

**EBSCO** |  **Stacks**  
**Stacks Integrations Guide**

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## Authentication Overview

Stacks supports Internal Authentication with a rich moderated user workflow with hierarchical staff roles and users access. Authentication provides Users access to Full Text, Stacks My Account and Protected Content. Staff are granted appropriate levels of access to the Stacks Dashboard.

Authentication may also be integrated using Stacks plug and play ILS API integrations, SIP2 or standard directory and SSO integrations such as LDAP, ADFS, SAML, Shibboleth and Ping. Additional statistical benefits are added when pairing one of these external integrations with OpenAthens.

Stacks sites can be configured as open websites or as password protected portals. All sample user journeys illustrated below are Open Website scenarios.

Content created in Stacks can be restricted to users by role or IP using Stacks Content Protection. Event Registrations and Room Bookings can also be password protected.

Stacks supports eight (8) configuration options for patron authentication.

## Patron Authentication

Users are granted access to Read Online (one click access to Full Text with EDS integration), Stacks My Account and User-protected Content.

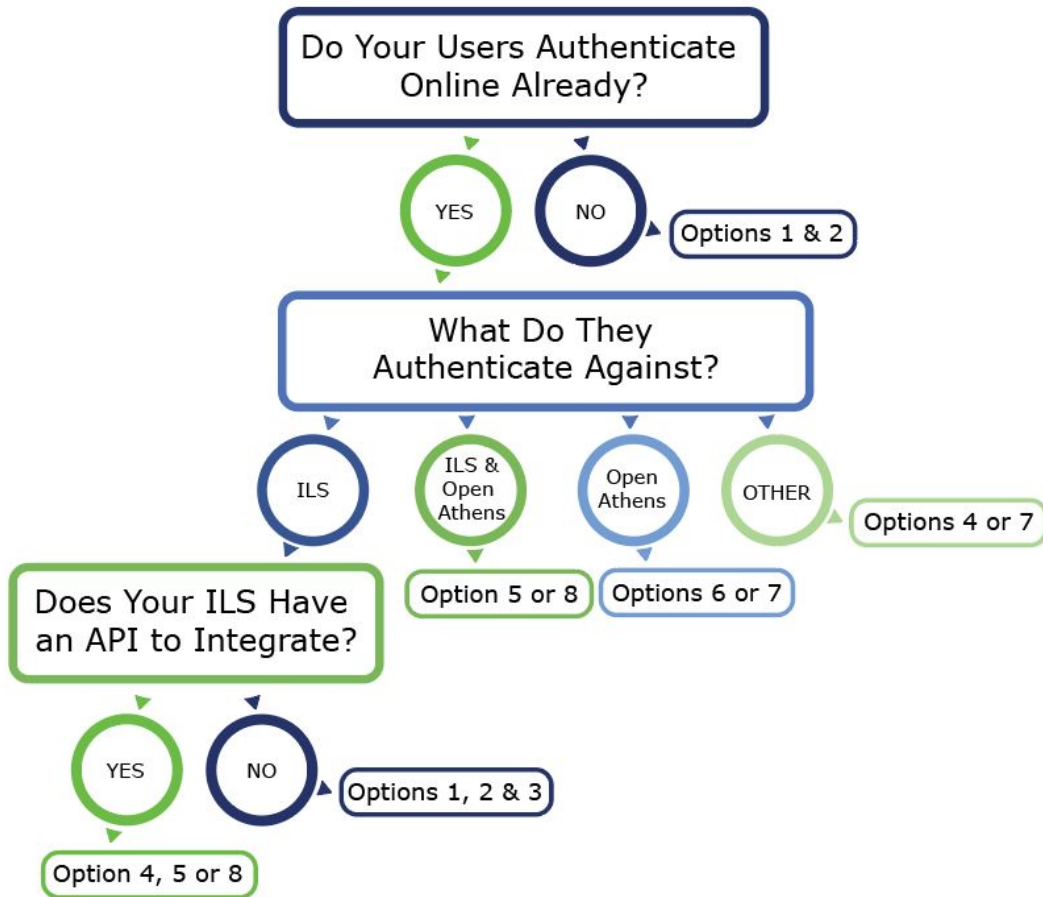
## Full Text Access in Stacks

1. Requires user authentication (options 2-7)
2. Option 1 grants anonymous onsite access to Full Text

## Authenticated, Personalized Access into Individual Databases

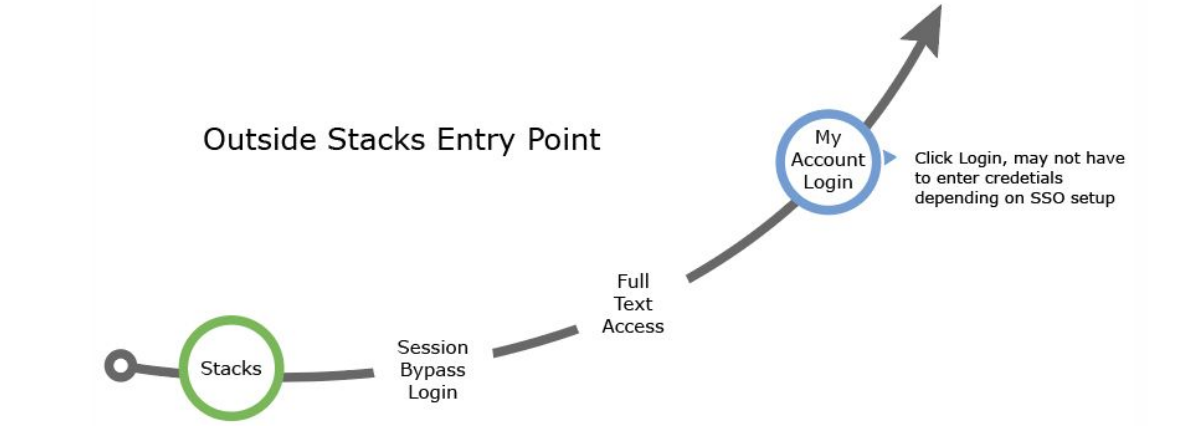
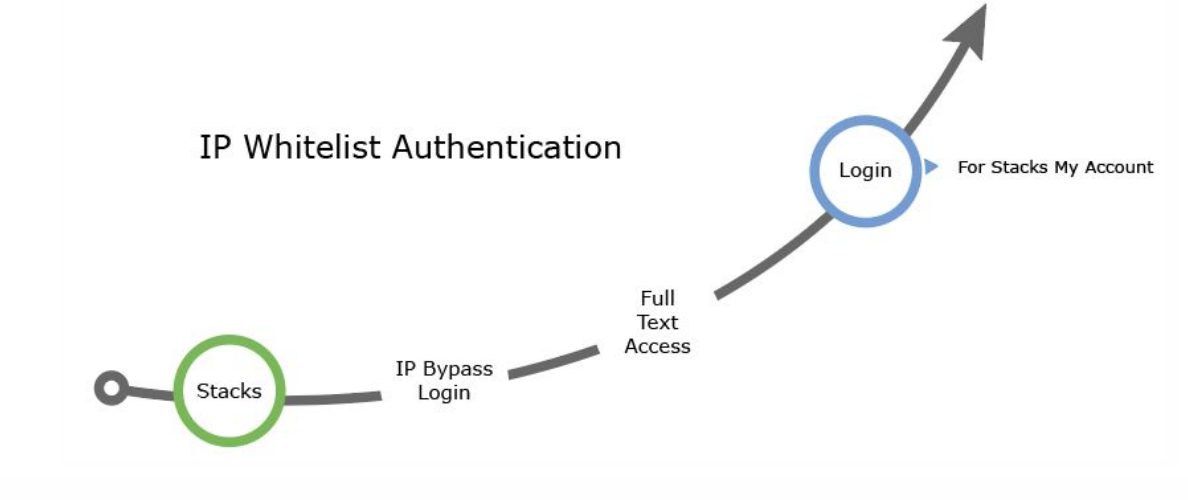
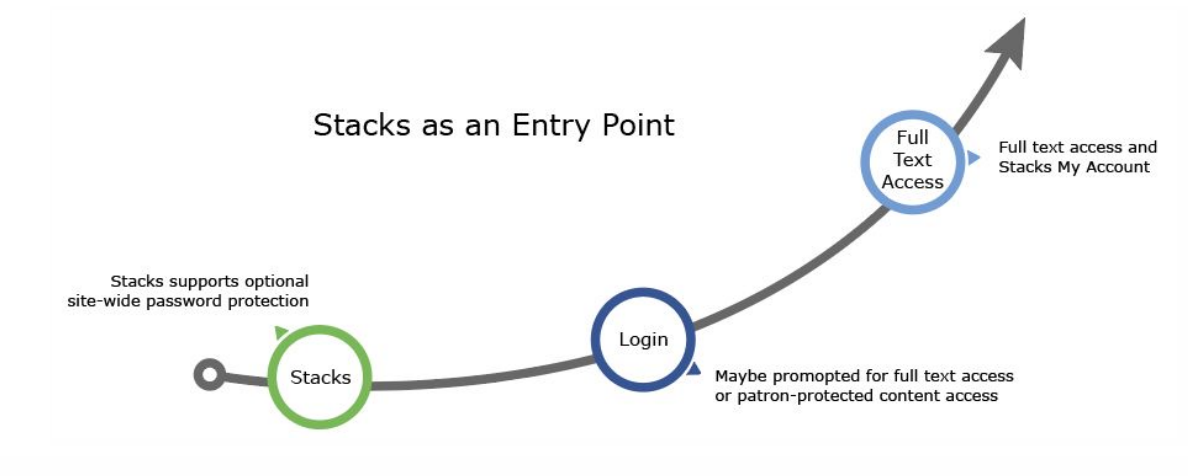
1. Requires options 5-7
2. May be handled by site SSO if mature enough

