



Making the Most of Purchase Suggestions in Aspen Discovery

Presented by Tara Wood, SWAN

SWAN Expo 2026

Today we'll talk about...

- How purchase suggestions work in Aspen
- Benefits of using Aspen Purchase Suggestions
- Customizing purchase suggestions
- How to get started
- Questions

How many of you collect purchase suggestions from patrons?

Even if its through cards in a suggestion box!

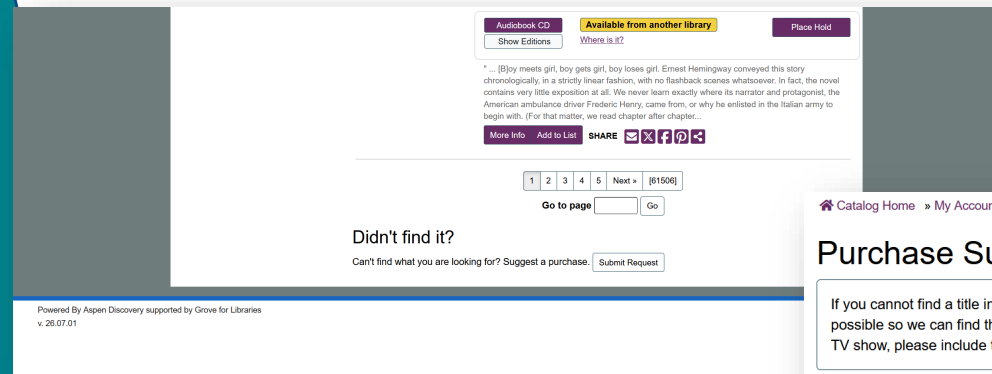
How many of you use Aspen purchase suggestions?

How many of you use your own web form?

How purchase suggestions work in Aspen

1. Patron submits a request

From search results or My Account



[Catalog Home](#) » [My Account](#) » New Purchase Suggestion

Purchase Suggestion

If you cannot find a title in our catalog, you can request the title via this form. Please enter as much information as possible so we can find the exact title you are looking for. For example, if you are looking for a specific season of a TV show, please include that information.

Material Information

Format Required

Title Information

Title Required

Author

Hold Options

Place a hold for me when the item is available ☒ Yes ☐ No

Pick-up Location

Supplemental Details (optional)

