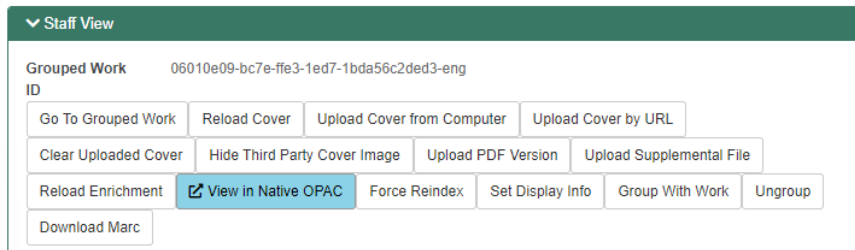
The screenshot shows a library website interface. At the top, there are navigation links: "BROWSE", "LIBRARY WEBSITE", and "NEED HELP?". On the right, it says "ACTING AS JOE S." with a menu icon. Below this is a search bar with a "Keyword" dropdown and "in Library Catalog" dropdown. The main content area is titled "Checked Out Titles" and shows a notification: "Helen Plum Library is open today from 9:00 AM to 5:00 PM". There are tabs for "All", "Physical Materials", "Libby", "Hoopla", and "Boundless". A "Sort by" dropdown is set to "Due Date Asc". The first item listed is "1) Tahini and turmeric : 101 Middle Eastern classics-made irresistibly vegan" by Cohen, Vicky, 1967-. The call number is 641.5956 COHEN. The format is "Book" and the due date is "Mar 6, 2024" with a red "OVERDUE" label. There is a "Renew" button and a "You Might Also Like" link. A sidebar menu on the left includes "Your Account", "Checked Out Titles", "Titles On Hold", "Fines", "Your Library Card", "Your Lists", "Your Searches", "Your Events", and "Reading History".

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Alex: If enabled, the Masquerade feature allows authorized staff users to access a patron's Aspen account (without needing to know their password) to perform actions on their behalf, including viewing their account, placing holds, and changing settings. Our reference librarians have found this very helpful when assisting patrons with account issues over the phone or by email. The "Acting As" indicator in the upper left corner of the screen clearly indicates when a staff user is accessing this feature, so they can exit Masquerade at the end of the support interaction.

Staff Access & Permissions: Upload or Change a Cover Image



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Pam – When you are logged in, click More Info to get to a full record and expand the Staff View – from here you can Reload the Cover, Upload a cover and more.

Staff Access & Permissions: Set Display Info

▼ Staff View

Grouped Work ID 06010e09-bc7e-f1e3-1ed7-1bda56c2ded3-eng

Go To Grouped Work Reload Cover Upload Cover from Computer Upload Cover by URL

Clear Uploaded Cover Hide Third Party Cover Image Upload PDF Version Upload Supplemental File

Reload Enrichment **View in Native OPAC** Force Reindex Set Display Info Group With Work Ungroup

Download Marc

Set display information ✕

Title

Author

Series Name

Series Display Order

Close **Set Display Info**

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Pam: If you give your staff permission to Set Display, you can edit the Title, Author, Series and Series display order. There are times when this information is incorrect as NoveList can override the data you put in you Series fields. Most of the time, that is a good thing, but we've found a few series that we needed to update.

Browse Categories

- Saved Searches
- Lists
 - Add from search results
 - Import as title or ISBN
- NYT lists
- User defined lists
- User's saved searches

New for Adults New for Youth New for Teens NY Times Lists Your Lists

New Fiction New Nonfiction New Large Print New Romance New Mystery New Science Fiction and Fantasy New Books on CD & Playaways

New DVD / Blu-Ray New Music CDs

Q New for Adults > New Mystery

Covers Grid Hide

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Tim

Aspen LiDA Mobile App

- LiDA (LibraryDiscoveryApp) mobile app is included and available on iOS and Android for all Aspen sites
- Custom library-branded versions of the app are available
- Features:
 - Catalog search
 - Digital library card
 - Account management (including linked accounts)
 - Library information & links
 - Push notifications



