Aspen Administration

Customizing Your Library's Catalog

Aspen Administration

What does an Aspen Administrator do?

- Customize your catalog to match your library's branding.
- Create Browse Categories.
- Add Menu links.
- Update Library Hours.
- Add Holiday Closures.

- View Dashboards.
- Embed Collection Spotlights into your website.
- Create Placards to promote events and services!
- Use System Messages to communicate with patrons.

....Or don't! It's literally up to you!

Aspen Administration "Housekeeping"

From The Aspen Administration Menu,

You have access to:

- Aspen Discovery Support (The Aspen Help Center)
- Primary Configuration (Edit Menu links, Hours, Holidays, and more!)
- Local catalog Enrichment (Edit Browse Categories, Collection Spotlights, Placards, and System Messages)
- Theme & Layout (Edit your catalogs theme)
- Web Builder (Create Web Pages, Custom Forms and Web Resources)
- View Dashboards

Aspen Discovery Administration

Search for a Setting

AS	PEN DISCOVERY SUPPORT	HC	DOPLA
>	Help Center View the Help Center for Aspen Discovery.	Ø	Dashboard View the usage dashboard for Hoopla integration.
>	Release Notes View release notes for Aspen Discovery which contain information about new functionality and fixes for each release.	ILS	SINTEGRATION
OF	PENARCHIVES	Θ	Dashboard View the usage dashboard for ILS integration.
9	Dashboard View the usage dashboard for Open Archives integration.	LC	DCAL CATALOG ENRICHMENT
0		•	Browse Category Groups Configure the Browse Categories that are shown on the library home page.
))	Dashboard	Ð	Browse Categories Define browse categories shown on the library home page.
	View the usage dashboard for OverDrive integration.	Ø	Collection Spotlights Define spotlights that can be embedded within Aspen custom pages or other websites.
PF	RIMARY CONFIGURATION	0	Placards
0	Library Systems		Placards allow you to promote services that do not have MARC records or APIs for inclusion in the catalog.
Ð	Configure location settings.	Ð	System Messages System Messages allow you to display messages to your patrons in specific locations.
SI	DE LOADS	TH	IEME & LAYOUT
2	Dashboard View the usage dashboard for Side Loads integration.	Ð	Themes Define colors, fonts, images etc used within Aspen Discovery.

8

Note: Use the Search Bar to quickly find the menu you're looking for!

Aspen Administration "Housekeeping"

Administration Options	Abrowse Catalog » Adm	inistration Home » P	rimary Configuration » L	ocations					
Aspen Discovery Support	Locations	s (Brand	ches)					? D	ocumentation
> Hoopla	Sort by Display Name	Ascending		~					
> ILS Integration)					
> Local Catalog Enrichment	> Filters								
> Open Archives	Location Select Id Display	Create Search Name Interface	Show In Select Interface Create Search Interface	e (requires SI) Do	how Location on	Use Library Themes	Theme	s Librarv	Actions
> OverDrive/Libby	Ardsley F	Public 1	Not Set	,1		Yes	1	5	Fdit
✓ Primary Configuration	Library							L L	3 History
Library Systems									
» Locations	Select All Deselect	All Batch Upd	ate Selected Batc	h Update All	Export Select	ed to CSV	Export	to CSV	
> Side Loads									T
> Svetem Renorte									

When you open a menu from Admin, click on your Location ID or the Edit button to open the interface.

Aspen Administration "Housekeeping"

When you open an interface, there will be:

- The **collapsed Aspen Admin Menus** on the left side of your screen.
- "**Breadcrumbs**" of the links/pages you've clicked on to get to that page.
- A "**Return to List**" button that will exit of the page.
- In the top right corner, a link to the corresponding documentation in the help center.
- A **Search Bar** at the top of the screen to find the property you want to edit.
- Save options.
- A navigation arrow to bring you back to the top of your page.
- A **history log** of everything that was worked on this interface for the last 90 days.

Administration Options Q Search	A Browse Catalog » Administration Home » Primary Configuration » Library » Locations
> Aspen Discovery Support	Locations (Branches)
➤ Hoopla	Return to List Distory
► ILS Integration	
Local Catalog Enrichment	Search for a Property
> Open Archives	Hours
> OverDrive/Libby	
✓ Primary Configuration	Show in Locations and Hours List Aspen LiDA also uses this setting
Library Systems » Locations	Ardsley ~
> Side Loads	> Library Hours
> System Reports	
> Theme & Layout	Save Changes and Return Save Changes and Stay Here
> Web Builder	
> Website Indexing	
w ByWater Solutions	

Note: There is no "undo" button, but you can use the ctrl and Z buttons to undo unsaved changes.



Dashboards

(Documentation: From Aspen Help Center > Admin > System Reports)

Toggle the view of these reports to show the information in a graph format as well by hitting the graph icon next to the category you'd like to view. This will also provide you with the raw data underneath the graph.

- ILS Usage dashboard: See how many user logins, records held and holds placed.
- **CloudLibrary:** See how many Active Users, Records with usage, Loans, and Holds.
- Hoopla: See how many Active Users, Records with usage, and Loans.
- **Overdrive/Libby:** See how many Active Users, Records with usage, and Loans, Failed Loans, Renewals, Early Returns, Holds, Failed Holds, Cancelled Holds, Holds Frozen, Holds Thawed, etc.
- Sideloads: See how often Comics Plus, Kanopy, LinkedIn Learning, Peterson's Test Prep, and Tumblebooks are being accessed from Aspen.
- System Reports: See how many Page Views, Sessions started, Searches, etc.

