BLACK GOLD
COOPERATIVE LIBRARY SYSTEM

580 Camino Mercado
Arroyo Grande, CA 93420
805 543 6082
Blackgold.org

**AUTOMATION AND TECHNICAL SERVICES
(ATS) OPERATIONS COMMITTEE REVISED AGENDA
July 7, 2021– 10:00 a.m.
Video Webinar – ATS Ops**

https://blackgold.webex.com/blackgold/j.php?MTID=mc6c00e9d264a125f0788425caca2d8a3

Meeting number: 625 911 376

Join by phone: 1-650-479-3208 Call-in toll number (US/Canada)
Access code: 625 911 376

* Item accompanies the agenda

1) **10:00 A.M. CALL TO ORDER** Kim Hunter, Chair, Presiding
   Recorder; Kristina Uvalle (BG)

2) **ADOPT AGENDA** —

3) ***APPROVE MINUTES** — May 5, 2021, by Kristina Uvalle (BG)

4) **CIRCULATION** –

   a) *New patron Type "Welcome" (BA)

   b) *Branch specific homebound patron category for SBPL

   c) *UDF Field Changes/approval

   d) *UDF Field Circ Manual

   e) Circulation Manual review (Click here for most recent version)

   f) *New Item Moratorium – Discussion (sample included of SB procedure) (BG)

5) **ILL –**

6) **TECHNICAL** —

   a) *Discuss/Review Aspen installation

7) **ONGOING DISCUSSION ITEMS**
   a) What Technology vendor(s) are you in discussions with for your library? —
   b) Are any new installs of technology hardware planned? —
   c) PCI Informational Minute

8) **BLACK GOLD UPDATE**

9) **ROUNDTABLE**

10) **ITEMS TO BE FORWARDED** — (To Council or other committees)

11) **AGENDA BUILDING**

12) **NEXT MEETING** — 10:00 a.m., Wednesday, August 4, 2021 – Webinar

13) **ADJOURNMENT**

Distribution — email notice of web-posted agenda packet (available at www.ats.blackgold.org): Karen Christiansen, PR; Marci Cunningham, SLO; Selena Fierro, SM; Joanne Britton SM; Dominic Keen, Donn Adolfo, Jonathon Cardenas, LM; Alain Dussert, Molly Wetta, SB; Marie Crusinberry GO; Justin Formanek SP; Kim Hunter, ATS; Matt Duhon, ATS; Glynis Fitzgerald, BG; Directors [File Copy];

**AUTOMATION AND TECHNICAL SERVICES
(ATS) OPERATIONS COMMITTEE MINUTES
May 5, 2021– 10:00 a.m.
Video Webinar – ATS Ops**

Attending: Karen Christiansen, PR; Marci Cunningham, SLO; Selena Fierro, SM; Ariana Bilek, SB; Marie Crusinberry, GV; Kim Hunter, ATS; Matt Duhon, ATS; Glynis Fitzgerald, BG; Kristina Uvalle, BG.

* Item accompanies the agenda

1) **10:00 A.M. CALL TO ORDER** Kim Hunter, Chair, Presiding
   Recorder; Kristina Uvalle (BG)

2) **ADOPT AGENDA** — 1St MC (SLO) 2nd SF (SM) Approved.

3) ***APPROVE MINUTES** — April 7, 2021, by Kristina Uvalle (BG). 1St MC (GV) 2nd KC (PR)
   Approved.

4) **CIRCULATION** –

   a) Discuss reports (PR) – KC (PR) asked for input from each jurisdiction about what reports (such as Lost/Missing, Holds Alert, etc.) you are currently using and what your best practices for them.

   SF (SM) – Regularly use Holds Request, Lost/Missing. (remove after 24 months) and In Transit.

   MC (SLO) – In Transit, Lost/Missing (older than 12 months), Inventory Reports, Hold Request by Branch (not very accurate with multiple locations). Mostly use Simply Reports for statistical data.

   MC (GV) – Brent Fields handles reports. Please feel free to contact him directly.

   AB (SB) – Mostly use Simply Reports. Lost/ Missing remove after 18 months.

   b) Circulation Manual review (Click here for most recent version) - KH(BG) encouraged everyone to review the circulation manual and send her any changes or updates to be included . She also reminded everyone to let BG know if libraries were adding or removing material types.

