V-Cat ILS Evaluation and Review Committee Report Appendices

These appendices are shared in addition to the full V-Cat ILS Evaluation and Review Committee Report, included in a separate document due to file size limitations.

Appendix A – Sierra Staff Survey Results Overview

Appendix B – Gantt   Chart

Appendix C – Request For Information

Appendix D – Post Demonstration Survey Results

Appendix E – Committee Post Demonstration Survey Results

Appendix F – Koha Post Site Visit Survey Results

Appendix G – August 2023 Product Rating Survey Results

Appendix H – Lessons Learned and Advice for Future ILS Evaluations

Sierra Survey Results Summary

- A total 115 participants opened the survey and answered at least one question.

- 86 participants completed the entire survey.

- 24 of the 25 V-Cat libraries participated in the survey.

- Initial questions identified frequent users for each area and then followed up with additional user experience questions.

- Slightly more than half of survey respondents are are open to, or in favor of, making a change.

- Overall satisfaction with Sierra is good, with 80% or more reporting 'satisfied' to 'very satisfied' in area.

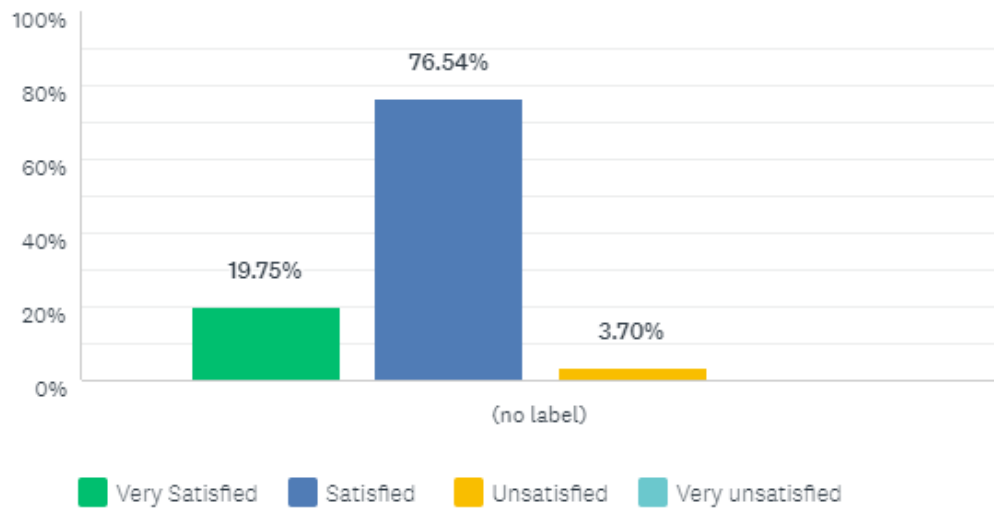## Please rank your experience searching and placing holds in Sierra.

Answered: 96   Skipped: 19
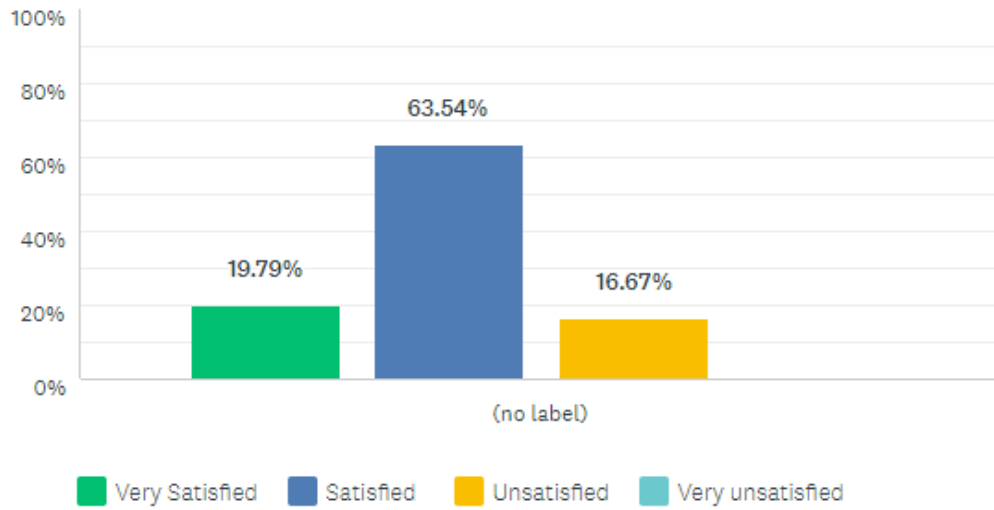
	VERY SATISFIED	SATISFIED	UNSATISFIED	VERY UNSATISFIED	TOTAL	WEIGHTED AVERAGE
(no label)	19.79% 19	63.54% 61	16.67% 16	0.00% 0	96	0.00

Please rank your experience with circulation and patron records in Sierra
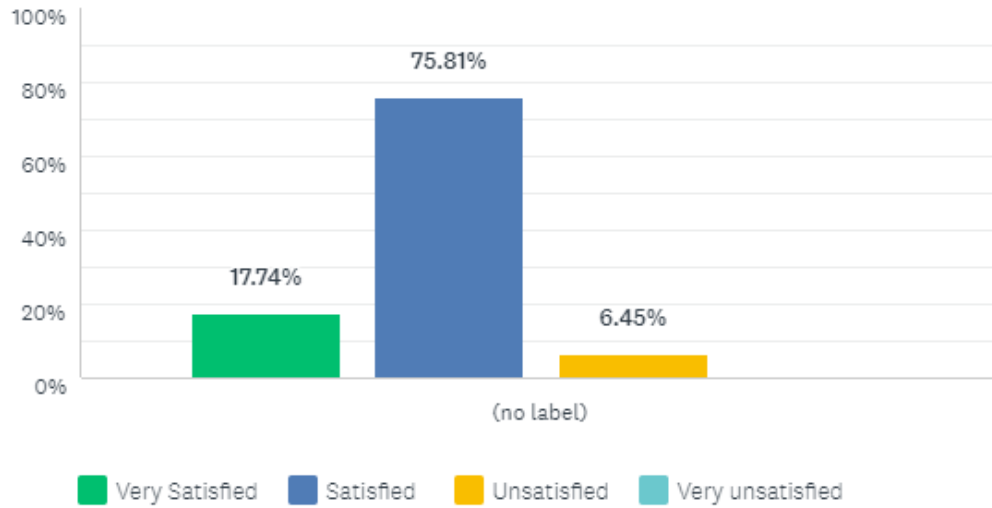
Answered: 81   Skipped: 34

	VERY SATISFIED	SATISFIED	UNSATISFIED	VERY UNSATISFIED	TOTAL	WEIGHTED AVERAGE
(no label)	19.75% 16	76.54% 62	3.70% 3	0.00% 0	81	0.00

Please rank your experience with using Sierra for paging lists and hold shelf management.
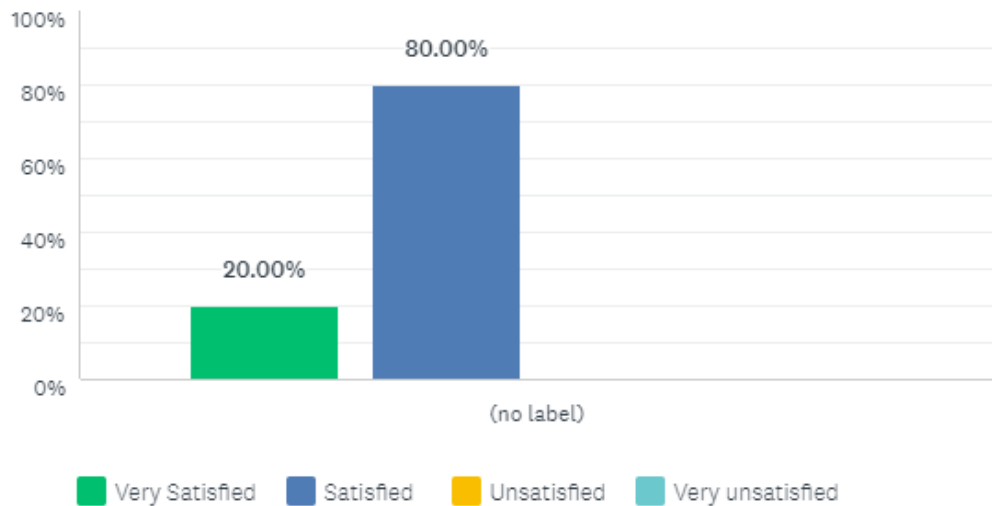
Answered: 62   Skipped: 53

	VERY SATISFIED	SATISFIED	UNSATISFIED	VERY UNSATISFIED	TOTAL	WEIGHTED AVERAGE
(no label)	17.74% 11	75.81% 47	6.45% 4	0.00% 0	62	0.00

Please rank your experience with Cataloging and bibliographic records management in Sierra.
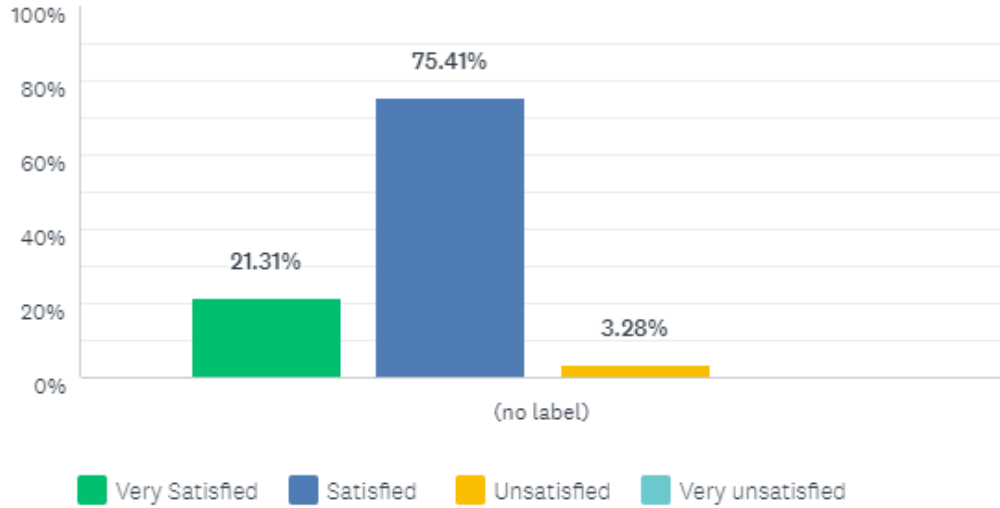
Answered: 45   Skipped: 70

	VERY SATISFIED	SATISFIED	UNSATISFIED	VERY UNSATISFIED	TOTAL	WEIGHTED AVERAGE
(no label)	20.00% 9	80.00% 36	0.00% 0	0.00% 0	45	0.00

Please rank your experience with item records management in Sierra.

