## INTRODUCTION

The 2024-25 ILS evaluation process included vendor demonstrations for the Discovery Layers listed below (other than Bibliovation). In addition, we submitted follow-up questions to the vendors after the vendor demos, as well as reviewed online catalogs from other libraries.

## REFERENCE DOCUMENTS

Discovery Layer

## SYSTEM REVIEWS

### Polaris

The vendor demonstrations featured Polaris Vega.

Pros
- Title-level "rollups"
- Mobile app supported by Polaris
- Built-in accessibility options supported by vendor
- OverDrive integration allows patrons to see availability and checkouts from Discovery Layer
- Volume-level holds for magazines
- Automated "Forgot password" option for patrons
- Spell checking/"did you mean" feature available
- Predictive text when searching available
- Multiple non-English interface language options
- Extensive vendor documentation and support
- User Group available
- Each library catalog can have a different theme or subsection called "Scoping," for example Kids Catalog, Genealogy Catalog, Large Print Catalog, etc.

Cons
- Numbers didn't normalize when typed as search terms (e.g. 13 for thirteen)
- Options for customizing MARC are unclear
- Did not demo sorting, custom indexes, search limit options
- Limited sort options at this time, although more are planned
- Unclear how patrons can differentiate between translations with rollups
- Unclear as to how well item statuses display to patrons
- At time of demo, no option to batch renew checkouts, or suspend/re-activate holds, although this is planned
- Family portal is still in design stage
- Switching to "rollup" display may require extensive bib cleanup/changes
- Switching to "rollup" display may require more extensive patron re-training/educating
- Suspended holds not included in total holds count in Discovery Layer
- Holds require an "Active" date if staff are placing holds for patrons; however, patrons can indefinitely "Freeze" holds in Discovery Layer

### SirsiDynix

The vendor demonstrations featured SirsiDynix Enterprise.

Pros
- Mobile app supported by SirsiDynix

- With BlueCloud Discovery and BlueCloud Mobile2, mobile app and Discovery Layer will have same administrative interface, although this may not be in place by a go live date
- Many options for interface customization, including per-library branding customization
- Built-in accessibility options supported by vendor
- OverDrive integration allows patrons to see availability and checkouts from Discovery Layer
- Volume-level holds for magazines
- Automated "Forgot password" option for patrons
- Spell checking/"did you mean" feature available
- Predictive text when searching available
- Ability to search and download patron reading history
- Multiple non-English language interface options
- Extensive vendor documentation and support
- User Group available, including a consortia-specific User Group
- Family/linked accounts

Cons
- Working on new Discovery Layer (BlueCloud Discovery), which we haven't seen
- BlueCloud Mobile2 mobile app is still very new
- No title-level "rollups" (coming in BlueCloud Discovery) (there are options to collapse formats)
- Suspended holds not included in total holds count in Discovery Layer

## Aspen

The vendor demonstrations featured Aspen Discovery.

Pros
- Title-level "rollups"
- Mobile app supported by Bywater
- Ability to integrate non-book content into the Discovery Layer (e.g. events)
- Built-in accessibility options supported by vendor
- Options for per-library branding customization
- Linked accounts for child/family available
- Spell checking/"did you mean" feature available
- Predictive text when searching available
- OverDrive integration allows patrons to see availability and checkouts from Discovery Layer
- Multiple non-English language interface options

Cons
- Unclear as to how to customize MARC field display
- Format limiting challenging to do before searching
- Unclear how patrons can differentiate between translations with rollups
- Have to drill down multiple levels to find item level information, including statuses
- Switching to "rollup" display may require extensive bib cleanup/changes
- Switching to "rollup" display may require more extensive patron re-training/educating
- Back-end management of patron reading history would be complex due to interaction between ILS and Discovery Layer

## Bibliocommons

The vendor demonstrations featured BiblioCommons.

Pros

- Title-level "rollups"
- Mobile app supported by Bibliocommons
- Built-in accessibility options supported by vendor
- OverDrive integration allows patrons to see availability and checkouts from Discovery Layer
- Multiple non-English language interface options
- Spell checking/"did you mean" feature available
- Predictive text when searching available

Cons
- Unclear as to how to customize MARC field display
- Unclear how patrons can differentiate between translations with rollups
- Cannot place holds on group of titles, only one at a time
- Child/family accounts only available in the app
- Switching to "rollup" display may require extensive bib cleanup/changes
- Switching to "rollup" display may require more extensive patron re-training/educating
- Back-end management of patron reading history would be complex due to interaction between ILS and Discovery Layer

## Bibliovation

We did not have a vendor demonstration for Bibliovation. Assessments are based on our current experience of the software.

Pros
- Would not require patron re-training/education

Cons
- Lacks usable spell checking or "did you mean" feature
- Lacks option for predictive text when typing search terms
- Lacks OverDrive integration
- Lacks title-level rollups and other material display options
- No mobile app supported by LibLime
- No options for non-English language interface
- Lacks built-in accessibility features supported by vendor
- Per-library branding options are limited
- Display customization requires CSS and Javascript knowledge
- Vendor documentation is sparse and support is limited, especially for Display customizations
- No volume-level holds for magazines
- Automated "Forget password" option for patrons requires additional development
- No option to search or download patron reading history
- Child/family accounts not usable for patrons

## RECOMMENDATION

While each system has several pros and cons, the workgroup is especially interested in features such as:

- Netflix-style display and ability to customize display
- Non-English language interface options
- Family/linked accounts, usable by patrons
- Spell-check and predictive searching

- OverDrive integration so patrons can view OverDrive checkouts/holds from their library account along with checkouts/holds for physical items
- Automated "Forgot password" functionality
- Mobile app and digital library card with similar functionality as browser-based Discovery Layer

Based on the system pros and cons and the above features, the workgroup recommends eliminating Bibliovation and Bibliocommons from consideration. Bibliovation either lacks the above features, or the feature is not usable without additional software development. While Bibliocommons does include the above features, there are some limitations. For example, with Bibliocommons, some features, such as linked/family accounts, are only available via the mobile app.

Workgroup members are split on which Discovery Layer to recommend as a top choice. The system with the most votes is SirsiDynix Enterprise, and Aspen Discovery is in second place. Polaris Vega has the least support. However, one person preferred Vega. Others stated that either Enterprise, Aspen, or Vega would work. Vega is the newest Discovery Layer, and at the time of the demo it was missing some functionality such as bulk holds and renewals. By the time we would migrate to a new system, more functionality would be available in Vega. While SirsiDynix Enterprise and Aspen Discovery are preferred over Polaris Vega, it's likely that Enterprise, Aspen, or Vega would meet our needs.