5) **ILL – N/A**

6) **TECHNICAL** —

   a) Discuss/Review Aspen installation – The next meeting with Aspen is scheduled for 5/6/21. Libraries should be working on updating their home library site including social media links and adding a system message.

7) **ONGOING DISCUSSION ITEMS**
   a) What Technology vendor(s) are you in discussions with for your library? —
   b) Are any new installs of technology hardware planned? — SF (SM) reported that they were looking at possible AMH(s) at Santa Maria and Orcutt.
   c) PCI Informational Minute – MD (BG) reported that the BG Security Policy has been written and added to the ATS website under Resources -> Tech Resources. He encouraged everyone to read and review the policy.

8) **BLACK GOLD UPDATE** - GF(BG) reported that delivery was moving to Thursday from Friday. Admin Council has started to talk about sharing books, but no date has been decided upon yet. The State is scheduled to reopen by June 15th. Delivery will probably start slowly with 2-3 days per week. Hotspots will become non-shareable as of July 1st pending Admin Council final approval. Collection HQ will be gone as of August 1st except for SLO. The RAS Committee will be reviewing an alternate magazine vendor at their next meeting. MD (BG) reported that work is continuing on

Cuyama and Los Alamos for Cenic connections. The Data Center has schedule upgrade work for 5/16/21 and is reporting the power will be down from 7 am to 12 (noon). Nothing needs to be done at the libraries themselves. KH ((BG) is working on reports and with Unique on notice changes.

9) ROUNDTABLE   N/A

10) ITEMS TO BE FORWARDED — N/A

11) AGENDA BUILDING – N/A

12) NEXT MEETING — 10:00 a.m., Wednesday, July 7, 2021 – Webinar

13) ADJOURNMENT – at 11:08 am. 1St KC (PR) 2nd MC (SLO) Approved.

Distribution — email notice of web-posted agenda packet (available at www.ats.blackgold.org): Karen Christiansen, PR; Marci Cunningham, SLO; Selena Fierro, SM; Joanne Britton SM; Dominic Keen, Donn Adolfo, Jonathon Cardenas, LM; Alain Dussert, Molly Wetta, SB; Marie Crusinberry GO; Justin Formanek SP; Kim Hunter, ATS; Matt Duhon, ATS; Glynis Fitzgerald, BG; Directors [File Copy];

TOPIC:	Santa Barbara Public Library Welcome Card	PRIORITY LEVEL: (1-Low 3 – High)	☐ 1 ☐ 2 ☒ 3
SUBMITTED BY:	Alain Dussert, on behalf of SBPL		
TYPE OF ITEM:	☐ For Discussion ☐ For Recommendation ☒ Other: _That SBPL be allowed to create this new patron category and library card _____		

	BACKGROUND STATEMENT

| **BACKGROUND:** *Describe why you are bringing this item before the committee. What problem are you trying to solve?* | SBPL would like to create Welcome Cards will be issued to any library patron over the age of 18 who has an approved photo ID, but is unable to provide proof of address due to not having a physical residence.

Welcome Cards are limited to check out three items at any one time and have three holds at any one time. Library of Things, Electronic, and Kit-type items will be limited to one checked out *or* held item at a time. Materials checked out with a Welcome Card will adhere to standard check out time limits. Standard renewal periods will apply. All digital resources and downloadables will follow full access card check-out policies.

Welcome Cards will expire after six months of use and require an in-person renewal with any of the types of photo ID listed above. Welcome Cards will be purged from the Library's database after no use within a one year period of time. Welcome cards will not be purged if replacement fees or outstanding materials remain on the card, and an attempt to reach the cardholder will be made.

Fines/Fees

Welcome Cards are free to patrons. Patrons are responsible for damaged or lost items. The library's standard fee schedule will apply for damaged or lost items.

Materials Available for check-out by Santa Barbara Welcome Cardholders

All Santa Barbara Public Library owned materials are available for reservation and check-out for Welcome Cardholders. In the event these cardholders want to check out a computer, they are limited to Chromebook checkouts only (no laptop checkout).