Primary Configuration Library Systems

- Basic Display (Library Home link)
- Contact links (Social Media links and General Email Address)
- Turn On Explore More Options
- Input Holidays
- Add Menu Links
- Add Contact/Social Media Links

PF	RIMARY CONFIGURATION
Ð	Library Systems Configure library settings.
Ð	Locations Configure location settings.

(Documentation: From Aspen Help Center > Admin > Library Systems > Contact Links)

- In Contact Links you can input the appropriate links for social media pages.
 - When you input a link, the social media icon will appear beneath book descriptions.
- The icons are clickable and redirect patrons to those

Facebook Link URL https://www.facebook.com/@westchesterlibrarysystem/ Twitter Link URL Youtube Link URL https://www.youtube.com/@WestchesterLibraries Instagram Link URL ips://www.instagram.com/westchesterlibrarysystem/

The I hate to cook book Author Bracken, Peg Book Available from another library Show Edition Where is it? dReads Link URL 🚱 🔒 ✓ Available Online eBook Check Out Hoopla Show Edition Philosopher's Chowder. Skinny Meatloaf. Fat Man's Shrimp. Immediate Fudge Cake. These iok Link URL 🚱 🔒 are just a few of the beloved recipes from Peg Bracken's classic I HATE TO COOK BOOK. Written in a time when women were expected to have full, delicious meals on the table for their families every night, Peg Bracken offered women who didn't revel in this obligation an alternative, wick simple meals that took minimal effort but would still satisfy. 50 years eral Contact Link URL 🚱 🔒 later,... ps://www.westchesterlibraries.org/contact-wls/ More Info Add to List SHARE 🔽 💟 🕻

Contact Links

pages.

Primary Configuration Library Systems - Add Holidays

(Documentation: From Aspen Help Center > Admin > Library Systems > Scroll to bottom of page)

To add a Holiday or Closed Date, open Library Systems and scroll to the bottom of the page.

- Open the Holidays tab and click on the Add New button.
- Input the date or choose from the calendar widget.
- In the text box, name the Holiday.
- Use one of the Save options.

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	10/09/2023		Columbus Day		Delete			
	11/11/2023		Veteran's Day	Ĩ	Delete			
	11/22/2023		Thanksgiving Eve (1/2 day)	1	Delete			
	11/23/2023		Thanksgiving Day	1	Delete			
	11/24/2023		Day After Thanksgiving		Delete			
	12/24/2023		Christmas Eve	•	Delete			
	12/25/2023		Christmas Day (obs)	Î	Delete			
	01/01/2024		News Years Day	1	Delete			
	02/17/2025		President's day	•	Delete			
	mm/dd/yyyy							
	+ Add New		-		v			

Primary Configuration Library Systems - Add Holidays

(Documentation: From Aspen Help Center > Admin > Library Systems > Scroll to bottom of page)

When Holidays are added to this section, information about the holiday closure will appear on pages in the user account (Checked Out Titles and Titles On Hold).

Note that holiday information will *not* display in the Hours & Locations information.

Holidays also aren't for regular closures (e.g. "we're closed every Sunday"); those can be added in Primary Configuration > Locations > Hours.

Another great way to advertise holiday or other closures is through System Messages.

Title	s On Hold				
Ardsley F	Public Library is closed today for	President's day. It	will reopen on Fri from 10:00 AM to 5:30 PM		
AI O	Physical Materials	sby 📵			
-	07/04/2024		Independence Day	Delete	۲
	09/01/2024		Labor Day	Telete	
	10/13/2024		Columbus Day	Delete	
	11/11/2024		Veteran's Day	Delete	
	11/23/2024		Thanksgiving Day	D elete	
	12/24/2024		Christmas Eve	Delete	
	12/25/2024		Christmas Day (obs)	Delete	
	01/01/2025		News Years Day	T Delete	
	02/17/2025		President's day	Telete	

(Documentation: From Aspen Help Center > Customize > Menu Links)



- When planning your Menu Links, think about:
- Can Menu Links be combined into categories to create dropdown menus?
- Do all of my Menu Links need to be above the search bar, or can I put some links in the side hamburger menu instead? (Example: About Us, Contact Us, Help, Mission Statement, Library Policies, Staff Directory, etc. are all good candidates for the side/hamburger menu)
- Can my Menu Link labels use less words to convey the same message? (Example: "Resources" vs. "Electronic Resources & Databases")
- Would switching to a full-width header and footer give me more space for menu links? (To adjust this, go into Aspen Administration > Theme & Layout > Themes > click into my theme > check Make Header & Footer Full Width)

(Documentation: From Aspen Help Center > Customize > Menu Links)

To add Menu Links to your catalog, open Library Systems, use the search box for "Menu Links," or scroll to the bottom of the page.



Top Menu Links:

To add Menu Links across the top of the search bar, you must select Show in Top Menu and/or Show Icon in Top Menu.

- If you leave both of these deselected and the Menu Link is checked as Published? then the Menu Link will automatically move into the side hamburger menu instead of along the top of the search bar.
- Show in Top Menu (Large Screens Only)- If checked, then the top icon will remain in mobile view and the link labels will be collapsed.
- Show Icon in Top Menu (All Screen Sizes) If also checked, then the top icons will move to the side hamburger menu in mobile view.

Me	enu Links [®]					
					Show In Top	Show Ic
		FontAwesome Icon			Menu	Top Me
Sort	Category	Name 🕕	Link Text	URL	Large Screens Only	All Scree
t	Events	calendar-alt	Events	https://bywaterso		

(Documentation: From Aspen Help Center > Customize > Menu Links)

Stacked Menu Links or Drop-down Menu Links

- To create a set of nested links aka a drop-down menu, you'll first decide the name of the menu Category. This is the text that will become the header of your menu link.
- Next, add one line for each link in your menu copying down the exact same Category name. This is how Aspen knows to group these links together.



