



**Aspen
Discovery**

Scoping Checklist

I want to build:

This catalog will include this data:

URL/Domain Configuration:

If you host your own domain, reach out to your Systems/IT Team to create a new URL. If you use an aspendiscovery.org domain, reach out to your Support company.

Initial Configuration:

Primary Configuration > Library System > Add New or Copy existing system.

Fill in the required fields - **Subdomain** and **Display Name**. (Example: if your desired URL is kidscat.library.org, the subdomain would be kidscat. The Display Name could be Library Kid's Catalog)

Go through the Library System settings and make sure everything you'd like enabled is the same for this catalog. (exp: No holds on the kid's catalog)

Theme & Customizations:

Theme & Layout > Theme, Add New or Copy an existing theme. (Exp: Upload a kid friendly logo or choose more bold colors)

Local Catalog Enrichment > Browse Category Groups > Add New and manually add browse categories. Then, apply to your new catalog

Local Catalog / Grouped Works > Grouped Work Display > Copy > Create a new Grouped Work Display setting

Local Catalog / Grouped Works > Grouped Work Facets > Copy > Create a new Grouped Work Facet > apply to your new Group Work Display settings

Primary Configuration > Library System > Menu Links > Copy or Add New links specific to new catalog



ILS Scoping:

Primary Configuration > Library System > scroll to the bottom > Records to Include

This is where you can include or exclude specific location codes, shelf locations, collection codes, etc. Example: exclude codes for Adults and Teens so all that remains are the children's items.

Shelf Locations to Exclude (Regex)	Collection Code (Regex)	Collection Codes to Exclude (Regex)
<input type="text"/>	<input type="text"/>	A.* T.*

A.* means "any code that begins with A" -- the .* is a placeholder. **[Read this Aspen Weekly to learn more about regex codes.](#)**

Example of including only certain shelf locations:

Shelf Location (Regex)
.*Traditional.*

This means, "any shelf location that contains the word Traditional"

Note: the Location field is based on the ILS code. The shelf location and collection fields are based on the description/display text, not the code.

Side Loads:

You can either apply existing side loads to new catalog by going to **Side Loads > Scopes** or create a new side load with only specific marc files and apply to new catalog.

eContent:

All - Scope by audience

Boundless, cloudLibrary, hoopla, Libby, Palace Project and Side Loads can all be scoped by audience. The options are Include Kids Titles, Include Teen Titles and Include Adult Titles.

[These audiences are defined here.](#)

cloudLibrary

cloudLibrary can be scoped to include eAudio books and/or eBooks. Go to **CloudLibrary > Scopes** and Add New. Apply this scope to new catalog.

hoopla:

Hoopla offers a number of customization options. Hoopla records can be scoped by collection (exp: eComic, eAudio, etc.), price per checkout,, Exclude Abridged Records, Exclude Parental Advisory Records, Exclude Records With Profanity and Genres To Exclude. Go to **Hoopla > Scopes** and Add New. Apply this scope to new catalog. In **Library Systems > Hoopla ID** > paste in the Hoopla ID that you have in your current Library System.

Libby:

Go to **Libby > Scopes** and **Add New**. Copy over The ILS Name Overdrive uses for user Authentication, select is s a Pin Required to log into Overdrive website?, Overdrive Advantage Name and Overdrive Advantage Products Key found in existing setting. Apply this scope to new catalog.