ILS Marketplace – What's Up?

Lori Bowen Ayre, Galecia Group
John Thill, Napa City-County Library
Califa Vendor Fair
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There's Good News & Bad News

Good News

- Open source ILSs are gaining momentum
- Alternatives to the "ILS" are emerging
- Traditional ILS vendors are responding to the need for "open" systems

Bad News

- ILS market is still cannibalistic
- ILS market is still too small
- There's no free lunch
- ILS migrations are hell

ILS Choices 2010/2011

http://www.librarytechnology.org/ils-turnover.pl?Year=2010
http://www.librarytechnology.org/ils-turnover.pl?Year=2011

	2010	2011
Evergreen	198*	90
Koha	157	171*
SirsiDynix	60	106
AgentVerso	83	3
Millennium	33	17
Library.Solution	30	33
CARL	3	28
Polaris	37	153

Open ILSs are gaining momentum

GOOD NEWS

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Evergreen/Koha Updates

- Evergreen
  - Becomes member of Software Freedom Conservancy
  - #1 choice for libraries in 2010
  - #4 choice in 2011
  - still short on support providers
- Koha
  - 150th “committer”
  - #2 choice for libraries in 2010
  - #1 choice for libraries in 2011
  - Liblime Koha vs. Koha Koha still problematic

Koha Libraries in California

- Arcadia Public Library
- California Institute of Integral Studies
- Jung Institute
- Los Gatos Public Library
- New Haven School District
- NorthNet Library System
  - Trinity County Library
  - Plumas County Library
  - Orland Library
  - Del Norte County Library
- Pacifica Graduate Institute
- Palo Alto University
- Samuel Merritt College
- San Benito County Library
- Wright Institute

Evergreen Libraries in California

- William Jessup University

Evergreen is still short on support providers

BAD NEWS

ILS market is too small and cannibalistic

BAD NEWS

ILSs Abandoned in 2010/2011

(http://www.librarytechnology.org/ils-turnover-reverse.pl?Year=2011 and http://www.librarytechnology.org/ils-turnover-reverse.pl?Year=2010)

)

	2010	2011
SirsiDynix	278*	346*
Koha Liblime	7	90
Millennium	42	6
Carl	6	28
Evergreen	0	0

Alternatives to the traditional ILS are emerging

GOOD NEWS

OCLC WMS

- WMS = Web Scale Management Service
- Leverages Worldcat
- Allows for shareable data between OCLC members
- Web-based
- Built on cooperative platform (Web+OCLC)
- Leverages e-resources management capability

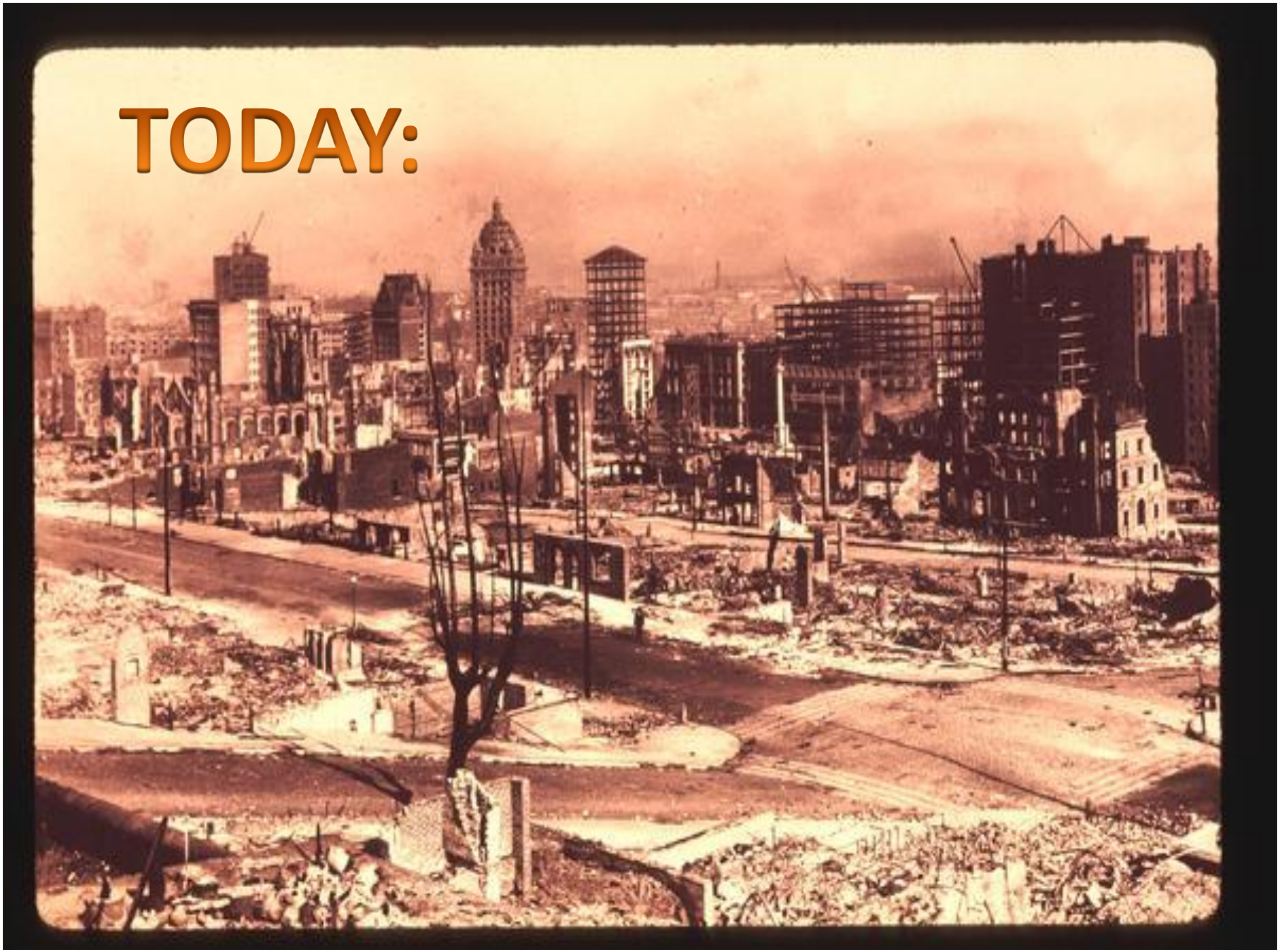
Traditional ILS vendors are responding to the need for “open” systems