Answered: 61   Skipped: 54

	VERY SATISFIED	SATISFIED	UNSATISFIED	VERY UNSATISFIED	TOTAL	WEIGHTED AVERAGE
(no label)	21.31% 13	75.41% 46	3.28% 2	0.00% 0	61	0.00

Please rank your experience with Sierra Statistics and/or Web Management Reports.

Answered: 15   Skipped: 100
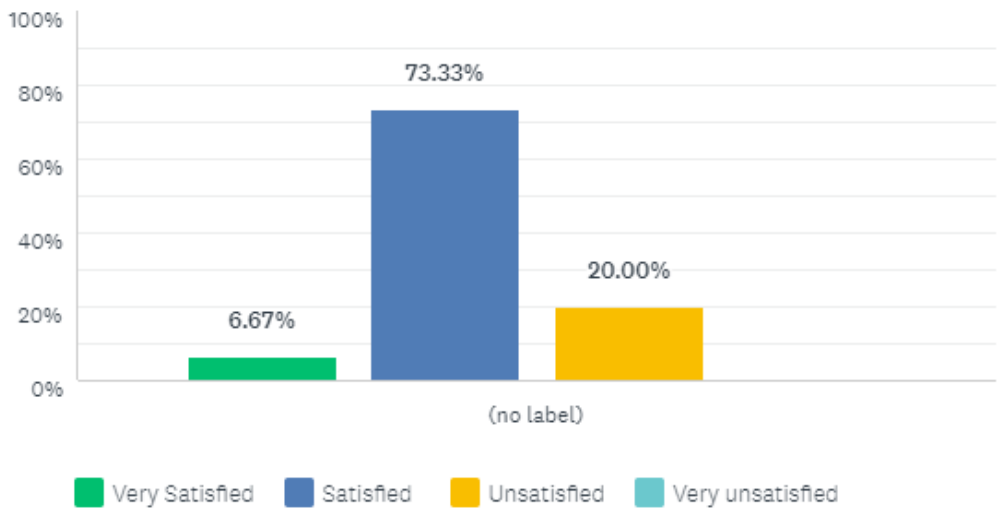
	VERY SATISFIED	SATISFIED	UNSATISFIED	VERY UNSATISFIED	TOTAL	WEIGHTED AVERAGE
(no label)	6.67% 1	73.33% 11	20.00% 3	0.00% 0	15	0.00

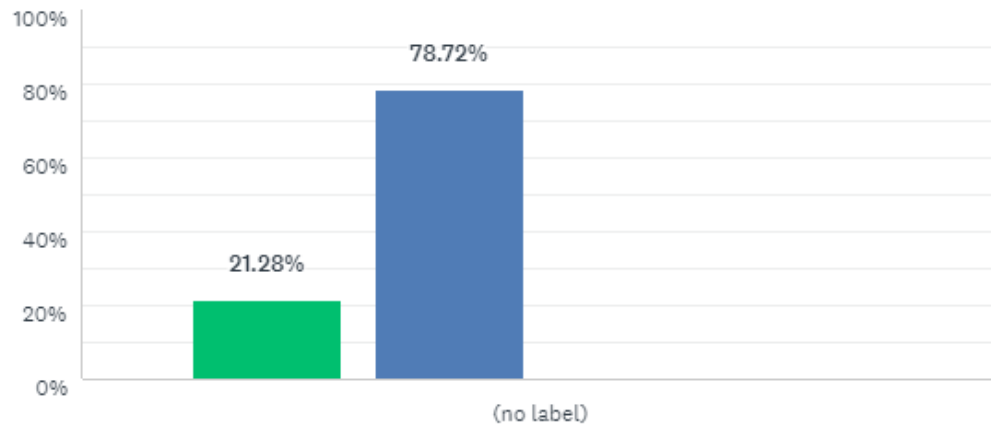# Please rank your experience with using Sierra Notices to send hold pickup, overdues or bills.

Answered: 47   Skipped: 68

	VERY SATISFIED	SATISFIED	UNSATISFIED	VERY UNSATISFIED	TOTAL	WEIGHTED AVERAGE
(no label)	21.28% 10	78.72% 37	0.00% 0	0.00% 0	47	0.00

Please rank your experience with Sierra Create Lists and/or Rapid Update.

Answered: 46   Skipped: 69

	VERY SATISFIED	SATISFIED	UNSATISFIED	VERY UNSATISFIED	TOTAL	WEIGHTED AVERAGE
(no label)	21.74% 10	71.74% 33	4.35% 2	2.17% 1	46	0.00

Please rank your experience with Sierra Acquisitions and order records.

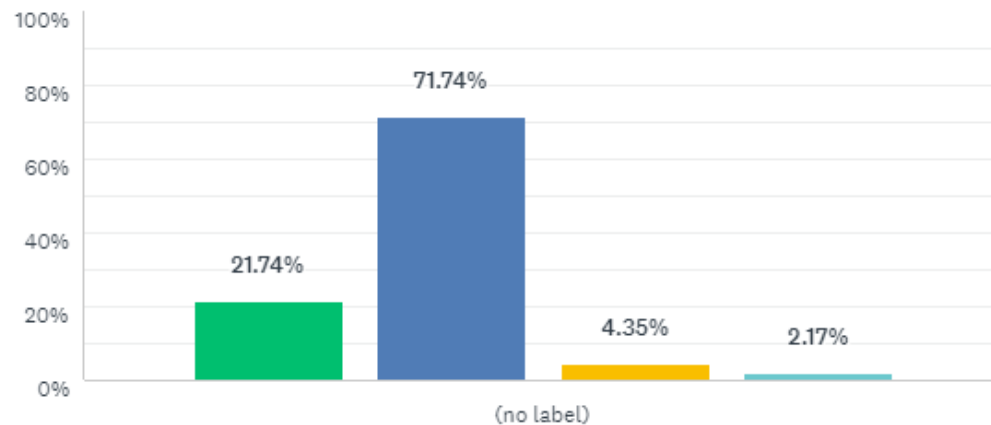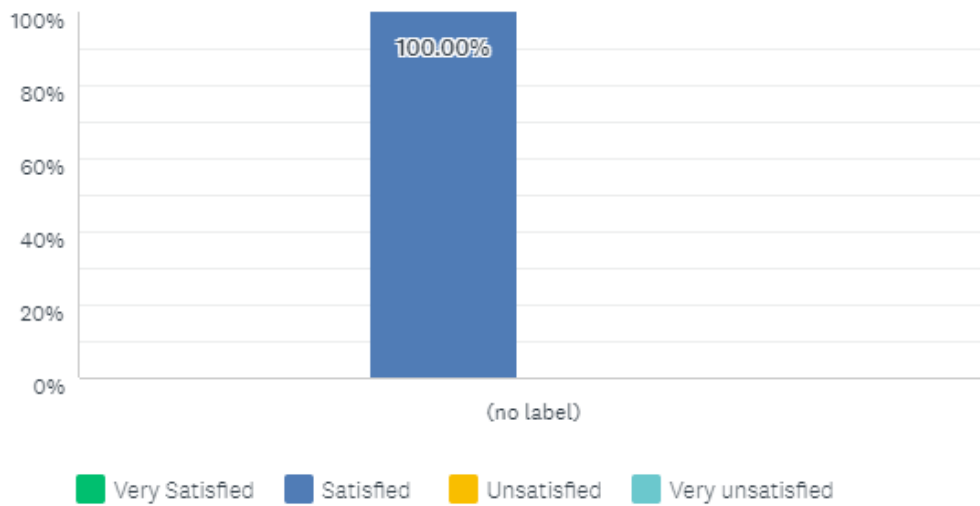Answered: 5   Skipped: 110

Legend: ■ Very Satisfied ■ Satisfied ■ Unsatisfied ■ Very unsatisfied

	VERY SATISFIED	SATISFIED	UNSATISFIED	VERY UNSATISFIED	TOTAL	WEIGHTED AVERAGE
(no label)	0.00% 0	100.00% 5	0.00% 0	0.00% 0	5	0.00

What best describes your position on a possible migration to a different library software for staff?