Age Level

Type

Publisher

Publication Year

How and/or where did you hear about this title

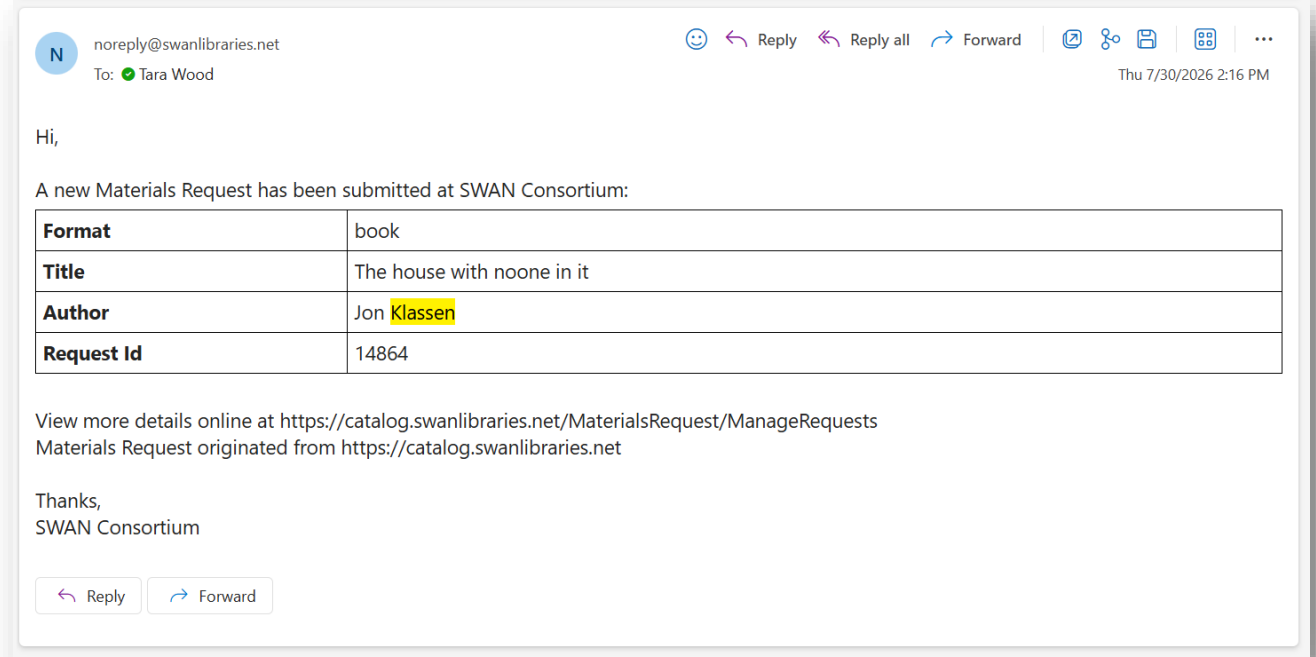
Comments

Contact Information

Email

2. Staff get an email

(Optional)



3. The request appears in the staff dashboard

Schiller Park Public Library

Acting As Schiller Park

Search

Administration Options

- Aspen Discovery Support
- cloudLibrary
- EBSCO EDS
- Hoopla
- ILS Integration
- Libby/OverDrive
- Local Catalog Enrichment
- Open Archives
- Palace Project
- Purchase Suggestions
- Manage Requests
- Manage Requests by Title
- Requests Needing Holds
- Usage Dashboard
- Summary Report
- Report By User
- Hold Candidate Generation Log
- Side Loads
- System Administration
- System Reports
- Website Indexing

Manage Purchase Requests

Filters

Entries Per Page: 30

☐	Id	Source	Title	Author	Format	Patron	Place a Hold	Inter-Library Loan	Assigned To	Status	Created On	Updated On	Has Duplicates?	Exists in Catalog?	
☐	12744	Purchase Suggestion					Yes - Schiller Park Public Library	No		Request Pending			Yes	No Checked 08/13/2026 09:39:16	Check for Existing Title Details Update Request
☐	12900	Purchase Suggestion					Yes - Schiller Park Public Library	No		Request Pending			No	Yes	Details Update Request
☐	13571	Purchase Suggestion					Yes - Schiller Park Public Library	No		Request Pending			No	Yes	Details Update Request
☐	13774	Purchase Suggestion					Yes - Schiller Park Public Library	No		Request Pending			No	No Checked 08/13/2026 09:39:16	Check for Existing Title Details

4. Staff review and assign a status

Depending on your setup, a request could go through several statuses

The screenshot shows a web form titled "Update Materials Request" with a close button (X) in the top right corner. The form is divided into several sections: "Hold information", "Contact information", and "Staff information".

- Hold information:** Includes a radio button for "Place a hold when available?" (selected "Yes"), a dropdown for "Hold pickup location" (set to "Blue Island Public Library"), and an empty "Email" field.
- Staff information:** Includes a "Request Id" field (13853), a "Status" dropdown menu (currently showing "Request Pending"), a "Created by" field (set to "Request Pending"), and a "Library card" field (set to "Already owned/On order").

The "Status" dropdown menu is open, showing a list of options: "Request Pending", "Already owned/On order", "Hold Failed", "Item purchased", "Cancelled - Duplicate Request", "Cancelled by Patron", "Hold Not Needed", "Hold Placed", "Unable to acquire this item - contact your home library", and "Unavailable".

5. Staff close the request, and place a hold

Example: Set the status to “Already owned/on order” and place a hold

[Catalog Home](#) » [Manage Purchase Requests](#) » [Requests Needing Holds](#)

Requests Needing Holds

5 requests were updated with new hold suggestions.

Select	Request Id	Patron Barcode	Title	Author	Format	Num Hold Candidates	Selected Hold Candidate	Hold Failure Message	Actions
☐	13990		Directive 8020	Supermassive games	Other	1	ils:a3443001 Directive 8020 / (Xbox Series X)		<button>Place Hold</button>
☐	14864	21140	The house with nobody in it	Jon Klassen	Book	1	ils:a3410259 The house with nobody in it / Klassen, Jon (Board Book)		<button>Place Hold</button>
☐	14283		The Island	Garry Paulsen	Book	3	None		<button>Select Hold Candidate</button>

Select All Deselect All Compare Export Selected to CSV Export to CSV

Check for New Hold Candidates Place Holds for selected

Change status of selected to Select One Update Status

What are the benefits of using Aspen Purchase Suggestions?

