

September 4, 2024

Thank you for inviting BiblioCommons to demonstrate the features and functionality of BiblioCore for the South Central Library System as part of your Discovery Layer Evaluation. As requested, the demo will address the items listed in the demo checklists provided with exceptions noted below. The items that have been omitted fall into one of the following categories:

- The item is part of the implementation process and not a staff function.
- BiblioCore does not allow for this functionality.
- The item is related to a separate module and not part of a BiblioCore demo.

All checklists are included in this document with notes wherever the item will not be shown during the demo. For the items that are part of a separate module (BiblioApps), we can schedule a second demo to highlight this functionality.

Please reach out with any questions that come up and we will be happy to address them.
Thank you!
Susan & Erik

DL1: Discovery Interface Customization

- Customizing display of bibliographic data - **Implementation**
- Suppressing certain bibliographic data from patron view - **Implementation**
- Customizing indexes for patrons - **Implementation**
- Modification options for patron "help" screens – **Not available in BiblioCore**
- Customization/Branding per library
- Language options for Discovery Layer display
- Custom index, search limits, and sorting based on fixed fields of MARC record - **Implementation**
- Custom index, search limits, and sorting based on non-fixed fields of MARC record - **Implementation**
- Custom index, search limits, and sorting based on item/holdings record fields - **Implementation**
- Custom index, search limits, and sorting using standard Boolean operators - **Implementation**

DL2: Discovery Display Features

- Display bibliographic records for print books.
- Display bibliographic records for a downloadable e-book and e-audiobooks
- Display a bibliographic record for an audiobook
 - Vendor should show bibliographic record for audiobooks in different formats, including books on CD and digital audio players (such as Playaways), and audio-enabled books (such as Wonderbooks).
- Display a bibliographic record for video recordings
 - Vendor should show bibliographic records for video recordings, such as DVDs, Blu-rays, 4-K.
- Clickable authority-controlled links in bibliographic records
 - Vendor should demonstrate clickable authority-controlled links in bibliographic records, such as author, subject, and series.
- Clickable links in bibliographic records that aren't authority-controlled, including e-book records and website links in bibliographic records
 - Vendor should demonstrate clickable links in bibliographic records that are not for authority-controlled headings.
- Opening clickable links in new browser tab
 - Vendor should demonstrate opening links in a new browser tab, for example, by right-clicking and choosing Open in New Tab.
- Discuss Enriched Content
 - Vendor should discuss (and show if possible) options for enriched content (e.g. cover art).
- Display of number of holds
 - Vendor should show where the number of holds on each bib is displayed. Are both the number of active and suspended holds displayed?
- Display of number of items/holdings
 - Vendor should show where the number of items/holdings on each bib is displayed.

- Display of Items with different statuses
 - Vendor should show how different item/holding records with different item statuses display, such as checked out, in transit, on hold shelf, on order, damaged. Vendor should display item/holdings with the "Available" status (e.g. the item is on shelf and ready for checkout/holds). Is there an option to display a status that notes when an item is only available for holds at its owning library?
- Display of Items that are on display
 - Vendor should show how items that are on display will appear. Can an item/holdings record be set to a temporary "display" status? For example, item A is owned by NNN library, but is currently on display at TTT library.
<https://librarypoint.bibliocommons.com/v2/record/S72C639183>

DL3: Discovery Patron Empowerment

- System parameters for bibliographic and item level holds
 - Vendor should show how we can set parameters so patrons place bibliographic level holds on all materials, while allowing item-level holds only on magazines.
- Placing holds on one bibliographic record
 - Vendor should show how a patron can place holds on one bibliographic record.
- Placing holds on a group of bibliographic records
 - Vendor should show how a patron can place holds on a group of bibliographic records.
- Placing Item-level holds on a magazine (specific issue selection)
 - Vendor should show how a patron can place item-level holds on a magazine, or a holds process that allows patrons to select an issue (e.g. September 2023 issue). [Search | Chicago Public Library | BiblioCommons](#)
- Making an individual hold active or inactive
 - Vendor should show how a patron can make one hold at a time active or inactive.
- Making a group of holds active or inactive
 - Vendor should show how a patron can make a group of holds active or inactive.