## Which Options Apply to Your Organization?



Option 1 - IP Whitelist	FREE
Option 2 - Internal	FREE
Option 3 - SIP2	FREE
Option 4 - ILS or IDP	ILS API IDP \$\$
Option 5 - ILS or IDP + OpenAthens API	Open Athens ILS API IDP \$\$
Option 6 - OpenAthens API	Open Athens FREE
Option 7 - SSO via Secure Cloud	SSO \$
Option 8 - SSO with ILS Functionality	SSO ILS API \$\$

### Patron User Journeys



\*with SSO

## Patron Authentication Options

### Option 1: IP Whitelist

- Plug and Play
- No associated cost
- Allows anonymous Full Text access onsite

### Option 2: Internal

- No charge
- Managed via Stacks Dashboard
- Staff and Patron User Roles managed by Stacks
- Patrons have access to Full Text and My Account
- Users can be batch loaded/imported
- Ideal for no directory or batch loading (ex. small college)

### Option 3: SIP2

- Plug and Play
- No associated cost
- Standard protocol (available with most older ILS systems)
- Simple user directory
- Patrons have access to Full Text and My Account

### Option 4: ILS or IDP

- Plug and Play
- Annual ILS or Authentication fee applies (per grid)
- Options include:
  - iii Millennium
  - iii Polaris
  - iii Sierra
  - SirsiDynix Symphony
  - SirsiDynix Horizon
  - Ex Libris ALMA/Primo
  - OCLC WMS
  - LDAP
  - ADFS
  - SAML
  - Shibboleth
  - Ping
  - Other
  - Coming soon - Koha and FOLIO
- ILS Authentication enables full ILS integration feature set
- Must have valid API license for ILS systems

**Option 5: ILS or IDP + OpenAthens API**

- Plug and Play
- Annual ILS or Authentication fee applies
- Directory connection in Stacks & OpenAthens (OA)
- Session from OA API
- Best for ILS integrated library wanting OA stats and database access
- Best for Stacks as entry point
- Must have valid OA subscription
- Must have valid API license for ILS systems

**Option 6: OpenAthens API**

- Plug and Play
- No associated cost; must be an OA subscriber
- Use for MD (when users manually created in OA)
- Self registration options available
- Best for customers with no directory but want one
- Must have valid OA subscription

**Option 7: SSO via Secure Cloud**

- Annual ILS or Authentication fee applies
- Leverages secure OpenID connect technology
- Compatible with all SAML based SSO systems including OpenAthens and Office 365 Azure Active Directory
- Service required from Stacks; quick activation with accurate metadata
- Best performance for non-Stacks entry point

**Option 8: SSO with ILS Functionality**

- Option seven (7) features plus full ILS Integration capabilities



## **Staff Authentication**

Staff users are granted access to the Stacks Dashboard and can have various permissions based on their role. These users are typically created and managed from the Stacks Dashboard by the Administrator, but can also be integrated with LDAP or another IDP directly. Associated fees above apply.

