

EBSCO Stacks

Capability Statement | 2021

Introduction and Company Overview

EBSCO Stacks

Stacks

Since 2006, Stacks technology powers libraries, educational and research entities of all types including Microsoft, California Institute of Technology (Caltech), the Home Depot, the US Department of Defense and many more. Stacks technology expertise has been recognized on a number of occasions with the most recent being the reception of the platinum award for the 2018 Modern Library Awards (MLAs.) In 2014 when Stacks was awarded the American Library Association Award for Collaboration and the Canadian Library Association Award for Innovation in Technology. This passionate team of library professionals, usability thought leaders, design experts, and software engineers are reinventing library, learning & research experiences.

EBSCO

EBSCO Information Services

EBSCO Information Services (EBSCO) is the leading discovery service provider for libraries of all kinds worldwide with more than 11,000 discovery customers in over 100 countries. EBSCO Discovery Service (EDS) provides each institution with a comprehensive, single search box for its entire collection, offering unparalleled relevance ranking quality and extensive customization.

EBSCO is also the preeminent provider of online research content for libraries, including hundreds of research databases, historical archives, point-of-care medical reference, and corporate learning tools serving millions of end users at tens of thousands of institutions.

EBSCO is the sole provider of Stacks, the only online learning digital experience platform that leverages premium professional services and software-as-a-service technology expertise to aggregate each of the digital learning tools and resources outlined above into personalized and dynamic experiences for libraries and organizational users through unique integrations and exclusive functionality. Stacks features intuitive and modern user experiences, mobile-friendly (responsive) interfaces and an easy-to-use administrative dashboard.

Core Competencies

How Stacks Stacks Up Against the Competition

User experience research shows that one of the main challenges users face is knowing where to find resources and knowing what's available to them. One of the main challenges facing administrators is how to provide the right resources that are also easy to find and access.

Unified Discovery Experience

Discovery is the concept of bringing content from the SIS, LMS, ILS and more together with full text and digital content from databases and other subscription services for a unified, responsive, discovery experience. With Stacks, you can even search website content like news and events along with physical and digital collections & licenses simultaneously, creating a truly seamless experience.

Truly Seamless and Integrated Experience

Stacks strives to take this one step further by bringing the Discovery experience into your end user experience with licensed instructional materials, library collections, local content and services together in one place. Manage events, room bookings, locations, users, content creation and more through a single modern interface.

Plug and Play Integrations

All Stacks integrations are plug and play meaning there are no risks or costs associated with custom development. Stacks ensures industry leading maintenance and support when compared to any other unique implementations available. Pull together SSO & rostering systems with SIS, LMS, ILS, translation and other supported integrated services with the flick of a switch.

The Ultimate SSO Experience

Stacks SSO capabilities round out the differentiators by providing the ultimate SSO experience with an easy to use integration. Personalized access to everything including licensed instructional materials, databases, subscription services, resources, catalogs, LMSs, and Stacks. Stacks makes this all happen with only a single login.

Intuitive Design

Stacks offers a number of responsive, customizable themes and configurable layouts that are clean, modern and perform optimally on all devices. New themes are added every quarter and can be changed in a matter of seconds without impacting your content. With Stacks, you can be sure your experience is going to stay new and fresh.

Configurable and Responsive Themes

Stacks allows for the complete customization of your user experience. Creating a unique user experience is easy with ready to use themes, drag and drop page layouts, and fully customizable blocks with CSS override. The best part, your experience is responsive meaning it will look great on any device including phones, tablets and TVs.

Choose a theme and then customize with dozens of settings. You can change the look and feel of the experience in seconds without having to adjust your content. From professionally selected color palettes to granular configurations, it's never been easier to create a look and feel that aligns with your brand and that you can be confident meets today's mobile users' high expectations. Stacks provides the ability to customize CSS override files allowing you to take complete control of the theming and overall look and feel of your experience.

Easy-to-Use

Our dashboard-driven interface empowers all staff to create brilliant and engaging content with ease. Every feature was built with the administrator in mind including the ability to edit content within the webpage itself. Intuitive interfaces, robust training and support materials, a responsive helpdesk will ensure your success.

Promote programs and manage registrations in the same place people search, place holds, or access content - all delivered in their preferred language. No individual modules needed - a complete package with seamless, turnkey integrations.

Drag and Drop layouts for landing pages lets you move elements around quickly and easily to ensure a perfect performance on any device.

