



# Aspen Discovery

## Aspen for Consortiums

August 20th, 2025 at 8 am PST, 9 am MST, 10 am CST, 11 am EST

Join Here: [Zoom Link](#)

Name	Partner organization
Heather Arnold	Missouri Evergreen/ Municipal Library Consortium
Kevin French	GMILCS, Inc.
Lauren Conley	ByWater Solutions
Olivia Montolin	SWAN
Jordan Fields	Grove
Joan Kranich	C/W MARS
Mark Noble	Grove
Bob Bennhoff	Colorado Library Consortium
Jenn Del Cegno	Minuteman Library Network
Phil McNulty	Minuteman Library Network
Elaine Greenfield	Minuteman Library Network
Katie Zimmermann	WVLS
Michelle Spinney	CLAMS Library Network
Caitlin Baumgartner	Hoopla Digital   MidwestTape
Leo Stoyanov	ByWater Solutions
George Williams	Northeast Kansas Library System
Mike Grgurev	Main Library Alliance

## August 20th, 2025 Agenda

*Any attendee should feel free to add additional agenda topics. Please add your name following any agenda items you add and be willing to kick off that topic with the group.*

### New Business Items

#### 1. Question: Do you use Linked Accounts in Aspen?

- Some libraries in the Missouri consortium do, while some do not, most enjoy it, but can lead to confusion since not every library does have them (Evergreen)
- CLiC has one library who uses it
- Minuteman does not use linked accounts
- Wisconsin Valley does not due to some confusion between patron initiated linking in Aspen and uncorrelated account linking in Sierra (also legal/privacy reasons)
- Clams has it on, but does not encourage it
- GMILCS has it on, but does not know of anyone using it
- CWMARS is not using it
- The setting is in Primary Config - Library Systems, so you can do it by library

#### 2. Question: How do you handle staff-created lists and turnover? Do you use a generic account? What about consortium-wide lists for awards?

- WVLS has generic accounts for public lists, Minuteman has some for public lists and some accounts for just their library lists
- CW/MARS Library staff who are creating public, searchable lists in Aspen should include their town name in the title of the list
- Many libraries do not handle them but are looking for good ideas to do that
- Everyone can create public lists, but there are permissions on making them searchable

*Ideas for development to make it better for consortium*

1. The list itself would have an indicator of who it should be shared with (consortium list, library list, personal list, etc)
2. The ability to transfer lists, copy and edit, as well
3. Be able to customize the general staff list creator

*Share your ideas on any changes to Lists that you would like to see!*

#### 3. Continued Discussion: Improving permissions for consortia

- a. Proposal for Limiting Access to Shared Records
  - i. [Draft proposal - Requirements for Limiting Access to Shared Records](#)
    1. Discussion:

- a. Folks should review the draft and add comments!
- b. Especially looking for comments on objects/things that should or should not be locked
- c. Do we want something more like locking or more like sharing (like we did for Sideloads) - sharing might be more flexible
  - i. Could see cases for both locking and sharing
  - ii. Locking could be sufficient for something like System Messages, while sharing might be better for Themes, Placards, etc.
- d. Could there be different permissions to see something vs edit something? (this would be a phase 2) - this is what was done for the sideloading permissions, so that would solve this
  - ii. Other ideas to approach this problem?
- b. Preventing uploaded file overwrites
  - i. [DIS-657](#)
  - ii. Released in 25.07, CWMARS partnered with Grove for this development
- c. Any other improvements for consortiums in the works?
  - i. Performance improvements are good for everyone!

#### 4. Open Time

- CW MARS has noticed that advanced search has been slow for them (loading the page is slow because it's loading all of the facets) - Advanced Search could use some love (they only show 100 values for facets, for instance)
  - i. NEKLS and other libraries have added an Advanced Search button under their Search button or Search box, so it's easier for users to access
  - ii. Previous usability studies showed that Advanced Search was not used much or used well, when it was
- Question about floating collections in Koha and how they show in Aspen, if they're showing the Current Library vs. Owning Library. Has anyone else seen that situation?
  - Could be a development to show both or choose per library how they show
- Question about items that cannot transit to other libraries
  - CWMARS has item notes for things like that
  - Minuteman is trying to get home pickup from Sierra work in Aspen (<https://aspen-discovery.atlassian.net/browse/DIS-790>)
  - WVLS translated our hold failed message to include something generic about some items being limited to local use.