### **Roles include:**

#### **Administrator**

This is the highest permission level available within Stacks. Administrators have access to all Dashboard tools. Their responsibilities may include managing user roles, integrations, analytics, site configuration, and aesthetics of the site. They have the ability to publish and unpublish all content, regardless of author. This role would typically be assigned to a manager or staff member who is a decision maker and requires the highest level of permission.

#### **Moderator**

Like an Administrator, a Moderator has permission to publish or unpublish any and all content, regardless of author. They are responsible for moderating and publishing any content produced by Editors and Contributors. Unlike an Administrator, their responsibilities focus on managing content specifically. They are not responsible for managing the integrations, users, or the look and feel of the site. Moderators would likely be experienced staff, trusted with managing content, programs and events, room bookings, directories, and filter vocabularies.

#### **Editor**

An Editor has permission to create any form of content, with the exception of Database Listings, Menus, Room Bookings, or Filter Vocabularies. They cannot, however, publish this content directly to the Stacks site. Instead, their created content must be approved by either a Moderator or Administrator (see Content Moderation). Though they can not publish content directly, they can edit existing content without requiring further moderation. An Editor role would likely be assigned to regular or part-time staff.

#### **Contributor**

A Contributor can create and edit their own content only. Any content they create must be reviewed and approved by a Moderator or Administrator, prior to its publication. A Contributor may only create Events, News Articles, Pages, Custom Blocks, Research Guides, Reserves, Resource Flows, or Sliders. This role is ideal for volunteers, interns, and other specialized team members.

## Stacks 'My Account'

ILS Integrations				
Vendor	Product	Status	API/Service	Responses
iii	Polaris	Live	Rest	JSON/XML
iii	Sierra	Live	Rest	JSON
SirsiDynix	Symphony	Live	Rest	JSON/XML
SirsiDynix	Horizon	Live	Rest	JSON
OCLC	WMS	Live	Rest	JSON/XML
ExLibris	ALMA/Primo	Live	Rest	JSON
OLE	Koha	In Development		

### My Account Features

Create and manage Saved Lists, Saved Searches, My Event Registrations and My Room Bookings.

### ILS Integration Functionality

View items out, renew items out, view hold requests and status, cancel hold requests, view fees and fines, etc.

### Innovative Interfaces Inc. (iii) - Polaris API

- Authenticate
  - Using barcode and pin or username/password
  - Authenticate behind the scenes to OpenAthens when applicable
- My Account
  - View items out
  - Renew items out
  - View Requests
  - Cancel Requests
  - View Fees and Fines
  - View General Account Information
- Integrated Features
  - Place Hold Requests on EDS Search Result Details
  - See Holdings (Location) Information on EDS Search Result Details
  - Populate item details when creating Resource Flows with entry of ISBN
  - Place request button for Resource Flows
  - Create a Catalog Bento Box
- Mobile App
  - My Account

- Catalog Search
- Augmented EDS Search

### **Innovative Interfaces Inc. (iii) - Sierra API**

- Authenticate
  - Using barcode and pin or username/password
  - Authenticate behind the scenes to OpenAthens when applicable
- My Account
  - View items out
  - Renew items out
  - View Requests
  - Cancel Requests
  - View Fees and Fines
  - View General Account Information
- Integrated Features
  - Place Hold Requests on EDS Search Result Details
  - See Holdings (Location) Information on EDS Search Result Details
  - Populate item details when creating Resource Flows with entry of ISBN
  - Place request button for Resource Flows
  - Create a Catalog Bento Box
- Mobile App
  - My Account
  - Catalog Search
  - Augmented EDS Search

### **Innovative Interfaces Inc. (iii) - Millennium**

- SIP2 Authentication
- Limited account information
- Full text access with EDS integration
- View in Catalog Button on search results

### **SirsiDynix API - Symphony**

\* API license must support the following: Standard, Security, Patron, and Admin.

