

**EBSCO** |  **Stacks**  
**Capability Statement**  
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## **Introduction and Company Overview**

### **Stacks Inc.**

Since 2006, Stacks technology powers libraries of all types including Microsoft, California Institute of Technology (Caltech) and Singapore University of Technology and Design. Stacks library 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 the library experience.

### **EBSCO Information Services**

EBSCO Information Services (EBSCO) is the leading discovery service provider for libraries 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 leading provider of electronic journals & books for libraries, with subscription management for more than 360,000 serials, including more than 57,000 e-journals, as well as online access to more than 900,000 e-books. For more information, visit the EBSCO website at: [www.ebsco.com](http://www.ebsco.com). EBSCO Information Services is a division of EBSCO Industries Inc., a family owned company since 1944.

### **Partnership**

Stacks has partnered with EBSCO Information Services as an exclusive distribution partner. Through Stacks, EBSCO is offering a combination of features, function and integration that goes beyond the traditional one-off web design and development model. With this truly collaborative approach, Stacks creates, supports, hosts and services the websites it helps to design, not just up to the time of the launch, but for the life of the contract.

## **How Stacks Stacks Up Against the Competition**

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

Here is how Stacks not only helps patrons and administrators overcome these challenges but how Stacks sets itself apart from the competition.

## **Unified Discovery Experience**

Discovery is the concept of bringing the catalog content from the ILS 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 simultaneously, creating a truly seamless experience.

No other web platform vendor provides this functionality. Only three companies do this and two of those companies are ILS vendors, not web platform vendors.

## **Truly Seamless and Integrated Experience**

Stacks strives to take this one step further by bringing the Discovery experience into your library website with 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 book jackets, reviews, similar titles, translation and other supported integrated services with the flick of a switch.

Our exclusive partnership with EBSCO has empowered Stacks to provide the most refined EBSCO integrations available on the market.

## **Configurable and Responsive Themes**

Stacks allows for the complete customization of your library website. 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 website is responsive meaning it will look great on any device including phones, tablets and TVs.

## **The Ultimate SSO Experience**

OpenAthens rounds out the differentiators by providing the ultimate SSO experience with an easy to use tool. Personalized access to everything including databases, subscription services, resources, catalogs, and Stacks without the need for an external proxy. Stacks makes this all happen with only a single login.

## **Core Competencies**

### **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 website is going to stay new and fresh.

## 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 and quality training 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.

## Customizable Themes

Choose a theme and then customize with dozens of settings. You can change the look and feel of the website 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. New themes are added quarterly to ensure new and fresh aesthetics are always available to you at no extra cost.

## CSS Customization

Stacks also provides those with technical experience the ability to upload CSS override files. This allows you to take complete control in regards to the theming and the overall look and feel of your website.

## Drag and Drop Layouts

To improve flexibility, Stacks offers Drag-and-Drop layouts for your home and landing pages. This makes moving elements around quick and easy and ensures perfect performance on every device.

## Responsive Design

Responsive design means optimal performance on all devices. The Stacks website adjusts to the size of the screen regardless if its a tablet, phone or television; conform to the resolution of the display that they are shown on. No need to worry about creating content that breaks, gets lost or depreciates the user experience.

## 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.

## **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 patrons;
- 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 patrons;
- 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.

## **Consortia Value**

Libraries 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 libraries, Stacks enables libraries to create many websites within one CMS. Individual libraries within the Stacks instance may share files and publish content to one, select or all sites within an instance. This empowers even the smallest library to have a professional website 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 library-specific 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 libraries post implementation as necessary. Default roles include: Administrator, Moderator, Editor, Contributor and User/Patron.

## Additional Services Offered

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

- Custom website design: Stacks can work with your team to design a custom website design that suits specific needs or requests that you have. This will include interactive prototypes of the website. This is different from the SaaS Subscription service like Stacks.
- Content migration: Stacks can work with your existing website and migrate content into your new Stacks powered website. 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 website.

Additional services include Premium Stacks and Professional Services. Please reference the Appendix for further details.

## Features

### 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

### 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

### Events Management

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

Create repeating events to save time, specify publication dates to control when patrons 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

### **Easy Forms**

Need to collect feedback? Looking to provide an easy way for patrons to connect with your library? 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.

