Aspen Weekly

DEC 15
ISSUE 107

linked accounts part 1

ByWater SOLUTIONS

LINKED ACCOUNTS PART 1

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In late October, we held an Aspen community meeting about Linked Accounts and what ideas, suggestions, and updates Aspen libraries would like to see with this functionality. In the 22.12 release, we began to roll out these updates. In today's Aspen Weekly, we provide an overview of Linked Accounts and the updates in the new release.

What Are Linked Accounts

Linked Accounts are a way for users to manage multiple library accounts in Aspen without needing to log in and out of each of their accounts to keep track of their holds and checkouts. The Linked Accounts module is not dependent on any guarantee/guarantor ILS setting and we make no relationship judgement with Linked Accounts (can be linked to a neighbor, friend, partner, child, etc.). Plus, set up is in the hands of the user.

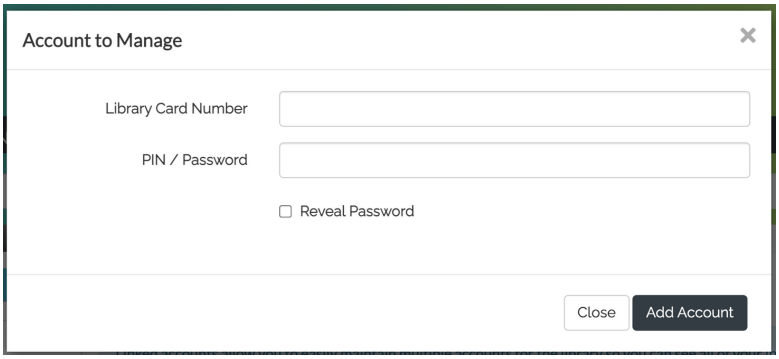
How Do We Turn This On?

If you are not currently using Linked Accounts, turn this on in **Primary Configuration** > **Library Systems** > click into your Library System > **ILS/Account Integration** > check **Allow Linked Accounts**.

Adding a Linkee

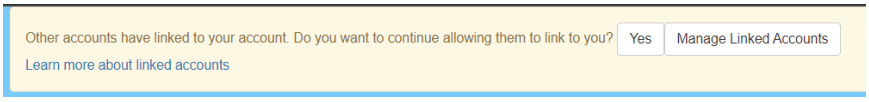
Once enabled, users will be able to see this in their **Account** > **Account Settings** > **Linked Accounts**.

From here, users can click on **Add Account** to add additional library card(s). They will be prompted to a screen that looks similar to the sign on screen where they will need to enter the other library card number and pin/password in order for the accounts to be linked.



Updates to Messaging

With these new features, we needed to improve the messaging we give patrons so they know what's going on with their linked accounts. If a patron account is linked to by someone else, they are notified with this message that says, *"Other accounts have linked to your account. Do you want to continue allowing them to link to you?"* :



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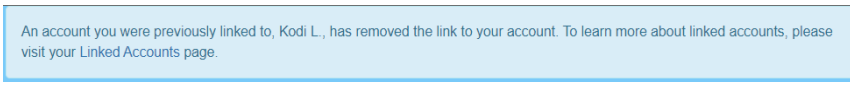
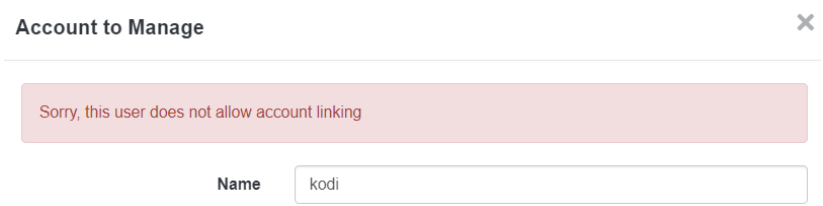
Clicking "**Yes**" or the "**x**" in the top right corner will simply dismiss the message, while "**Manage Linked Accounts**" will bring the user to their Linked Accounts page and dismiss the message.