- Can restrict pickup locations in the Format Map (in ILS Indexing) per format
- Hoopla title ingestion - currently have to choose one Hoopla library ID to ingest, would like to discuss a better, more flexible way to do this
  - SWAN says yes!
  - Hoopla has new APIs that might allow this, without the issue we had before where ingestion of all the collections took too many resources. Would libraries still want to be able to filter by price, subject, audience, etc. in Aspen? Hoopla also offers price caps

**5. Register for [AspenCon 2025!](#)**

- a. [Session descriptions](#)
- b. Registration is FREE!
- c. October 8th-10th, 2025 in Nashville, TN

**6. Aspen Discovery Community Google Groups mailing list - Join us!**

- a. [https://drive.google.com/file/d/1koA-DU-Nxv0tmQzyZ-\\_ZxmFBgual\\_-7u/view](https://drive.google.com/file/d/1koA-DU-Nxv0tmQzyZ-_ZxmFBgual_-7u/view)
- b. Looking for administrators in PST, EST, and other time zones. Also folks who speak other languages!
  - i. Most of the work is helping people get on or off the mailing list
  - ii. If interested, email [George@nekls.org](mailto:George@nekls.org)

**7. Next meeting:**

- a. Wednesday, October 15th, 2025

**Tabled Topics**

1. (Revisiting after more time has passed) - We need to establish a clear process for handling action items and transferring ideas, development requests, and issues from this group to the appropriate teams or individuals who can address them effectively.
  - a. Work on a framework/proposal, user stories to organize our discussion. After that is done and agreed upon, we can write up a Jira ticket (but in the future, not right away)
  - b. Has this been working for folks?

## Aspen for Consortiums

June 18th, 2025 at 8 am PST, 9 am MST, 10 am CST, 11 am EST

Join Here: [Zoom Link](#)

Name	Partner organization
Ruth Souto	Minuteman Library Network
Olivia Montolin	SWAN
Mike Grgurev	Main Library Alliance
Courtney Brown	Evergreen Indiana
Sierra Chastain-Rittue	CW MARS
Heather Arnold	MLC - Missouri Evergreen
Liza Arend	Minuteman Library Network
Kevin French	GMILCS, Inc.
Shaylee Krueger	WYLD
Elaine Greenfield	Minuteman Library Network
Jordan Fields	Grove
Mark NobleLauren Conley	GroveByWater
Britta Dorsey	Evergreen Indiana
Leo Stoyanov	ByWater Solutions
Eileen Chandler	CLAMS Library Network
Linda Kramer	Martin Luther College/Traverse des Sioux
Shantry Miller	WYLD

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## June 18th, 2025 Agenda

*Any attendee should feel free to add additional agenda topics. Please add your name following any agenda items you add and be willing to kick off that topic with the group.*

### New Business Items

#### 8. Question: Does anyone have individual library kids catalogs?

##### a. Discussion: Browse Category Permissions/Local Administrator Users

- i. Are you utilizing a consortial kids catalog or individual library kids catalogs? How?
  1. This could get out of hand quickly in large consortiums, but smaller consortiums it may be more manageable to have 2 catalogs per library
  2. No other folks atm
  3. Pros and Cons - difficult for kids to navigate a large consortium kids catalog
  4. This could be done as a location that is their Children's Catalog
  5. Sierra is reaching out to her libraries to gauge interest (currently about 10 libraries) to look into a test run.
  6. Figuring out records to include for each library could be tricky
  7. How tricky this is might depend on how much freedom member libraries already have (whether or not libraries administer their own Browse Categories, for example).
  8. Libraries that have their own kids catalog can highlight their own collections and not worry about differences across the consortium on whether materials are shelved as kids or teens.
- ii. Do your libraries have permissions to create browse categories for their catalogs?
  1. Issue with Browse Category Groups
    - a.  DIS-954: Allow "Administer Library Browse Categorie..."
  2. The libraries that have permissions to create Browse Categories love them!
- iii. Are you utilizing the Local Administrator user functionality?
  1. Sierra doesn't need this for her current plan
- iv. Brief discussion on Placards and how folks are using them
  1. What should we do if there are multiple placards for the same trigger? Having a method to show all of them might be good (could be a carousel/slider). Could also make them dismissable.