### **Filter Vocabularies**

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

### **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

### **Menus**

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

### **News Articles**

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

### **Pages**

Create and manage pages that display content, support rich media and attachments and support other site features.

### **Research Guides**

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

## LibGuides Integration

Stacks will work with the customer to setup a LibGuides import function within the Stacks Dashboard that will enable the dynamic recreation of existing LibGuides within the Stacks Research Guides feature, ensuring a simple migration path and offering a mobile-first and seamless experience on all devices.

## 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

- Course or program reserves
- Supports all file types

## Resource Flows

Book lists/carousels. Pull from and link to ILS, EDS or Flipster resources.

## 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.

Patrons 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

## 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.

## 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.

## Plug and Play Integrations

Integrations with the Stacks platform are robust and help to provide a tailored experience for both the user and the administrator. The following provides an overview of a few highlights of plug and play integrations with Stacks:

### EBSCO Discovery Service (EDS) Search

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

### External Catalogs

Search the Polaris PowerPAC, SirsiDynix Enterprise, III Sierra, Evergreen, OCLC WorldCat, Koha OPAC, ExLibris Primo, Bibliocommons, VuFind and more.

### Authentication

Stacks supports Single Sign-on providers such as OpenAthens, ILS systems, and more.

Integrated ILS Details: Stacks integrated search works with Innovative Interfaces ILSs such as Millennium, Sierra and Polaris; SirsiDynix ILSs such as Horizon and Symphony; ExLibris ILSs such as ALMA, ALEPH; and more. Once activated, users can view item details such as call number, location and more plus place hold requests.

### IP Whitelist

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

### 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.

### Cover Art

Integrate book jackets from Content Café, Syndetics, or ChiliFresh.

### Reviews

Choose to include item reviews from Baker & Taylor or ChiliFresh.

### Recommendations

Supported by NoveList Select.

### Location and Hours

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

### Google Analytics

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

## Multi-Language

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

## 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.

## Multi-Domain

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

## 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.

## Additional Integrations

### Flipster and Additional Third Party Tools

Flipster can be integrated into the Stacks platform several ways:

- Third party widgets are supported in Stacks by using the Custom Blocks feature that can be utilized on Landing Pages throughout your Stacks site. An example would be a Flipster carousel of titles with deep links.
- Flipster can be integrated into your Stacks search results by leveraging Stacks' EBSCO Discovery Service (EDS) Integration.
- Flipster can be featured throughout your Stacks site using any of the Visual Navigation Aids throughout the platform such as Sliders & Callouts.
- Flipster can be added to Stacks as a Database Listing, enabling dedicated resource title and description-level search, A-Z sort options and more.
- Stacks also supports various methods of SSO access to Flipster content if this is something your institution offers.

## 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.

## Full Discovery API Search

The first search format is full EBSCO Discovery Service 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.

## External Catalog Search

External Catalog Search means Stacks carries the search term through to the Online Public Access Catalog (OPAC) interface. This may be any catalog or OPAC (EDS, Polaris, Sirsi, III, Evergreen, OCLC WorldCat, Koha, ExLibris, Bibliocommons, VuFind, etc.). In the case of "External EDS Native" for example, a search term is entered in Stacks and the patron is taken out to the Native EDS Interface and the search term is carried through, immediately showing results.

If the patron is logged into "My Account" in Stacks, they will be an authenticated EDS visitor and have access to the "Full Text" content without having to login again. If the patron is not logged into "My Account" in Stacks, they will browse EDS as a guest and be required to login when they find a resource they'd like to access the "Full Text". Other OPAC and catalogs will not authenticate on entry. A Stacks search bar can accommodate up to three (3) of these external catalog search configurations at one time. This capability is available without the ILS Integration option.

## Website Search

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

## Stacks Bento Search

The final search format is Stacks 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 bento-style 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.

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. Any combination of the above search methods may be configured with custom labels and the default search type set.