If a user clicks on "**Learn more about linked accounts**" the message will remain and they will be brought to their Linked Accounts page. By bringing the user to their Linked Accounts summary page, they will be able to see the accounts that have linked to them and remove them accordingly if needed.

If they do choose to remove an account that linked to them, that account will receive this message,
"An account you were previously linked to, {user's name}, has removed the link to your account. To learn more about linked accounts, please visit your Linked Accounts page."



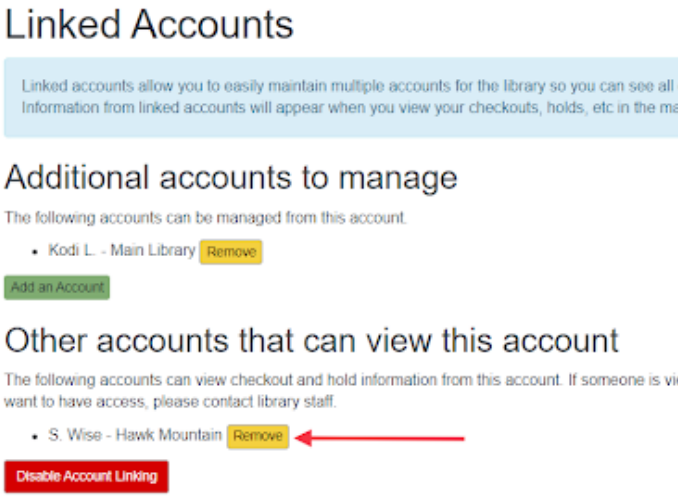
Again, we direct the user to their Linked Accounts page to manage their Linked Accounts if needed. If the account that linked to them broke the link by disabling account linking and the user tries to add that account again, they will receive the following error message,
"Sorry, this user does not allow account linking"



Removing Account Links

Previously, we allowed removing accounts that a patron manages, but there are many scenarios where patrons may want to remove accounts that have linked to them. This used to be achieved by patrons changing their PIN/password, which would disable account linking until they accepted the message. To give patrons better control over their Linked Accounts, we have removed this functionality and added a new one!

When looking at the Linked Accounts page, if there are accounts that have linked to a patron, they will now see a "**Remove**" button next to their name. You will also notice the addition of a "**Disable Account Linking**" button, but we will visit that in a moment!



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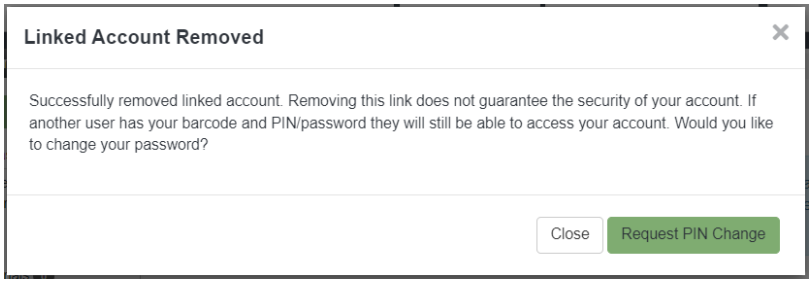
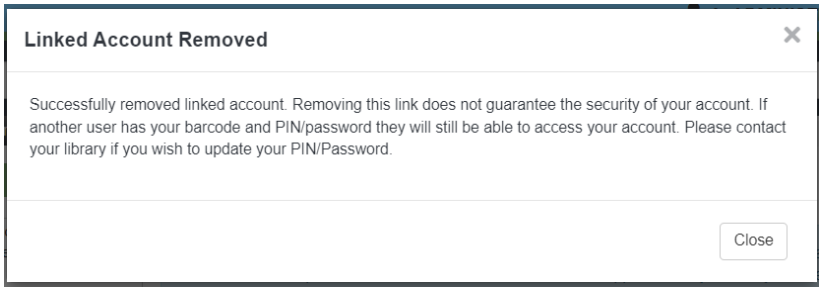
Upon removing an account that has linked to them, patrons will receive the following message if their library allows password changes,
"Linked Account Removed - Successfully removed linked account. Removing this link does not guarantee the security of your account. If another user has your barcode and PIN/password they will still be able to access your account. Would you like to change your password?"



