Discovery Platform Evaluation: Platform Survey

Overview

The SWAN UX team is conducting an evaluation of the current landscape of online catalog (OPAC) and discovery platforms. The goal of this evaluation is to establish a shared understanding of the options available to our consortium and determine the future direction of our online catalog.

The first phase of this evaluation is a survey of all available discovery platforms, with an initial evaluation of each against a set of inclusion and exclusion criteria. These criteria determine if the platform deserves further evaluation in the next phases of our research.

Survey

The following sources were reviewed to gather a comprehensive list of discovery platforms.

> Best library automation software | 2019 reviews of the most popular tools & systems. (n.d.). Retrieved from https://www.capterra.com/library-automation-software/
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> Library systems report 2018. (2018, May 1). American Libraries Magazine. Retrieved from https://americanlibrariesmagazine.org/2018/05/01/library-systems-report-2018/
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> Library systems report 2019. (2019, May 1). American Libraries Magazine. Retrieved from https://americanlibrariesmagazine.org/2019/05/01/library-systems-report-2019/

These platforms were evaluated against the following criteria:

Inclusion criteria

- Available for use or sale in the U.S. (with implementations for U.S. based customers)
- Web based
- Responsive catalog or mobile site (apps are not a factor in inclusion)
- Federated search of circulating physical materials and e-resources
- Live implementations for consortia

Exclusion criteria

- Systems primarily for museums, schools, special libraries or special collections, or academic libraries – the system must be designed to handle a large volume of holds in a large consortium with a majority of public libraries
- Systems primarily for a single-site library or libraries with collections under a set threshold
- Systems no longer supported by the vendor, or under active development if open source (must have been updated in the past year)

Platform	In Use in SWAN	Include	Exclusion Reasons	Vendor
Enterprise/Portfolio	x	yes		SirsiDynix
WorldCat Discovery	x	yes		
Aspen		yes		Open Source
BiblioCore		yes		Bibliocommons
Encore		yes		III
Evergreen OPAC		yes		Open Source
Koha OPAC		yes		Open Source
Polaris Discovery		yes		III
SearchIt/ShareIt & Verso		yes		Auto-Graphics
AquaBrowser		no	Not responsive	ExLibris/ProQuest
Iguana		no	For individual libraries	Infor
EDS	x	no	For academic libraries	EBSCO
Primo		no	For academic libraries	ExLibris/ProQuest
Summon		no	For academic libraries	ExLibris/ProQuest
VuFind		no	For academic libraries	Open Source
Blacklight		no	For special collections	OpenSource
AbsysNET		no	Not available in the U.S.	Baratz
Accessit Library		no	For school libraries	Accessit Library
Alexandria		no	Not responsive	COMPanion
Apollo		no	Only serves public libraries with fewer than 300,000 items	Biblionix

Atriuum	no	Not responsive	Book Systems
Aura	no	For Dutch school libraries	Aura Software
Axiell	no	For museums and special libraries	
Capita	no	Not available in the U.S.	
Code Achi	no	Only supports up to 3,000 members	Code Achi
Destiny Library Manager	no	For K-12 schools	Follett
Easylib	no	Found no evidence of consortia customers	Easylib
Eloquent Library	no	For special, corporate, legal, and medical libraries and school districts	Acquired by Lucidea
EOS.Web	no	For special libraries	SirsiDynix
Evolve Library	no	Found no evidence of consortia customers	Infovision Software
eXtensible Catalog	no	Does not seem to be in active development	Open Source - CARLI
Franklin	no	Is now built on Blacklight	Open Source - University of Pennsylvania
Genesis G4	no	No consortia customers	Library Resource Management Systems
Insignia	no	Not responsive	Insignia Software
KLAS	no	Not responsive	Keystone Systems
Knowall Matrix	no	For legal, college, and healthcare libraries	Bailey Solutions
Libero	no	Not available in the U.S.	Insight Informatics
Liberty	no	Found no evidence of consortia customers	Softlink America
LibGuru	no	Found no evidence of consortia customers	Spring TIme Software

Lib-Portal	no	Not responsive	IP-DOT
Librarian WebOPAC	no	No U.S. customers	CR2
Library World	no	Found no evidence of consortia customers	Library World
LiBRARYSOFT	no	Found no evidence of consortia customers	LiBRARYSOFT
LIBSOFT	no	Does not seem to be in active development - online demo has a runtime error	Environ Infotech
LibSys7	no	Not web based	LIBSYS
LS2PAC	no	Not responsive	TLC
Mandarin M5	no	Not responsive For school libraries, special libraries, small public libraries	Mandarin Library Automation
Oliver V5	no	For K-12 school libraries	Softlink
OPALS	no	For school and religious libraries	Open Source
PC Card Catalog Concept III	no	For small to midsized libraries	Library Concepts
Pika	No	No longer in development, Marmot did not accept SWAN as a discovery partner	Open Source (Marmot)
Prima	no	Not available in the U.S.	
Research - The Knowledge Hub	no	Does not include physical items	Reademption
ResourceMate	no	For religious libraries, schools, non-profits, museums, prisons, professionals, corporations	Jaywil Software Development

Reword - The Library Hub	no	For K-12 school libraries	Reademption
ROVAN LMS	no	For school libraries	Rovan
SLIM21	no	For special and academic libraries, no consortia or public customers	Algorhythms Consultants
SNAP	no	Found no evidence of consortia customers	Tek Data Systems
Soutron	no	For corporate, special libraries & archives	Soutron
Surpass Safari	no	Not responsive For school libraries	Surpass
Sydney Enterprise	no	For special libraries	Lucidea

Next Steps

The Discovery and User Experience Advisory Group will conduct a System Usability Scale (SUS) against the platforms that met inclusion criteria. Based on the scores from this exercise, the top 3-4 platforms will be evaluated against the Discovery Platform Feature Matrix.

The Discovery Platform Feature Matrix is a weighted matrix template, which lists important features or goals and assigns a 'weight' based on importance. DUX has already assigned weights to a comprehensive list of discovery platform features. The possible scores are as follows:

- 0 - Not important at all
- 1 - Of little importance
- 2 - Of average importance
- 3 - Very important
- 4 - Absolutely essential

Each platform will then receive a score for each feature, based on if it meets, doesn't meet, or "sort of meets" the requirement:

- 0 - Not present or unknown
- 1 - Future release
- 2 - Partial functionality
- 3 - Full functionality

The weight and score will be multiplied, resulting in a weighted score for each feature and each discovery platform. In addition, features are grouped into categories so we can more easily compare the score for broader categories of features (e.g. which platforms score higher for mobile experience, eResource integration, etc.)

It is important to note that this is a qualitative research method that provides a structure for conversations about the potential features available in different discovery systems. A platform that receives the highest score may not necessarily be "the best" platform. However, the scores will be a valuable decision-making tool for the consortium to determine the future direction of our discovery platform.