You can opt to use your own webform or website – but here are a few features unique to using Aspen

Patrons can see their requests

In My Account > Purchase Suggestions

SWAN LIBRARY SERVICES

Find Your Library

Acting As T

Search: theo of golden Keyword in Library Catalog Search

My Account

- Checked Out Titles
 - Physical Materials 2
- Titles On Hold
 - Physical Materials 1
- Fines \$20.99
- Purchase Suggestions 1**
- My Library Card
- Recommended For You
 - My Ratings 0
 - Not Interested In Titles 0
- My Lists
 - My Searches
 - Checkout History 87
 - 2025 Year In Review
- Account Settings

My Purchase Suggestions

Your request for The house with noone in it by Jon Klassen was submitted successfully.

You have used 2 of your 60 yearly material requests. We also limit patrons to 5 active material requests at a time. You currently have 1 active material requests.

Filters

Show Open purchase suggestions All purchase suggestions Update Filters

Title	Author	Format	Status	Created	
The house with noone in it	Jon Klassen	Book	Request Pending	Jul 30, 2026	Details Cancel Request

[Submit a New Purchase Suggestion](#)

Aspen will check if a title already exists – before the patron submits it

Assuming they enter the correct title!

Publisher

Publication Year

How and/or where did you hear about this title

Comments

Hold information

Place a hold when available?

☒ Yes ☐ No

Hold pickup location

Blue Island Public Library

Contact information

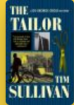
Email

test@swanlibraries.net

Staff information

ISBN

UPC



Existing Title Found

A title with the same information you entered above was found in the catalog. Please verify that this title will not meet your needs before submitting your request

[View in New Tab](#)

Submit Purchase Suggestion

Library staff automatically get key patron details

Saves staff and patron time

When a patron submits a purchase suggestion, Aspen sends you:

- Name
- Library barcode
- Email
- Preferred pickup location

From the patron's account information.

One shared staff interface

Library staff can track requests collaboratively in one shared visual dashboard

Administration Options Search Catalog Home Manage Purchase Requests

Manage Purchase Requests

Filters

Entries Per Page 30

☐	Id	Source	Title	Author	Format	Patron	Place a Hold	Inter-Library Loan	Assigned To	Status	Created On	Updated On	Has Duplicates?	Exists In Catalog?	
☐	14864	Purchase Suggestion	The house with noone in it	Jon Klassen	Book	WOOD, TARA 21140/	Yes - Oak Park Public Library Main Branch	No		Request Pending	Jul 30, 2026	Jul 30, 2026	No	No	Check for Existing Title Update Request
☐	14846	Purchase Suggestion	Musafir Cafe	Diya Prakash Dubey	Book		Yes - Eisenhower Public Library District	No		Request Pending	Jul 28, 2026	Jul 28, 2026	No	No	Check for Existing Title
☐	14818	Purchase Suggestion	(Title:Pica Pau Wonders AND Author:Schenkel, Yari)		Book		Yes - Eisenhower Public Library District	No		Request Pending	Jul 25, 2026	Jul 25, 2026	No	No	
☐	14817	Purchase Suggestion	(Title:Kawaii Crochet Cuties AND Author:Ash Han Chubbiesbyash)		Book		Yes - Eisenhower Public Library District	No		Request Pending	Jul 25, 2026	Jul 25, 2026	No	No	
☐	14816	Purchase Suggestion	(Title:Froggo's Year in Yarn AND Author:Lerner, Rebecca)		Book		Yes - Eisenhower Public Library District	No		Request Pending	Jul 25, 2026	Jul 25, 2026	No	No	
☐	13853	Purchase Suggestion	hope valley 1874		DVD		Yes - Blue Island Public Library	No		Request Pending	Apr 25, 2026	Apr 25, 2026	No	No	

Assign selected to

Change status of selected to

[Export Selected To CSV](#) [Export All To CSV](#) [Update Selected Requests](#)