(Documentation: From Aspen Help Center > Customize > Menu Links)

After adding the Category, Link Text, and URL – use the navigation bar towards the right to view the display options.

- Show in Top Menu & Show Icon in Top Menu: Displays the icon and designates the menu links to appear in the homepage, above the search bar.
- **Show Expanded:** For stacked/drop-down menus, turning this on will display all links without having to "open" them.
- Open in New Tab: Opens links in new tab.
- **Published:** Makes the links visible and usable.
- Show to logged in users only: This will make links visible to patrons only when they are logged into the catalog.
- Show on...: Determines which versions of the catalog the links display in. (I.e.: Aspen Discovery Only = Only the catalog, Aspen LiDa Only = Only in the App, Display in both).

URL	Show In Top Menu Large Screens Only	Show Icon In Top Menu All Screen Sizes	Show Expanded	Open In New Tab	Published	Show to logged in users only	Show on
/MyAccount/Selec							Aspen Discov
https://opac.westc							Aspen Discov
https://opac.westc							Aspen Discov

Last Step! Use the navigation bar to go back to the left and click on the blue icon to open the options for selecting an icon.

(Documentation: From Aspen Help Center > Customize > Menu Links)

The icons used in menu links come from Font Awesome: https://fontawesome.com/v5/search?o=r&m=free&s=soli d

When you find an icon you want, type the word exactly as it is into Aspen.

If you click onto the image, you can also copy the word from the modal by copy and pasting or clicking on the link icon to copy the word and then pasting into the lcon field.



Primary Configuration Locations

PRIMARY CONFIGURATION

- Library Systems Configure library settings.
- Locations Configure location settings.
 - Address
 - Contact info
 - Hours of operation

Library Hour Westch 570 Taxter Roa Phone: 914-67	rs and Locations Nester Library Sys ad Suite 400 Elmsford, NY 10523 4-3600	tem Administration Office	×
Open until 5:	Visit Library	Call Library)
Sunday Monday Tuesday Wednesday Thursday Friday Saturday	Closed 9:00 AM - 5:00 PM 9:00 AM - 5:00 PM 9:00 AM - 5:00 PM 9:00 AM - 5:00 PM 9:00 AM - 5:00 PM Closed	View larger map	

Primary Configuration Locations

(Documentation: From Aspen Help Center > Admin > Locations)

In Locations, this is where you will find the library's

address, latitude and longitude (this creates the map in the

Hours and Location link), Contact information and options

to include additional text in the header space, or add a

description of your library to the Hours and Locations box.

You can also configure whether or not you want the Explore

More banner to appear in the search results of your

catalog.



box!

P » SPAN

Primary Configuration Locations

(Documentation: From Aspen Help Center > Admin > Locations > Adding or Editing Location Hours)

Hours of operation:

- Use the search bar to type "Hours", or scroll to the bottom of the page and click **Add New** to add or edit hours.
- Choose a day of the week from the dropdown.
- If the location is closed that day, check the Closed box.
- Set the Opening Hour and the Closing Hour. Times listed are in Military Time.
- Type any notes that might apply to that day. (*Example:* curbside or pickup window hours, hours apply only to a specific time frame like Summer or Winter, etc.

lours®							
Day of Week	Closed	Opening Hour		Closing Hour		Notes	Actions
Sunday	✓	00:00	~	24:00	~		Telete
Monday	~	10:00	~	17:30	~		Telete
Tuesday	~	10:00	~	17:30	~		Telete
Wednesday	~	10:00	~	17:30	~		Telete
Thursday	~	13:00	~	20:00	~		Telete
Friday	~	10:00	~	17:30	~		Telete
Saturday	~	10:00	~	17:30	~	July & August: 10am-1	Telete

Primary Configuration Locations

(Documentation: From Aspen Help Center > Admin > Locations > Adding or Editing Location Hours)

Where Hours Are Reflected

- Library hours are reflected in up to two places in Aspen:
 - $\circ~$ the Library Locations & Hours list
 - $\circ~$ on pages in the user account (Checked Out
 - Titles and Titles On Hold)
- Hours are displayed in the user account by default. The hours shown are always based on the user's home library location.
- Save your changes.



"Regular" AM	Military	"Regular" PM	Military
12:00 AM	0:00	12:00 PM	12:00
1:00 AM	1:00	1:00 PM	13:00
2:00 AM	2:00	2:00 PM	14:00
3:00 AM	3:00	3:00 PM	15:00
4:00 AM	4:00	4:00 PM	16:00
5:00 AM	5:00	5:00 PM	17:00
6:00 AM	6:00	6:00 PM	18:00
7:00 AM	7:00	7:00 PM	19:00
8:00 AM	8:00	8:00 PM	20:00
9:00 AM	9:00	9:00 PM	21:00
10:00 AM	10:00	10:00 PM	22:00
11:00 AM	11:00	11:00 PM	23:00

Theme & Layout Themes

(Documentation: From Aspen Help Center > Customize > Theme and Layout)

- Change colors for the entire interface
- Upload your library's logo, favicon
- Change the heading and body fonts, or upload your own

THEME & LAYOUT

Themes

Define colors, fonts, images etc used within Aspen Discovery.

Theme & Layout Themes

(Documentation: From Aspen Help Center > Customize > Theme and Layout)

The theme colors that will have the most impact on the overall look of your site are the **Primary, Secondary**, and **Tertiary Background** colors, the **Menubar** colors, and the **Browse category** colors.



Theme & Layout **Themes**

(Documentation: From Aspen Help Center > Customize > Theme and Layout)

To change theme colors:

- Change the color for an interface component by clicking the color box for that component. This will open a drop-down color selector tool. Drag the slider to adjust hues. Click and drag to adjust the color saturation.
- You can also change colors by manually typing in the RGB values or pasting in the hex color code, if known.
- To grab colors from a logo or another image, use the eyedropper tool.
- Pay attention to the contrast ratio!
- When finished making color adjustments, save your changes at the bottor of the screen.