- Authenticate
  - Using barcode and pin or username/password
  - Authenticate behind the scenes to OpenAthens when applicable
- My Account
  - View items out
  - Renew items out
  - View Requests
  - Cancel Requests
  - View Fees and Fines
  - View General Account Information
- Integrated Features

- Place Hold Requests on EDS Search Result Details
- See Holdings (Location) Information on EDS Search Result Details
- Populate item details when creating Resource Flows with entry of ISBN
- Place request button for Resource Flows
- Create a Catalog Bento Box
- Mobile App
  - My Account
  - Catalog Search
  - Augmented EDS Search

### **SirsiDynix API - Horizon**

\* API license must support the following: Standard, Security, Patron, and Admin features.

- Authenticate
  - Using barcode and pin or username/password
  - Authenticate behind the scenes to OpenAthens when applicable
- My Account
  - View items out
  - Renew items out
  - View Requests
  - Cancel Requests
  - View Fees and Fines
  - View General Account Information
- Integrated Features
  - Place Hold Requests on EDS Search Result Details
  - See Holdings (Location) Information on EDS Search Result Details
  - Populate item details when creating Resource Flows with entry of ISBN
  - Place request button for Resource Flows
  - Create a Catalog Bento Box
- Mobile App
  - My Account
  - Catalog Search
  - Augmented EDS Search

### **ExLibris - Alma**

- Authenticate
  - Using barcode and pin or username/password
  - Authenticate behind the scenes to OpenAthens when applicable
- My Account
  - View items out
  - Renew items out
  - View Requests
  - Cancel Requests
  - View Fees and Fines

- View General Account Information
- Integrated Features
  - Place Hold Requests on EDS Search Result Details
  - See Holdings (Location) Information on EDS Search Result Details
  - Populate item details when creating Resource Flows with entry of ISBN
  - Place request button for Resource Flows
- Mobile App
  - My Account
  - Catalog Search (using Primo API)
  - Augmented EDS Search

### ExLibris - Primo API

- Create a Catalog Bento Box

### OCLC - Worldshare Management Services (WMS) API

\* Please note the WSKey requires access to the following services: WorldCat Search API (wcapi), WMS Availability (WMS\_Availability), WMS NCIP Service (WMS\_NCIP).

- Authenticate
  - Using barcode and pin or username/password
  - Authenticate behind the scenes to OpenAthens when applicable
- My Account
  - View items out
  - Renew items out
  - View Requests
  - Cancel Requests
  - View Fees and Fines
  - View General Account Information
- Integrated Features
  - Place Hold Requests on EDS Search Result Details
  - See Holdings (Location) Information on EDS Search Result Details
  - Populate item details when creating Resource Flows with entry of ISBN
  - Place request button for Resource Flows
- Mobile App
  - My Account
  - Catalog Search
  - Augmented EDS Search

### Pending

### ExLibris - Aleph API

- Authenticate
  - Using barcode and pin or username/password
  - Authenticate behind the scenes to OpenAthens when applicable

- My Account
  - View items out
  - Renew items out
  - View Requests
  - Cancel Requests
  - View Fees and Fines
  - View General Account Information
- Integrated Features
  - Place Hold Requests on EDS Search Result Details
  - See Holdings (Location) Information on EDS Search Result Details
  - Populate item details when creating Resource Flows with entry of ISBN
  - Place request button for Resource Flows
- Mobile App
  - My Account
  - Catalog Search (using Summon API)
  - Augmented EDS Search

### **ExLibris - Voyager API**

- Authenticate
  - Using barcode and pin or username/password
  - Authenticate behind the scenes to OpenAthens when applicable
- My Account
  - View items out
  - Renew items out
  - View Requests
  - Cancel Requests
  - View Fees and Fines
  - View General Account Information
- Integrated Features
  - Place Hold Requests on EDS Search Result Details
  - See Holdings (Location) Information on EDS Search Result Details
  - Populate item details when creating Resource Flows with entry of ISBN
  - Place request button for Resource Flows
- Mobile App
  - My Account
  - Catalog Search (using Summon API)
  - Augmented EDS Search

### **ExLibris Summon API**

- Create a Catalog Bento Box

### **Koha**

- Authenticate
  - Using barcode and pin or username/password
  - Authenticate behind the scenes to OpenAthens when applicable
- My Account

- View items out
- Renew items out
- View Requests
- Cancel Requests
- View Fees and Fines
- View General Account Information
- Integrated Features
  - Place Hold Requests on EDS Search Result Details
  - See Holdings (Location) Information on EDS Search Result Details
  - Populate item details when creating Resource Flows with entry of ISBN
  - Place request button for Resource Flows
- Mobile App
  - My Account
  - Catalog Search
  - Augmented EDS Search