Answered: 86   Skipped: 29
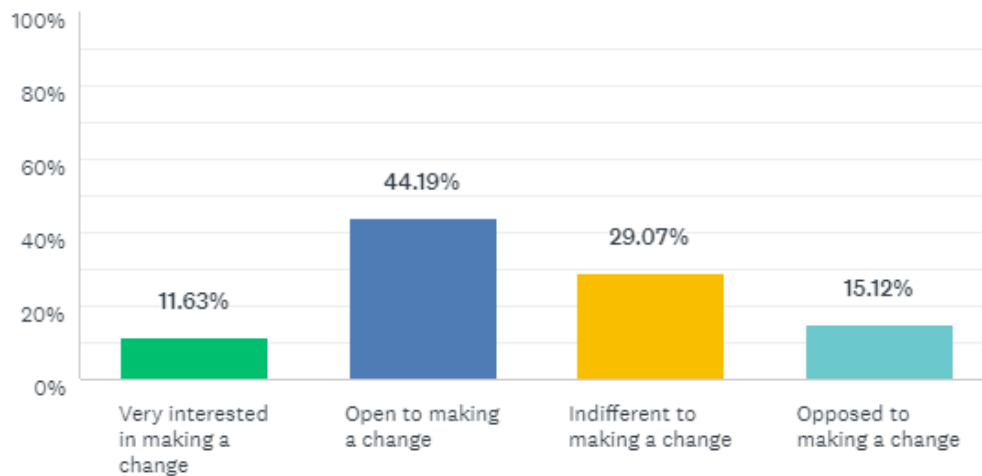
ANSWER CHOICES	RESPONSES	
Very interested in making a change	11.63%	10
Open to making a change	44.19%	38
Indifferent to making a change	29.07%	25
Opposed to making a change	15.12%	13
TOTAL		86

Which best describes your ability to participate in a leadership role if V-Cat chooses a new product? (Note that this survey is anonymous. This question is intended to measure the number of individuals who may be able to participate.)

Answered: 86   Skipped: 29
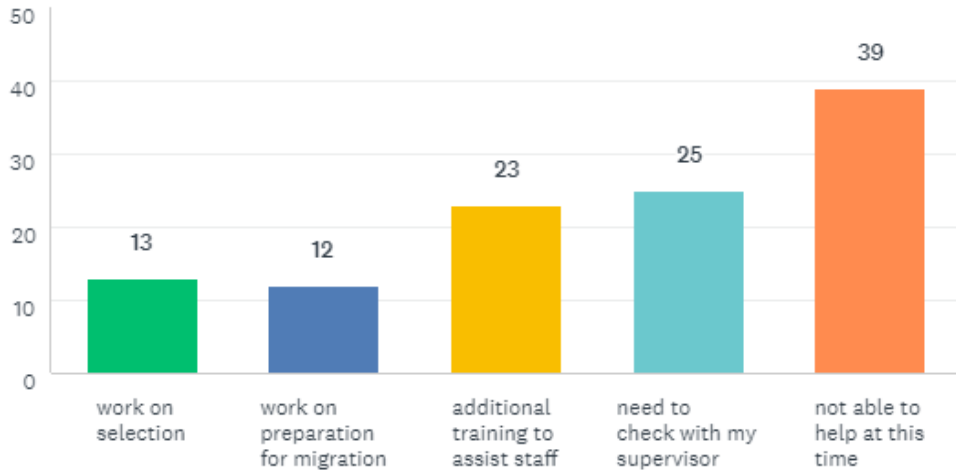
Anticipated next steps:

- Share responses in open ended questions with Innovative
- Determine whether Sierra can be configured differently to meet our needs
- Report back to V-Cat
- Create lists of desired functionality for each area
- Send out a request for information from multiple vendors
- Review the info we receive, and consider if V-Cat would like to see any product demonstrations
- Create an evaluation matrix to determine what factors are the most important in making our decisions
- Participate in detailed product demonstrations
- See products in action at a library, and ask the vendor follow up questions
- Evaluate products with the matrix and find which would best serve V-Cat's needs
- V-Cat votes to select a product
- Contract negotiation
- Migration

Appendix B – Gantt Chart

PROJECT TITLE	V-Cat ILS Review
PROJECT MANAGER	Katie Zimmerman

Year / quarter groupings across the month columns below: **2022** (Q2: A M J · Q3: J A S · Q4: O N D) · **2023** (Q1: J F M · Q2: A M J · Q3: J A S · Q4: O N D) · **2024** (Q1: J F M · Q2: A M J · Q3: J A S · Q4: O N D)

TASK TITLE	PCT OF TASK COMPLETE	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D
RFI development																																		
Develop RFI dcument	100%	x																																
Share RFI with V-cat	100%		x	x																														
Select vendors to consider	100%	x																																
Send RFI to potential vendors	100%		x	x																														
Review RFI responses	100%				x	x	x																											
Product review																																		
Select prodcuts for demos/review	100%				x	x																												
Develop additional questions for functions	100%	x	x	x	x	x	x																											
Develop scoring matrix for products	100%				x	x	x																											
Product demos	100%							x	x	x																								
Product scoring	100%										x	x					x	x																
Visits with libraries using products	100%													x	x	x	x	x	x															
Review/select products to recommend	100%																	x	x	x	x	x												
Product selection																																		
Recommend product to V-cat council	0%																	X		X														
V-cat council selects product	0%																		X		X											X		X
WVLS BOT approves selection	0%																		X		X											X		X
WVLS contract negotiation	0%																			X	x													X
WVLS terminates previous contract (as needed)	0%													X												X								
Data migration (if necessary)	0%																										x	x						
General Library/WVLS Events																																		
Annual end of current ILS contract	0%						X													X												X		
V-cat Council meetings	0%	x		x			x		x			x		x		X			X		X			x		X		x				X		X
Board of Trustees meetings	0%		x				x		x			x	x		x				X		X			x	x		x					X		X
Summer Reading Program	0%		x	x	x	x									x	x	x	x									x	x	x	x				
Annual Report preparation	0%										x	x											x	x										

Request for Information

Integrated Library System

JUNE 2022

V-Cat Consortium
Wisconsin Valley Library Service (WVLS)
301 North First Street, Wausau WI

Statement of Intent

Wisconsin Valley Library Service and the V-Cat Consortium are evaluating integrated library system (ILS) and platform products to fulfill a goal from the consortium's current long-term strategic plan. This is a necessary task that should be undertaken periodically. The purpose is to ensure V-Cat is providing and will continue to provide the best library automation software that supports the needs of member libraries and patrons. There are many requirements to consider when assessing both the current ILS as well as any potential product. This document is intended to help collect useful information for these different areas. Please supply up-to-date and complete information about integrated library system and platform product(s) following the timeline below. This will allow V-Cat and its stakeholders to identify the best product for member libraries' current and future needs. WVLS asks for the right to circulate responses internally among member library staff, and partner libraries. The responses will not be a matter of public record but are subject to freedom of information act requests. Submission of a response signifies acceptance of this condition.

WVLS and the V-Cat Consortium

WVLS is primarily funded by the State of Wisconsin, overseen by the Department of Public Instruction, and administered by a 15-member Board of Trustees. It functions as a membership organization - with its membership made up of Clark, Forest, Langlade, Lincoln, Marathon, Oneida and Taylor Counties. WVLS serves 25 administratively autonomous and fiscally independent public libraries in these counties. WVLS administers the V-Cat Library Consortium, which libraries join voluntarily by signing a membership agreement. Two of the libraries have multiple branch locations. Two libraries are school-public partnerships. There are a total of 36 sites in the V-Cat Consortium. Appendix A includes a list of member libraries including service population and annual circulations for 2019 and 2021.

The WVLS central office is based within the same building as the Marathon County Public Library's Main Library located in downtown Wausau, Wisconsin. WVLS Office staff consist of 8.5 full time employees. ILS Maintenance and support staff consist of 2 full time employees plus additional IT and administrative support.

WVLS manages the shared library automation system, V-Cat, using Sierra from Innovative as well as Aspen Discovery, supported by Bywater Solutions. Along with the physical materials owned by member libraries, some electronic resources are searchable in the V-Cat database. WVLS represents its members in the Wisconsin Public Library Consortium (WPLC) which coordinates OverDrive access. OverDrive records are searchable in the V-Cat database. WVLS purchases shared electronic subscriptions such as Gale Courses and Novelist Select. Additional shared electronic subscriptions are available via Wisconsin BadgerLink including resources from Ancestry, Archive of Wisconsin Newspapers, Britannica Digital Learning, EBSCO, Heritage Quest Online, Learning Express, PBS Wisconsin Education, ProQuest, Teaching Books, and the Wisconsin Historical Society.

WVLS also provides all members with the following:
- Wide area network administration
- Remote authentication services for databases member libraries offer to the public
- Online forms for public requests for new materials
- PC help desk support.
- System-wide email through Microsoft 365
- Website hosting platform
- Coordination of the use of third-party products working with the ILS, including computer management software, RFID software, self-check units, and enhanced content for the online catalog; and telephone and text message notice services

A major service program V-Cat supports is resource sharing across municipal borders within the 7-county area. WVLS contracts and facilitates system-wide delivery service to every member library three days a week. Additionally, 3 libraries receive 4 deliveries a week, and the WVLS office receives 5 deliveries a week.

Overview to the Current ILS

The V-Cat Consortium was formed in 1999 and consisted of two libraries. The V-Cat Consortium formerly utilized SirsiDynix's Horizon software system and migrated to Innovative's Sierra system in 2013. The V-Cat implementation of Sierra is "software only," self-hosted in a private virtualization platform maintained by a partnership of several Wisconsin public library systems. The virtualization platform is or will be made capable of supporting all reasonable hardware requirements necessary to support at least three production implementations of ILS product sets, one for each partner library system's consortium.

Within the V-Cat database, bibliographic records are shared among members with local holdings represented via attached records. Member libraries are trained to evaluate and import records into the ILS from OCLC daily via the z39.50 protocol. Member libraries are also able to edit and improve records as necessary following local guidelines. Member libraries also can add brief records when an OCLC record does not exist or is unsuitable. Original cataloging is performed as needed by system staff. Bibliographic records are spot checked to assist with quality control. Maintaining the integrity of this database structure and how search results display to the public is of utmost importance to V-Cat.

Throughout the V-Cat consortium, libraries utilize 7 Bibliotheca self-check units and two Innovative Express Lane self-check units. One location has an automatic materials handling (AMH) sorter using 3M - Bibliotheca.