If their library does not allow password changes, this is the message they will receive,
"Linked Account Removed - Successfully removed linked account. Removing this link does not guarantee the security of your account. If another user has your barcode and PIN/password they will still be able to access your account. Please contact your library if you wish to updated your PIN/Password."

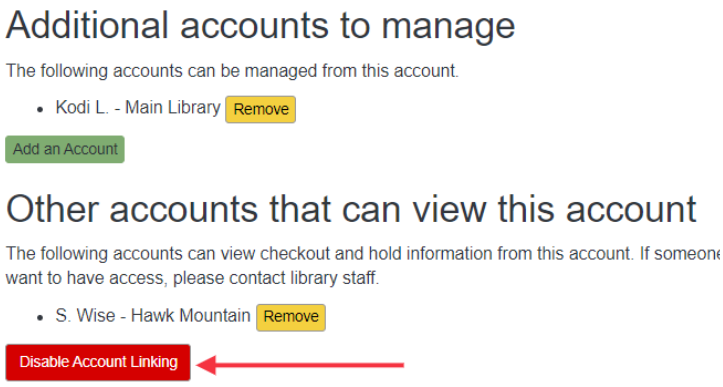


QUICK TIPS

Both of these messages are translatable, so if your library has different needs in terms of messaging, you may change them accordingly in **Languages and Translations** > **Translations**.

Disabling Account Linking

Now that we've covered removing accounts, let's talk about that "**Disable Account Linking**" button. In many scenarios, you may have patrons who want to disable account linking altogether. This is now possible with a simple press of a button!



When a patron clicks on this button, they will first be notified that disabling account linking severs any current account links and will prevent any new ones with the message,
"Disable Account Linking - Disabling account linking will sever any current links and prevent any new ones. Do you want to continue?"

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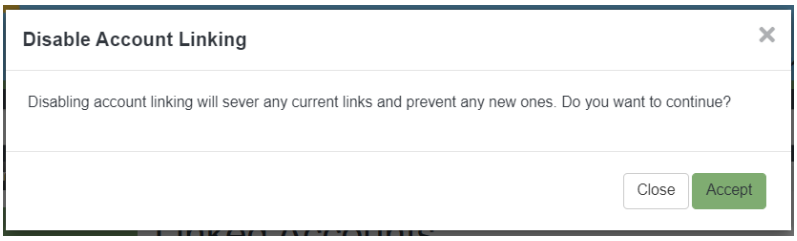
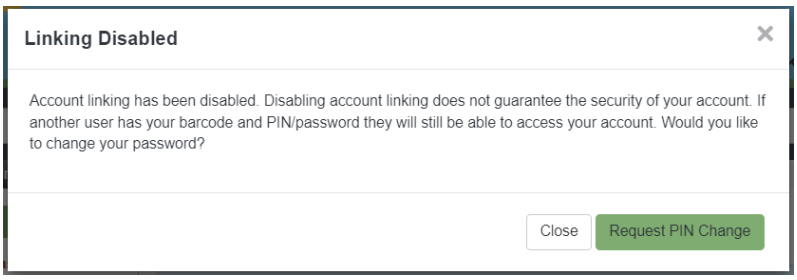
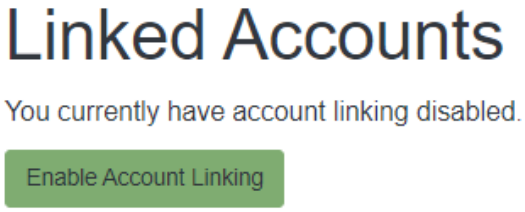


If they accept this message, account linking will be disabled and they will receive a message regarding their account security and resetting their PIN/password.