## Evergreen

- TBD

## FOLIO

- ASAP

## TIND

- No API available

## Notable

\* API Licenses required

\* When no ILS API is available, SIP2 may be used for authentication and limited account information

\* OpenAthens can be used independently or along with an ILS

## Bento Search

This search format has the ability to search multiple APIs and the website simultaneously and group the results according to your preference. If the Stacks Bento search configuration is applied in Stacks, a patron can search EDS, the OPAC (when a full ILS integration is possible) and the Stacks website simultaneously. Stacks can also provide custom integration services for SharePoint or other third party sources for a fee.

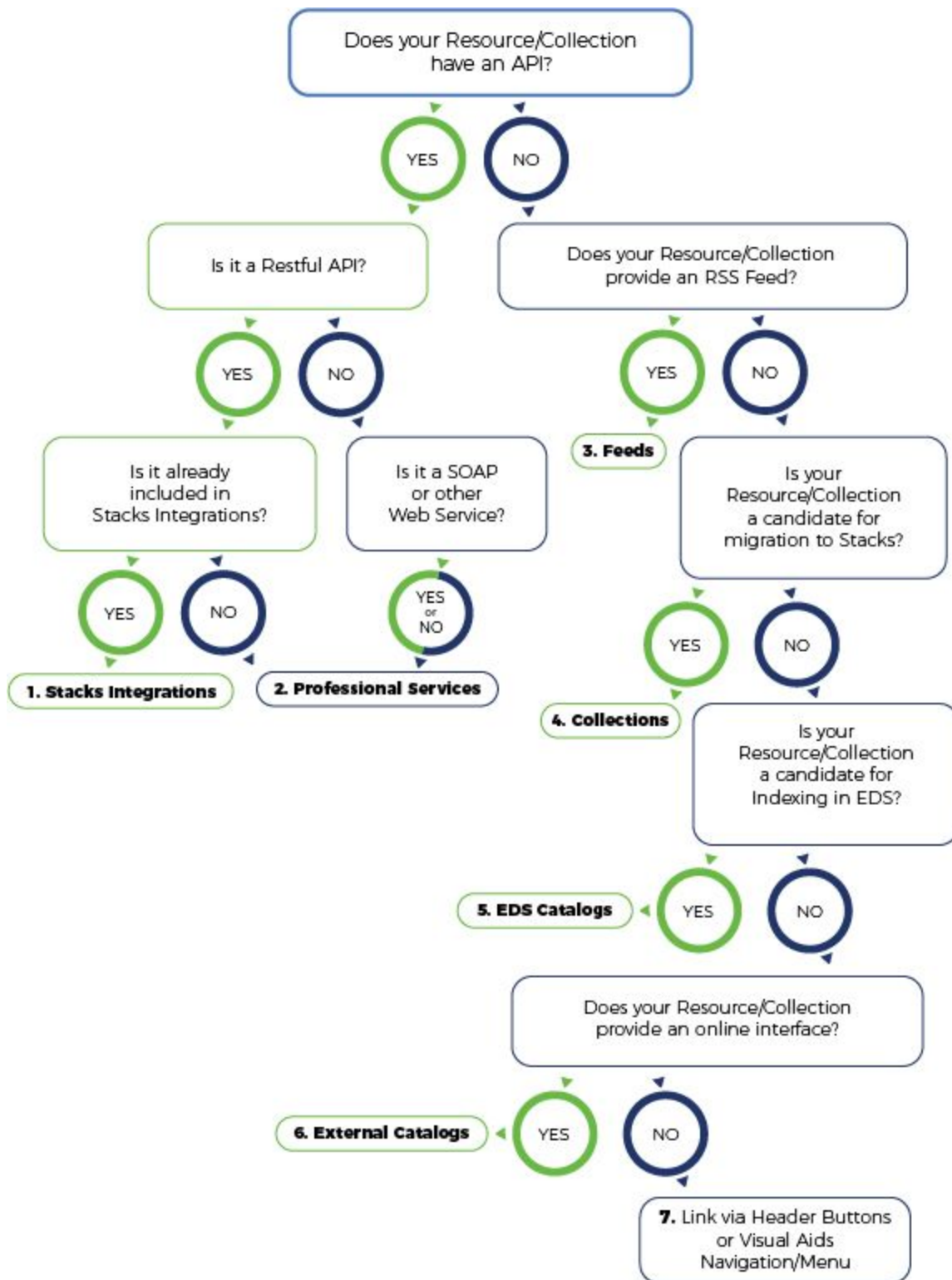
The Stacks Bento Search format allows the library to customize search results in blocks of content that can be easily rearranged. There are several result groups available from each source. For example, the library may choose to display everything from EDS, books from the catalog and news and events items specifically from the website. The library 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. In this case, each block has a "read more" label that will take the patron to either the EDS Integrated search results page as noted above, or out to the OPAC/catalog interface for more results. Same authentication rules apply. This capability is available without the ILS Integration option. With EDS

