Discovery & User Experience Meeting

September 24th, 2020

Agenda

- Welcome and introductions
- Discussion - Catalog consistency – Enterprise and beyond (Jean)
- Aspen Discovery update
- Discussion – Aspen pilot
- Aspen show and tell
- Next Meeting Thursday, November 12th, 2020

Aspen Discovery update

Milestones

Milestone	Target Start	Target Complete	Done?
Aspen Test System Installation	May 2020	June 2020	✓
Create Personas & User Stories	May 2020	June 2020	✓
Search Query Set	May 2020	June 2020	✓
Expert Review & Configuration	June 2020	December 2020	
Usability Testing – Library Staff	May 2020	December 2020	
Usability Testing – Library Patrons	Dependent on test system configuration	December 2020	
Recommendation to SWAN Board		Q4 2020	✓
Phase 2 - Pilot Phase	Dependent on Board discussion & decision		

Usability testing

- Enterprise & Aspen comparative testing (Complete – June 2020)
  - Oak Lawn staff
- EBSCO Discovery integration testing(Complete-August 2020)
  - St. Charles patrons
- Aspen search experience (In progress – Sept/Oct 2020)
  - Elmwood Park patrons
- Aspen patron account features (TBD)
  - Oak Park patrons

Reports: https://support.swanlibraries.net/documentation/78234

Usability testing (cont.)

- More to test with patrons
  - E-resource download process
  - Materials requests
  - What else?

- Testing with staff in pilot libraries
  - Core patron services (search and masquerade)
  - Admin features
  - What else?

Comments the from Aspen staff training?

Aspen pilot phase

Pilot library commitments

- 2-3 staff members (pilot leads) to weekly meetings
- Pilot lead staff time for research assignments and configuration responsibilities
- Library staff time for trainings and patron support in Aspen
- Release Aspen beta on the library website and potentially other channels

Primary Roles & Testing Areas

Public Services Lead

- Responsibilities in readers advisory and/or collection development, regularly works with the catalog to place holds and assist patrons

- Materials requests

- Masquerade mode

- Browse categories

- Placards

Cataloging Lead

- Available to cataloging libraries only

- Sideloading (e.g. Kanopy)

- Grouping and ungrouping records

Web/Communications Lead

- Manages the library website

- Theme

- Contact, hours, library information

- Spotlights

- Placards

Proposed Timeline

Milestone	Target Dates	Notes
Kickoff	December 2020	Following SWAN 100 Go-Live
Pilot lead training	December 2020	Take place at weekly meetings
Beta catalog configuration	December 2020 – January 2021	Completed by pilot leads with assistance from SWAN staff
Library staff training	January 2021	Training for all pilot library staff to prepare for supporting patrons using Aspen
Beta launch	February 2021	"Get a sneak peek at the new catalog" - Enterprise is still primary catalog, but Aspen is available to curious patrons
Research activities	February 2021 – April 2021	Could include interviews, surveys, usability testing, desk observations, time-capture screen recordings, and other methods – remote or in-person if safe.
Configuration and development	February 2021 – April 2021	Ongoing with research activities
Full member go-live	May 2021 – January 2022	Libraries would be scheduled in cohorts to go live together
Enterprise retirement	April 29th, 2022	Enterprise no longer available to patrons or staff

Discussion

- What are your biggest questions/concerns?
- Show of hands – who would want to be live by Summer 2021?

Next up: Show & tell!