It is important to the V-Cat Consortium not to lose any existing functionality. Currently the libraries in V-Cat make use of the following functional areas or products:

- Acquisitions including electronic ordering; funds management and invoicing
- Authority control and duplicate record control
- Cataloging management of bibliographic and item records
- Circulation and patron record management
- Circulation notifications for library users offered through email, phone, text, and paper formats
- E-Commerce for online fine payment
- Holds management functionality for both staff and patrons that includes the ability to
    - limit hold placement and hold fulfillment on items by patron type and owning location,
    - freeze and unfreeze holds,
    - designate multiple priority levels for paging,
    - set local hold priority
- Inventory management
- Offline circulation
- Online patron catalog or discovery catalog
- Online library card registration
- Serials management (available, but not currently used)

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Instructions for Responding

Sections

This RFI consists of eight sections (see below). Respondents are asked to complete all sections. For Sections VI. Costs and VII. Collaboration, respondents are asked to provide a breakdown of anticipated costs.

RFI Timeline

By June 17, 2022	Respondents are asked to submit a notification of intent via email to ils.admin@wvls.org
By June 24, 2022	Questions or requests for clarification should be submitted via email to ils.admin@wvls.org
By July 5, 2022	Respondents are asked to submit responses electronically in PDF format to ils.admin@wvls.org
By December 2, 2022	Select respondents will be contacted to schedule a vendor demonstration consisting of a full day or multiple days broken down by V-Cat designated functional groups. Demonstrations for V-Cat libraries will be completed no later than December 2, 2022. The RFI process may or may not lead to a purchasing decision. Follow up information will be communicated.

I. General Information

A. Please provide a brief history of the library system / service platform including information about the following:
1. The majority and minority owners of the company
2. How many years the library system has been in the market
3. Any plans for a merger or acquisition
4. Any plans or roadmaps for the library system / platform products coming up over the next one-to-five years.
5. The commitment of the majority owners towards on-going support for this library system / platform products over the next five-to-ten years
6. The number of public library consortia added between 2016 and 2022 broken down by year, and from which automated system
7. How the library system / platform products stand apart from other products with regards to supporting consortia

B. Please describe the library system / platform products including information about the following:
1. The client hardware and workstation requirements for optimal performance by the ILS
2. Network connectivity requirements, including sensitivity to network latency and connection disruption for typically expected performance of the ILS.
3. The model for Software as a Service / cloud hosting
4. The underlying database structure or architecture
5. The database language and whether ILS administrators have direct database access to read and/or write to the database
6. The application architecture and language for each distinct interface / product
7. The number of client workstations running and database size, at the largest consortium using the library system / platform products
8. The options available for database backup
9. The types of APIs available to third-party applications
10. Requirements of barcode scanners, RFID scanners, printers and other devices for optimal performance with the ILS.

C. Please summarize information about the library system / platform products with regards to the following:
1. The schedule for new releases and bug-fix releases of the library system / platform products in a year's time
2. The software development cycle, including the process used to collect, evaluate, and implement customer-suggested enhancements
3. The process for delivering and applying patches between major software releases
4. The methods for communication available for customers to work with the company during business hours and off-hours

D. Please describe the process for on-boarding new customer, including the following:
1. Describe the extent and the type of staff training provided with implementation
2. Describe the extent of project management services and resources provided with implementation
3. Describe the extent and online training materials the company offers on the library system and platform products
4. Describe the schedule for updating training materials and ongoing training opportunities

II. ILS Functionality Assessment

A. Acquisitions, Serials and E-Resource Management

1. Please list the APIs the ILS / platform product(s) can use to display e-resources and indicate whether an API can display e-resources in the staff and/or public interface.

	Yes – Part of the Current Base Software	No – Not Part of the Current Base Software	In Development	Available via a Custom Development	Add-On Product
Acquisitions					
Ability to create & manage multiple funds and budget tracking, including funds management to support a library consortium with different accounting methods and agencies					
Ability to create funds earmarked as different funding types within system					
Ability to generate fund management reports and statistics for each member library					
Ability to perform fiscal close (end of year rollover) & fiscal open					
Ability to auto-generate and/or schedule reports & statistics on funds management & fiscal data					
Ability to create a funds organizational structure, including funds hierarchies, for ease of use & statistical reporting					
Ability for order records to include all necessary fixed and variable fields for accurate order submission & processing					
Ability to generate, load and submit order records manually and integrated with external vendors, including EDIFACT Ordering					
Ability to automatically queue purchase orders via vendor order loads					
Ability for on orders & in process titles to show on public display					
Ability to generate reports & statistics for each member library's orders					
Ability to search orders using multiple points of access					
Ability to create order records for standing orders					
Ability to auto-generate and/or schedule reports & statistics on order records					
Ability to move, manipulate and cancel orders					
Ability to generate multiple order records & rough bibliographic records using imported data					
Ability to see Order Record history, including users & dates for creations and changes					
Ability to manually add or remove an order from FTP data load					

	Yes – Part of the Current Base Software	No – Not Part of the Current Base Software	In Development	Available via a Custom Development	Add-On Product
Acquisitions (continued)					
Ability to import invoices with outside vendors (EDIFACT invoicing)					
Ability to pay invoices via ILS system					
Ability to search for invoices through multiple data points					
Ability to create vendor profiles, including unique profiles for each account within a vendor using fixed and variable length fields.					
Ability to search for vendors through multiple data points					
Ability to interface with outside vendor payment software					
Ability to retrieve a record of adjustments to fund records (fund activity report)					
Ability to allow multi-fund orders fund fixed field to be broken out by percentage or dollar amount					
Ability to allow multiple payments against a single order record in the same session for all order types					
Ability to export more than 1 order file per FTP session to the same vendor					
Ability to view fund balances while ordering without needing to post first					
Ability to import more than one invoice file per FTP session from the same vendor					
Ability to encumber funds at the discount/estimated price					
Ability to allow multiple payments against a single order record in a different session for all order types (partial payments)					
Ability to create and edit vendor codes					
Ability to search invoices (including by vendor and invoice date)					
Ability to delete and/or edit an invoice after posting (to correct an error)					
Ability to view and/or edit the unencumbered amount during invoice entry					

	Yes – Part of the Current Base Software	No – Not Part of the Current Base Software	In Development	Available via a Custom Development	Add-On Product
Electronic Resource Management (ERM)					
Ability to manage e-resources either included with ILS or as a separate product					
Ability to manage e-resource licenses					
Ability to load e-resources order & vendor records similar to traditional resources					
Ability to verify URL for e-resources					
Ability to interface and authenticate with publisher web site or resources					
Ability to use APIs to display e-resources without loading records into the database					

	Yes – Part of the Current Base Software	No – Not Part of the Current Base Software	In Development	Available via a Custom Development	Add-On Product
Serials					
Ability for system to have distinct serials specific serial records and item records, including bibliographic records, order records, check-in records, holding records					
Ability for efficient functionality of check in record, including check in of a title with volume and issue number.					
Ability to check in and track serials issues/subscriptions for multiple libraries with a library consortium					
Ability to support MARC or non-MARC serial holdings					
Ability to cleanly export serial holdings out of the system					
Ability to use and execute a claims function for serials, including ability to use in submission to external serials vendors					
Ability for granularity with serial permissions to accommodate consortium, including ability for each branch/library to limit visibility to own serials data.					
Ability to make batch check-in record or serial item record changes					
Ability to have 'public notes' on titles that are visible in discovery catalog					
Ability to set up automatic numbering of volumes and issues by title (based on publication pattern)					
Ability to efficiently identify and report late issues					
Ability for software to handle periodical 'supplements'					
Ability to create serials-specific statistics and reports					
Ability to identify status of a volume/issue number as not received, missing, unavailable, etc.					
Ability to link users to previous or future title changes in discovery catalog (CONTINUES, CONTINUED BY links)					
Ability to link users to digital/electronic versions of same title available in discovery catalog					
Ability for order records & associated check-in records to be directly linked					
A check-in or serial record is available and includes all necessary fixed & variable fields for accurate processing & reporting					
A check-in record card is available and is associated with each check-in record					
Ability to assign holdings or a holdings record to each check-in record					

	Yes – Part of the Current Base Software	No – Not Part of the Current Base Software	In Development	Available via a Custom Development	Add-On Product
Serials (continued)					
Limited retention holding statements are available					
A routing record is available for each check-in record					
Ability to automatically sort new item records created at serials check-in					
Ability to view order record and check-in card of the same bib record simultaneously					
Ability to preview spine labels during check-in process					
Ability to automatically merge holdings when a missing issue is checked in					
Ability to generate reports and lists based on check-in box status, including ability to export reports					

B. Cataloging, Authority Control and Records Management

	Yes – Part of the Current Base Software	No – Not Part of the Current Base Software	In Development	Available via a Custom Development	Add-On Product
General record management for all types of records					
Ability to edit all types of records in groups					
Ability to export/print groups of records or single records					
Ability to toggle back and forth between the backend and public interfaces					
Ability to add text macros as shortcuts					
Duplicate record checking by specified field(s) is available					
Navigation options are clear and clearly labeled					
Complete record modification and record deletion history tracking is available for all record types					
Ability to administratively control ownership and management of all types of records					
Ability to duplicate, print and delete all record types					
Ability to restrict record creation by record type based on login					
Ability to restrict fields within a record that can be modified by login					
Ability to restrict fields that can be edited in a batch process by login					
Ability to restrict record editing by record type based on login					
An indicator or message is available to alert that an action is not allowed because of login permissions					