Accessible

Stacks is fully functional for visually impaired users. The Stacks platform meets, and in many ways exceeds section 508 of the Rehabilitation Act, Electronic and Information Technology Accessibility Standards. It offers guidance and a variety of tools that empower all users creating content on the platform to align that content quickly and easily with the accepted standards. Additionally, Stacks is WCAG 2.0 Level A compliant, exceeding accessibility guidelines and supporting several features that are part of the WCAG Level AA compliance by improving page orientation and navigation in all available themes. Notable accessibility features include:

- Introductory text and shortcuts for screen reader users;
- Elimination of most tables to improve searching with screen readers or keyboard controls;
- Help text and compliance reminders for content creators;
- Descriptive page titles, section header tags and selected link labels;
- Streamlined code for simpler page structures;
- Detailed alternative text image descriptions;
- Decreased page size and list pagination for shorter download times for all users;
- Implementation of WAI ARIA (Accessible Rich Internet Applications) coding standards from W3C consortia that work in conjunction with HTML5's built in accessibility features; and font zoom in header.

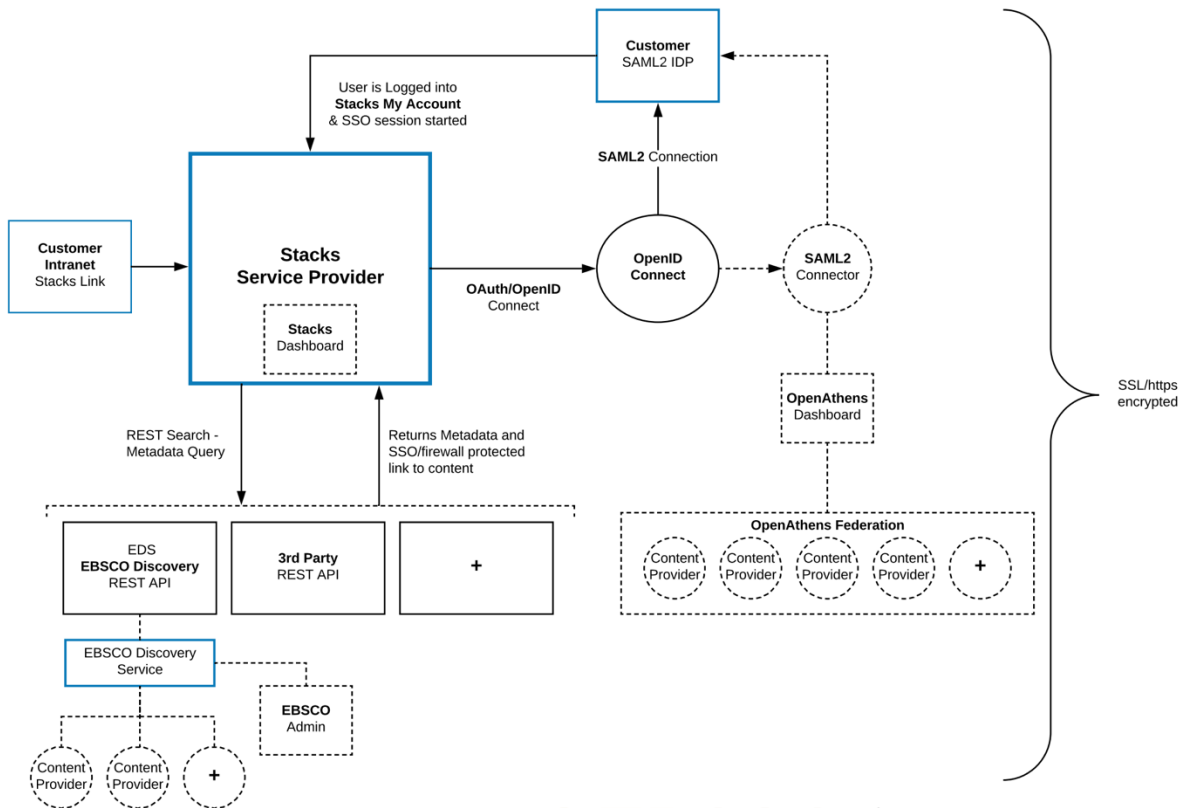
Software as a Service (SaaS) - Subscription Service

Stacks is a subscription service. This means that we take care of the maintenance behind the scenes so you can focus on what you're passionate about, creating a great experience. Subscription benefits include:

- Easy to budget as there are no surprise costs
- Never worry about expensive upgrades
- Never worry about security issues or risks
- Continuous deployment with 99.9% uptime guarantee
- Secure cloud hosting including backups, maintenance, support, etc.
- Site stays new and fresh year over year

One affordable annual license fee guarantees all your integrations will be maintained, software and hardware updates are taken care of and security remains at an industry best.