#### 9. Question: How much access to Aspen Administration do your libraries have?

- a. CW Mars has one “Aspen Admin” user for each library. They also use Mike’s “consortial object guard javascript” to prevent libraries from editing things shared between libraries. They don’t let libraries change anything related to search (ie search full consortium first, etc). Mostly they can customize UI like Browse Categories and colors. Regular staff get permission to make public lists and masquerade. There are a few other folks with a few more permissions.
- b. MAIN started by giving out permissions freely (for their library, not consortium-wide). Mike later reworked permissions into tiered roles. [Here’s his list of roles.](#)
- c. CLAMS - Eileen said that their libraries do their own Kanopy sideloads.

**10. Question: Any feedback from your libraries/patrons that you’d like to share?**

- a. The group would like more APIs
  - i. For Kanopy
  - ii. For Comics Plus (these are done, just need integration)

**11. Continued Discussion: Improving permissions for consortia**

- a. Enhanced Side Load Permissions
  - i. [DIS-560](#)
  - ii. Available in 25.06! CW MARS and WYLD partnered on development with Grove for this functionality 😊
  - iii. [Video demonstration](#)
  - iv. [Documentation](#)
- b. Proposal for Limiting Access to Shared Records
  - i. [Draft proposal - Requirements for Limiting Access to Shared Records](#)
    - 1. Discussion:
      - a. Folks should review the draft and add comments!
      - b. Especially looking for comments on objects/things that should or should not be locked
      - c. Do we want something more like locking or more like sharing (like we did for Sideloads) - sharing might be more flexible
      - d. Could there be different permissions to see something vs edit something? (this would be a phase 2) - this is what was done for the sideload permissions, so that would solve this
    - ii. Other ideas to approach this problem?
- c. NEW: Preventing uploaded file overwrites
  - i. [DIS-657](#)
  - ii. Scheduled for 25.07 CWMARS partnered with Grove for this development
- d. Any other improvements for consortiums in the works?
  - i.

## 12. Register for [AspenCon 2025!](#)

- a. [Session descriptions](#)
- b. Registration is FREE!
- c. October 8th-10th, 2025 in Nashville, TN\*
  - i. **NOTE:** There was a recent fire and damage to the venue; we may need to pivot to a new location/or move to a virtual conference. If you can, hold off on purchasing flights/accommodations, or make them refundable/get insurance if you cannot wait to purchase.

## 13. Aspen Discovery Community Google Groups mailing list - Join us!

- a. [https://drive.google.com/file/d/1koA-DU-Nxv0tmQzyZ-ZxmFBqual\\_-7u/view](https://drive.google.com/file/d/1koA-DU-Nxv0tmQzyZ-ZxmFBqual_-7u/view)
- b. Looking for administrators in PST, EST, and other time zones. Also folks who speak other languages!
  - i. Most of the work is helping people get on or off the mailing list
  - ii. If interested, email [George@nekls.org](mailto:George@nekls.org)

## 14. Community Tool Update: Sign up for Jira!

- a. Demo at the [June Community Gathering](#) - recording available!
- b. [Issues for Consortiums filter](#)
- c. You can view issues without a login here:  
<https://aspen-discovery.atlassian.net/jira/software/c/projects/DIS/issues?jql=project%20%3D%20%22DIS%22%20ORDER%20BY%20created%20DESC>

## 15. Next meeting: Wednesday, August 20th, 2025!

- a. **MODERATOR/NOTE TAKER NEEDED!**
  - i. Sierra will be OOO this day and unable to attend

## Tabled Topics

2. (Revisiting after more time has passed) - We need to establish a clear process for handling action items and transferring ideas, development requests, and issues from this group to the appropriate teams or individuals who can address them effectively.
  - a. Work on a framework/proposal, user stories to organize our discussion. After that is done and agreed upon, we can write up a Jira ticket (but in the future, not right away)
  - b. Has this been working for folks?