	Yes – Part of the Current Base Software	No – Not Part of the Current Base Software	In Development	Available via a Custom Development	Add-On Product
Bibliographic record management					
Integration with Bibliographic Formats and Standards					
Ability to handle current RDA fields and future RDA fields					
Ability to bring in records either singly or in batches from a variety of third-party providers					
Ability to easily create, overlay and modify bib records for all material formats					
Ability to easily select, insert and correctly display diacritical marks					
Ability to limit by other index fields when searching in one index					
Immediate indexing of completed records, even when multiple accounts are active concurrently					
Ability to customize indexing					
Ability to quickly check for duplicate ISBNs in the database.					
Ability to report bibliographic errors to a central mailbox from within the system					
Ability to suggest titles in the staff interface when searching if the original search returns no results					
Ability to provide keyword or author search results connecting to the 'Name See From' 400 field in an Authority Record in the staff interface					
Supports searching despite non-English articles that start titles (non-English skip digits)					
Supports searching for titles in a series					
Ability to see and manage/transfer holds within cataloging interface					
Ability to limit searches / search results by format, language, date, publisher, audience and owning library					
Authority control management					
Ability to maintain multiple authority thesauri without conflict					
Ability to batch update controlled terms/fields					
Ability to identify and print off or export duplicate, first time use, and/or invalid headings					
Ability to easily identify blind authority records					

	Yes – Part of the Current Base Software	No – Not Part of the Current Base Software	In Development	Available via a Custom Development	Add-On Product
Item record management					
Ability to restrict permissions on certain fields in an item record					
Ability to create on-the-fly items with different permissions that can be easily distinguished in the database					
A volume field is available for items records					
Ability to transfer items between records					
Ability to quickly identify bad codes (mistakes, typos)					
Ability to export/print the lists of codes applying to each controlled field					
Ability to manage codes based on permissions					
Ability to print item spine and book labels from within the ILS					
Ability to customize spine and book labels to meet individual owning library's needs					
Ability to print item labels in batches					
Ability to display call number scroll of a specific member library while creating Cutter numbers					
Ability to manipulate the order in which items display to staff and the public					
Item records include a history of status changes in an item record for past 5 or so changes					
Collection management					
Ability to identify nonfiction areas of high and low interest at each physical location					
Data benchmarks and reports are available for when material becomes unusable due to condition (without requiring physical examination of every piece first)					
Customizable and canned weeding & missing lists are available					
Ability to identify the most popular fiction authors for each audience level at each physical location					
Customizable and canned reports are available to inform collection size adjustments					

C.   Circulation and Self-Checkout

	Yes – Part of the Current Base Software	No – Not Part of the Current Base Software	In Development	Available via a Custom Development	Add-On Product
Patron Record Management					
Ability to batch update patron records					
Ability to batch extend due date					
Ability to have multiple types of patron records (child, adult, temp, educator, institutional, homebound, and other community types)					
Ability to designate internet use permissions for minors					
Ability to view details of patron fines in check out					
Ability to add custom fixed and variable patron fields					
New Patron record templates by branch and patron type					
New patron record template can auto-calculate a default expiration date (prefer set by library/location)					
Duplicate record check alert when creating new patron records					
An alert message is available to notify staff a set number of days before patron expiration date					
Multiple fields are indexed to search for patron records (barcode, last name, address, e-mail, phone, birthdate)					
Ability to designate a patron's preferred name, and for that preferred name to appear on circulation notices and in patron online interface.					
Ability to add notes (hidden from patron) and messages (hidden from patron but pop-up message to staff) to a patron record					
Ability to allow patrons to opt in for email or SMS notifications such as newsletter or emergency closures					
Ability to merge patron records					
Ability for staff to select a default hold pick up location to any location (not tied to patron's 'home' library)					
Ability to view last patron and circ history on an item record					
Ability to customize brief patron record view in check-out					
Ability to customize patron record codes available by login					
Ability to set custom templates for patron record creation to pre-fill fields (by patron type and library location)					
Ability to set custom templates for patron record creation to prompt for specific fields					
Ability to move forward and backward when using a custom template to create patron records					

	Yes – Part of the Current Base Software	No – Not Part of the Current Base Software	In Development	Available via a Custom Development	Add-On Product
Patron Record Management (continued)					
Ability to record the number of times a patron record was used in a given time period (not just the last use)					
Ability to link patrons in the staff interface					
Ability to set parameters to extend select blocks to linked patrons					
Ability to include both a creation date and an updated date in patron records					
A signature is available to track the user who last updated the patron account					
Ability to view patron's OverDrive use/holds in staff interface					
Holds Management					
Bothe bib-level and item-level holds are available					
Ability to place item-level holds that page but do not transfer					
Ability for patron to select the default hold pick up location to any location, not limited patron's 'home' location.					
Ability to change pickup location for a hold already in transit or on a hold shelf.					
Ability for staff to see frozen holds and freeze or unfreeze holds for patrons					
Ability to freeze holds when an item is available or has no other holds.					
Ability to see cancelled holds and reinstate cancelled holds					
Ability to batch extend hold pick up dates for a single location (emergency closures)					
Ability to easily exclude locations from filling holds (emergency closures)					
Hold shelf management tools (clear the hold shelf report, current list, pick up date, location)					
Ability to easily generate a list of expired holds on the hold shelf					
Ability to easily generate a report of holds unfilled with available items to fill by either pickup location or owning location					
Ability to format paging lists by library branch					
Ability to include OverDrive use/holds information in staff interface					

	Yes – Part of the Current Base Software	No – Not Part of the Current Base Software	In Development	Available via a Custom Development	Add-On Product
Checkin					
Ability to backdate check in date for materials					
Ability to check in with overrides to not fulfill hold or send items in transit					
Ability to waive fines within check in interface					
Ability to edit item from Check In (add note, change status etc.)					
Ability to mark items damaged (and charge patron) in the check-in interface					
Pop-up messages are available to alert staff when checking in items					
Ability to have warning sounds and/or obvious visual alerts when checking in items					
Ability to toggle from checked in item to patron in Checkout interface					
In-transit messages are added to an item record with origin, destination, date and time when the status is updated to in transit via the Check In interface					
Check-in is available within the patron record/checkout interface					
Checkout					
Ability to extend or modify the due date during Checkout					
Ability to batch extend due dates for a group of items or patrons (emergency closures)					
Ability to mark items lost in the patron record / checkout interface					
Ability to mark items damaged in the patron record / checkout interface					
Ability to block number of items checked out by patron type or other patron record field					
Ability to block number of items by a combination of patron type and type of items					
Available implicit check in notification when an item is checked out to another patron					
Ability to block circulation and display warning message when a patron tries to check out an item on hold for another patron					
Ability to customize check out receipts and statements of checked out items by location					
Ability to see previous patron(s) in checkout interface					

	Yes – Part of the Current Base Software	No – Not Part of the Current Base Software	In Development	Available via a Custom Development	Add-On Product
Loan Rules Management					
Allows for the creation and management of complex loan rules based on patron type, material type, location					
Ability to easily modify and manage loan rules for multiple libraries and multi-location libraries in a consortium					
Ability to sort or group loan rules based on loan rule facets					
Ability to batch update a single facet of selected loan rules					
Notifications					
Paper, email, and phone delivery methods are available for circulation notices					
SMS or text message notifications are available within the ILS product(s) or integrates with third-party text message notification system					
Telephone notifications are available within the ILS product(s) or integrates with third-party telephone message notification system					
Multiple notice types are available including: overdue, courtesy, hold pickup, statement of charge / bill					
Fines Management and Fines Paid					
Ability to easily collect money and waive charges (no negative balances)					
Ability to accept partial payments or for patrons to select which charges to pay					
Ability to assign predefined charges and add new ones to the system					
Ability to retain patron fine payment history for a set length of time with specific information for all charge types					
Fines management tools are available to review fines paid, review waived fines and globally purge fines by library or by file					
Ability to reinstate manual fines paid or waived in error.					
Ability to reinstate overdue, replacement, and other automatically generated fines paid or waived in error.					

	Yes – Part of the Current Base Software	No – Not Part of the Current Base Software	In Development	Available via a Custom Development	Add-On Product
E-Commerce					
Ability to support e-commerce payment via PayPal credit card payments					
Ability to report on e-commerce payments					
Ability for standalone fine payments independent of the catalog via API or other method					
Ability to integrate e-commerce payment with third-party discovery catalogs such as Aspen Discovery					
Online Patron Registration					
An online self-registration form is included with the ILS or as an add-on product.					
Ability to customize patron self-registration form					
Online patron registration form performs duplicate record checking against the patron database using patron name and at least one additional field					

	Yes – Part of the Current Base Software	No – Not Part of the Current Base Software	In Development	Available via a Custom Development	Add-On Product
Paging Slips for Holds					
Customizable paging lists are available for bib and item holds management					
Transit slips listing date and destination are available					
Customizable hold shelf slips are available					
Customizable date due receipts are available					
Ability to restrict frozen holds from showing up on paging slips					
Self-Checkout / SIP2					
SIP2 is integrated into the ILS package (no licenses)					
The ILS product supports a variety of self-check vendors. (Currently in use/under consideration: Bibliotheca/3M, Logitech, Envisionware and related AHMs)					
ILS information necessary for SIP2 management is available					
Patron can select paper receipt option (none, paper)					
Patron can select email receipt option					
ILS integrates with self-check vendors for customizable date due receipt format (email and print) (Currently in use/under consideration: Bibliotheca/3M, Logitech, Envisionware and related AHMs)					
Ability to pay fines at self-check station					
Ability to display custom patron messages					
Offline Circulation					
Offline circulation processes are available					
Offline circulation documentation is available					
Patron API					
System communication for patron sign on to PC management is available (Currently Cassie and Pharos)					
System communication with OverDrive for patron authentication is available					