Data Flow Diagram



Professional Services

Improve User Experience

Let's work together to understand your user experience (UX) needs. From there we can provide custom solutions, build subject-specific portals using the [Stacks](#) platform, and host design and user interface consultations to enhance your existing products to meet UX needs.

Meet the Professional Services Team

- **Field Services Engineers** are skilled in information applications and technical conversations.
- **Implementation Project Managers** provide support and streamline your implementation process.
- **Engagement Managers** provide online and onsite training.
- **Professional Services Consultants & Solution Specialists** consult and design solutions with clients.

Specialties

- Customized learning and career pathways
- Custom integrations and interoperability
- Micro-credential programs

Consortia/System Value

Our customers are often complex organizational structures and Stacks is designed to meet those complex requirements. Based on a decade of building platforms and servicing complex consortia of institutions, Stacks enables customers to create many experiences (websites) within one CMS. Individual institutions within the Stacks instance may share files and publish content to one, select or all sites within an instance. This empowers even the smallest contributor to have a professional experience and keep their local information up to date.

- Multi-Domain;
- Shared instance for improved pricing;
- Unique domains;
- Unique look and feel;
- Publish content to one, some, or all sites; and
- Ability to share files.

Granular User Roles and Workflow

Stacks provides a hierarchical role structure which is designed to support all levels of staff. Intricate moderation rules such as requiring proofing and approval before publishing with email notifications, ensures safe and responsible workflows within your organization. These roles can be further refined by individual customers post implementation as necessary.


Additional Services Offered

Stacks offers several additional services that can be included at an additional cost. Included in these services are:

- Custom design: Stacks can work with your team to design a custom design that suits specific needs or requests that you have. This will include interactive prototypes. This is different from the SaaS Subscription service like Stacks.
- Content migration: Stacks can work with your existing experience and migrate content into your new Stacks powered experience. A custom quote can be provided after an analysis of the current content.
- Additional features: Stacks can work with your team to design and develop additional features or tools that you may want to make available as part of your experience.
- Additional services include Premium Stacks and Professional Services.
- Custom Learning and/or Career Pathways
- Custom Micro-credential/Badge programs

Content Management System (CMS) Features

Simplified experiences, improved outcomes
Wherever your teachers and students are learning

	Unified Experience	<ul style="list-style-type: none"> • Subscriptions (Library, etc.) • Licenses (Instructional Materials, Publishers, etc.) • Approved Open Access Resources • Proprietary Materials (remote learning, PD, etc.)
	Improved, Personalized Access	<ul style="list-style-type: none"> • Browse, Search, Share, Save, Explore • My personalized access/licenses • My preferences, my lists and more...
	LMS Interoperability	<ul style="list-style-type: none"> • Embedded within expected workflows • Learning Management Systems: Schoology, Canvas, etc. • Virtual Classrooms
	Roster & SIS Compatibility	<ul style="list-style-type: none"> • Classlink, Clever, Rapid Identity, PowerSchool, etc. • SSO integration: Azure, Google, Okta and more • Native user management • SIS Systems integrations

Authentication

Integrate your SSO, SIS, IDP, ILS or roster system like Clever, Classlink, Rapid Identity, Google and more

Bento Search

The final search format is Stacks Bento Search. This search format has the ability to search multiple APIs and the experience simultaneously and group the results according to your preference.

The Stacks Bento Search format allows the administrator to customize search results in blocks of content that can be easily rearranged. There are several result groups available from each source. For example, the administrator may choose to display everything from EDS, books from the catalog and news and events items specifically from the experience and instructional materials direct from publishers. The administrator can configure how many of each result type are presented in the results view and drag-and-drop those blocks into any layout they choose.