## Aspen for Consortiums

*April 16th, 2025 at 8 am PST, 9 am MST, 10 am CST, 11 am EST*

Join Here: [Zoom Link](#)



Name	Partner organization
Sierra Chastain-Rittue	CW MARS
Philip McNulty	Minuteman Library Network
Jeremy Goldstein	Minuteman Library Network
Kyle Davis	Milwaukee Public Library
Bill Kessler	ByWater Solutions
George Williams	Northeast Kansas Library System
Ruth Souto	Minuteman Library Network
Mark Noble	Grove
Jordan Fields	Grove
Jenn Del Cegno	Minuteman Library Network
Olivia Montolin	SWAN
Lauren Conley	BWS
Millissa Macomber	Skagit Libraries
Elaine Greenfield	Minuteman Library Network
Heather Arnold	Missouri Evergreen
Linda Kramer	Traverse des Sioux

**April 16th, 2025 Agenda**

*Any attendee should feel free to add additional agenda topics. Please add your name following any agenda items you add and be willing to kick off that topic with the group.*

**New Business Items**

16. Present at AspenCon 2025! <https://community.aspendiscovery.org/ACProposalCall25>

- a. How does your consortium use Aspen?
- b. Pros and Cons? Where have you had to adapt?
- c. Dream enhancements for consortial use?
- d. Lessons learned?

17. Any feedback from your libraries/patrons that you'd like to share?

**18. SWAN - Improvements to the administrative side of Aspen for consortiums**

- a. A lot of little things that we could improve for network administrators managing multiple libraries
  - i. Things like copying items
  - ii. Batch updates
  - iii. Admin notes to records/side loads
- b. Put them in Jira as enhancements and tag them with Consortiums
- c. We can review them in this meeting moving forward and prioritize the issues in kanban boards

**19. CW MARS - Browse Category Permissions bug**

- a. There appears to be a permissions conflict between Administer Library Browse Category Groups and Administer Selected Browse Category Groups.
  - i. Jira tickets - [DIS-347](#), [DIS-585](#)
- b. Basically, we are investigating how to set up individual library kid's catalogs that libraries can manage themselves, including updating the browse categories themselves.
  - i. The library administrator was added to the kid's catalog location using Additional Locations to Administer. This does not cover the browse category group for that location.
  - ii. In order to view the browse category group for the kid's catalog, "Administer Selected Browse Category Groups" needed to be added to the library administrator's role. This allows the admin to create browse categories on this catalog and access the browse category group.
  - iii. However, this leads to an error where the administrator cannot see the subcategories they created on the browse category group and is unable to update these subcategories from Search Tools. Instead, it shows the first one they have access to:

670

**Label** Required  
Books by Topic

**textid**  
HATFIELDKIDS\_books\_by\_topic

**userid**  
95

**Share With**  
Selected Library

**Library**  
Hatfield Public Library

**Description**

Start Date to Show

End Date to Show

**Browse Sub-Categories**

Sort	Sub-Category	Actions
↓	Books by Topic (HATFIELDKIDS_books_by_topic) - 670	Edit Delete
↓	Books by Topic (HATFIELDKIDS_books_by_topic) - 670	Edit Delete
↓	Books by Topic (HATFIELDKIDS_books_by_topic) - 670	Edit Delete
↓	Books by Topic (HATFIELDKIDS_books_by_topic) - 670	Edit Delete
↓	Books by Topic (HATFIELDKIDS_books_by_topic) - 670	Edit Delete

### Update Existing Browse Category

Select a browse category

Books by Topic (HATFIELDKIDS\_books\_by\_topic)

Close Update Category

- c. The only way the admin can see their browse categories in the Search Tools dropdown correctly is to remove the Administer Selected Browse Category Groups permission. But, then these admins cannot access the browse category group and cannot customize the kid's catalog in that way
- d. Mark - Seems like a standardization thing/overlapping permissions issue?

**20. Minuteman - List-based bucket browse categories with subcategories in LiDA won't show the subcategories**

- a. Can be fixed if you change the bucket browse category to a search-based browse category instead of a list-based browse category
- b. Mark is thinking! Will try to look into it