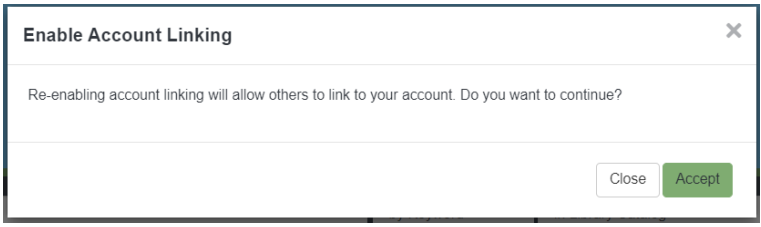
Note: Much like removing account links, this messaging will differ if their library allows or disallows changing their PIN/password.



Once account linking is disabled, their account page will only show the following message and an "**Enable Account Linking**" button:



To enable account linking again, all a patron needs to do is click the button and then click "**Accept**" in the following message,
"Enable Account Linking - Re-enabling account linking will allow others to link to your account. Do you want to continue?"

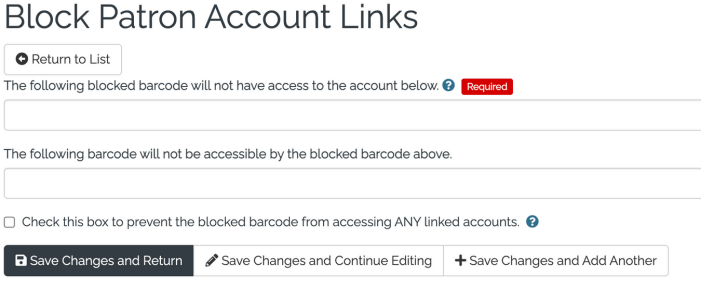


Admin - Block Patron Account Links

This is not a new feature with Linked Accounts but a reminder of an existing and helpful feature!

In **Aspen Administration** > **Primary Configuration** > **Block Patron Account Linking**, Admin with permissions can input two library barcodes to prevent future links to be made with those accounts.

By checking, **Check this box to prevent the blocked barcode from accessing ANY linked accounts**, you can prevent that user from linking to any account in the future.



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The User Experience

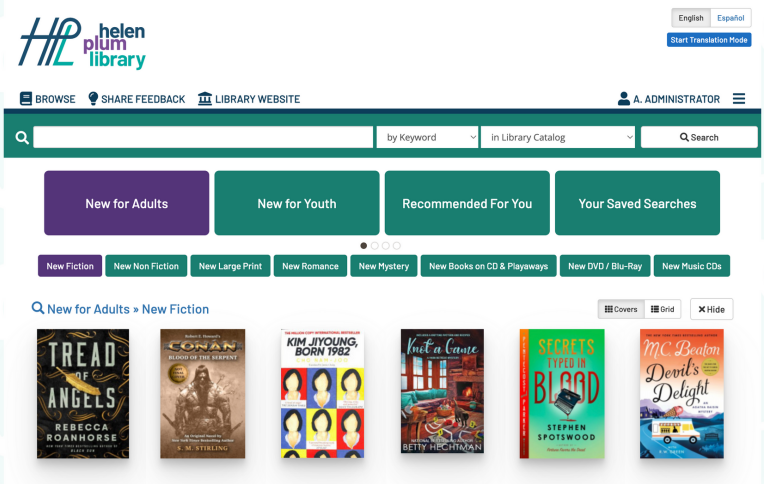
What can users do once they have set up their Linked Accounts? They can manage their active checkouts, manage active holds, access their scannable library barcodes, manage fines, and even checkout and place holds on physical and econtent items on their various cards! [Check out our Help Center to learn more!]

Stay Tuned

We hope you and your patrons enjoy these changes to linked accounts, and we can't wait to hear feedback. We have more planned for linked accounts to give you and your patrons more control over these features, so stay tuned! ■

[Check out more great features in the 22.12 release!]

Welcome

Welcome to the Helen Plum Library in IL who went live on Aspen this week! They went through an expedited implementation and created a beautiful catalog. They are moving to a new building in a few months (congrats!!!) and are excited to have a new catalog to go along with this new chapter.

Check out their Aspen catalog: [https://catalog.helenplum.org] and [press release]!