Callouts

Create blocks of content with or without images that can include descriptions and links to other areas of the site or even other sites. Create calls to action to highlight key resources available to users:

- Supports images, title, description, links
- Navigation best practices used
- Database Listings
 - Create an online index of external databases that sort and become searchable by users alphabetically or by category. Supports all database providers as well as:
- Customizable categories
- Quick features
- Filter, sort, or search listings
- Tailored aggregate view with facets and filters

Cover Art

Stacks integrates with Content Café, ChiliFresh and Syndetics for Book Jackets and BrowZine for Journal Jackets. Reviews. Choose to include item reviews from Content Café API (Baker & Taylor) & Chili Fresh API

Content Protection

Show/hide content based on pre-determined user roles for a truly personalized experience.

Directory Listings

Automatically generate searchable directories of people, places or things. Designed to organize people, places and/or things:

- Supports rich media embed with full WYSIWYG
- Tailored aggregate view with facets and filters

Domain Name Services

Stacks can provide subdomains, new domains and/or institutional domains.

EBSCO Discovery Service (EDS) Search

For the ultimate user experience, Stacks integrates with EBSCO Discovery Service providing a true single-search for all your catalogs and electronic resources including full text database results.

This format means EDS results are seamless embedded within the Stacks experience. In this case, a more consistent experience is provided, particularly if catalog/OPAC items are included in the Discovery profile. This search format will return results directly within the Stacks experience, keeping your users in one consistent interface. The results displayed are provided via the EDS API and embody the EDS facet and ranking logic. Stacks augments the EDS search results with a variety of subscription content that libraries often have accounts for such as reviews from ChiliFresh or Baker & Taylor and recommendations from NovelList Select.

Stacks also brings in Integrated Library System (ILS) item details such as locations, call numbers, status, etc. all in real time using the ILS API (when ILS integration is included). A patron may then place a hold via the ILS right within the search results without having to visit the OPAC. If the user is trying to access an EBSCO Full Text resource from these search results, a direct link to the content will be provided to the user. For the ultimate search experience, EDS can index your ILS holdings and full text database content as well as EBSCO eBooks all within one Discovery platform.

Easy Forms

Need to collect feedback? Looking to provide an easy way for patrons to connect with your institution? Stacks has you covered. Quickly and easily build custom forms, polls and surveys, collect responses and analyze the results all from within the platform.

The Easy Forms feature can be used to build forms, collect and analyze responses for things like Contact Us, Suggest a Title for Purchase, feedback surveys and more. The Stacks Easy Forms tool makes it easy to drag in the fields you need, edit them as necessary and start collecting responses. Robust reporting also helps you to aggregate and analyze results.

Events Management

Stacks Events Management lets you can take complete control of your events. Manage all your events, program listings, room bookings and associated registrations quickly and easily. Navigating upcoming events is as easy for your users as it is for you to manage them. Leverage built in roles and permissions to accommodate collaboration by all types of employees and contributors.

Create repeating events to save time, specify publication dates to control when users can view events and their details, manage registrations by setting limits and tracking attendance, then generate reports on attendance all from the comfort of the Stacks Dashboard.

- Create recurring events with exceptions
- Manage controlled vocabularies to filter and manage events
- Accept online and in-app event registrations with limits
- Schedule publish and expiration dates

Filter Vocabularies

Customize and manage controlled vocabularies used throughout the site to facet and filter content.

Google Analytics

Upload your Google Analytics credentials to activate analytics for your Stacks powered experience.

Google Translate

Stacks integrates with Google Translate to make content available in more than 100 languages. By default, you will see English, Spanish, and French. Additional languages can be turned on by request. All content, including search results from integrated catalogs are translated on-the-fly, with the click of a mouse, by any visitor.

Index Pages

Create and manage pages of unique indexes for improved browsing with dedicated title/description search. Each index page you create can have its own customizable categories and entries. Entries can include content and/or file attachments.

IP Whitelist

Provide immediate online access to digital resources and electronic materials using Stacks IP Whitelist feature paired with exclusive EDS integration.

LMS Interoperability

Users have one (1) App to search from within their LMS instead of dozens from various publishers and providers.

Read Online within their classroom (LMS) workflow reduces friction and makes finding and using qualified resources easy.

Landing Pages

Create customized Drag & Drop landing pages
Supports Callouts, Sliders, Resource Flows, Events, News, RSS feeds

Link Checker

Quickly locate and repair dead links

Location and Hours

Set the location and hours for one or many locations with optional Google Places integration, details and interactive maps.

Menus

Customize menus and manage their content as quickly and easily as drag, drop and save.

Multi-Domain

With Stacks Multi-Domain you can create multiple domains/experiences under a single Dashboard. Manage your experiences from a central location with robust management and publishing options.