	Yes – Part of the Current Base Software	No – Not Part of the Current Base Software	In Development	Available via a Custom Development	Add-On Product
Inventory					
Inventory functionality is available either included with the ILS, as an add-on product, or via integration with a third-party vendor					
Statistical reports are available for fields tied to inventory					
Inventory functionality can be separated out by branch library					
Navigation options are clear and clearly labeled					
Compatible with RFID shelf scanning technology from multiple vendors					
Miscellaneous					
Collection Agency functionality is available with consortia support, or integration with Collection Agency (Unique Management)					
Ability to see signature with date/time stamp on transactions (e.g., new card set up, card last updated, item record changes, etc.)					
Multiple custom item statuses are available					
Ability to automatically set items in transit between locations and update item status that indicates the item is in transit					
Ability to add notes and messages to item records					
Support for RFID tags on materials					
Support for old or new item and patron barcode labels					
Reciprocal borrowing statistics for a consortium are available to track usage of owning and non-owning items					
Interlibrary Loan					
Interlibrary Loan functionality is included with the ILS or offered as an add-on product					

D. Reports and Statistics

	Yes – Part of the Current Base Software	No – Not Part of the Current Base Software	In Development	Available via a Custom Development	Add-On Product
Ability to create canned and custom reports at branch/location level and at consortium level					
Ability to create canned and custom reports at the library/agency level					
Ability to create canned and custom reports for circulation and hold transactions (monthly and annually)					
Ability to edit lists or reports directly in the ILS					
Ability to edit records in reports without exiting from the report					
Ability to export reports in a variety of formats					
SQL reporting or some other equivalent is available					
Ability to create custom queries					
Ability for reports to interface directly in the discovery catalog					
Charts/images are available for automatic output to facilitate dashboards for libraries					
Ability to limit access to reports/reporting tool(s) by login					
Reports can be shared directly within or from the ILS					
Ability to save, edit, and re-run custom reports					
Ability to schedule regularly run reports					
Unlimited or very large capacity for the number of reports at any given time					
Analytics support a consortium of multiple libraries					
Statistical reports can be modified before printing					
Statistical reports can be printed directly from the ILS					
Statistical reports can be run on all record types					
Statistical reports can be exported as Excel files (not just a text / .csv format)					
Ability to create collection development reports that accommodate a local call numbers					
Ability to track in-house statistics for item records					
Ability to modify report facets in the interface to compare results					
Item records contain yearly cumulative checkout totals for current and past year automatically without a batch change or affecting record's last updated date					

E. Systems Administration & Authentication

Please provide a brief description of the following functions or features:

    2. The main features of the administration module

    3. The level of access to the database for consortium staff

	Yes – Part of the Current Base Software	No – Not Part of the Current Base Software	In Development	Available via a Custom Development	Add-On Product
Documentation and Training					
Current manual(s) that cover the entire library system / platform products and its different functionality are available					
In-person staff training is provided					
Additional/ongoing training is provided					
Online training materials are provided for system administration functions					
A test server / sandbox is available					
A customizable user manual template that can be modified to note local/current practices is available					

	Yes – Part of the Current Base Software	No – Not Part of the Current Base Software	In Development	Available via a Custom Development	Add-On Product
Systems Administration					
System can accommodate record and workflow set up for multiple libraries and multiple branches					
System allows for the customization of some amount of fixed and variable length fields in all types of records					
System allows for patron and item barcodes of varying lengths					
System accommodates z39.50 record searching and record loading from outside databases					
The entire database can be exported to outside vendors via FTP or another method.					
System provides a field option to suppress records of any type from public view					
System administration module offers the ability to manage and modify record templates for all types of records.					
System administration module offers both group and granular levels of staff permissions					
Staff administration module offers the ability to create and duplicate individual and group logins (accounts)					
Staff administration module offers the ability to temporarily disable staff accounts as well as remove accounts.					
Staff administration module offers password management for scheduled changes.					
Ability to handle circulation/loan rules for a consortium having multiple libraries.					
Ability to set days closed and hours open to govern due dates/times and fines					
Ability to reset a fixed field (or restart a date field) annually or as needed by record type					

	Yes – Part of the Current Base Software	No – Not Part of the Current Base Software	In Development	Available via a Custom Development	Add-On Product
Profiles for Record Loading					
A load table is available to bring in batch records with specific parameters for preserving, overwriting, adding, and deleting fields					
Multiple load tables are available with specific parameters for preserving, overwriting, adding, and deleting fields					
Ability to customize load profile tables to identify parameters for preserving, overwriting, adding, and deleting fields					
Remote Authentication for E-Resources					
A remote patron authentication module is available					
Ability to expose minimal data for patron authentication					
Ability to control and restrict patron authentication for holds, payments and account management					
Remote authentication user statistics are available					
Usage statistics for remote authentication are available including fields to associate users with a particular library/location					
A patron API is available to facilitate remote access of e-resources.					
A RESTful API or other method is available to automatically create, modify or delete database records.					

III. Public Catalog (included base product)

1. Please describe the basic public catalog product.

2. Please list the catalog features that are only available to users upon account login. Feel free to specify if there are any unique (non-basic) features that do not require account login.

	Yes – Part of the Current Base Software	No – Not Part of the Current Base Software	In Development	Available via a Custom Development	Add-On Product
Interface and Search Capabilities					
Offers a clean basic search interface					
Offers keyword, phrase and Boolean searches					
Offers an advanced search option					
Performs well with any/all web browsers					
Offers real-time catalog results and patron information					
Is mobile responsive by design to accommodate searching via many types of devices					
Supports enlarged fonts and WC3 design standards					
Supports multiple world languages					
Ability to search and limit results to one member library					
Ability to limit a search using facets to restrict to one library, one format, etc.					
Supports cross-references and see-also headings					
Supports bib and item level holds					
Ability to sort catalog results					
Features material type icons for ease of format identification					
Failed search attempts should give a "Did you mean?" alternative or close results rather than no results					
Ability to provide keyword or author search results connecting to the 'Name See From' 400 field in an Authority Record					
Highlights words when results are returned to help explain why results came back					
Offers persistent links to individual titles					
Ability to create persistent links to featured lists					

	Yes – Part of the Current Base Software	No – Not Part of the Current Base Software	In Development	Available via a Custom Development	Add-On Product
Patron Account Functionality					
Ability for patrons to edit personal contact information					
Ability to control which personal contact information patrons can edit					
Ability for patrons to access personal checkout/hold data					
Provides patrons ability to renew materials					
Ability to view notes from staff					
Reading history is available, and patrons must choose to opt in					
Offers lists or favorites which a patron could curate					
Offers method for patrons to track preferences and interests					
Patrons are able to manage requests/holds in the patron catalog (place holds, cancel holds, change pickup location)					
Patrons are able to freeze and unfreeze holds					
Features and Integration					
Staff interface links back to public view of a given record in the discovery catalog					
Ability to choose FRBR-ized display or non FRBR-ized display					
Provides information on similar titles or other titles in a series (integrates with Novelist Select)					
OverDrive API integration					
Ability to easily integrate carousels into web pages					
Ability for patrons to text or email a title and share on social media platforms					
Ability for users to save searches and search results					
Miscellaneous					
Ability to view a full record as a MARC record					
An online fine payment option is available (e-commerce)					
An online library card registration form is available					
Ability for libraries or the system admin to customize the discovery catalog's display					

IV. Discovery Catalog (add-on product)

1. Please describe the discovery catalog product, if offered.

2. Please list the discovery features that are only available to users upon account login. Feel free to specify if there are any unique (non-basic) features that do not require account login.

	Yes – Part of the Current Base Software	No – Not Part of the Current Base Software	In Development	Available via a Custom Development	Add-On Product
Interface and Search Capabilities					
Offers a clean basic search interface					
Offers keyword, phrase, and Boolean searches					
Offers an advanced search option					
Performs well with any/all web browsers					
Offers real-time catalog results and patron information					
Is mobile responsive by design to accommodate searching via many types of devices					
Supports enlarged fonts and WC3 design standards					
Supports multiple world languages					
Ability to search and limit results to one member library					
Ability to limit a search using facets to restrict to one library, one format, etc.					
Supports cross-references and see-also headings					
Supports bib and item level holds					
Ability to sort catalog results					
Features material type icons for ease of format identification					
Failed search attempts should give a "Did you mean?" alternative or close results rather than no results					
Ability to provide keyword or author search results connecting to the 'Name See From' 400 field in an Authority Record in the staff interface					
Highlights words when results are returned to help explain why results came back					
Offers persistent links to individual titles					
Ability to create persistent links to featured lists					

	Yes – Part of the Current Base Software	No – Not Part of the Current Base Software	In Development	Available via a Custom Development	Add-On Product
Patron Account Functionality					
Ability for patrons to edit personal contact information					
Ability to control which personal contact information patrons can edit					
Ability for patrons to access personal checkout/hold data					
Provides patrons ability to renew materials					
Ability to view notes from staff					
Reading history is available, and patrons must choose to opt in					
Offers lists or favorites which a patron could curate					
Offers method for patrons to track preferences and interests					
Patrons are able to manage requests/holds in the patron catalog (place holds, cancel holds, change pickup location)					
Patrons are able to freeze and unfreeze holds					
Features and Integration					
Staff interface links back to public view of a given record in the discovery catalog					
Ability to choose FRBR-ized display or non FRBR-ized display					
Provides information on similar titles or other titles in a series (integrates with Novelist Select)					
OverDrive API integration					
Ability to easily integrate carousels into web pages					
Ability for patrons to text or email a title and share on social media platforms					
Ability for users to save searches and search results					
Miscellaneous					
Ability to view a full record as a MARC record					
An online fine payment option is available (e-commerce)					
An online library card registration form is available					
Ability for libraries or the system admin to customize the discovery catalog's display					

V. Integration with Other Companies

Below is a list of the companies V-Cat and/or individual libraries currently work with in concert with the Sierra library system and/or Aspen Discovery Layer. Please use the checklist below to indicate which of these companies the ILS / platform product(s) integrate with at present.

1. Please briefly describe how the product(s) are equipped to handle AMH Sorters and RFID tags.

2. Please list if there are any limitations tied to outputting the database to an outside vendor. For example, can this only be done for bibliographic records or in a specific format?

