2022 ILS Marketplace Evaluation

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Introduction

At ALA Annual 2022, Margie Navarre-Saaf (MAD), Vicki Teal Lovely (SCLS), and Amy Gannaway (SCLS) met with representatives from SirsiDynix and Polaris to review progress since 2017 on browser-based functionality. We also briefly talked to representatives from TLC.

Prior to ALA Annual, SCLS staff met virtually with representatives of Bywater Solutions, which supports Community Koha. We were able to try their demo site of Community Koha and review their documentation.

Summary of findings

Polaris

The web-based software, Leap, is now available for all modules. We focused on circulation and holds functionality in our meeting. While Leap has made progress since 2017 and has circulation functionality such as proxy borrowing, it still requires the use of Active Directory, which would require further investigation. Setting up and maintaining Active Directory may take extensive work on the part of the Technology Team. In addition, while Leap does have the capacity to manage reduced transportation holds, it does not have the "threshold" setting, which we set at 60 days. Polaris staff stated that it would not be difficult to add this threshold as a parameter, however.

SirsiDynix

The web client for the Symphony Workflows software, SymphonyWeb, has been completed and has the same functionality as the Workflows client. The SymphonyWeb software supports Active Directory, but does not require Active Directory, so it would be easier to administer for the Technology Team than Polaris Leap. SymphonyWeb has also made progress since 2017 and has functionality such as proxy borrowing and family cards. However, the SymphonyWeb software also did not have the "threshold" setting as part of its hold management functionality. In addition, SirsiDynix is still in the process of adding a history of patron notifications in an accessible form, and the patron edit/block history can only be accessed by running a report.

TLC

We didn't schedule a meeting with TLC, but we stopped by the booth and talked to TLC representatives. TLC has two products: Library Solution and CARL Solution. While Library Solution is fully browser-based, it is structured for smaller libraries and wouldn't scale to our needs. CARL Solution is for larger libraries, but it is not yet fully browser-based. TLC told us that they are working to make CARL fully browser-based, but that it would be several years before that is completed.

Bywater Solutions

SCLS staff tried out Community Koha on the Bywater demo site, and we found that Community Koha is lacking much of the consortial functionality that we depend on. It would be very challenging to use the

Community Koha Acquisitions in a consortial environment, because the library-specific information is not separated out very well. The permissions for other technical services functions in Cataloging and Serials were not broken out per library. While there are consortia who are using Community Koha, they are consortia composed of very small libraries and aren't comparable to the LINKcat libraries overall.

Recommendation

The group recommends that we do not move forward with an in-depth ILS investigation at this time. While there have been improvements in the ILS software since we did a comprehensive review in 2017, nothing in the vendor meetings was compelling enough to warrant an investigation. An ILS investigation would take up the time of all ILS staff for the entire year, and for involved library staff, it is also a major time commitment.

Moving forward, SCLS staff will create a schedule that sets up a system for regularly reviewing the ILS marketplace, as well as the marketplace for third-party projects, such as Discovery Layers, enhanced content, mobile apps, and self-checks. SCLS staff and interested library staff will check in with vendors at conferences such as PLA and ALA. In addition, SCLS staff will also continue to work with LibLime on fixing priority bugs and functionality such as proxy borrowing.