- Adding Notes to holds – **Not available in BiblioCore**
- Canceling one hold at a time
 - Vendor should show how a patron can cancel one hold at a time. Does the patron get a confirmation message before the hold is cancelled?
- Canceling a group of holds
 - Vendor should show how a patron can cancel a group of holds. Does the patron get a confirmation message before the holds are cancelled?
- Changing pickup location on one unfilled hold
 - Vendor should show how a patron can change the pickup location on one unfilled hold (if not In Transit or Waiting on Hold Shelf).
- Changing pickup location on a group of unfilled holds
 - Vendor should show how a patron can change the pickup location on a group of unfilled holds (if not In Transit or Waiting on Hold Shelf).
- Auto-placing holds for bibliographic records that meet certain parameters – **Not available in BiblioCore**
- Renewing one checked out item
 - Vendor should show how a patron can renew checked out items one at a time.
- Renewing a group of checked out items
 - Vendor should show how a patron can renew a group of checked out items.
- Sorting active and suspended holds
 - Vendor should show sorting options for active holds and suspended holds. If the holds priority is displayed, can patrons sort by priority? Can patrons set their own default sort?
- Sorting checked out items
 - Vendor should show sorting options for checked out items.

- Title (245) display for patron lists of checked out items, active holds, and suspended holds
- Customization options for patron lists of checked out items, active holds, and suspended holds - **Implementation**
- Updating patron account info
 - Vendor should show how a patron can update their account information, including phone number and email address.
- System parameters for updating patron account info
 - Vendor should show how we can set permissions so patrons cannot change their phone number without contacting the library. Could this be a per-library setting or is it global?
- How to change PIN/password
 - Vendor should show a patron can change their PIN or password. – **add screenshots.**
- How to retrieve PIN/password or generate new PIN/password
 - Vendor should show options for retrieving a password or generating a new password when a patron doesn't know their password.
- Setup options for reading/checkout history
 - Vendor should show setup options for reading/checkout history - how can we set default to OFF?
- Turning reading/checkout history on or off
 - Vendor should show how patrons can turn their reading/checkout history on and off. When patrons turn their reading/checkout history off, is the entire reading/checkout history deleted from the system?
- Editing reading/checkout history
 - Vendor should demo how patrons can edit their reading history (e.g. delete certain entries), if they can edit the reading history.
- Searching and downloading options for reading/checkout history
 - Vendor should show whether patrons can search their reading/checkout history, as well as whether they can download their reading history in an Excel-readable format.

- Online patron registration – **Not available in BiblioCore**
- Saving items to carts and/or lists
 - Vendor should show options for saving titles to a "cart" and/or "list" for current and future use.
- Management/features of lists
 - Vendor should show management features of a patron "list" (e.g. adding and deleting items, printing and downloading, placing holds).
- Ability to view and manage child/family accounts - **Not available in BiblioCore (this functionality can be used in BiblioApps)**

DL4: Discovery Searching

- Demo a Full keyword search
- Demo a Known title search
- Demo a Partial title search
- Demo an Author search
- Demo Author "see" cross reference search
 - Vendor should demo a "see" reference search, when an author/artist goes by multiple names, but one name is used as a main entry (e.g. Sean Combs and Puff Daddy are "See" references for Diddy, so searching Sean Combs should point you to Diddy). (show Richard Bachman)
- Demo Author "see also" cross reference search
 - Vendor should demo a "see also" reference search, when an author/artist goes by multiple names, but both names may be used as a main entry (e.g. Richard Bachman is "See also" reference for Stephen King).
- Demo search for a TV series on DVD or Blu-ray
 - Vendor should demo a search for a TV series, where patron wants to find discs for a particular series from a particular season (e.g. Girls season three; Game of