In order to register for or convert any type of library card to a Welcome Card, a patron must apply in person with a form of photo ID. The following are all types of photo IDs that will be accepted in creating a Welcome Card:
- Government Picture ID (Out of State ID, Passport, Military ID, DoD ID Card, Veteran ID Card, Veteran Health ID Card, Green Card, Alien Registration ID, Matricula Consular (Mexican CID), international Driver License, Credencial Para Votar ID (Mexico voter registration card), Non-US Consular ID, etc.)
- Student ID (High School ID, College ID, etc.)
- Credible Picture ID (Bank Card, Transit Card, Costco Card etc.)
- Professional, vocational or union photo ID.
- If a valid form of these types of ID is not available, any expired version of the types of photo IDs listed above may be accepted. |

In addition to a photo ID, all Welcome Card registrations will require a phone number or email address and each registration will include the creation of a secret question for ease of findability in the Library's patron database.

Welcome Cardholders may place requests for materials using the Library's online catalogue or by calling the Library. Materials may be picked up by the patron in person at any of the Santa Barbara Public Library jurisdictions. Account must remain in good standing in order to continue to check out materials. Welcome Cardholders may check out materials from the library by presenting their physical library card or their Secret Question.

Welcome Cardholders may update their card to an Adult Full Access Card in-person with the presentation of a valid Photo ID and proof of address.

Welcome Cards are limited to check out three items at any one time and have three holds at any one time. Library of Things, Electronic, and Kit-type items will be limited to one checked out *or* held item at a time. Materials checked out with a Welcome Card will adhere to standard check out time limits. Standard renewal periods will apply. All digital resources and downloadables will follow full access card check-out policies.

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OUTCOME(S)

DESIRED OUTCOME(S): *Describe your desired outcome(s)*	SBPL be allowed to have this patron category and new type of library card.
OTHER COMMENTS:	Welcome Cards would only be applicable to the SBPL jurisdiction.

TOPIC:	Separate homebound patron category for SBPL	PRIORITY LEVEL: (1-Low 3 – High)	☐ 1 ☐ 2 ☒ 3
SUBMITTED BY:	Alain Dussert on behalf of SBPL		
TYPE OF ITEM:	☐ For Discussion ☒ For Recommendation ☐ Other: _____		

BACKGROUND STATEMENT		
BACKGROUND: *Describe why you are bringing this item before the committee. What problem are you trying to solve?*	SBPL mails packages of books to homebound patrons at this point. If another jurisdiction's items get lost in the mail to those patrons, we cannot waive replacement fees charged by that other jurisdiction. For example, if we mailed another jurisdiction's items to a homebound patron but the package never arrives to the patron, that jurisdiction would still charge our homebound patron for the replacement costs. Considering our homebound patrons' possible economic statuses, it would be difficult for them to pay the costs. We ask in order to better serve those homebound patrons who would be economically affected by potential fines from other jurisdictions and to also not adversely affect those other jurisdictions.

OUTCOME(S)	
DESIRED OUTCOME(S): *Describe your desired outcome(s)*	A homebound patron category for SBPL that would not allow patrons in this category to place holds from any jurisdiction other than SBPL.
OTHER COMMENTS:	

TOPIC:	UDF Field changes/approval	PRIORITY LEVEL: (1-Low 3 – High)	☐ 1 ☐ 2 ☒ 3
SUBMITTED BY:	K Hunter		
TYPE OF ITEM:	☐ For Discussion ☒ For Recommendation ☐ Other: _____		

	BACKGROUND STATEMENT		

| BACKGROUND: *Describe why you are bringing this item before the committee. What problem are you trying to solve?* | Please review/approve training database patron UDF field:

• Black Gold would like selected patron USER1 fields "encrypted" so that selected numerical data replaced with an X. Specifications show that based on string patterns found in the data, all but the last 4 NUMERIC characters in a given pattern should be replaced with a "X", leaving the last 4 NUMERIC characters in place, as well as leaving all non-numeric characters in place.
• Data review shows:
   o Library has over 210,000 patrons with USER1 populated.
   o 15,000 patrons have a USER1 value that does not contain any numeric data, and would not be affected.
   o 7,000 patrons have a USER1 value that does not seem to fit any general pattern. Replace ALL numeric data with "X" and leave the rest