Update Materials Request

Material information

Format **Required**

Title information

Title **Required**

Author

Additional details

Age Level

Type

Publisher

Publication Year

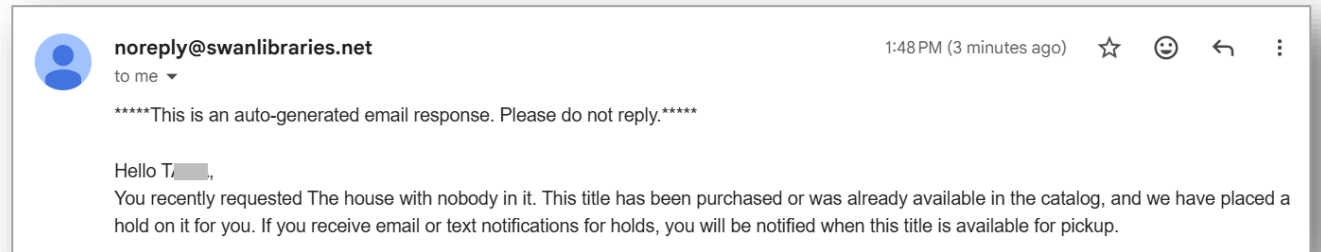
How and/or where did you hear about this title

Comments

[Close](#) [Update Request](#)

Automated emails to patrons

When staff update a request, you can optionally have an email updating the status go to patrons automatically.



One-click check for existing copies in the catalog

Aspen will look for matching titles already in the catalog – patrons also see an alert if there's a clear match.

[Catalog Home](#) » [Manage Purchase Requests](#)

Manage Purchase Requests

▸ Filters

Entries Per Page
30

☐	Id	Source	Title	Author	Format	Patron	Place a Hold	Inter-Library Loan	Assigned To	Status	Created On	Updated On	Has Duplicates?	Exists In Catalog?	
☐	14864	Purchase Suggestion	The house with nobody in it	Jon Klassen	Book	WOOD, TARA 21146	Yes - Oak Park Public Library Maze Branch	No		Request Pending	Jul 30, 2026	Jul 30, 2026	No	Yes Checked 07/30/2026 14:39:24	Check for Existing Title Details Update Request
☐	14846	Purchase Suggestion	Musafir Cafe	Divya Prakash Dubey	Book		Yes - Eisenhower Public Library District	No		Request Pending	Jul 28, 2026	Jul 28, 2026	No	No	Check for Existing Title Details Update Request

Library staff can place holds right from Aspen

For titles that exist or are added to the catalog, you can use Aspen to place holds.

Catalog Home » Manage Purchase Requests » Requests Needing Holds

Requests Needing Holds

5 requests were updated with new hold suggestions.

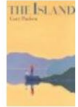
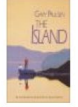
Select	Request Id	Patron Barcode	Title	Author	Format	Num Hold Candidates	Selected Hold Candidate	Hold Failure Message	Actions
☐	13990		Directive 8020	Supermassive games	Other	1	ils:a3443001 Directive 8020 / (Xbox Series X)		<button>Place Hold</button>
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☐	14283		The Island	Garry Paulsen	Book	3	None		<button>Select Hold Candidate</button>