Multi-Language

Break the language barrier with the Stacks Multi-Language feature. Manually create content across one or many experiences in multiple languages and allow your users to select their preferred language. With over 100 languages available, Stacks ensures your users will be able to offer curated content in the language your users need.

My Account

ILS functionality includes but is not limited to: view items out, renew items out, view holds and status, cancel holds, view fees and fines, view reading history paired with Stacks functions like create and manage saved lists, view my event registrations and room bookings.

News Articles

Create news articles to inform your users of events, programs and other important happenings in the community.

Outbound Searches

Search out to favorite resources from a single search to foster easy access and overcome technical boundaries.

Publisher/Content Integrations

Stacks supports direct interoperability with any license or service. Partners include but are not limited to:

- Savvas, formerly Pearson
- BFW, Macmillan
- Cengage, Big Ideas Learning (Cengage Partner)
- McGraw Hill
- Houghton Mifflin Harcourt
- Carnegie Learning, EMC (Imprint)
- Accelerate Learning

Recommendations

Supported by NoveList Select.

Research Guides

Create and manage brilliant responsive guides and tutorials with rich multimedia support and full WYSIWYGs.

Resource Flows

Create scrollable, visual lists of resources that can be built manually or pulled automatically from the ILS and/or other convenient locations.

Reserves

Create and manage reserve materials and associate them with a specific program, course, term or instructor. Tailored aggregate view with facets and filters.

Resource Flows

Book lists/carousels. Pull from and link to ILS, EDS or Flipster resources. Other sources supported on request.

Room Bookings

Configure room categories and set group defaults, manage controlled vocabularies to filter and manage rooms, accept online and in-app booking without conflicts, manage email templates for automated confirmations, reminders.

Users can book a room for a set period of time and a certain number of people by selecting a time and submitting the details of their booking. Tailor email notifications and reminders and take control of your bookings with the ability to accept or decline requests and never worry about double booking a room again.

- Configure room categories and set group defaults
- Manage controlled vocabularies to filter and manage rooms
- Accept online and in-app booking without conflicts
- Manage email templates for automated confirmations, reminders, and more

Search Formats

Stacks includes the most robust search options available on the market. Choose from full EBSCO Discovery Service Integration, standard website and catalog searches and Stacks Bento search with combined local (website content), catalog and electronic resource results from a plethora of providers simultaneously.

Sliders

Display a series of images with links in a slim horizontal carousel or a large promotional-style banner to showcase content and improve information architecture.

Social Media Integration

Easily add all your favorite social media accounts to the footer. Want to share content throughout your site like search results, events and other content? Stacks adds the share feature to all elements by default and supports all your favorites including Facebook, Twitter, LinkedIn and more.

Topics

Organize and draw attention to blocks of topic-based links that can be placed on a landing page. Topic Blocks can contain multiple groups of topics with many links.

Website Search

The third search format is website search. This format searches all website content from the Stacks experience. Stacks can also apply weighting rules to types of website content during implementation upon request.

Stacks Mobile

The Stacks Mobile app for iOS and Android offers an industry leading mobile experience boasting rich integrations and exclusive functionality. Change the look and feel of your experience on the web or update content such as hours and location details or event listings and see those updates in your app instantly. One affordable annual subscription fee guarantees updates, maintenance, support and continued enhancements. Features Available with Standalone Apps include:

For Users

- Browse catalog(s) and:
- View details, reviews, recommendations and cover art; and
- Retrieve call numbers and item status. Manage 'My Account' including:
- View and renew current checkouts;
- Review, place, and cancel holds;
- Access digital membership card; and
- Scan a barcode to place a hold request.

For Administrators

- Manage app content with the intuitive Stacks Dashboard;
- Get away from the reference desk and engage users; and
- Retrieve call numbers.

Additional Features Available When Paired with Web Platform

- When paired with the Stacks web platform, mobile app content is easy to manage and automatically updated when you make experience (website) changes.
- Scan a book, anywhere and check availability or place a hold instantly;
- Register for programs and events;
- Book rooms;
- Manage forms and polls with Stacks Easy Forms;
- Access Databases; and
- Look and feel matches your Stacks web experience.

APPENDIX A - Stacks Implementation Plan and Timeline

The Stacks approach to implementation comes from years of experience including more than ten (10) years of software maintenance and support for organizations of all types including the Microsoft, California Institute of Technology (Caltech) Library and the US Department of Defense.