Majority

User defined fields
Unique ID
K0906086 CDL
Data Entry (Branch/Initi

User defined fields
Unique ID
KXXX6086 CDL
Data Entry (Branch/Initials) |

7,000 patrons →

user1	IDType	PotentialUpdateValue
244 984 539 NYDL	DL	XXX XXX XXX NYDL
D872362 CDL	DL	DXXXXXX CDL
favorite number = 25		favorite number = XX
# 062-320-554 USCIS USA		# XXX-XXX-XXX USCIS USA
#10225623 Mexico ID #		#XXXXXXXX Mexico ID #
#1261 Inmate ID		#XXXX Inmate ID
#13137 Path Santa Barbara		#XXXXX Path Santa Barbara
#13655315 Mexican Passport	PASSPORT	#XXXXXXXX Mexican Passport
#1924968 CDL	DL	#XXXXXXX CDL
#2227219 mom cdl	DL	#XXXXXXX mom cdl
#28590504 PADL	DL	#XXXXXXXX PADL
#353668 AG high school		#XXXXXX AG high school
#535516454 PASSPORT & BILL		#XXXXXXXXX PASSPORT & BILL
#7159776 Matricula		#XXXXXXX Matricula
#7354 Path Santa Barbara		#XXXX Path Santa Barbara
#8883472 OR		#XXXXXXX OR
#F637668 Republica de Honduras		#FXXXXXX Republica de Honduras
#N050-719083-0508 ID Matricular Republica de Guatemala		#NXXX-XXXXXX-XXXX ID Matricular Republica de (
&2642051 CD		&XXXXXXX CD
&2700551 CDL	DL	&XXXXXXX CDL
&8560699 CDL	DL	&XXXXXXX CDL
(353457) Arroyo Grande HS		(XXXXXX) Arroyo Grande HS
(matricula consular) 2611435		(matricula consular) XXXXXXX
(Parent) B6951971 CDL	DL	(Parent) BXXXXXXX CDL
******3044 MLID	MLID	******XXXX MLID
*****6726 AZDL	DL	*****XXXX AZDL
**2761 MXID		**XXXX MXID
007684123 Cal Poly Student ID		*XXXXXXXXX* Cal Poly Student ID
*1296 GBR		*XXXX GBR

	OUTCOME(S)	

DESIRED OUTCOME(S): *Describe your desired outcome(s)*	Approval of data in training
OTHER COMMENTS:	

TOPIC:	UDF Field Circ Manual	PRIORITY LEVEL: (1-Low 3 – High)	☐ 1 ☐ 2 ☒ 3
SUBMITTED BY:	K Hunter		
TYPE OF ITEM:	☐ For Discussion ☒ For Recommendation ☐ Other: _____		

BACKGROUND STATEMENT	
BACKGROUND: *Describe why you are bringing this item before the committee. What problem are you trying to solve?*	All but the last 4 NUMERIC characters in a given pattern should be replaced with a "X", leaving the last 4 NUMERIC characters in place, as well as leaving all non-numeric characters in place. Proposed format below circ manual examples. **Scanners will not support this format – they can be programmed to leave the field blank**

UNIQUE ID

Enter the number, followed by the type of ID.
Use these forms of ID in this order:

RULE	EXAMPLE
DRIVER'S LICENSE 1. Enter the number, followed by a space. 2. Enter the abbreviation of the issuing stated, followed by **DL** to denote Driver's License (with the exception of California which would be entered as **CDL**). 3. Do not place a space between the two (i.e., AZDL, not AZ DL).	N6579760 CDL SM541721 WADL
STATE ID	N6579760 CID

11

New format Nxxx9760 CDL

AZDL, not AZ DL).	
STATE ID	N6579760 CID

Nxxx9760 CID

License, use ID to denote identification.	
MILITARY ID Enter the number, followed by a space, then **MLID**	495950628 MLID
ALIEN RESIDENT NUMBER	

Xxxxx0628 MLID

ALIEN RESIDENT NUMBER 1. Enter the number, followed by a space 2. Enter **INSID** (Immigration & Naturalization Identification) and the issuing country.	8030497 INSID Mexico

Xxx0497 INSID Mexico

PASSPORT NUMBER
1. Enter the number followed by a space.
2. Enter **PPN** followed by a space.
3. Enter the country of origin, or the country's abbreviation (e.g., USA).