Select All Deselect All Compare Export Selected to CSV Export to CSV

Check for New Hold Candidates Place Holds for selected

Change status of selected to

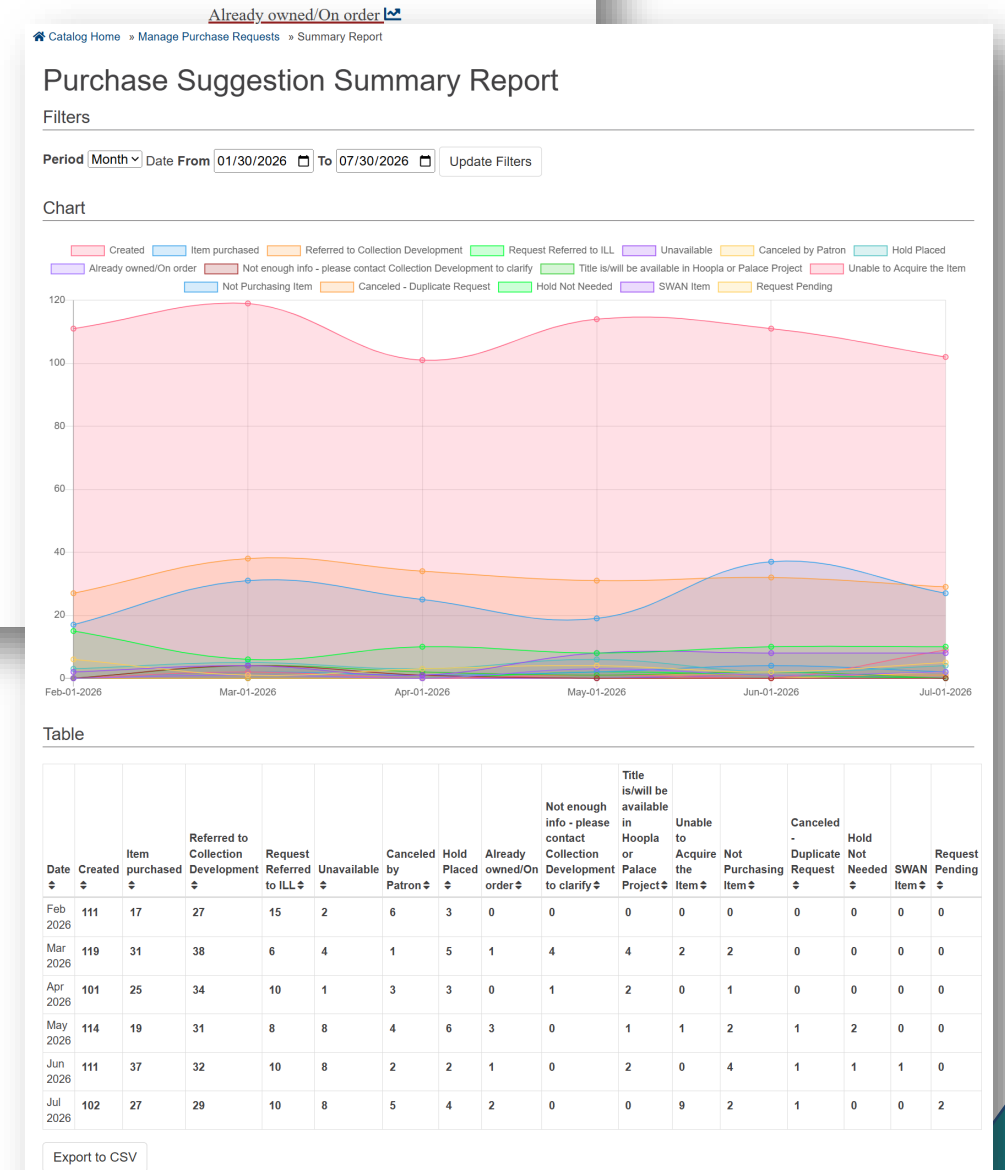
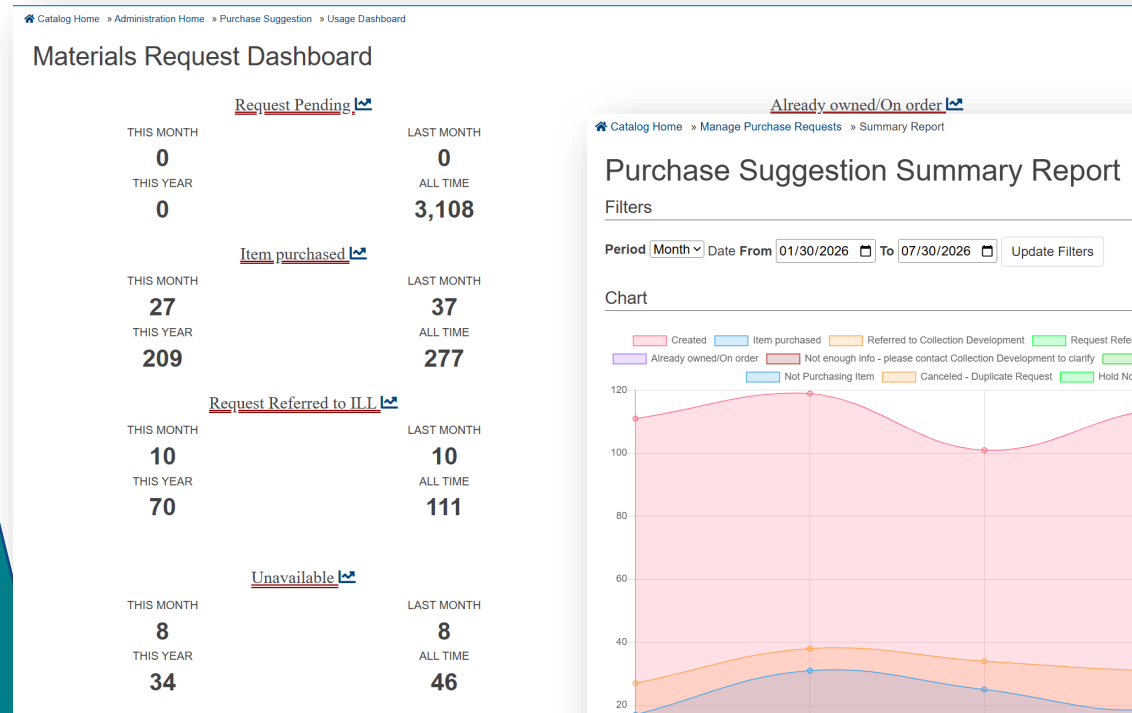
Select Hold Candidate