- c. Would that be a bug in the API or in LiDA?
- 21. NEKLS - Aspen Governance is considering joining the Open Library Foundation (OLF)**
  - a. OLF has an annual conference, [WolfCon](#), and George is considering going since it is local to him
  - b. Proposals are due next week. Is anyone else going or thinking about going/presenting?
  - c. George will also be at AspenCon :)
  - d. WOLFcon 2025 website  
<https://openlibraryfoundation.org/about/wolfcon/upcoming/>
- 22. Aspen Discovery Community Google Groups mailing list - Join us!**
  - a. [https://drive.google.com/file/d/1koA-DU-Nxv0tmQzyZ-\\_ZxmFBgual\\_-7u/view](https://drive.google.com/file/d/1koA-DU-Nxv0tmQzyZ-_ZxmFBgual_-7u/view)
  - b. George Williams is an administrator, Bob Bennhoff is an administrator, looking for administrators in PST, EST, and other time zones. Also folks who speak other languages!
    - i. Most of the work is helping people get on or off the mailing list
    - ii. If interested email [George@nekls.org](mailto:George@nekls.org)
    - iii. Sierra can be an EST administrator
- 23. Sign up for Jira!**
  - a. Email [jordan.fields@groveforlibraries.com](mailto:jordan.fields@groveforlibraries.com) to be added
  - b. You can view issues without a login here:  
<https://aspen-discovery.atlassian.net/jira/software/c/projects/DIS/issues?jql=project%20%3D%20%22DIS%22%20ORDER%20BY%20created%20DESC>
- 24. Next meeting:** Wednesday, June 18th, 2025!

### Old Business Items

- 3. Improving permissions for consortia
  - a. **[Proposal for Sideload Permissions](#)**
    - i. Planned for 25.06! CW MARS and WYLD partnering on development with Grove for this 😊
  - b. **Proposal for Limiting Access to Shared Records**
    - i. [Draft proposal - Requirements for Limiting Access to Shared Records](#)
      - 1. Please take a look and add any areas your network would like to see this work applied to, and add any comments you may have so we can discuss this next time!
- 4. We need to establish a clear process for handling action items and transferring ideas, development requests, and issues from this group to the appropriate teams or individuals who can address them effectively.
  - a. Work on a framework/proposal, user stories to organize our discussion. After that is done and agreed upon, we can write up a Jira ticket (but in the future, not right away)
  - b. Has this been working for folks?
    - i. Yes for now, revisit when it's happened a couple more times

# Aspen for Consortiums

February 19, 2025 at 8 am PST, 9 am MST, 10 am CST, 11 am EST

Join Here: [Zoom Link](#)

Name	Partner organization
Mark Noble	Grove
Sierra Chastain-Rittue	CW MARS
Mike Grgurev	Main Library Alliance
Aaron Skog	SWAN
Jordan Fields	Grove
Jeremy Goldstein	Minuteman Library Network
Ruth Souto	Minuteman Library Network
Eileen Chandler	CLAMS Library Network
Olivia Montolin	SWAN
Lauren Conley	BWS
Elaine Greenfield	Minuteman Library Network
Kevin French	GMILCS, Inc.
Michael Adamyk	ByWater Solutions
Millissa Macomber	Central Skagit Library
Liza Arend	Minuteman Library Network
Annisha Romney	CLAMS

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## Feb. 19th, 2025 Agenda

*Any attendee should feel free to add additional agenda topics. Please add your name following any agenda items you add and be willing to kick off that topic with the group.*

### New Business Items

25. We need to establish a clear process for handling action items and transferring ideas, development requests, and issues from this group to the appropriate teams or individuals who can address them effectively.
  - a. Work on a framework/proposal, user stories to organize our discussion
  - b. After that is done and agreed upon, we can write up a Jira ticket (but in the future, not right away)
  - c. Add agenda/notes to the [Aspen Community Partner shared folder](#) - **DONE**
26. Any feedback from your libraries/patrons that you'd like to share?
27. Present at AspenCon 2025! <https://community.aspendiscovery.org/ACProposalCall25>
  - a. How does your consortium use Aspen?
  - b. Pros and Cons? Where have you had to adapt?
  - c. Dream enhancements for consortial use?
  - d. Lessons learned?
28. **Next meeting:** Wednesday, April 16th, 2025!

### Old Business Items

5. Improving permissions for consortia:
  - a. Set up additional permissions in Aspen's administration to allow libraries to edit their own catalogs and materials without granting access to the entire consortium. E.g. sideloads (Cori - WYLD)
    - i. [Framework document](#) update from Cori?
    - ii. Another layer of connecting libraries to the scope, do we want to say regardless of scope you can edit side loads?
    - iii. Seems doable with what we do for other things, like Web Builder settings
    - iv. Would need to test both directions
    - v. For just sideloads, seems straightforward
    - vi. Mark may throw together some numbers?
      1. Yes!
    - vii. CLAMS, GMILCS, CW MARS, WYLD interested
    - viii. Should libraries be able to see what others are side loading, but not edit them? For examples for how to load, URLs, etc.
      1. What are other networks doing?