8679023 PPN USA
1234568 PPN FRA

Xxx9023 PPN USA
Xxx4568 PPN FRA

BORDER CROSSING CARD
1. Use the back of the card (no photo)
2. At the bottom, on the first line, enter the information beginning with MEX

MEX004214033

MEXxxxxx4033

Matricula Consular ID
1. Enter the number in the lower right corner on the picture side of the ID located below the expiration date followed by a space
2. Enter country abbreviation followed by a space then **MAT CON**

0302447 MX MAT CON

Xxx2447 MX MAT CON

Employment Authorization Document
1. Use the front of the card (photo)
2. Under the name is a USCIS number, enter the information beginning with the number followed by USEA.

000-000-702-USEA

Xxxxx0702 USEA

OUTCOME(S)

DESIRED OUTCOME(S): *Describe your desired outcome(s)*	Circ manual/staff entry guideline changes approved
OTHER COMMENTS:	

TOPIC:	6-month moratorium on holds for new items	PRIORITY LEVEL: (1-Low 3 – High)	☐ 1 ☒ 2 ☐ 3
SUBMITTED BY:			
TYPE OF ITEM:	☐ For Discussion ☐ For Recommendation ☒ Other: Requested by Glynis		

| | BACKGROUND STATEMENT | | |

BACKGROUND: *Describe why you are bringing this item before the committee. What problem are you trying to solve?*	Process for 6-month moratorium on new items not being trapped for holds by other jurisdictions.

| | OUTCOME(S) | |

DESIRED OUTCOME(S): *Describe your desired outcome(s)*	
OTHER COMMENTS:	Note that each jurisdiction will have its own on-order templates per branch and item type in Polaris that it will need to account for.

Steps to organize changing a large batch of items to 'Patrons from this library and branches' and include 180 days past first available.

First, change on-order templates in Polaris per branch and item type. It is important to do so prior to submitting new orders from your cataloging and processing provider (e.g. Baker & Taylor). Otherwise, new item records will need to be individually changed as they come in.

Note: you cannot batch change any fields in templates, you would need to open each one, hand-check the "holdable by patrons from this branch" and then hand-check the 'days' and enter the '180'

Second, determine how many items already ordered and/or in the building already and change them to not be holdable.

- Run a simply reports search on:
  o Your branch
  o (checkbox filter) "Holdable checked"
  o (date filter) Created from dd/mm/yy through dd/mm/yy
    ▪ We used April 1, 2021 through June 5 or so to begin, then scooped up later items
- Create a record set from the results of the search
- We ended up with 3,120 items. We divided the record set up into 6 equal parts and 3 of us worked through them.
- We sorted them by item record id and kept track of last one modified as part of the set title
- Step 1 for the set: batch change all to holdable category 'patrons from this library and branches'
- Step 2 for the set: start with first item, go to detail screen, check 'days past first available' and enter 180
- Step 3 for the set: copy the 180, then save & close the item
- Step 4 for the set: open the next item, go to detail, click the 'days' checkbox and paste the 180!!!!
- Continue until done.

Third, test that inbound items from your third party cataloging and processing provider doesn't overwrite the changes made in your templates.

Current Statement on the eCard Registration Page

Residents of the Black Gold Cooperative member libraries service area can now get immediate 24/7 access to online services without having to visit a library. Your eCard will allow access to:

- Bestselling eBooks and eAudiobooks from OverDrive and hoopla
- Music, television programs and movies from hoopla
- eBooks from Enki

Complete the online application to get your eCard number now. If you already have a public library card from Blanchard Community Library, Santa Barbara Public Library, Goleta Valley Library, Lompoc Public Library, Santa Maria Public Library, San Luis Obispo County Library or Paso Robles City Library, you do not need an eCard. Your current library card number can be used to access online resources and place holds. If you live outside the Black Gold Cooperative member libraries service area but are a resident of California, you will have to visit a member library to obtain a card.