## Stacks Product Comparison

PRODUCT COMPARISON			
Features	Stacks LITE	Stacks CORE	Stacks PREMIUM
Content Management System (CMS)	✓	✓	✓
Customizable Themes	✓	✓	✓
Responsive Design	✓	✓	✓
Integrated Catalog Search	✓	✓	✓
EBSCO Discovery Service™ (EDS) Integration	✓	✓	✓
Maintained SaaS - 99.9% Uptime Guaranteed and Hosting	✓	✓	✓
Authentication Integrations	✓	✓	✓
Database Integration	✓	✓	✓
IP Whitelist	✓	✓	✓
Google Analytics, Translate, Places, Maps	✓*	✓	✓
Granular User Roles with Moderation	✓	✓	✓
Customizable Terminology	✓	✓	✓
Stacks Bento Search	✓	✓	✓
Multi-Domain	✗	✓	✓
Multi-Language	✗	✓	✓
Index Pages	✗	✓	✓
Native Mobile App	✗	✓	✓
Visual Navigation Aids	✗	✓	✓
Room Bookings	✗	✓	✓
Event Management	✗	✓	✓
Research Guides	✗	✓	✓
Reserves	✗	✓	✓
Performance - 99.99% Uptime Option	✗	✗	✓
Integrate Internal Repositories	✗	✗	✓
Collaborative Research Features	✗	✗	✓
Full Project Team	✗	✗	✓
Optional Professional Services eg: Custom Design, Custom Development	✓	✓	✓

## Stacks Mobile

The Stacks Mobile app for iOS and Android offers an industry leading mobile library experience boasting rich integrations and exclusive functionality. Change the look and feel of your website 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 the library's 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 library 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 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 website.

## Description of Senior Stacks Team

Stacks is comprised of a passionate team of library professionals, usability thought leaders, design experts, and software engineers. Together, they have created the Stacks web and mobile platforms. Included in this group is a technical support team, a training and support team and the following senior members:

**Kristin Delwo, President & CEO**, is focused on finding new and better ways to conduct business. She strives to improve efficiencies and make an impact on bottom lines and service delivery through today's mobile technologies. She has been leading award-winning enterprise-scale projects for clients with a team of talented designers, programmers, engineers and software architects. As a former Public Library Manager and Systems Administrator for a large multi-type consortia with over ten years of experience managing library projects, Kristin knows first-hand the challenges libraries face and has built her business around creating solutions that are sustainable, affordable and accessible.

**Chad Smith, Chief Technology Officer (CTO)**, has been building web and mobile solutions for libraries of all kinds since 2009. His company Hybrid Global (formerly Hybrid Forge) led the charge on advancing digital library experiences by influencing vendor APIs and providing thought leadership in the industry. He is a computer engineer with a deep and meaningful understanding of the library technology space. His portfolio includes mobile experiences for the Microsoft Faculty Library, The Alberta Library, Dallas Public Library and many, many more. He has architected dozens of integrations with library products and continues to deliver industry-leading solutions.

**Dennis Bridges, Chief Product Officer (CPO)**, has been working with the Stacks team in a variety of different roles for more than four (4) years. Before Stacks, he was the Director of Operations for Hybrid Global, managing custom development of web software solutions for public, academic and special libraries of all sizes, including large consortia. He holds a Bachelor's Degree in Economics, a Masters of Business Administration and an active Project Management Professional (PMP) designation. Dennis has over ten (10) years of experience in professional services and is driven to provide enterprise level support by building strong relationships with customers.

**Kevin Horek, Chief Design Officer (CDO)**, is a thought leader on responsive design and modern usability. This is evidenced by his radio/television series, Building the Future and his guest blogging on TechZulu. He is a published author and is best known for his work published by Packt Publishing on Zurb's responsive framework, Foundation 5. Kevin studied web development and design at universities across North America, including UCLA and the University of Alberta. For over 20 years, Kevin has been working on web and mobile apps for some of the world's most notable and well respected organizations. Among them are BMW, Best Buy, Apple, Adobe, Sprint, Eastlink, TD Canada Trust, Qantas Airlines, Emirates Airlines, CB Richard Ellis, Cushman & Wakefield and Colliers International. He has also worked with hundreds of libraries such as the prestigious Caltech Library, the Microsoft Faculty Library and Miami-Dade County Public Library System. His design and development projects have won critical acclaim and have been featured by media outlets like Hit Parader magazine. Kevin continues to champion superior user experiences and maintains a relentless focus on achieving this goal in all of his ventures.