- a. CW MARS would plan to have cataloging staff upload side loads the first time, then have libraries maintain.
      - b. CLAMS would like to have libraries load their own
      - c. MAIN uses one Kanopy upload and then scopes for libraries.
        - i. Maybe it could be helpful if there's a scenario where staff volunteer to work on the cataloging/side load and share with the consortium (take workload off of network staff)
    - ix. Should it be similar to browse categories? Can share with everyone, or share with just their library
    - x. What if removing records per-scope was part of it? A bit out of scope for permissions but related to side loads
      - 1. This would allow individual libraries to delete records from a shared side load?
      - 2. Then you can do both URL rewriting and record scopes for an individual sideload
    - xi. Hoopla too?
  - b. The ability to lock down pages, materials, etc. in the catalog so only certain admin levels can edit those features (Sierra - CW MARS)
    - i. [Framework document](#) update from Sierra?
    - ii. MAIN, CW MARS, CLAMS, GMILCS
    - iii. Browse category groups for MAIN was a pain point
    - iv. Custom pages and themes for CW MARS was a pain point
    - v. Would copying be useful? So they could still see it but also could copy if they liked
      - 1. Yes!
      - 2. Browse category groups, themes
      - 3. Having the option for them to see stuff in certain cases would be good
    - vi. Should it be role-specific? You can edit locked-things, for example
      - 1. Permission to modify locked objects (vs. locked fields)
    - vii. Sierra to finish up requirements proposal based on conversation today, will share in Slack or at next meeting
6. Set up a library filter so patrons can initially see records only owned by their library system but then narrow it down to a single branch (Cori - WYLD)
  - a. Framework document update from Cori?
  - b. Related to facets and overlap - so this is owned by this branch regardless of availability
  - c. We tie availability and format right now, but not necessarily ownership
  - d. Hard to see all titles owned by branch
  - e. Tying in the added in the last functionality for the library/branch level
  - f. While You Wait driving traffic to ebooks vs. physical items at the pickup library vs. another library in the consortium

- g. Relating to ILL needing to be done through mail!
- 7. Genealogy: scope to only allow the owning library to edit (Cori - WYLD)
  - a. Need to discuss how to handle connecting information (same person but have records in several places around the state)
    - i. Permissions on who can edit records
  - b. If we could have 1 record per person, that is clean. Maybe we think about this solution in a different way? Maybe tracking changes/edits for the data
    - i. Seems better to do it that way and then solve residual issues from that solution
  - c. Maybe some sort of approval process? Suggest changes vs. making changes. Local notes? Seems important for data organization/cleanliness
  - d. Is anyone here using Genealogy?
    - i. If anyone here wants to set it up or get advice, Jordan has connections!

## Aspen for Consortiums

*December 18, 2024 at 8 am PST, 9 am MST, 10 am CST, 11 am EST*

Join Here: [Zoom Link](#)

Name	Partner organization
Cori Hundley	WYLD
Shaylee Krueger	WYLD
Kevin French	GMILCS
Britta Dorsey	Evergreen Indiana
Mark Noble	Grove
Katie Zimmermann	WVLS
Elaine Greenfield	Minuteman Library Network
Aaron Skog	SWAN
Michelle Spinney	CLAMS Library Network
Jordan Fields	Grove
Sarah St. Martin	GMILCS
Olivia Montolin	SWAN
Kyle Davis	Milwaukee County Federated Library System



Sierra Chastain-Rittue	CW MARS
Lauren Conley	ByWater
Jeremy Goldstein	Minuteman Library Network
Liza Arend	Minuteman Library Network
Courtney Brown	Evergreen Indiana
Shantry Miller	WYLD
Ruth Souto	Minuteman Library Network
Jenn Del Cegno	Minuteman Library Network
Bill Kessler	ByWater Solutions

## Dec. 18th, 2024 Agenda

*Any attendee should feel free to add additional agenda topics. Please add your name following any agenda items you add and be willing to kick off that topic with the group.*

### New Business Items

29. Passing of Leadership for group meetings
  - a. Cori is leaving WYLD and going to OhioNet
  - b. Sierra will run the group in February
30. We need to establish a clear process for handling action items and transferring ideas, development requests, and issues from this group to the appropriate teams or individuals who can address them effectively.
  - a. Work on a framework/proposal, user stories to organize our discussion
  - b. After that is done Jira ticket (but in the future, not right away)
  - c. Add agenda/notes to the Aspen Community Partner shared folder
31. Next meeting: Wednesday, Feb 19th, 2025!