Thrones season five) for a particular format, such as Blu-ray. Also, for example, if patron enters the number "3" in the search, will the system find the title if "three" or "third" is spelled in the title of the bibliographic record. (Big Bang Theory Second season, 2nd season)

- Demo a Book series search
 - Vendor should demo a search for a book series, where patron wants to find all books in a series (e.g. Earthsea (Le Guin); Judy Moody (McDonald)).
- Demo a browse index searching
 - Vendor should demo how to do browse index searching for author, title, series, subjects (if available).
- Demo a search using multiple search menus
 - Vendor should demonstrate a search using multiple search menus, such as basic search, advanced search, etc. (guitar not bass?)
- Demo a multi-index search
 - Vendor should demonstrate a search using multiple indexes, such as author and title.
- Demo a search that normalizes the use of stop words and contractions
 - Vendor should demonstrate a search where stop words such as The, A, An are used as well as contractions. For example, patrons enter Dont and the system acknowledges it as Don't.
- Demo standard Boolean operators (and, or, not)
 - Vendor should demonstrate the use of AND, OR, NOT as part of a search. (only in advanced search – guitar not bass)
- Demo proximity searching (near)
 - Vendor should demonstrate how to do a proximity search (NEAR), such as 'wonder NEAR woman' or something similar (find records where the word 'wonder' is close to the word 'woman').
- Demo phrase searching
 - Vendor should demonstrate how to search for an exact phrase, such as "wonder woman"

- Demo wildcards and stemming (for truncation)
 - Vendor should demonstrate the use of wildcards and stemming to truncate words. For example, womn finds either woman or women. Another example would be nap? find snaps or napping. (advanced search only)
- Demo relevance ranking
 - Vendor should do a search and demonstrate the relevancy ranking of the search results. How is the relevancy ranking determined? **(See below)**
There are four primary contributors to the relevancy score.
 - The **fields matching** query terms are indexed in
 - The **weighting** of each of these fields
 - The **character** of each field match relative to the user query
 - The **popularity** of a matched result*Each of these interact with each other to create a composite relevancy score.*
- Demo facets for limiting a list of search results
 - Vendor should demonstrate how facets can be used to limit search results, such as limiting by a particular format, author, owning library, etc.
- Demo sorting options for a list of search results
 - Vendor should demonstrate how to sort a list of search results, as well as the different sorting options available (such as publication date, author, etc.). Can the sorting options be customized?
- Demo changing the number of results per page
 - Vendor should demonstrate how to customize the number of search results shown per page.
- Demo "Did you mean..." spell checking
- Suggestions for other title? (If you like this, you might also like...")
 - Vendor should demonstrate options for suggesting similar titles, such as the same title in another format (large print, audiobook), titles by the same author, titles with similar content, etc.
- Option to limit search to "available items"
- View search history within session - **Not Available in BiblioCore**
- Options for saving custom searches to patron account

- Vendor should describe and/or demonstrate how the patron can save custom searches to their patron account, so they can log in and run the search again.
- Options for emailing a list of search results
 - Vendor should describe and/or demonstrate how the patron can email a list of search results.
- Demo navigation through search results list
 - Vendor should demonstrate how the patron can navigate through the search results list, such as going to the Next and Previous records, jumping to the beginning and end of the list, etc. Are navigation options available at the top of the search results page, the end, or both?
- Show what happens when no search results are found
 - Vendor should demonstrate what happens when no search results are found.
- Is there a limit to the maximum number of items retrieved by search?
 - Vendor should discuss whether there is a maximum number of hits that will be returned in search results list.
- Discuss and/or demo integration with OverDrive
 - Vendor should describe and/or demonstrate how OverDrive is integrated into the PAC. For example, can patrons see the availability, number of holds, etc. from the PAC without clicking through to OverDrive?
- Discuss and/or demo integration with databases
 - Vendor should describe and/or demonstrate how databases can be integrated into the Discovery Layer (e.g. Ebsco, Proquest).