Source	ID	Cover	Title	Author	Format	Link
☐	ils a2110858		The island / Paulsen, Gary.	Book	View	
☐	ils a335866		The island / Paulsen, Gary.	Book	View	
☐	ils a912651		The island / Paulsen, Gary.	Book	View	

Close Use Selected

Reports and statistics

Dashboards and reports can help you track usage



Caveats

These are just some things to be aware of – they could be benefits or drawbacks depending on your library.

- We can't assign purchase suggestions to individual staff – we need individual staff logins to the ILS to accomplish this.
- Holds placement is not fully automated – there's still a staff review step.
- You only get requests for your home library patrons.

Customizing purchase suggestions for my library

Patron form

The patron form has many fields to select from, including the option to allow requests for e-content or physical items only.

[Catalog Home](#) » [My Account](#) » New Purchase Suggestion

Purchase Suggestion

If you cannot find a title in our catalog, you can request the title via this form. Please enter as much information as possible so we can find the exact title you are looking for. For example, if you are looking for a specific season of a TV show, please include that information.

Material information

Format **Required**

Title information

Title **Required**

Author

Additional details

Age Level

Type

Publisher

Publication Year

How and/or where did you hear about this title

Comments

Hold information

Place a hold when available? ☒ Yes ☐ No

Hold pickup location

Contact information

Email

Staff information

ISBN

UPC

[Submit Purchase Suggestion](#)



Patron options

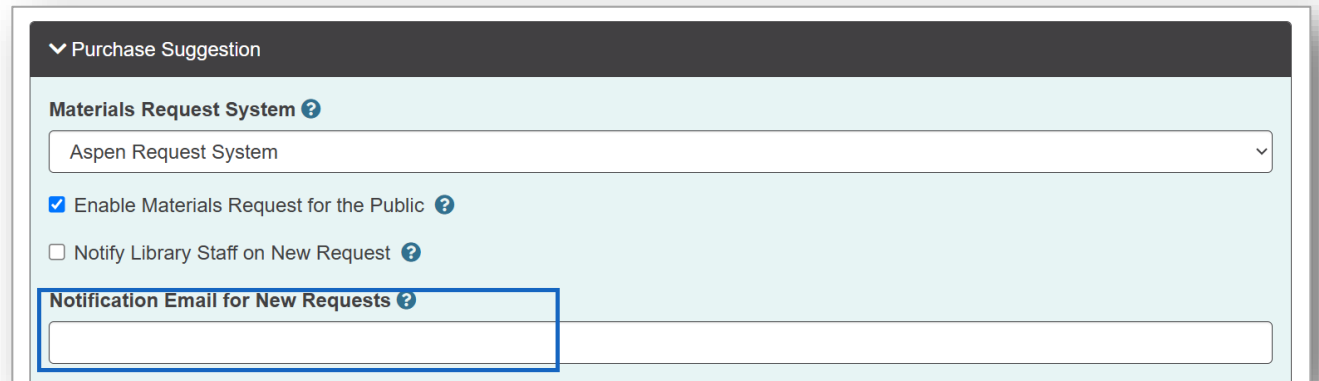
You can optionally set some additional options to manage the volume of requests you receive

- Maximum requests per year
- Rolling year or calendar year limits
- Maximum active requests
- Delete requests older than ____

Email notifications for staff

You can optionally add one email address for staff to receive notifications of new requests.