If you would like to check out physical materials from your public library, go to the nearest branch with a photo ID and present your eCard number to a staff member to be issued a library card with checkout privileges. If you have any problems getting an eCard with this form, please visit your nearest branch with a photo ID to obtain a library card.

Please be aware that if you change your eCard to a regular library card and you use OverDrive, you will need to merge your accounts to retain access to your holds and borrowed items. To merge your accounts, contact Overdrive via their support form with both card numbers. If you do not have both card numbers, contact Library Staff.

Suggested Change to Statement on eCard Registration Page

Residents of the Black Gold Cooperative member libraries service area (San Luis Obispo and Santa Barbara counties and Santa Paula) can now get immediate 24/7 access to online services without having to visit a library. eCards are designed to provide immediate access to eLibrary materials including downloadable eBooks and audiovisual materials through OverDrive, hoopla, and Enki, and other informational databases and learning tools from your local library.

How do I get an eCard? Complete the online application to get your eCard number now. If you already have a public library card from one of the Black Gold libraries, your current library card number can be used to access online resources and place holds.

Live outside the Black Gold Cooperative Library System? You can still get a library card but must visit a member library with a picture ID to do so.

Can I check out books and other materials from my local library with my eCard? You will need to visit the nearest branch with a photo ID and present your eCard number to a staff member to be issued a library card with checkout privileges.

The eCard form is not working for me. If you have any problems getting an eCard with this form, please visit your nearest branch with a photo ID to obtain a library card.

I set up an account to download materials using my eCard, but it doesn't work with my new library card. If you change your eCard to a regular library card and you use one of our downloadable services, your accounts will need to be merged to retain access to your holds and borrowed items. Library staff can assist you with this process.

Current Privacy Policy on the Polaris PAC

Your account in the system contains information about current hold requests, items checked out, items overdue, and fines. Once items are returned and fines are paid, this information is removed from your account. By default, the library does not keep a history of previous books checked out on your account. Optional services allow you to save book lists, save searches, and maintain a permanent reading list. This information is confidential and will not be shared with anyone unless required by court order. This information will not be used for any commercial purposes. You can delete optional features at any time by changing your account options. If you pay fines and fees via credit card, the credit card number is not stored in your account, it is simply passed through to the payment processor.

Please click here to view the full Black Gold Cooperative Library System privacy policy.

My Reading History Statement on the Aspen Website

The library takes seriously the privacy of your library records. Therefore, we do not keep track of what you borrow after you return it. However, our automated system has a feature called My Reading History" that allows you to track items you check out. Participation in the feature is entirely voluntary. You may start or stop using it, as well as delete any or all entries in "My Reading History" at any time. If you choose to start recording "My Reading History," you agree to allow our automated system to store this data. The library staff does not have access to your "My Reading History", however, it is subject to all applicable local, state, and federal laws, and under those laws, could be examined by law enforcement authorities without your permission. If this is of concern to you, you should not use the "My Reading History" feature."

Suggested changes:

#1

The library takes the privacy of your library records seriously. We do not keep track of what you borrow after you return it unless you choose to enable "My Reading History." This feature allows you to track items you check out. You may start or stop using it at any time, as well as delete any or all entries in your reading history. Library staff does not have access to your reading history without your permission. However, it is subject to all applicable local, state, and federal laws, and under those laws could be examined by law enforcement authorities without your permission. If you wish to enable "My Reading History" please click the button below.

#2

By choosing to enable "My Reading History," you are able to access a list of items that you have checked out – even after you have returned them! This can be useful for keeping track of titles you have read or watched in series or items you may be using in research that you want to access in the future. Items in this list may be kept or deleted at your discretion, and My Reading History may be turned on and off as you desire (when you turn off My Reading History then reactivate it, the list restarts from the point where it is turned on again). The library takes your privacy seriously; staff will not access your reading history without your permission unless required by a court order. In addition, account information such as current items checked out, holds requests, fines and fees, and credit card information are all confidential will not be shared with any parties without the aforementioned court order.