□Use Default	Contrast Ratio 7.23
□Use Default	Contrast Ratio 7.23
	Use Default

Local Catalog Enrichment System Messages

(Documentation: From Aspen Help Center > Customize > System Messages)

With these settings, you can:

- Create messages that communicate information to users
- Target messages to specific user account pages
- Schedule system messages to appear for a specific amount of time

LOCAL CATALOG ENRICHMENT

Ø	Browse Category Groups Configure the Browse Categories that are shown on the library home page.
Ø	Browse Categories Define browse categories shown on the library home page.
0	Collection Spotlights Define spotlights that can be embedded within Aspen custom pages or other websites.
Ø	Placards Placards allow you to promote services that do not have MARC records or APIs for inclusion in the catalog.
0	System Messages System Messages allow you to display messages to your patrons in specific locations.

Local Catalog Enrichment System Messages

(Documentation: From Aspen Help Center > Customize > System Messages)

- Open System Messages and click Add New.
- Give your system message a title. This is not shown anywhere publicly; it is for your internal identification purposes only.

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- Type and format your message in the **Message to show** text area. You can change the font, color, size of font, add hyperlinks or even upload images here. If uploading images, keep in mind the size (smaller images might be better)
 - Check Display in **Aspen LiDA** if you want the message to show in Aspen LiDA. (Note: If showing in Aspen LiDA, add the message you want to show here.)
- Click the Show On dropdown to change where the system message displays, if desired. The message will show on All
 Pages by default (top of header placement), but you can also target messages based on whether users are logged in, or display on specific account pages.

Local Catalog Enrichment System Messages

(Documentation: From Aspen Help Center > Customize > System Messages)

• Select a Message Style to help your message stand out with background colors. The Message Style default colors are

as follows but they can be updated in your Theme Settings and correlate to the Button colors.

- o Info (blue)
- Warning (yellow)
- o Danger (red)
- o Success (green)



- Select a **Start Date to Show** and **End Date to Show** for your message if you only want the message to show during a specific time period.
- Check **Dismissible** to allow logged in patrons to be able to hide a message if they have already seen it. All Aspen LiDa messages are dismissible by default.
- Select the Libraries and Locations the system message applies to. If no libraries or locations are selected, the system message will not appear.
- Save your changes.

Local Catalog Enrichment Placards

(Documentation: From Aspen Help Center > Customize > Placards)

Placards are like strategic advertisements that can help you promote resources, events, lists, and more! When users perform catalog searches that match keywords or phrases you specify, your placard will appear above search results.

- Feature an online resource, such as Mango Languages.
- Link to a "While You Wait" staff list of read-a-likes when searching for a popular title or author.
- Advertise an upcoming author talk event when searching for the author or their books.
- Link to resources when searching for related terms.
- Promote story time or kids events when searching for popular children's book topics.

LOCAL CATALOG ENRICHMENT

Θ Browse Category Groups Configure the Browse Categories that are shown on the library home page. Ø Browse Categories Define browse categories shown on the library home page. Ø Collection Spotlights Define spotlights that can be embedded within Aspen custom pages or other websites Ø Placards Placards allow you to promote services that do not have MARC records or APIs for inclusion in the catalog. Θ System Messages System Messages allow you to display messages to your patrons in specific locations.



Local Catalog Enrichment Placards

(Documentation: From Aspen Help Center > Customize > Placards)

- From Local Catalog Enrichment, open Placards and click "Add New."
- Give your placard a title.
 - This will not show on the placard itself and is only seen internally.
- Optional: Select a Start Date and/or End Date for the placard.
 - If no start or end date are selected, the placard will continue to show indefinitely.
- Optional: if you want users to be able to dismiss the placard, check the "Dismissible" box. (Note: if you allow users to dismiss your placard, when the user is logged in they will NOT see this particular placard again.)
- Type text for your placard in the body. Use the text formatting options to increase font size, upload images, and add links.

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Community Conversations
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nd Date to Show 🚱
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Visit <u>conversations.westchesterlibraries.org</u> to learn how the Westchester Library System is fostering dialog ar
action on topics of importance to our communities.
Recent topics include trauma, resilience, and mindfulness practices.
P » SPAN 29 WORDS POWERED BY TI

Local Catalog Enrichment **Placards**

(Documentation: From Aspen Help Center > Customize > Placards)

- Add an image, if desired. If using an image for the entire placard, the maximum recommended dimensions are specified here (800px by 150px).
- If uploading an image, add alt text. This text is used by screen readers for accessibility.
 - Definitely fill in the alt text if you plan to use an image for the entire placard instead of a mix of image and text.
- Add a URL to link the entire placard. Adding a link will make the entire placard clickable.
- Click "Add New" to add trigger words for your placard. When catalog searches contain any of the keywords you specify, your placard will appear above search results.
- Add as many trigger words as you like. When catalog searches contain any of the keywords you specify, your placard will appear above search results. **Think like a library user: what are they likely to search for?**

Community Brought to you by Select an image	y Conver Westchester I	sations .ibrary System
Fremove		
Community Conversations description: "Visit conversations.westc	hesterlibraries.org to learn ho	w the Westchester Library Syster
Link 😧		
https://conversations.westchesterlibraries.org/]
Triggers 😧 Trigger word	Exact Match	Actions
ACEs		Telete
Adverse childhood experiences		Telete
Breath Body Mind		Telete
Breathing Exercises		Telete
Community Conversations		Telete
Harwood Institute		Telete
Resilience		Telete
Richard Harwood		Telete
Trauma-informed practice		Telete
+Add New		

Note: You might have placards that share the same trigger word! When placards share the same trigger word, the placard **saved most recently** will display when that keyword is searched.