integrated, customized boxes of search results can be created based on content type, source provider and subject. [Click here to learn more.](#)

Catalog Integrations				
Lucidea	Sydney Plus		Rest	JSON
	EBMG		Rest	JSON
	Mintel		Rest	Atom/XML
	Questel		Rest	JSON
Microsoft	Sharepoint		Rest	JSON



## Evaluate Your Resources and Collections



## 1. Stacks Integrations with Bento Search Capability

### ILS Integrations

Stacks bento currently supports searching the records of a list of supported ILS providers. Once the customers credentials have been successfully added for a given ILS, the corresponding bento box can be added to the search results. When a patron searches for an item using the bento search, the top ten results are displayed on the page with a see more link at the bottom that takes the user to the external ILS catalog results. Each row displays the items title, description a button to add to a save list and a request item button. We currently support ExLibris's Alma and Primo, OCLC's WMS, Innovative Interfaces Inc's Polaris, Sierra and Millennium API's as well as SirsiDynix's Symphony and Horizon APIs. Due to a request from a client we also provide an items details view for the SirsiDynix's results.

### Catalog Integrations

Stacks bento currently supports searching against a list of supported catalog providers. Unlike the ILS integrations, the catalog search results are limited in functionality. The search results list displays the first 10 items. The *see more* link at the bottom takes the user to the catalog's website results page for the same query. Each result row displays the title, description and external link for an item. We currently support the following catalog providers in Stacks: Lucidea SydneyPLUS, Microsoft SharePoint, Mintel, Questel and EBMG.

## 2. Stacks Professional Services

Take your project to the next level, your situation is unique, and your digital project experience should be too. EBSCO | Stacks Professional Services provides full service project management and expertise needed to achieve your unique goals and objectives. Your customized project plan may include services such as project management, consulting, business analysis, information architecture, content strategy, portal design, graphic design, **software development**, content migration and more.

## 3. Feeds

RSS Feeds Are a Powerful Tool When Working with Web Content RSS Feeds can be found in many search and browse interfaces, both those you subscribe to as well as open resources, including websites and portals of all kinds. You may even be able to request a Feed from a content vendor directly in some cases. Stacks Feeds empower you to easily integrate and include Feeds of content in your digital experience.

- Bento Boxes of Search Results alongside other collections
- Dynamic Teaser Blocks for Landing Pages alerting users to the newest content
- Full paginated list views

**Examples:** Open News Feeds, Bibliogo Catalog

## 4. Collections

Do You Have Collections or Resources That Don't Fit the Mold? Stacks Collections helps you to manage all your remaining disparate resources or internal content repositories. From documents to media, Stacks Collections empowers you to upload spreadsheets (comma delimited lists) of resources. Map and label any metadata into a faceted search experience embedded right within your Stacks website. Take this seamless concept to the next level by including Stacks Collections in Stacks Bento Search; presenting results alongside results from your Discovery system(s), Catalog(s), Website, and more.

**Examples:** replacement may be SharePoint or FileNet

## 5. EBSCO Discovery Service API

The first search format is full EBSCO Discovery Service (EDS) API search. This format means EDS results are seamless embedded within the Stacks website. 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 website, 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 NoveList 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.

In addition to your subscription content in EDS, catalogs and collections can be loaded and indexed in EDS as well.