### Old Business Items

8. Improving permissions for consortia:
  - a. Set up additional permissions in Aspen's administration to allow libraries to edit their own catalogs and materials without granting access to the entire consortium. E.g. sideloads (Cori - WYLD)
    - i. Could be a nice first focus, to chunk out the permissions work
    - ii. Cori to work on a template/document framework (Jordan will share a template)

- b. The ability to lock down pages, materials, etc. in the catalog so only certain admin levels can edit those features (Sierra - CW MARS)
      - i. A way to mark things as “consortial” would be nice
      - ii. Sierra to work on a template/document framework
- 9. Set up a library filter so patrons can initially see records only owned by their library system but then narrow it down to a single branch (Cori - WYLD)
  - a. Limitation due to Solr, Solr 9 may have new functionality that could help (Grouped Works add a layer of complexity)
  - b. Solr doesn't like to do AND, loves OR
  - c. WYLD's goal is to help smaller branch collections to be able to shine through instead of being hidden by larger branch counterparts
  - d. Something like this could be useful for other features that have been discussed in the past, like Kids catalogs
  - e. WYLD had libraries reach ILL caps due to the While You Wait suggestions not being from their library
    - i. Could limit While You Wait to the instance instead of the global potentially
  - f. Cori to work on a template/document framework
- 10. Genealogy: scope to only allow the owning library to edit (Cori - WYLD)
  - a. Need to discuss how to handle connecting information (same person but have records in several places around the state)
    - i. Permissions on who can edit records
  - b. Tabled to next meeting (larger discussion)

## Aspen for Consortiums

October 16, 2024 at 8 am PST, 9 am MST, 10 am CST, 11 am EST

Join Here: [Zoom link](#)

Name	Partner organization
Cori Hundley	WYLD
Chanel Wheeler	YLN
Sierra Chastain-Rittue	CW MARS
Kyle Davis	Milwaukee County Federated Library System
Brendan Lawlor	CLAMS
Ben Wolfe	CLiC

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Kyle Davis	Milwaukee County Federated Library System
Brendan Lawlor	CLAMS
Elaine Greenfield	Minuteman Library Network
Shantry Miller	WYLD
Ruth Souto	Minuteman Library Network
Michelle Spinney	CLAMS
Liza Arend	Minuteman Library Network
Olivia Montolin	SWAN
Eileen Chandler	CLAMS
Nancy Mumford	CLAMS
Katie Zimmermann	WVLS
Allison Pryor	Westchester Library System
Lindsay Stratton	Westchester Library System
Anita Brown	Evergreen Indiana Consortium
Bridget Page	hoopla Digital
Annisha Romney	CLAMS
Jordan Fields	Grove
Mark Noble	Grove
Phil McNulty	Minuteman Library Network
Caitlin Baumgartner	hoopla Digital
Jenn Del Cegno	Minuteman Library Network
Jeremy Goldstein	Minuteman Library Network

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Brendan Lawlor	CLAMS
Lauren Conley	ByWater Solutions
Desiree Saunders	WYLD
Shaylee Krueger	WYLD
Jerry Struver	YLN
Mike Grgurev	Main Library Alliance
Danielle Meininger	OceanBooks Consortium

## Oct. 16th, 2024 Agenda

*Any attendee should feel free to add additional agenda topics. Please add your name following any agenda items you add and be willing to kick off that topic with the group.*

