Appendix B - Notes from Discovery Layer Advisory Meeting 1/27/2021

Meeting Attendance: D. Frandrup (Antigo), M. Pregler(Antigo), S. Maerz (Merrill), D. Kiefer (Merrill), T. Blomberg (Rib Lake), C. Oelrich (Rhinelander), K. Metzke (Greenwood), A. Puestow (Tomahawk), H. O'Hare (Tomahawk), E. Brewster (Three Lakes), A. Hamland (WVLS), R. Metzler (WVLS), K. Zimmermann (WVLS)

Goal: Gathering post demonstration advice and feedback from libraries to make informed decisions.

Please note that the absence of a feature in the 'strengths' listing is not an indication that a feature does not exist, only that it was not discussed as a standout feature. Likewise the absence of a feature in the 'weaknesses' listing is not an indication that the weakness is unique to that discovery product.

Aspen Discovery

Strengths	Weaknesses
- Clean design – easy to navigate interface - New items lists are on the front page - NYT Bestseller lists (API) - Able to pay fines in the discovery layer as well as other user account features in an intuitive way - Very easy to refine searches - Search showed formats and what is currently available in an easy to see way - Feels similar to V-Cat Classic Catalog, but with more features - Placard at the top of the search results can be used to promote events and other resources not in V-Cat catalog (this is customizable by keyword terms). - Has an API for Overdrive - Patron initiated linked accounts for sharing account information - More like this recommendations - Users can save search history - Reading history is opt in and includes Overdrive Titles - Cover images can come from free or subscription sources including Syndetics Classic, Content Café, Google Books, Amazon and OMDB - Additional optional APIs are available: Accelerated Reader, Wikipedia, DPLA, Open Archive - All features are included – no additional costs for add on services - Very customizable - Can index individual library websites and include content in the search results.	- Does not enhance discovery as EDS does by integrating more databases outside of the V-Cat Catalog - EDS integration is needed to search databases outside of the V-Cat catalog. EDS integration is in beta testing. *Post meeting update: EDS integration is now available.* - A Novelist Select subscription is required for series display functionality - No other libraries are currently using both Sierra and Aspen - No other WI library systems are currently using Aspen - Aspen does not have a Gale Courses API

Concerns

- Possible confusion about linked accounts (Linked accounts in the online catalog are distinct/separate from Sierra's linked accounts)
- Is a separate paypal/ecommerce account/fee required to enable payment within the discovery layer?
  Post meeting update: Aspen indicated that a separate paypal/ecommerce account is not necessary.
- Are linked accounts able to see each other's fines?
  Post meeting update: Aspen indicated that yes, linked accounts can see each other's fines reading history (forward from the date of linking) and items checked out.
- Is Aspen able to send an alert to patrons when their account is up for renewal? (What is the advance notice option?)
- Aspen is a new product – only two years old
- Bywater – the company that manages Aspen – may push us to leave Sierra for Koha, or be reluctant to work with Innovative to find solutions when issues arise.

Other Notes:

Aspen implementation takes 9-12 weeks

Ebscohost API is in development to allow access to EBSCOhost databases in the discovery layer without EDS integration.

Ability to "block" Patron reviews from public view based on banned words lists

Bibliocore Discovery

Strengths	Weaknesses
- While you wait features when placing items on hold - Novelist Select or Library Thing for recommended readalikes - Keyword searches trigger curated lists shared across all Bibliocore libraries (these lists and keywords are not customizable) - Ability to place holds on Overdrive titles without leaving the discovery layer - Easy to navigate - Content is created by a community of all Bibliocore libraries and users – booklists already created by others are shared and V-Cat libraries and users will also be able to create and share - Easy to integrate booklists into websites - Mobile friendly product	- Additional cost for fine payment service - Additional cost for cover art – Syndetics or Content Café. - Must create a user account separate from library card number/pin to place holds or "use" the system - Series search relies solely on MARC data - Overdrive titles do not appear in reading history - Not a very customizable product – and the company may not be receptive to suggested changes - Individual library themed pages cost extra - Extra cost to allow individual location limiters to only show items the library owns or holdable items in the collection - New titles lists will show content across consortium if the individual location limiters are not in place - Clicking download for digital items downloads on the active device and there is not an option to deliver to other device - Reviews are shared across all Bibliocore users and are not local only - Few database integration options

Concerns
- Privacy concerns due to social media integration and some public by default settings   - Shelf/lists are public by default   - There is very little control over review content (A centralized review process occurs after 3 complaints about a single review. Decisions are final and reviews are not reconsidered a second time.)   - Cost of customization for individual library themed pages and collection views

Other Notes:

May possibly have the ability to offer a research drop down or link out to other resources

Integration takes 6 months

IFLS library system is using Bibliocore and would be able to partner with for tutorials, troubleshooting and implementation.
Post meeting update: OWLSNet will be adding Bibliocore Discovery layer in 2021.

Pika Discovery

Strengths	Weaknesses
- Good FRBR Record Grouping -matching records are grouped by author, title, language, type - Browse Lists can be made and shared: staff picks/lists, book clubs, individual users - Overdrive API integration - Carousel links for websites available and will go directly to catalog - Can sideload Gale Courses - Series suggestion "others in this series" - Customizable pages by library (Note this does not cost more) - Designed by library directors and staff - Pika's website embed design is really good - Uses Sierra's loan rules to limit the "new" and "holdable" items patrons see to locally holdable items - A consortium of members and not a for-profit company - member driven and values member participation for product improvements - Partial novelist subscription is included to power series information - Reading history is opt in and includes overdrive titles - Users can delete individual items from their reading history list - Bento-box look and design - Possible to offer a resources link out to other databases such as WISCAT or Badgerlink - Very customizable - User initiated linked accounts	- Fewer APIs currently available than Aspen - Does not enhance discovery as EDS does by integrating more databases outside of the V-Cat Catalog. - EDS search bento box exists, but does not have full functionality
Concerns	
Possible concern over confusion of linked accounts on Pika not being the same as linked accounts on Sierra	

Other Notes:

Northern Waters Library System is implementing Pika second quarter 2021 and would be able to partner with implementation, troubleshooting and tutorials.

Implementation takes 3 months

After the individual product discussions, those in attendance was asked to vote for 2 preferred layer choices:

Aspen: 9 votes
Bibliocore: 1 vote
Pika: 9 votes
Other discovery layers not yet reviewed: 1