Aspen Discovery Testing Plan
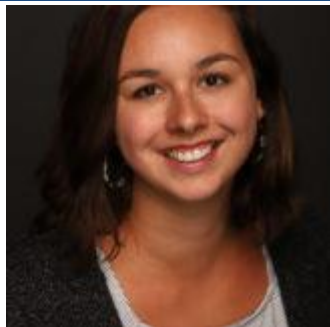
by [Addie Van Salisbury](#) *on Jun 18, 2020*

Below we have listed aspects of Aspen Discovery that you should fully test prior to releasing your Aspen Discovery layer to your patrons. This testing checklist assumes you have been trained on Aspen. If you do not understand what is meant by this checklist or you are confused, reach out to your support company for further training or with your questions.

The best way to ensure your Aspen Discovery layer is properly configured and ready to be advertised to your patrons is to test as much as possible! This will allow you to answer your patrons question and confirm that all of your connections to your ILS, enrichment resources, eContent vendors, and all of the amazing resources for your patrons are available.

Review the following actions for both physical items in your collection and all of your eContent source items.

- Validation of holds and accounts using test patrons for ILS and all eContent sources
    - Place holds
    - View holds
    - Freeze and thaw holds
    - Cancel holds
    - Change hold pickup location

- View Checkouts
- Renew a checkout
- View fines
- Pay fines (where applicable)
- Start and stop reading history for a patron
- View reading history
- Test searches through the normal interface
- Test searches through the advanced searches
- Limit searches by facets

Aspen Discovery Pre Go Live Checklist
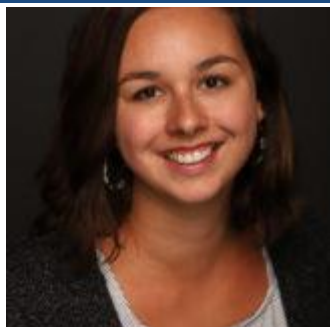
by Addie Van Salisbury *on Jun 18, 2020*

Now that you have gone through Administrative training and setup, along with staff training for Aspen Discovery it is time to confirm you are ready to go live with Aspen Discovery! You will want to ensure you have thoroughly tested and have walked through our Aspen Discovery Testing Plan. Along with lots of testing, it is important to make sure the following tasks have been properly configured and set up when applicable to your library!

- Make sure your theme (colors and logos) are fully customized as you want them to be for go live
- Ensure the catalog results are displaying the marc information you would like, as well as in the full record. (Grouped Work Display Settings)
- Ensure your facets are customized. (Grouped Work Facets)
- Create browse categories that engage patrons.
- Create collection spotlights for your library website and embed, if wanted
- Embed a search box in your library website, if wanted
- Create placards to return in search results for services or resources for your patrons.
- Ensure Library Systems settings are entirely set up. Go through all of the settings here in your system to verify contact links are filled out, ILS/Account integration settings are accurate, and PayPal is enabled if necessary. There are many settings within Library System, so feel free to clarify with your support company if you have questions on what these settings enable.
- Update contact information for your library in location settings.

- In your location settings in Primary Configuration, make sure the locations are set as valid hold pickup locations if they are, and set to not be valid hold pickup locations if they are invalid. Additionally, in the location settings you would need to define if the branch is valid for all patrons or only their own patrons.
- Enable PIN/password reset and ensure this has been tested (if using)
- Enable self registration and ensure this has been tested (if using)
- Ensure all enrichment sources that you want for go live are enabled. Questions to ask here:
  - Are you generating covers?
  - If you utilize Novelist or Content Cafe, is it integrated?
- Within your ILS integration, make sure your maps are accurate and display what you think will benefit the patron the most. You will want to confirm the format map, status mapping, and all translation maps are finalized.
- Set up your custom menu links over your search box and in the hamburger menu.
- Ensure your API connections are enabled – OverDrive, Cloud Library, Hoopla, Axis360, EBSCO EDS. You can do this making sure these resources are findable in your catalog and usable.
- Ensure side loaded eContent has been loaded – i.e. Kanopy, Flipster, etc.
- If you use Open Archives, make sure this is integrated
- If using the genealogy functionality, make sure this is enabled
- If you want patrons to see information on your website within their searches, enable website indexing
- Go through the Aspen Testing Plan, which is found here: https://bywatersolutions.com/education/aspen-discovery-testing-plan

At this point you are ready to inform patrons of your new Aspen Discovery layer and you can go live!

If you have any questions about the above tasks, please reach out to your local support company for more information.