GOOD NEWS

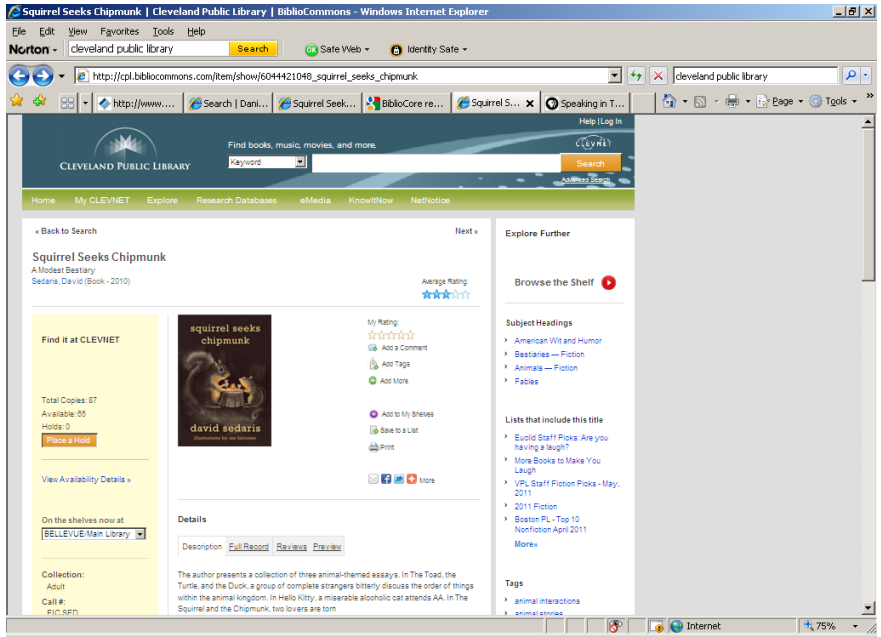
Innovative's Sierra's Services Platform

- Built on SOA (Services Oriented Architecture) design
- Lucene index and PostgreSQL database
- APIs and web services for data manipulation

TODAY:

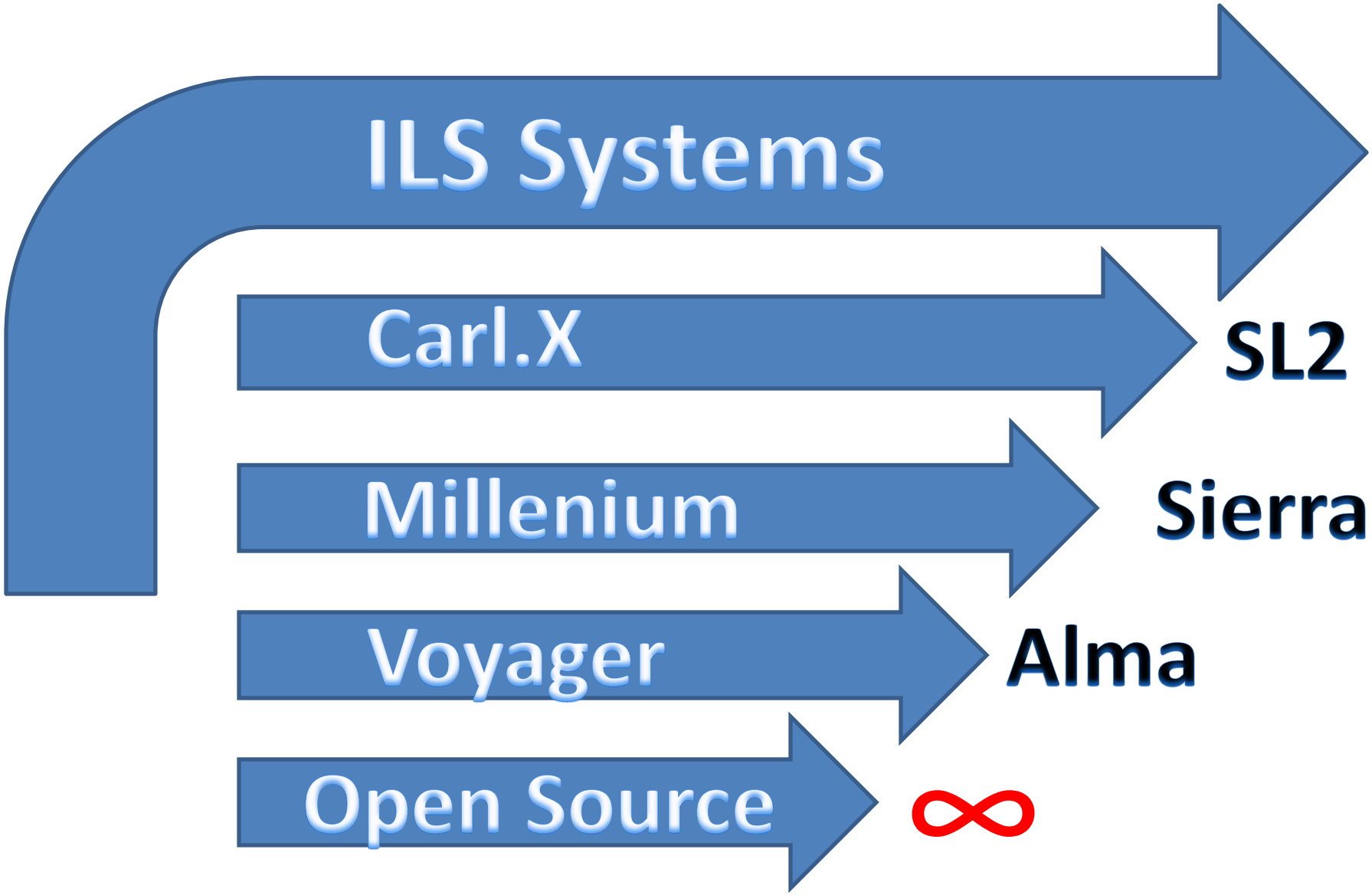


Major Concerns:



What not to expect:

- Perfection
- Algorithmic searches / “fuzzy logic”
- The Holy Grail of Staff Modules
- No cost ILS
- Things to stay the same


ILS Systems
Carl.X
SL2
Millenium
Sierra
Voyager
Alma
Open Source
∞

The Forking Paths

CARL·X™ LS2PAC

- More bells and whistles than the current CARL
- Improved terminology and button placement
- More interactive (staff lists, tags)
- Same basic staff interface…no learning curve

- …Same basic staff interface
- OPAC has an overreliance on pop-up windows
- Not entirely compatible with contemporary browsers
- Basic search underperforms

sierra

- Highly regarded staff module
- Well Regarded migration services
- Good support
- Improved with Encore “discovery service”
- Sierra is touted as being more scalable and architecturally open.
- Sierra will offer a cloud-based storage option

- Millenium notable for its closed architecture
- Millenium looks outdated and Sierra will be in beta
- Bells and whistles add cost
- Lacks interaction
- Cost
- $$

ExLibris Alma

yea

- Improved resource management
- Improved workflow
- Academic libraries might be interested
- Cloud based
- ExLibris has some of the best client satisfaction ratings

nay

- New product
- The platform seems “intense”
- Scalability might be an issue
- Check your wallet

- Most visually appealing "discovery" software available on the market
- Highly interactive
- Very clean mobile catalog
- Some algorithmic capabilities

- Not a full ILS /LMS, solely an OPAC interface
- Extra cost
- Raises some privacy concerns
- Could have better item image integration

WE
NEED TO
TALK