We strongly recommend using an email lists (e.g. reference@mylibrary.org).



▼ Purchase Suggestion

Materials Request System ?

Aspen Request System ▼

☒ Enable Materials Request for the Public ?

☐ Notify Library Staff on New Request ?

Notification Email for New Requests ?

Set a reply-to email address

You can also set a reply-to email per login.

[Catalog Home](#) » [My Account](#) » Staff Settings

Staff Settings

Roles

- SWAN OPAC Admin - Library OPAC admin

General

Bypass Automatic Logout ☒ ON

Materials Request Management

Reply-To Email Address

Email Signature

[Update Settings](#)

Statuses

Statuses are highly customizable, and you can set them to send emails, check for holds, or close/deactivate requests.

[Catalog Home](#) » [Manage Purchase Requests](#) » [Manage Purchase Suggestion Statuses](#)

Purchase Suggestion Statuses

[Return to List](#) [History](#) [Delete](#)

Search for a Property

Id ⓘ
1445

Description ⓘ
Title is/will be available in Hoopla or Palace Project

☐ Default Status? ⓘ

☐ Set When Patron Cancels? ⓘ

☐ Open Status? ⓘ

☐ Active Status? ⓘ

☐ Check for holds? ⓘ

☐ Hold Placed Successfully? ⓘ

☐ Hold Not Needed? ⓘ

☐ Hold Failed? ⓘ

☒ Send Email To Patron? ⓘ

Email Template ⓘ
Thank you for contacting the St. Charles Public Library. This e-mail is to let you know the status of your recent request for an item that you did not find in our catalog. The title you requested is currently or will be available in one of our e-content platforms.

Library ⓘ
St. Charles Public Library

[Save Changes and Return](#) [Save Changes and Stay Here](#)



Status options

- Default status (can only use once!)
- Set When Patron Cancels
- Open
- Active
- Check for holds
- Hold Placed Successfully?
- Hold Not Needed?
- Hold Failed?
- Send Email to Patron

Status Example: Request Pending

Id  
1343

Description  

☒ Default Status?  

☐ Set When Patron Cancels?  

☒ Open Status?  

☒ Active Status?  

☒ Check for holds?  

☐ Hold Placed Successfully?  

☐ Hold Not Needed?  

☐ Hold Failed?  

☐ Send Email To Patron?  

Status Example: Holds

Some statuses are required for the holds functionality to work.

Description ? 🔒

Hold Failed

☐ Default Status? 🔒 ?

☐ Set When Patron Cancels? 🔒 ?

☒ Open Status? 🔒 ?

☐ Active Status? 🔒 ?

☒ Check for holds? 🔒 ?

☐ Hold Placed Successfully? 🔒 ?

☐ Hold Not Needed? 🔒 ?

☒ Hold Failed? 🔒 ?

☐ Send Email To Patron? 🔒 ?

Description ? 🔒

Hold Placed

☐ Default Status? 🔒 ?

☐ Set When Patron Cancels? 🔒 ?

☐ Open Status? 🔒 ?

☐ Active Status? 🔒 ?

☐ Check for holds? 🔒 ?

☒ Hold Placed Successfully? 🔒 ?

☐ Hold Not Needed? 🔒 ?

☐ Hold Failed? 🔒 ?

☒ Send Email To Patron? 🔒 ?

Email Template ? 🔒

You recently requested a title that you could not find in the library catalog. This title has been purchased or was already available in the catalog, and we have placed a hold on it for you. If you receive email or text notifications for holds, you will be notified when this title is available for pickup. Check your account or contact your home library for additional details.