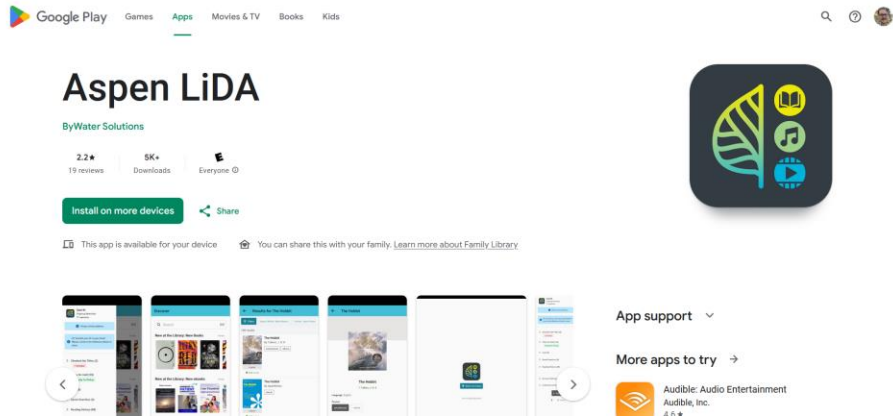
 #IUG2024

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Alex: Aspen includes a mobile app, LiDA, which is available for iOS and Android. This is a core part of the system, not a separate product. Although the website works well on mobile browsers, LiDA is a more convenient option for managing your account on the go and provide access to all of Aspen's core features, like search, account management, and the digital library card, as well as links to library information.

In addition to the community LiDA app, available to all Aspen sites, libraries can also choose to have a custom branded version added to the app stores.

LiDA Mobile App: Community Version

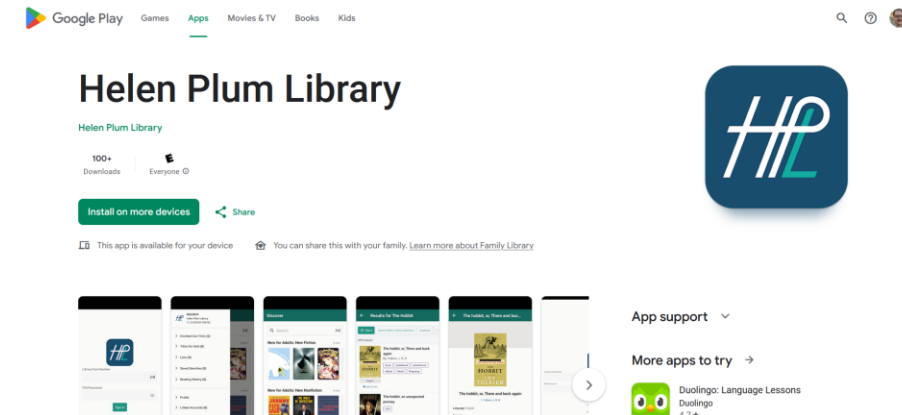


#IUG2024

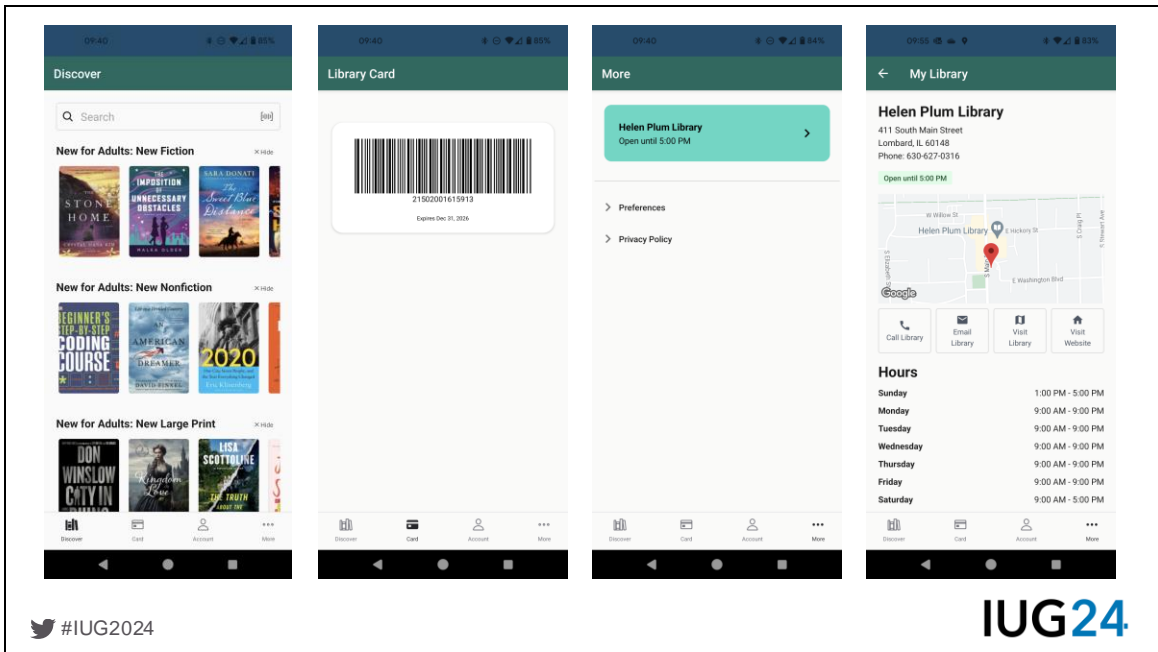
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The community version is listed as AspenLiDA. When patrons first install it, they are prompted to choose their home library from a list of all participating Aspen sites.