If you are using the same word across multiple placards, you should make the placards dismissible. This way, when one placard is dismissed, another placard using the same word could display in its place.

Local Catalog Enrichment Placards

(Documentation: From Aspen Help Center > Customize > Placards)

- When "Exact Match" is checked, the placard will only appear if the exact trigger word(s) are searched. Test out your trigger words after saving the placard to make sure your placard appears as expected.
- Select language(s). Selecting a language here allows you to target placards based on which interface translation the patron is using. If you want your placard to show up for everyone regardless of language translation, click "Select All."
- Select your Library and Location.
 - Note: If no libraries or locations are selected, your placard will not appear. This is one way to keep your placard in "draft" form if it's still under construction.
- When finished, save your changes.



Local Catalog Enrichment Browse Categories

(Documentation: From Aspen Help Center > Customize > Browse Categories)

Browse Categories are one of the most visible and useful tools for your catalog!

•Create new browse categories from search results or saved lists.

- •Add, remove, delete, edit, or re-arrange browse categories.
- •Schedule browse categories.
- •View browse category information and usage data.



Local Catalog Enrichment

Browse Categories from Search Results

(Documentation: From Aspen Help Center > Customize > Browse Categories > Adding a New Browse Category from Search Results)

- Start with either a blank search, or a generic keyword search depending on the type of browse category you're wanting to create.
- Use the "Narrow Your Results" search facets to narrow your search results. Fiction Vs. Non-fiction, Audience, Added In The Last...,
 Format, Genre are popular facets used to curate browse categories.
- Next, select the "Sort By" dropdown and select "Date Purchased Desc". This will move items most recently added to your collection to the top of search results. This filter looks at the acquisition date on the record.
- When you're happy with your search results, open the Search Tools drop-down menu and select "Add to Browse."



Note: Browse Categories from a search can only be made from the regular catalog search results with facets, *not* from Advanced Search.

Local Catalog Enrichment Browse Categories from Saved Lists

(Documentation: From Aspen Help Center > Customize > Browse Categories > Adding a Browse Category from Lists)

In addition to using search results to create browse categories, you can also turn your user lists into browse categories!

- Access your saved lists from your account.
- Find the list you want to use for your browse category. Keep in mind that the list will need to be set to "Public" instead of "Private" in order to make it into a browse category.
- Click on Add To Browse
- When you make changes to the list, the browse category will also update to reflect those changes.



Local Catalog Enrichment Browse Categories

Whether its from Search Results, or a Saved List, when you select Add to Browse:

- Enter a title for the browse category.
- If you want this to become a sub-category to another browse category, make sure to select that in the dropdown list.
- Click on Create Category. Your new browse category will now appear on the front page!



Local Catalog Enrichment > Browse Category Groups Edit Your Browse Categories

(Documentation: From Aspen Help Center > Customize > Edit Browse Categories Contents)

Perhaps you've set up a browse category and realize the results aren't looking the way you'd like. No problem! Here's how to edit an existing browse category that was created with search results.

- Navigate to the browse category you wish to edit and click the text link above the cover images.
- You're now seeing the search results with the filters used to create this browse category. From here, you can adjust any of the search filters until you have the desired results.
- When finished, open the Search Tools Dop-down menu and Add to Browse.
- Since this browse category already exists, click Update Existing.
- Select the browse category you wish to update from the dropdown list. Make sure you're selecting the correct list for the correct library!
- Click **Update Category** and your browse category will immediately reflect your changes.

Note: If your browse category is built from a list, just edit the list contents to change what appears for the browse category.



Local Catalog Enrichment > Browse Category Groups Edit Your Browse Categories

(Documentation: From Aspen Help Center > Customize > Browse Categories > Rearrange Browse Categories and Sub-Categories)

From Local Catalog Enrichment, open Browse Category Groups. This is where we can control which browse categories show up on your main page, and in what order.

- Find your library's settings, then click the ID Number or Edit button.
- This page will show all the browse categories currently displaying on your main catalog page. There are additional settings on this page if you want to customize how cover images appear, whether star ratings are displayed, etc.
- Find the browse category you want to move. Use the Sort Arrows next to the browse category title to drag ands
- The Edit button will allow you to change the title, add a description, add a date range and view how many times the categories have been clicked on or dismissed!
- Click on Save Changes and Return.

LOCAL CATALOG ENRICHMENT Browse Category Groups Configure the Browse Categories that are shown on the library home page. Ω Browse Categories Define browse categories shown on the library home page. **Collection Spotlights** Default Viewing Mode 🚱 Show Covers Only Ratings Mode 🚱 Do not show rating stars. Browse Categories 🚱 Browse Category Sort Actions 1 Recently Added (westchester_recently_added) - 13 Delete 🖋 Edit Movies (S ARD movies) - 39 ~ Telete 🖋 Edit Black History Month (S ARD black history month) - 40 Delete 🖋 Edit Romance Books (S ARD romance books) - 41 ~ Delete

Local Catalog Enrichment Browse Categories vs. Browse Category Groups

(Documentation: From Aspen Help Center > Customize > Browse Categories)

Think of **Browse Category Groups** as the browse

category **layout**. This is what is showing on your catalog left to right top to bottom.

You can move the sort order up and down here to re-order your browse categories.

You can delete browse categories when you are done featuring them or add browse categories when you want to update the look of your catalog browse category view.

Think of **Browse Categories** as a **database** of all the browse categories that have been created that you can pull from. This area is searchable, has some basic statistics, you can set start and end dates and you can also delete browse categories forever when you no longer want them on your catalog instance.