### ILS Partnerships Mean More Choices for Libraries

By partnering with some of the most popular ILS vendors EBSCO gives libraries ultimate choice when it comes to how they serve their patrons. With the option of using either *EBSCO Discovery Service* or a library's current catalog user interface as the front end, EBSCO's ILS partnerships allow libraries to take advantage of the benefits of both services. Through these partnerships mutual customers will get better, easier access to the databases, journals, conference proceedings, magazines, newspapers, e-books, images, videos and other resources their libraries provide.

EBSCO's ILS partnerships represent our increasing experience integrating with third-party services. In fact, EBSCO works with more than thirty vendors already and more are being added. As a collaborative technology partner EBSCO is happy to hear your suggestions for future partnerships.

## Libraries that Choose EBSCO Discovery Service and keep their ILS experience the benefits of partnership

**Save Time** with set up and maintenance. ILS partnerships allow for increased workflow integration through the incorporation of the [FDS API \(Application Programming Interface\)](#) into a library's catalog.

**Increase Exposure to Valuable Resources** through a single search experience.

**Seamless User Experience** through the inclusion of ILS functionality into the discovery experience like checkouts, holds, renewals, access to personal account history, review fines, and so on.

### Partnerships include:

- Innovative Interfaces, Inc.
- SirsiDynix
- OCLC
- Kuali OLE
- Algorhythms SLIM
- Archimed
- aStec
- Aurora
- Bookhouse Company
- Capita
- Catalyst IT
- Cosmotron
- EOS International (now part of Sirsi)
- FutureNuri
- Hyweb
- Inek
- Janium
- LA Info Tech / Smartlib
- Lucidea (including SydneyPLUS Inmagic)
- Mirtech Inc
- Pergamum
- Prima SophiA
- SIABI
- Softlink
- Soutron
- SVOP
- TIND
- UNIBIS
- Yordam

### Vendor-Neutral Partnerships

EBSCO's goal is to offer libraries the options they need to optimize their individual discovery experiences. Because EBSCO is vendor-neutral in its approach to discovery, there are additional discussions underway with other well-known and regional ILS vendors. EBSCO also encourages individual libraries to talk to their ILS vendor and ask them to consider a similar partnership with EBSCO.

### Harvesting Institutional Repositories via *EBSCO Discovery Service*

Institutional Repositories (IRs) can be directly loaded into *EBSCO Discovery Service* so that they can be fully searched alongside all other EDS resources/content.

### Loading Institutional Repositories

EBSCO supports harvesting institutional repositories via Open Archives Initiative Protocol for Metadata Harvesting (OAI-PMH) or via File Transfer Protocol (FTP).

EBSCO has developed a flexible framework for mapping your data to EDS. If your institution sends along additional documentation of the metadata format you'd like for us to support, including a full

dataset of your records, EBSCO can investigate integration options. Each unique institutional repository is analyzed for optimized loading and display.

## 6. Stacks External Catalogs

External Catalog Search means Stacks carries the search term through to the Online Public Access Catalog (OPAC) interface.

### Supported External Catalogs are:

- EBSCO EDS
- Bibliocommons
- Biblionix
- German Clinical
- Evergreen
- Follet
- III Millennium
- III Encore
- III Polaris
- III Sierra
- III WebPac PRO
- Koha
- Libib
- Lib Guides
- Mandarin
- OCLC
- Exlibris Primo
- SirsiDynix
- SirsiDynix ASP
- SirsiDynix EOS - Academic
- SirsiDynix EOS - Essentials
- Softlink
- TLC
- Verso
- VuFind
- WebVoyage

**Note:** Submit a Stacks Support Ticket to have a new one added

## 7. Stacks Navigation Tools

### 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.

### 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.

Header Buttons, Menus and more...

## Other Integrations

Other Integrations				
StackMap	StackMap	Live	HTTP	HTML
Novelist	Select Similar Titles	Live	Rest	JSON/XML
Chilifresh	Reviews/ Thumbnails	Live	HTTP	JSON
Bowker	Syndetics thumbnails	Live	HTTP	HTML
Baker & Taylor	Content Cafe Reviews / Thumbnails	Live	HTTP	XML
Google	Places	Live	Rest	JSON
Google	Analytics	Live	Rest	JSON
Import Tools				
Springshare	LibGuides A-Z	Live	Rest	JSON/Oauth
	Users	Live	HTTP	CSV Importer