LiDA Mobile App: Custom Branded Version

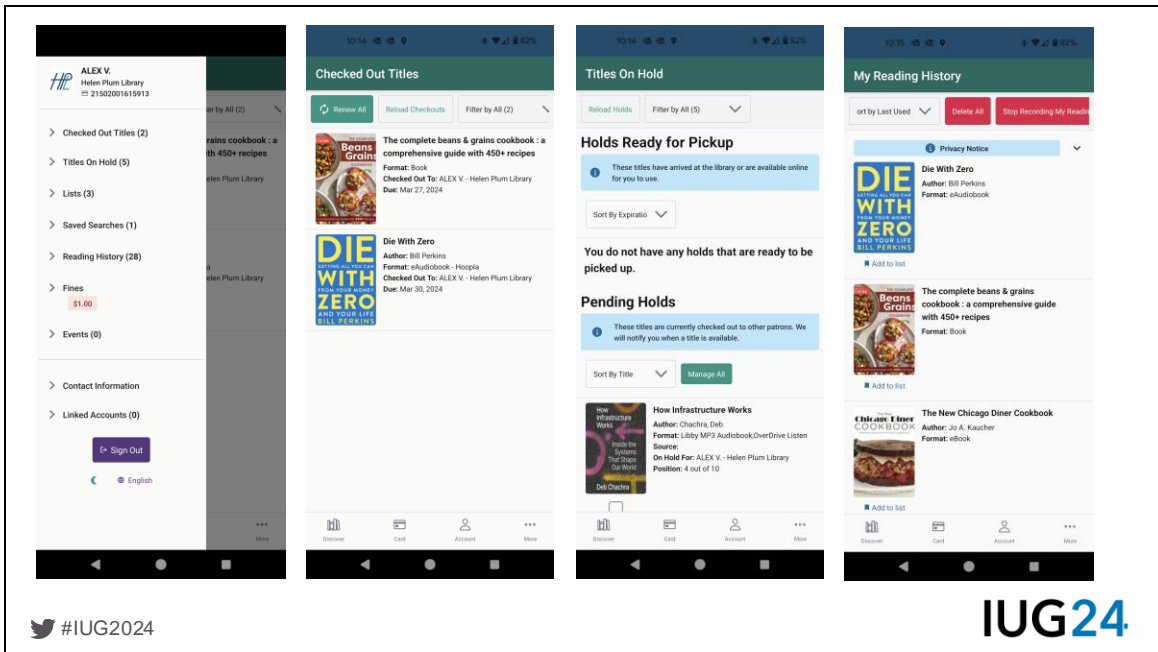


The custom branded option is available for a nominal fee. It's listed in the app stores with the library's own name, logo, and color scheme. Patrons do not need to search for their home library on first use. Otherwise, features are the same for both versions.