LOCAL CATALOG ENRICHMENT

- Browse Category Groups Configure the Browse Categories that are shown on the library home page.
- Browse Categories Define browse categories shown on the library home page.
- Collection Spotlights Define spotlights that can be embedded within Aspen custom pages or other websites.
- Placards

Placards allow you to promote services that do not have MARC records or APIs for inclusion in the catalog.

System Messages

System Messages allow you to display messages to your patrons in specific locations.

Local Catalog Enrichment Collection Spotlights

- •Create a collection spotlight from lists or search results.
- •Customize collection spotlight appearance.
- •Combine spotlights in a tabbed display.

LOCAL CATALOG ENRICHMENT

Ð	Browse Category Groups Configure the Browse Categories that are shown on the library home page.
Ø	Browse Categories Define browse categories shown on the library home page.
Ð	Collection Spotlights Define spotlights that can be embedded within Aspen custom pages or other websites.
Ð	Placards Placards allow you to promote services that do not have MARC records or APIs for inclusion in the catalog.
Ð	System Messages System Messages allow you to display messages to your patrons in specific locations.

Collection spotlights are a great way to feature items from your collection displayed in a carousel of cover images. After creating a collection spotlight, you'll be able to copy the code needed to embed the spotlight on your website. Or, if you've created <u>custom pages with Aspen's web builder</u>, you can embed collection spotlights with a few clicks!

Local Catalog Enrichment Collection Spotlights from Lists

(Documentation: From Aspen Help Center > Customize > Collection Spotlights)

- Access your lists by clicking your username, then "Your Lists."
- Locate your desired list and click its title to view the settings.
- Click "Create Spotlight"
- When the spotlight is created, to collection spotlight interface will automatically open.
- Scroll down to view and copy the embed code. You'll have two options for embed code: a standard spotlight and a resizable spotlight. This page will also display live previews of each.
- To customize your collection spotlight, click Edit.

	Let's	s Get	Cookin	•			_
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	Edit A	d Multiple Title	s Create Spotlight	Add To Browse			
icte	Email List	Print List	Export List to CSV	Export List to RIS	Generate Citations	Sort by Delete List	
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Create a Spotlight						×	
Please enter a name for the	Please enter a name for the spotlight to be created.						
New Spotlight Name / New Tab Name							
					Close	Create Spotlight	

Aspen Discovery Support	Collection Spotlight
> Hoopla	All Collection Spotlights Edit Preview Tebelete
> ILS Integration	
✓ Local Catalog Enrichment	Let's Get Cookin'
Browse Category Groups	Available to All libraries
> Open Archives	Description
> OverDrive/Libby	
> Primary Configuration	Style Sheet
> Side Loads	No custom css defined
> System Reports	Spatlight Shila
> Theme & Layout	opoliigin otyje
> Web Builder	Horizontal Carousel

Local Catalog Enrichment Collection Spotlights from Search Results

(Documentation: From Aspen Help Center > Customize > Collection Spotlights)

- From a catalog search, use the search facets to create your desired results.
- Open the Search Tools drop-down menu and click Create Spotlight.
- Type in a name for your collection spotlight and Click "Create Spotlight."
- After creating a new spotlight, you'll see a summary of your collection spotlight settings, along with the code snippets you'll need to copy if you wish to embed your spotlights on another website.
- Scroll down to view and copy the embed code. You'll have two options for embed code: a standard spotlight and a resizable spotlight. This page will also display live previews of each.
- To customize your collection spotlight, click Edit.

	i≡ı	.ist	A Search Tool	s →	
Results	Inst	Sa En Ge Ex Ex	ve Search nail this Search et RSS Feed port To CSV port To RIS eate Spotlight	,	
Create a Spotlight		Ad	d To Browse		×
You may either add this search to an existing collect spotlight to display this search in.	tion spot	light as	s a new tab, or you may	y create a new	
Select a collection spotlight Create a new	spotligh	t			V
New Spotlight Name / New Tab Name					
			Close	Create Spotligh	nt



Local Catalog Enrichment Edit and Configure Collection Spotlights

(Documentation: From Aspen Help Center > Customize > Collection Spotlights)

- To customize the appearance of a collection spotlight, open Collection Spotlights from the Web Builder.
- Click the Edit button for the spotlight you wish to customize. The settings are as follows:

Library: Select the library associated with this collection spotlight. Name: The title of your collection spotlight Description: An optional text field for entering in a description for your spotlight. This text is not visible to the public and is for your internal use only. The number of titles that should be shown: By default, this is set to 25. You can adjust this number if you would like to feature more or less titles in your spotlight. Should the title for the currently selected item be shown?: Determines whether the currently selected title will display below the cover images. Should the author (catalog items) /format (archive items) for the currently selected item be shown?: Determines whether the title's author or format will display below the cover images. Should ratings be shown under each cover?: Determines whether rating stars will appear for each title. The style to use when displaying featured titles: Changes the visual display of	 The cover size to use when showing the display: Toggles the cover size. Display lists as: Determines whether combined collection spotlights display together in a tabbed view or as a dropdown list. Show the display's title bar: By default, collection spotlights will display a title bar. Uncheck this option to remove the title bar from appearing above the cover carousel. Show the View More link on the title bar of the display: Determines whether a "View More" link appears on the title bar, if enabled. When clicked, the "View More" link will take users to a page to see all titles associated with the collection spotlight. This will display either as a list or as search results, depending on how the spotlight was created. Display mode for view more link: When users click on the View More Link, this can take users to the search results that show the spotlight titles as a list view or a covers view. The setting only applies to Collection Spotlights created from searches MOT Collection Spotlights created from lists.
your collection spotlight. (Experiment with different styles to see what they do!)	Lists: Displays all lists or search results associated with this collection spotlight.
Should the display automatically rotate between titles?: Determines whether the collection spotlight automatically rotates between titles.	Note: Do not use this section to add new lists. See the "Creating Tabbed Collection Spotlights" section of this page for more information.