Timeline - Stacks can be deployed in as little as 90 days during which you will be provided with documentation to help build your site. You will need to finalize site information architecture and create content.

Implementation - Through consultation, understanding, communication, and execution, Stacks will deliver a web experience customized for the needs of your organization and users. The plan is comprised of the following steps:

- 1. Onboarding Checklist**
The Onboarding Checklist is provided to each new Stacks customer and is designed to capture as much information about the organization as possible and covers details such as organizational information, system information, third-party integration details, authentication preferences, and more.
- 2. Web Experience Set-Up**
A web instance will be created while going through your Onboarding Checklist to verify all of the details required. This information will be used to set up initial integrations including authentication, reviews, book jackets, and recommendations. This phase can include setting up Google Analytics, Google Translate and Google Places, as well as activating site search and third-party tools such as social media platforms.
- 3. Onboarding**
Stacks implementations includes self-guided training documents and access to robust support material including user manuals and video tutorials. During the onboarding process your Implementation Manager will provide guidance on Administration, Content Management and Best Practices.
- 4. Information Architecture**
Before accessing the experience itself, the Stacks team will provide a reference guide and resource list to help guide the design of a menu structure for the web experience.
- 5. Content Development**
The customer is responsible for creating all content unless otherwise discussed. At the time of deployment, day-to-day maintenance, such as event postings, content updates, hours of operation, etc. will be managed by the customer through an easy-to-use dashboard. From one location, this dashboard offers access to all the product features and each user can adjust it to suit their preferred daily workflow.
- 6. Go-Live**
Once the new web experience is populated with content, it's time to launch the new web experience. The support team will work closely with the client when changing over DNS settings. We are also able to coordinate with PR and/or Marketing teams to time the Go-Live with important dates or events pertinent to your organization.

APPENDIX B - Stacks Mobile Implementation Plan and Timeline

Order Placed

A few scenarios may be present. You may have purchased Stacks Mobile, you may have purchased Stacks Mobile with the Stacks Web CMS or you may be adding Stacks Mobile to your existing Stacks Web CMS. Pairing Stacks Mobile with the Stacks CMS unlocks powerful features such as in-app event registration or room booking. Your EBSCO rep will provide you with any informational material available.

* Note that your app cannot be built until your Stacks Web Experience is at live at the permanent domain, if applicable.

Onboarding

You will be provided a package that contains both Apple App and Google Play Store Submission Previews and an Onboarding Checklist that will provide us everything we need to build and submit your app. This document also acts as the authorization to submit the apps to the store on your behalf. This may be logos, colors, third party integration credentials, etc. This package must be completed and signed in order to activate the implementation process.

Names Matter

You'll need to name your Apps. This is the name that will appear as your Title in the App Stores and will be the name your users use to search for your app in the App Stores. It can be a maximum 30 characters, including spaces. Keep in mind however that the App Icon Label that will appear on your users devices supports only 12 characters, including spaces. The same name must be used for both your iOS and Android Apps.

* Note that your name must not already exist in the App Stores.

Stacks Gets to Work

Once we receive your returned package, we will build your Apps and Icons using the logos and colors provided during Onboarding. Any necessary feature configuration, etc. will be coordinated by the Stacks Support Desk Team. The final step in the part of the process is to prepare your Store Submission and submit for App Store Reviews.

Launch Date

Stacks can guarantee App Store Release within 24 hours of your desired launch date with 30 days advance notice. This is because Apple and Google both provide only rough estimates of approval times. You may wish to coordinate the Launch/App Store Release with a particular day, event, or promotional activity.

APPENDIX C – Stacks Support

Stacks is a cloud-based web platform and is sold as a managed service meaning there are no additional staff required for support and maintenance. To ensure you are able to receive help when you need it, Stacks is supported by EBSCO Customer Support.

Need help? Have answers? 'Stacks Support' provides the latest information on platform updates, an ever-expanding list of FAQs, and a Forum section that will play host to community and expert information exchange. Check out the Stacks Knowledge Center at info.stacksdiscovery.com

Stacks provides a number of additional options when it comes to finding the help you need including:
Access Stacks 'Help' content directly from the Stacks Dashboard by clicking on 'Help'. Clicking on 'continue' will take you directly to that section on Stacks Support where you will have access to step by step instructions on managing your content and settings.

If you require assistance during the setup period, submit a support ticket by visiting connect.ebsco.com and clicking 'Contact Support'.