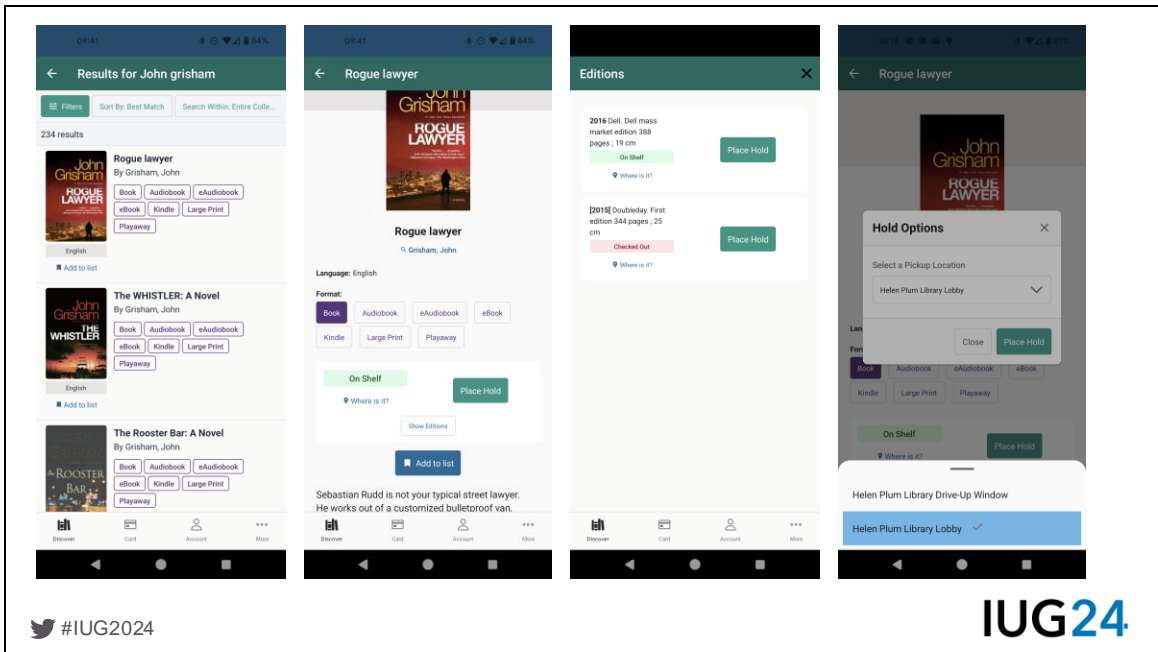


Buttons for four main function are shown at the bottom of the app: Discover, Card, Account, and More. Discover is the homepage, which includes a search box and ability to search by scanning and ISBN. Discover also shows the library’s Browse Categories. Users can choose which browse categories are displayed or hidden, so they can customize what they want to see featured – for example, maybe they only want see AV titles, or only new kids titles.

Card provides easy access to the digital library card. More shows the library’s name, and tapping this displays the library’s hours and contact options. A recently added feature is the ability to include custom links on the More. We haven’t used this yet but will likely add links to our website’s Online Resources page, ILL page, and other frequently used resources soon.



The Account button includes all the account management features found in the web catalog: checkouts, holds, reading history, saved lists, and fine payment.



Returning to Discovery, you can search the entire catalog, view details and available formats for grouped works, see specific editions, and place holds, including choosing a pickup location. In our case, that's either the Lobby hold shelf or our Drive-Up Window. This could also be branches or individual consortia member libraries.

Additional Resources

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We've included links to additional resources for further exploration.

Aspen Discovery Resources

- Aspen Discovery documentation
<https://help.aspendiscovery.org/>
- Aspen Discovery release notes
<https://aspen.bywatersolutions.com/project/aspen-release-notes>
- Aspen Weekly newsletter
<https://aspen.bywatersolutions.com/project/aspen-weekly>
- Aspen Discovery Slack
https://join.slack.com/t/aspen-discovery/shared_invite/zt-1c1i3y7qc-UKmq52l1EdWE6OcrjFCTg
- Community Groups
<https://help.aspendiscovery.org/community>

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Example Sites

- Deerfield Public Library (Sierra)
<https://catalog.deerfieldlibrary.org>
- Helen Plum Library (Sierra)
<https://catalog.helenplum.org>
- Nashville Public Library (Carl.X)
<https://catalog.library.nashville.org>
- SWAN Libraries (Symphony consortium)
<https://catalog.swanlibraries.net/>
- AspenCat (Koha consortium)
<https://catalog.aspen.cat.info>
- Darien Library (Polaris)
<https://catalog.darienlibrary.org>
- SHARE (Polaris consortium)
<https://share.illshareit.com>
- Chattanooga Public Library (Polaris)
<https://chatf.aspendiscovery.org>
- Cuyahoga County Public Library (Koha)
<https://discover.cuyahogalibrary.org>
- Websites built entirely in Aspen:
 - Okaloosa County Public Library
<https://readokaloosa.org>
 - Meadville Public Library
<https://meadvillelibrary.org>
 - Uintah County Library
<https://www.uintahlibrary.org>

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Miscellaneous Resources

- Deerfield's 1 page proposal to Friends to fund Aspen
<https://docs.google.com/document/d/13fbl46BsXUkWja1OawKuKm-wWkAyLCpqEnFUilkwNm4/edit?usp=sharing>
- Deerfield's Aspen tips of the day
<https://docs.google.com/document/d/1xCuRMMEndj9IAfOIkU9TwSSMdZ8YZwQBjIR5cklo3U/edit?usp=sharing>



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TOGETHER WE DRIVE INNOVATION

March 25 - 27, 2024 | Detroit, Michigan

THANK YOU!

Questions?

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Take Questions and do Live demo