Web Builder

- Create Web Pages
- Create Custom Forms
- Showcase Web Resources

WEB BUILDER

- Basic Pages
 Create basic pages with a simple layout.
- Custom Pages
 Create custom pages with a more complex cell based layout.
- Custom Forms
 Create custom forms within Aspen Discovery for patrons to fill out.
- Web Resources Add resources within Aspen Discovery that the library provides.

Γ	A Browse Catalog » Home » Catalog Help Guides				
	> Search the Catalog				
	Select a Library Catalog				
	Search for eContent				
	> Browse Categories				
	Saved Searching				
	> Search Tips				
	> Advanced Searching		> Advanced Search: Help wit	th Search Operators	
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	FirstFind	FMA	hoopla	kanopy	
Linked To Learning	MANGO medici.tv EDU	Libby.	tutor.com A Service of The Princeton Review	OF FASHION	
Resources by C	ategory				
> Arts and Music					
> Homework Help					

Web Builder Custom Forms

(Documentation: From Aspen Help Center > Web Builder > Custom Forms)

Create forms for users to fill out right within your catalog! Forms are great for collecting feedback, allowing patrons to sign up for book or mailing lists, or even signing up for events. Not only can you link directly to a form page, you can also embed forms within custom pages.

WEB BUILDER

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Ð	Create custom forms within Aspen Discovery for patrons to fill out.
Ð	Web Resources Add resources within Aspen Discovery that the library provides.

Web Builder Custom Forms

(Documentation: From Aspen Help Center > Web Builder > Custom Forms)

- Navigate to Web Builder → Custom Forms.
- Click **Add New** and give your form a **Title**.
- Enter a URL Alias. This will become part of the URL to access the form. For example, if you assign the URL alias "/feedback" the URL to access the form directly will be <u>https://[yourcatalogurl]/feedback</u>
- **Require Login:** checking this will require users to sign into their accounts before filling out the form.
- Introductory Text: Enter any text you would like to appear at the top of the form page. This could explain the purpose of your form and/or provide any additional instructions.
- Fields: In this section, you will add the fields for your form. Click Add New to add fields.
- For each field added, assign a Label. (Character limits for each Label field are set to 255 characters.) These field types are:
 - **Text Field:** Short text area for information such as names.
 - **Text Area:** Longer text fields for comments/feedback.
 - Checkbox: Adds a single checkbox. For example, "Click here to sign o up for our newsletter."
 - **Select List:** Lets the user select an option from a dropdown list. To create this, add your options in the Select List Values field, each option separated with commas and no spaces.
- **Date:** Allows users to type in the date or select a date from a Calendar view.
- **Email Address**: Text field for an email address. Will check that the text is in a valid email format.
- **URL**: Text field for a URL. Will check that the text entered is in a valid URL format.

Web Builder Custom Forms

(Documentation: From Aspen Help Center > Web Builder > Custom Forms)

- Enter an optional **Description**. Text entered in the Description fields will become tooltips that users can hover over on each form field to see more information.
- If creating a Select List field, enter in your desired options separated with commas and no spaces.
- Enter in a **Default Value** if you'd like one of the fields to be pre-populated with certain text. This text will remain in the field unless a user deletes it and writes in their own.
- Click the **Required** checkbox next to any form fields that should be required in order to submit the form.
- Email Results To: If you want to receive notifications of form submissions, enter in the email addresses of the desired recipients. If entering in multiple email addresses, separate each address with a semicolon and no spaces. When users submit a form response, the email addresses listed will receive an email with the user's form responses.
- Include Introductory Text in Email: Check this box if you want to include the Introductory Text in the email. An example of when this would be useful is if you are creating an agreement form and you are wanting to save/print the full form.
- **Submission Result Text:** This text will appear to users after successfully submitting the form.
- Select the library this form should apply to, then save your changes at the bottom. Users will not be able to access your form if no libraries are selected here.
- To view or link to your form, append the form's URL alias to the end of your main catalog URL.

	Favorite Genre 😮
)	✓ Mystery
-	Romance
	Comedy
Select List Values (separa	ate Horror
values with commas)	SciFi
Mystery,Romance,Come	dy,I

Fields	0						
Sort	Label	Field Type Descr	otion	Select List Values (separate values with commas)	Default Value	Required	Actions
1	Name	Text Field ~ Ente	your name				
1	Email	Email address ~ Ente	your email add				
1	Favorite Genre	Select List V Sele	t your favorite (Mystery,Romance,Comedy,Hc			
1	Subscribe to newsle	Checkbox ~ Cher	k here to opt in				

(Documentation: From Aspen Help Center > Customize > Web Resources)

To help you promote your resources, Aspen offers an easy way to feature them on your discovery layer. No web design or coding skills required! Just enter information about each resource you have, and Aspen will automatically generate a resource page for your patrons to browse.

WEB BUILDER

Ð	Basic Pages Create basic pages with a simple layout.
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Ð	Web Resources Add resources within Aspen Discovery that the library provides.

(Documentation: From Aspen Help Center > Web Builder > Web Resources > Create Web Resources)

- From Web Builder → Web Resources and click Add New.
- Enter the Name of the new resource.
- Enter the URL for the resource. This is required.
- Optional: select **Open in new tab** to have this resource open in a new tab when clicked.
- Upload a **Logo** for the resource, if desired. For a unified look to your resources page, you might consider having logo images of a similar size/orientation.
- Check **Featured?** to feature this resource at the top of your main Web Resources page.
- **Teaser:** Enter a short description for the resource. This will appear next to the resource on the main resource page, so is meant to be a brief introduction. **Maximum text is 512 characters**
- **Description:** Enter a longer description for the resource here. This will appear after users click on a specific resource to find out more information, and can include any additional instructions needed for accessing the resource.