3. Please list if there are any existing APIs to include outside vendor records in the staff and/or patron interface(s)

4. Please list any limitations tied to including outside vendor records in the staff or patron interface(s). For example, can this only be done for records in a specific format?

Company or Equipment	Yes – Experienced with this company and can integrate with the products	No – Not experienced with this company or integrated the product	Willing to work with this company and integrate a product at no additional cost	Willing to work with this company and integrate a product with an add-on cost
Bibliotheca 3M (self-check, AHM, security gate, RFID provider)				
Logitech (self-check, AHM, security gate, RFID provider)				
Envisionware (self-check, AHM, security gate, RFID provider, PC management, laptop kiosk)				
Pharos (PC time management, printing kiosk)				
Cassie (PC time management, printing kiosk)				
Princh (printing kiosk)				
Auto Graphics (software used for statewide catalog integration)				
Aspen Discovery				
Baker & Taylor Content Café Cover Images and Content				
Syndetics Cover Images and Content				
Ebsco Novelist Select or Novelist Plus for enhanced catalog content				
OverDrive API				
Baker & Taylor EDI/FTP Ordering and Invoicing				
Midwest Tape (electronic ordering and invoicing)				
Backstage				
Payflow (e-commerce)				
PayPal (e-commerce)				

Company or Equipment	Yes – Experienced with this company and can integrate with the products	No – Not experienced with this company or integrated the product	Willing to work with this company to integrate a product at no additional cost	Willing to work with this company to integrate a product with an add-on cost
Shoutbomb (text/SMS/phone notifications)				
Unique Management Services (collection agency reporting)				
Ancestry Library Edition				
Archive of Wisconsin Newspapers				
Britannica Digital Learning				
EBSCOhost				
HeritageQuest Online				
Learning Express Library				
Mango Languages				
Newspapers.com				
PBS Wisconsin Education				
ProQuest				
Teaching Books / Book Connections				
U. S. Newsstream				
Wisconsin Historical Society				

VI. Implementation Timeline and Known Constraints

1. Please list the components that make up a typical migration and implementation timeline as it applies to a consortium.

2. Are there any upcoming staffing / work constraints, or known issues with the company or software that may impact an implementation timeline?

VII. Costs

1. Please supply a breakdown of costs of migration from Innovative's Sierra to the product(s).

2. Please supply a breakdown of costs by service and list the options for multi-year contracts or subscriptions.

3. Describe the invoicing process for adding new products and when maintenance of those products begins.

4. Describe the invoicing process for custom developments.

5. Describe the invoicing process and cost for adding additional branch locations or standalone libraries.

6. V-Cat may choose to bill back member libraries for maintenance on ILS products purchased separately. Does the company's accounting process provide for the itemization of maintenance for products that are purchased by individual libraries within V-Cat?

7. Explain how maintenance increases are applied and what typical annual increase can be expected with or without multi-year contracts.

VIII. Collaboration

In addition to conducting its own ILS Evaluation and Review, Wisconsin Valley Library Service is considering the benefits of partnering with Northern Waters Library Service to bring V-Cat and the Northern Waters Library Network together in a single integrated library system implementation.

Appendix B includes information about Norther Waters Library Network (NWLN), including a list of member libraries along with service population and a summary of annual circulations for 2019 and 2021.

Merging Multiple Systems
Please list the requisite components and timeline to migrate multiple autonomous consortia into one ILS.

Resource Sharing
Please list the possible configurations for resource sharing among a large consortium made up of different zones. What options exist for managing, enabling, or restricting resource sharing at the regional, library and location level?

Integration with Other Companies
Below is a list of the companies NWLS and/or individual libraries in NWLS currently work with in concert with the Sierra library system, in addition to those listed in the WVLS/V-Cat section above. Please use the checklist below to indicate which of these companies the ILS / platform product(s) integrate with at present.

Company or Equipment	Yes – Experienced with this company and can integrate with the products	No – Not experienced with this company or integrated the product	Willing to work with this company to integrate a product at no additional cost	Willing to work with this company to integrate a product with an add-on cost
Pika Discovery Layer				
Ingram				
MARCIVE				
Midwest Tape (Hoopla)				
Kanopy				
SkyRiver				

Collaboration Costs

1. Please supply a breakdown of costs for a single integrated library system implementation for both V-Cat and NWLN by service and list the options for multi-year contracts or subscriptions.

2. Please provide a breakdown of costs for migration to the product(s)

3. Are there additional costs associated with merging two integrated library system implementations into one?

4. Would there be any difference in the invoicing process for new products and when maintenance of those products begins for a single integrated library system implementation made up of both V-Cat and NWLN libraries.

5. It may be necessary to bill back member libraries, or groups of member libraries, for maintenance on ILS products purchased separately. Does the company's accounting process provide for the itemization of maintenance for products that are purchased by individual libraries or groups of libraries within a consortium?

6. Explain how maintenance increases are applied and what typical annual increase can be expected with a single integrated library system implementation made up of both V-Cat and NWLN libraries with or without multi-year contracts.

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Appendix A – V-Cat Member Libraries & Statistics

V-Cat consists of 25 public member libraries, with 35 locations. Two member libraries have branch locations.

Total Number of Bibliographic Records: 543,461 as of 3/2/2022.
Total Number of Item Records: 1,204,472 as of 3/2/2022.

Circulation and Number of Patrons - Circulation of items at each location regardless of ownership.

Library / Branch Location	2019 Circulation	2021 Circulation	Number of Patrons as of 01/01/2022
Abbotsford	29,786	18,400	2416
APL Antigo	106,704	71,259	8424
APL Elcho	2,525	1,524	184
APL White Lake	1,386	1,201	203
Colby	78,805	67,837	2097
Crandon	24,758	18,391	2585
Dorchester	10,897	9,468	440
Gilman	18,081	16,643	1022
Granton (school-public)	11,960	12,821	609
Greenwood	22,537	18,453	1324
Laona (school-public)	8,245	5,392	1102
Loyal	15,579	11,171	1046
MCPL Athens	19,979	11,811	1628
MCPL Edgar	23,785	16,219	1587
MCPL Hatley	31,179	17,599	2126
MCPL Marathon	40,319	25,615	2115
MCPL Mosinee	42,337	25,469	4848
MCPL Rothschild	123,363	79,134	8926
MCPL Spencer	22,381	9,425	2441
MCPL Stratford	24,055	18,659	2475
MCPL Wausau	457,206	263,079	50944
Medford	152,572	106,757	4890
Merrill	155,277	100,307	9681
Minocqua	142,383	117,961	8009
Neillsville	35,840	25,725	2552
Owen	17,489	12,162	978
Rhinelander	156,987	97,689	10165
Rib Lake	21,612	14,290	1763
Stetsonville	15,460	11,877	517
Thorp	33,728	25,997	3046
Three Lakes	33,203	22,635	2278
Tomahawk	68,283	45,442	4036
Wabeno	5,069	4,235	175
Westboro	7,231	5,526	224
Withee	9,626	6,476	509
TOTAL	**1,970,627**	**1,316,649**	**147,365**

Appendix B – NWLN Information, Members & Statistics

About Northern Waters Library Network

Northern Waters Library Network (NWLN) is a network of libraries sharing an integrated library system (ILS) to process, circulate and display library resources for the public in an expanded interactive union catalog.
NWLN was established for the purpose of facilitating resource sharing and increasing the efficiency and effectiveness of library services in northern Wisconsin. NWLN is a service program of Northern Waters Library Service (NWLS) for libraries in Ashland, Bayfield, Burnett, Douglas, Iron, Sayner, Vilas and Washburn counties. The NWLN consists of 27 public libraries, 2 branch libraries and one school library. There are 80 staff user licenses. Combined, the membership typically has a yearly circulation of 990,000 and approximately 74,000 registered borrowers. The current catalog contains approximately 342,000 titles and 718,000 holdings.

NWLN provides delivery service between network libraries and administers a wide area network and offers PC, self-checkout and help desk support.

NWLS staff manages the shared library automation system, using Sierra from Innovative as well as the Pika discovery layer Along with the materials of member libraries found in NWLN, the system brokers purchase of shared electronic subscriptions such as Gale Courses and represents its members in the Wisconsin Public Library Consortium (WPLC) which coordinates OverDrive access to digital materials.

NWLN also provides all members with the following:
- Online forms for public requests for new materials
- Remote authentication services for reference databases that member libraries offer to the public
- Online library card registration
- System-wide email through Outlook 365
- Coordination of the use of third-party products working with the ILS, including text and phone notifications

NWLS had been on the Millennium software system from Innovative since 1999 and moved to Innovative's Sierra in 2013. The NWLN implementation of Sierra is "software only," self-hosted in a private virtualization platform maintained by a partnership of several Wisconsin public library systems. The virtualization platform is or will be made capable of supporting all reasonable hardware requirements necessary to support at least three production implementations of ILS product sets, one for each partner library system's consortium.

Within the NWLN database, bibliographic records are shared among members with local holdings represented via attached records. There is centralized cataloging performed by contracted member staff on behalf of all libraries with full MARC records being transferred into Sierra ILS from SkyRiver and via z39.50 protocol. Maintaining the integrity of this database structure including how the results display to the public is of utmost importance to NWLN.