DL5: Responsive design, accessibility, and *the mobile app**

- Demo responsive design for smaller screens
 - Vendor should demonstrate how the Discovery Layer will automatically re-size based on the size of the screen, including both tablet and phone-sized screens.
- Demo searching and placing holds when on small screen
 - Vendor should demonstrate searching and placing a hold on a small screen. Are the display features available in the large screen retained? Is anything lost?

- Demo management of checked out items and holds on a small screen
 - Vendor should demonstrate the management of checked out items and holds (for example, renewing items and making holds active/suspended). Are the display features available in the large screen retained? Is anything lost?
 - Demo accessibility features in the Discovery Layer
 - Vendor should demonstrate accessibility features in the Discovery Layer. How can users increase contrast and make text larger?
 - Demo how you can navigate and perform account tasks in the Discovery Layer using only the keyboard
 - Vendor should demonstrate how to navigate the Discovery Layer using only a keyboard, as well as how to perform tasks such as renewing items, placing holds, performing searches using only the keyboard.
 - Discuss how the Discovery Layer meets accessibility standards for screen readers
 - Vendor should discuss how the Discovery Layer is accessible to users who use a screen reader.
 - Discuss whether the Discovery Layer can be used with older browsers and computers.
 - Vendor should discuss the minimum versions for browsers and computers. Can patrons with older devices still use the Discovery Layer? ****see additional document.**
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*** Will send overview of BiblioApps with screenshots and available videos – BiblioApps is an add-on for BiblioCore**

- Demo mobile app
 - Vendor should demonstrate the Discovery Layer's mobile app. Is the app available in Apple and Android versions? What is the minimum operating system version necessary for the mobile app?
- Demo display of bibliographic and item/holdings records in the mobile app
 - Vendor should demonstrate the display of bibliographic and item/holdings records in the mobile app? Is there any information available in the full Discovery Layer that is not available in the mobile app display?
- Demo searching and placing holds using the mobile app
 - Vendor should demonstrate searching and placing a hold on the mobile app. Are the display features available in the Discovery Layer retained? Is anything lost?
- Demo management of checked out items and holds the mobile app
 - Vendor should demonstrate the management of checked out items and holds in the mobile app. Are the features available in the Discovery Layer retained? Is anything lost?

- Demo patron list features in the mobile app
 - Vendor should demonstrate the any patron "list" features in the mobile app. Are patron lists that are available in the Discovery Layer also available to the patron via the mobile app?
 - Demo ability to view and manage child/family accounts in mobile app
 - Vendor should show how patrons can view and manage child/family accounts in the mobile app. For example, can a parent view and manage their child's checked out items and holds while logged into the parent's account?
 - Demo and/or discuss patron logins and the mobile app
 - Vendor should discuss whether the patron login can be retained in the mobile app so patrons don't have to continue to log in over and over when using the mobile app on their personal devices. Can this feature be turned on and off by the patron or by the sys admin?
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DL6: Discovery Statistics/Miscellaneous

- Discuss options for global search statistics
 - Vendor should discuss and/or show options for generating global search statistics for the Discovery Layer.
- Discuss options for search statistics by library
 - Vendor should discuss and/or show options for generating search statistics by library.
- Discuss options for log of search queries
 - Vendor should discuss and/or show how a log of search queries can be generated (for example, we could get data on the search terms that patrons use).
- Discuss options for integration with Google Analytics or other website statistics and tracking products
 - Vendor should discuss whether the Discovery Layer integrates with Google Analytics or any other web statistics products
- Separate index (for newspapers)
 - Vendor should discuss how a separate index could be integrated or linked to the online catalog (e.g. an index of local newspaper clippings).
- Generating lists of new titles
 - Vendor should discuss options for automatically generating customized lists of new titles (e.g. Don't Miss Lists, New This Week list).
- Please enter any additional comments on Statistics.

- Please enter any additional comments on the Other Miscellaneous features (newspaper index, new titles list).