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Mango Languages						
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médicos y más.

(Documentation: From Aspen Help Center > Web Builder > Web Resources > Create Web Resources)

The next few options are:

- In Library Use Only: This option will add an *In Library Use Only* note and will check the accessing IP to see if the user is within the library building.
- **Requires Library Card**: This option will add a *This resource requires a library card to use it* note to the users.
- **Requires Being Logged In To Access, Unless in Library**: This option will require users to log in before accessing the resource link, unless they're already in the library.
- Select any **Audience** or **Categories** for this resource. Web Resources will appear when users switch the main search index from "in Library Catalog" to "in Library Website." Assigning audiences and categories can help users filter search results to find resources within specific categories or geared toward certain audiences. <u>Click here to learn more about audiences and categories</u>.
- Select the Libraries where this web resource page should display.
- Save your changes.



(Documentation: From Aspen Help Center > Web Builder > Web Resources > Create Web Resources)

Once you've built your Web Resources page, you can preview the page Aspen generates by appending this to the end of your catalog URL:

/WebBuilder/ResourcesList

For example: https://opac.westchesterlibraries.org/WebBuilder/ResourcesList

Once you have your web resources page finalized, you'll need to add a menu link to the page for your users to find it. You can simply add that URL alias above to the URL field when you create the link.

Web Builder Web Pages

(Documentation: From Aspen Help Center > Web Builder > Basic and Custom Web Pages)

You can create pages that look great with a variety of content options at your disposal with no coding knowledge whatsoever. Whether you want to create a few pages to supplement your catalog or build out your library's entire website in Aspen, you have options!

WEB BUILDER

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Ð	Web Resources Add resources within Aspen Discovery that the library provides.

Web Builder Web Pages

(Documentation: From Aspen Help Center > Web Builder > Basic and Custom Web Pages)

- From Web Builder > Basic Pages and click Add New.
- Give your page a title.
- Enter a URL Alias. This must always begin with a forward slash. For example: /bookclub
- The URL alias helps create the URL where the page will be accessed. Once you've finished your page, you can view it (and link to it) by appending the URL alias to the end of your main catalog URL. For example: catalog.mylibrary.org/bookclub
- Enter a teaser description, if desired. If searching within web builder pages is enabled, the teaser will display as a brief description for the page within search results.



Web Builder Web Pages

(Documentation: From Aspen Help Center > Web Builder > Basic and Custom Web Pages)

- Next, the page contents: this is where the fun begins! In this box, you can add and format text, upload images, and more.
- **Require login to access:** Only check this box if you want to restrict this page to users who are logged into Aspen Discovery. Once selected, you can even narrow down the access to specific patron types. This means you could potentially create pages that only staff have access to!
- Audience and Categories: Select any audiences or categories that apply to the page. If your library has enabled searching within web builder pages, the Audiences and Categories will appear as search facets patrons can use to narrow down to specific website content.
- Libraries: Select the library (or libraries) this page should be associated with. <u>If</u> <u>no libraries are selected, you will not be able to view the page.</u>
- Don't forget to save your changes periodically!
- Your page is technically "live" as soon as you create it. However, no one will know about the page until you directly link to it either somewhere on your catalog or on your library website.

Note: that if you're linking to a web builder page anywhere else in Aspen, all you need to do is enter in the URL alias for the link. This way, even if your main catalog URL changes, your links will continue to function.



ASPEN DISCOVERY SUPPORT

- Help Center (<u>https://help.aspendiscovery.org/</u>)
- IT Help Desk (support@wlsmail.org)

Lib.	Administrator(s)	Lib.	Administrator(s)	Lib.	Administrator(s)
ARD	Allison Pryor	KAT	Allison Pryor	POR	Steve Martinez
BDH	Allison Pryor	LAR	Linnea Moosman & Kim Larsen & Caroline Cunningham & Paul Doherty	POU	Jennifer Coulter
BDV	Allison Pryor	LAR	Veronica Berger & Alexandra Neceda & Evgenia Nikolopoulou	PUR	Allison Pryor
BRI	Zach Gerstein	LEW	Kathleen Iglesias	RYE	Kenny Nam & Tara Montini
BRO	Christine Utchel & Ellen McTyre	MAM	Allison Pryor	SCA	Erika Heinzelman
CHA	Denise Mincin & Thao Nguyen	МТК	Sioban Keane & Stephanie Coppala	SOM	Juan Carlos Villagomez
CRO	Dianna Solano	MTP	Alex Kiffer & Amy Mackin & John Fearon	TUK	Miriam Saphra & Justin Weber
DOB	Ned Canora & Amanda Sati	MTV	David Cambillo	WLS	Allison Pryor & Lindsay Stratton
EAS	Jonathan Heifetz & Teresa Chang & Tracy Wright	NCA	Diana Wendell	WHI	John Lolis & Susan Hoover
GRE	Nicole Guenkel & Diana Farez & Justin Sanchez	NEW	Brian Zamek & James Welch	WNR	Cassandra Troini & Jessica Pacciotti
HAS	Debbie Quinn & Ursula Cornely	NOR	Jen Gileno	YPL	Shauna Porteus
HAR	Dan Briem	OSS	Allison Robins & Marie Trepasso	YRK	Tamarah Hyman & Christine Julian
HHF	Katie Caracci	PEL	Kathy Palovick & Colette Storti-Roberts		
IRV	Keshet Roman & Christina Baulch	PEK	Nora Mulligan & Chelsea Holland		