Status Example: Item Purchased

With the holds feature = Open and Active
Without the holds feature = Unchecked

Description ⓘ 🔒

Item purchased

☐ Default Status? 🔒 ⓘ

☐ Set When Patron Cancels? 🔒 ⓘ

☒ Open Status? 🔒 ⓘ

☒ Active Status? 🔒 ⓘ

☒ Check for holds? 🔒 ⓘ

☐ Hold Placed Successfully? 🔒 ⓘ

☐ Hold Not Needed? 🔒 ⓘ

☐ Hold Failed? 🔒 ⓘ

☐ Send Email To Patron? 🔒 ⓘ

Emails to patrons

You can choose which statuses will send an email to patrons and customize the email template text.

Optional tokens are available to plug in data from the request, such as the title and patron name.

Description ? 🔒

Item purchased

☐ Default Status? 🔒 ?

☐ Set When Patron Cancels? 🔒 ?

☒ Open Status? 🔒 ?

☒ Active Status? 🔒 ?

☒ Check for holds? 🔒 ?

☐ Hold Placed Successfully? 🔒 ?

☐ Hold Not Needed? 🔒 ?

☐ Hold Failed? 🔒 ?

☐ Send Email To Patron? 🔒 ?

Email Template ? 🔒

Hello {firstname}! Your suggestion of {title} will be purchased by our library and placed on hold for you for pickup.

Library ? 🔒

SWAN Consortium

Save Changes and Return

Save Changes and Stay Here

Format mapping

Format mapping is super important if you use the holds features – each format in your form must map to a format in the catalog to properly place holds.

It has to be updated when we add new formats as well – which happens fairly regularly.

[Catalog Home](#) » [Manage Purchase Requests](#) » [Purchase Suggestion Format Mapping](#)

Purchase Suggestion Format Mapping

› Filters

Select	Id	Aspen Catalog Format	Materials Request Format	Actions
☐	 1	4K Blu-ray	Blu-ray	 Edit  History
☐	 2	Audiobook Cassette	Other	 Edit  History
☐	 3	Audiobook CD	Audiobook	 Edit  History
☐	 4	Audiobook MP3-CD	Audiobook	 Edit  History
☐	 5	Binge Pass	Other	 Edit  History
☐	 6	Blu-ray	Blu-ray	 Edit  History
☐	 7	Blu-ray / DVD Combo	DVD	 Edit  History
☐	 8	Board Book	Book	 Edit  History

How do I get started?

Review documentation on the SWAN website

It is intense – but thorough!

August 20, 2026

Setting up Aspen Purchase Suggestions

You will need OPAC Administrator permissions. We strongly recommend [setting up an Aspen consultation](#) if you are setting up the Aspen purchase suggestion system for the first time.

Purchase suggestions in Aspen consists of several parts:

1. Patron settings and request form, configured in **Library Systems** settings
2. **Statuses** that shape your staff workflows for managing requests
3. **Format mapping** that supports automated hold features

Expand All

Enable in Library Systems Settings



Formats of Materials that can be Requested



Materials Request Form Fields



Fields to display on Manage Materials Request Table



Request Statuses



Format Mapping



Email template configuration



SWAN Library Services

35

Experiment!

If you are setting up purchase suggestions for the first time, you can leave “Enable Materials Requests for the Public” off

Note: If you already have purchase suggestions on, any changes you make will be live immediately.

▼ Purchase Suggestion

Materials Request System ?

Aspen Request System ▼

☐ Enable Materials Request for the Public ?

☒ Notify Library Staff on New Request ?

Notification Email for New Requests ?

☐ Notify Staff on Request Assignment ?

Schedule a consultation

Whether you're setting up purchase suggestions for the first time, or want to review the options to make them work better for you, book a consult!

[Staff Home](#) > [Support](#) > Book a Consultation

Bookmark

Book a Consultation

Schedule an online consultation with SWAN staff for you and your library staff.

Acquisitions

Have SWAN staff assist in any acquisitions-related issue, such as adding vendors, cleanup projects, or fiscal rollover.

[Book an acquisitions consultation](#)

Aspen Discovery or Aspen LiDA

Meet with SWAN staff about anything related to our discovery services, including search strategies, setting up placards and browse categories, online payments, and Aspen administration.

[Book an Aspen consultation](#)

Questions?