**Jesse Meyer, VP, Commercialization**, is a leader and award winner in the fields of marketing, business development and communications. For over 15 years, Jesse has been directly involved with the development of marketing, business development, and corporate strategy for organizations of different sizes. From creating and launching a new brand to developing strategic marketing and business development plans, Jesse enjoys the challenge of working with new businesses and bringing new ideas to life. He holds a Bachelor's Degree in Marketing and International Business and a Masters of Business Administration. Jesse has worked with many diverse organizations across North America in the role of business development, marketing, and communications.

## Customers

Stacks works with customers across from a number of markets. Please visit [www.StacksDiscovery.com/customers](http://www.StacksDiscovery.com/customers) for a comprehensive listing.

## Achievements

Stacks has been recognized for its achievements over the years. Included are the following awards:

- 2018 Modern Library Awards - Platinum
- 2014 American Library Association Award for Collaboration
- 2014 Canadian Library Association Award for Innovation in Technology

## **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 Library, California Institute of Technology (Caltech) Library and Singapore University of Technology and Design (SUTD) Library.

**Timeline** - Stacks can be deployed in as little as three (3) weeks during which training can be provided. Once training is completed, you will need to finalize site information architecture and create content.

**Implementation** - Through consultation, understanding, communication, training 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. Website Set-Up**

A website 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. Training**

Stacks implementation includes the Stacks Academy training program and access to robust support materials. Three (3) training sessions will be held focusing on Administration, Content Editing and Content Best Practices. Training also includes access to user manuals, video tutorials, and the ticket support desk; all part of the comprehensive Stacks Support site that can be viewed at [Support.StackDiscovery.com](http://Support.StackDiscovery.com).

### **4. Information Architecture**

Before accessing the website itself, the Stacks team will provide a reference guide and resource list to help guide the design of a menu structure for the website. This material will help advise on how to create and structure content during training sessions.

### **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 website is populated with content, it's time to launch the new website. 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 Website 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.

### **Training and Support**

Stacks Support Team will contact you after submission to review the tools available to you to administer your Stacks Mobile Apps as well as provide you with Support Desk information and Analytics access. Any final tweaks to your configuration may be done at this time.

## APPENDIX C - Training Program

Stacks provides a training program for all new clients. Included as part of this training program are sessions and a guidebook. Training sessions provide the opportunity for a Stacks trainer to not only introduce the new user to the platform but provide a progressive walkthrough of the platforms features, integrations and how to create your website. These sessions provide an excellent opportunity for Q&A and can be tailored to meet the needs and skill levels of those involved.

Included in each training session is a training guide. This guide is intended as a supplement to each training session and provides a quick reference as to what will be covered, along with links to relevant content within the online manual. At the end of each module are simple exercises to help reinforce topics and content covered.

### Self-Guided Training

The Stacks Training Program is a comprehensive course that walks new customers through the process of website creation with Stacks from project planning and information architecture to technical training and design. The program combines training preparation modules and live training. New customers will go through the training preparation materials in each module and once complete will meet with a trainer for a hands-on review of the content.

The live training sessions are delivered through WebEx and require a computer with a microphone and a speaker so the trainer and customer can speak to and hear each other. Customers can also dial in on the telephone to access the audio portion of the training. More information about how to set up and use WebEx can be found on our WebEx page.

On completion of the Stacks Training Program, customers will receive a certificate.

The program combines training preparation modules and live training sessions. New customers will go through the training preparation exercises in each module and once complete, will meet with a trainer for a hands-on review of the content.

### Stacks Support

Stacks is a cloud-based website 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 both EBSCO Customer Support and the Stacks Support Desk.

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 Support Community today at [support.stacksdiscovery.com](http://support.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 [Support.StacksDiscovery.com](https://support.stacksdiscovery.com) and clicking 'Submit a Request'.

#### **APPENDIX D - Stacks Premium**

Please visit our website at <https://www.stacksdiscovery.com/marketing-materials> for more details.

#### **APPENDIX E - Stacks Professional Services**

Please visit our website at <https://www.stacksdiscovery.com/marketing-materials> for more details.