1. Search filters and facets like "Added in the Last" and "Library" do not currently work together to narrow results down to a specific library. This makes it difficult for patrons to search for branch-specific items. The "Available At" facet isn't a good solution because it only shows items that are immediately available, not those that patrons might want to place a hold on. We've submitted a development request for a new facet that would filter by the owning library, allowing patrons to easily scope down to a specific library, regardless of availability. Cori - WYLD
  - a. Yavapai has a ticket open currently
  - b. Nearby location setting is broken
    - i. Limited to allow two nearby location
    - ii. Available at facet could help with nearby locations
  - c. Excluding facets/options
2. The items that appear in the recommended sections, like "While You Wait" and "More Like This," currently display titles from the entire consortium rather than being specific to the system's catalog. We would prefer these recommendations to be scoped to the catalog the user is browsing in, ensuring a more relevant and system-specific

experience. We also don't have a courier so our items don't move as freely between library systems as other consortiums might allow. Cori - WYLD

- a. WVLS has a ticket open. It would be helpful to have it scoped by location - perhaps to either the site they're searching in or to the preferred pickup location.
  - b. Minuteman thinks this would be a "nice to have" too. While we have a robust delivery system, libraries like to promote their own collections rather than pulling more things for delivery.
3. Branch-system IP-based behaviors. Some of our branch-system libraries are in small towns where the branches are nearby and it is possible for patrons to browse a catalog at one location, see a copy is available at another, and drive there. The IP-based catalog behaviors (to show "It's Here" and force auto-logouts on OPACs) only allow one location to be shown in the search results. It would be nice if there was an option to show the branch locations within search results while onsite. We have a development request for this. I attached a screenshot showing our preferred behavior. Sierra - CW MARS

- a. CLAMS would like this feature as well
  - b. May be related to 'nearby locations' features
  - c. Could relate to hold groups with WYLD ILL processes
4. Improving permissions for consortia. This is a larger project/discussion, but we have a few tickets open and have found a few bugs relating to permissions. Being in a

consortia, it's important to be able to designate something as "consortial" so that only network staff can make changes to that page or theme that has been applied to all libraries. We've gotten around this in the meantime using Javascript (Shoutout to Mike from MAIN Alliance for the Consortial Object Guard code). Sierra - CW MARS

- a. Definitely support this. E.g. side loads permissioning Desiree - WYLD
  - b. Yes, please! -Katie WVLS
  - c. CLAMS also would like this
  - d. Mark - Sounds like a couple issues
    - i. Breaking out side loads into library level permissions
    - ii. Field locking, but an object? Like locking a theme
    - iii. Overall more nuance needed, sounds like a few different projects
  - e. Maybe have a separate meeting about permissions to discuss nuances and pain points to narrow the focus and move forward. Can add to the next meeting agenda? Table for now
5. Genealogy records are not scoped to a single library or library system. This not only allows all patrons using the module to see ALL the records including ones that are not related to their library but it also gives other libraries the ability to edit records that don't belong to them. We would like this to scope to the library systems. Cori - WYLD
- a. We have one library using genealogy and two others interested - Katie, WVLS
  - b. What about people with records in multiple locations? We don't want two John Smiths, but also, we want it to be clear where things are for the patron? - Jordan
    - i. Needs more thought for our use case! - Cori
  - c. We have a ticket open right now to allow URLs in Genealogy records; how would this fit in if it is linked out and different libraries have different subscriptions? Also part of that request is to add placards to Genealogy - Katie, WVLS
  - d. Maybe another larger topic like permissions to discuss later/separately. - Cori
  - e. Maybe related to permissions – this library made the record so they can edit it, other libraries can't - Mark
  - f. What if it was like Blu-ray/DVDs and having them grouped together for the individual - Ben Wolfe
  - g. Would this be manual grouping or could the system be nuanced enough to figure that out? - Cori
6. Managing Aspen Admin accounts in a test server environment with consortium members - what best practices do you have in place to allow or block changes to individual sites and track/manage changes? Katie - WVLS
- a. CW MARS does not give libraries access to the test server. Connected to a test ILS server. We also haven't told libraries about all the features available and use the test server to try these out—it would be confusing for them to see that.
  - b. WYLD gave access to \*one\* library who asked for it. Connected to a test ILS server now, but was initially connected to production. This way they can test without it being too disruptive. We are not as inclined to give them access as it may be confusing between what is production vs. test.
  - c. How do you get feedback to make decisions about changes? - Katie

- i. CW MARS has a monthly Aspen Interest Group meeting that discusses potential changes/gets feedback. We have a production test catalog that we can use to try out changes and share with folks. From there we have a recommendation and it may go higher (Executive committee) depending on the change being discussed.
- ii. WYLD discusses changes internally and considers if the feature can be controlled by individual library