Northern Waters Library Network Member Libraries and Statistics

Library	Annual Circulation - 2019	Annual Circulation - 2021	Number of Patrons
Vaughn Public Library	91,574	72,953	6,106
Bayfield Carnegie Library	30,456	19,923	1,764
Boulder Junction Public Library	19,212	12,621	1629
Forest Lodge Library	14,534	9,277	1,169
Drummond Public Library	5,150	5,047	652
Walter E. Olson Memorial Library	78,519	36,987	6,238
Grantsburg Public Library	30,948	22,234	2,293
Sherman & Ruth Weiss Community Library	94,113	47,616	7,472
Hurley Public Library	12,603	10,693	928
Evelyn Goldberg Briggs Memorial Library	37,180	27,283	1,959
LCO College Community Library	7,862	1,919	1,063
Lac du Flambeau Public Library	492	418	300
Lake Nebagamon	2,299	923	(all Superior PL)
Land O'Lakes Public Library	23,348	13,611	1,782
Legion Memorial Library	17,126	6,784	864
Madeline Island Public Library	6,108	4,572	903
Mercer Public Library	17,820	10,883	2,296
Koller Memorial Library	15,744	14,688	1,276
Northern Waters (Mail-a-book)	3,884	2,848	862
Eleanor Ellis Public Library	13,160	5,905	253
Presque Isle Community Library	11,090	7,702	698
Phelps School	1,503	1,342	253
Plum Lake Public Library	19,368	15,053	1,504
Shell Lake Public Library	32,547	20,723	2,217
Solon Springs	10,740	7,256	(all Superior PL)
Spooner Memorial Library	93,012	61,668	5,888
Superior Public Library	210,314	126,042	16,350
Washburn Public Library	36,834	19,964	2,122
Larsen Family Library	39,737	22,526	2,834
Winter Public Library	12,044	8,398	866
Winchester Public Library	1,536	1,718	251
Total	**990,857**	**619,577**	**73,481**

Appendix D – Post Demonstration Survey Results
Circulation

How would you rate the Circulation features of Koha? 1 - Terrible / 2 - Poor / 3 - Good / 4 - Excellent

30 responses

- 1 (3.3%)
- 2 (6.7%)
- 14 (46.7%)
- 13 (43.3%)

How would you rate the Circulation features of Carl? 1 - Terrible / 2 - Poor / 3 - Good / 4 - Excellent

21 responses

- 0 (0%)
- 8 (38.1%)
- 12 (57.1%)
- 1 (4.8%)

How would you rate the Circulation features of Sierra? 1 - Terrible / 2 - Poor / 3 - Good / 4 - Excellent

13 responses

- 0 (0%)
- 0 (0%)
- 8 (61.5%)
- 5 (38.5%)
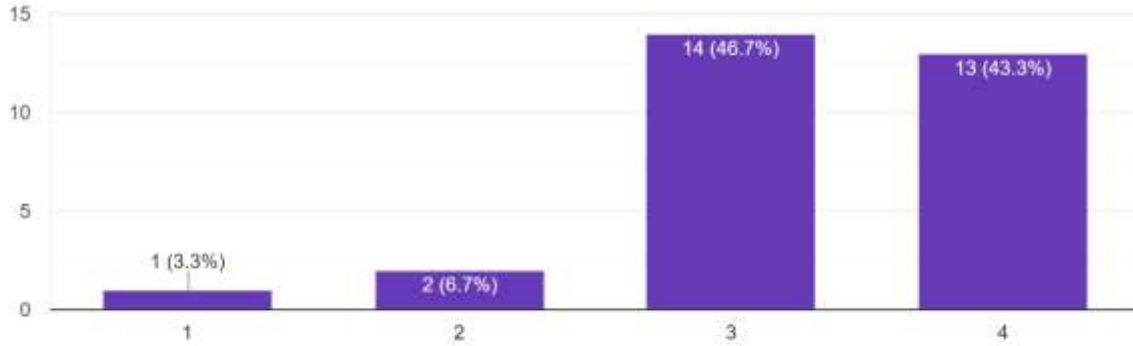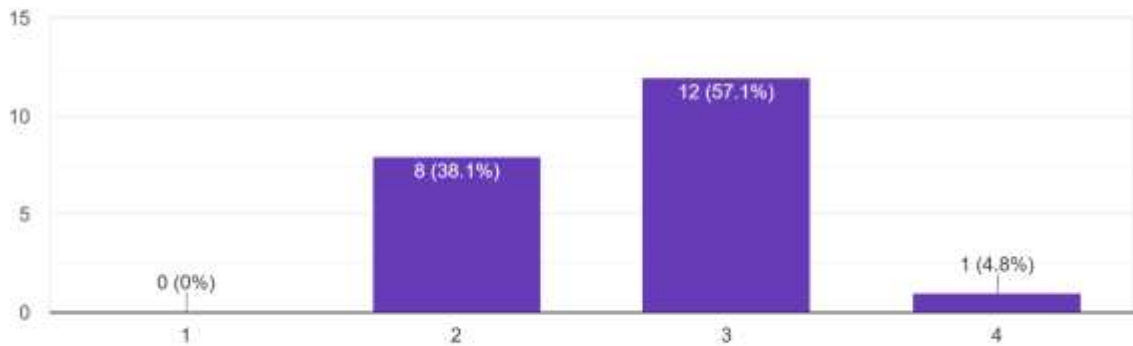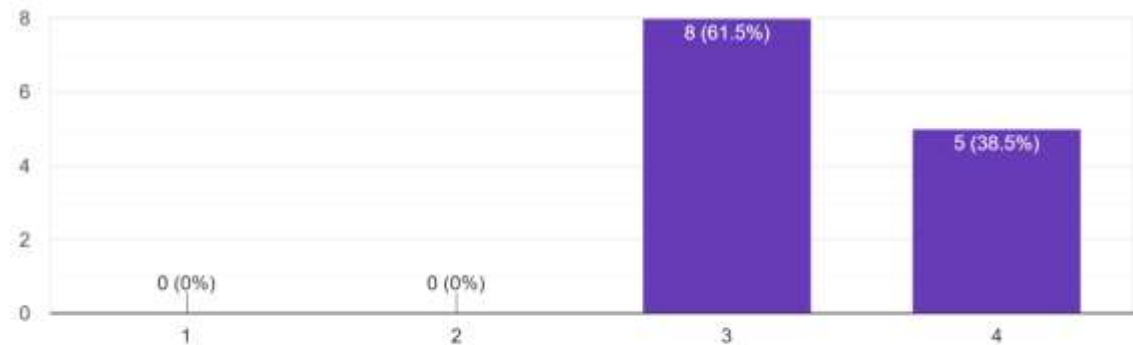
How do you feel Koha's Circulation features compare to Sierra?
30 responses
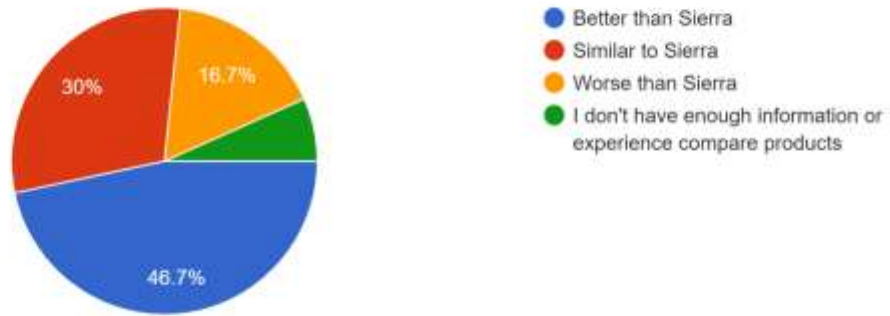
- Better than Sierra
- Similar to Sierra
- Worse than Sierra
- I don't have enough information or experience compare products

How do you feel this Carl's Circulation features compare to Sierra?
21 responses

- Better than Sierra
- Similar to Sierra
- Worse than Sierra
- I don't have enough information or experience compare products
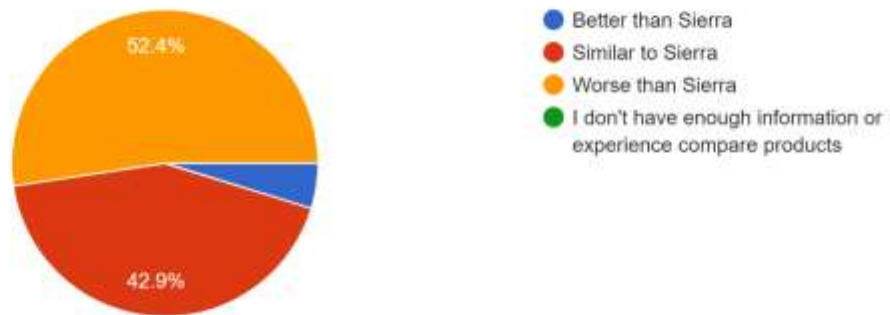
Holds and Paging

How would you rate the Holds & Paging features of this Koha? 1 - Terrible / 2 - Poor / 3 - Good / 4 - Excellent
30 responses
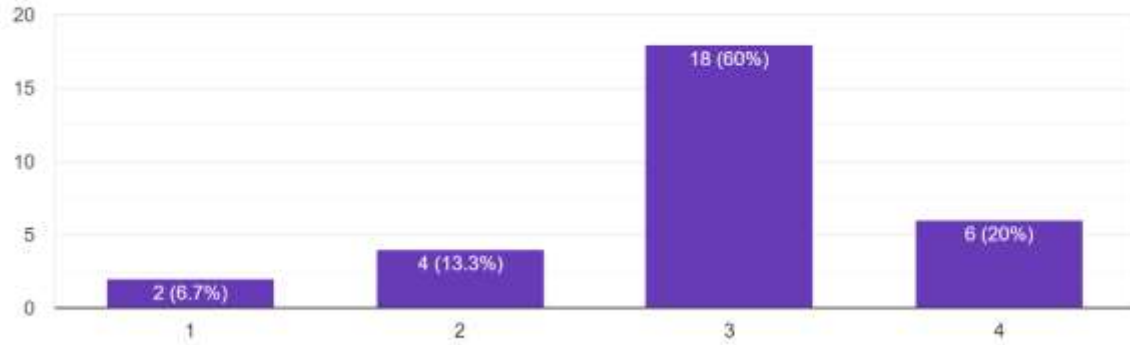
How would you rate the Holds & Paging features of Carl? 1 - Terrible / 2 - Poor / 3 - Good / 4 - Excellent
21 responses
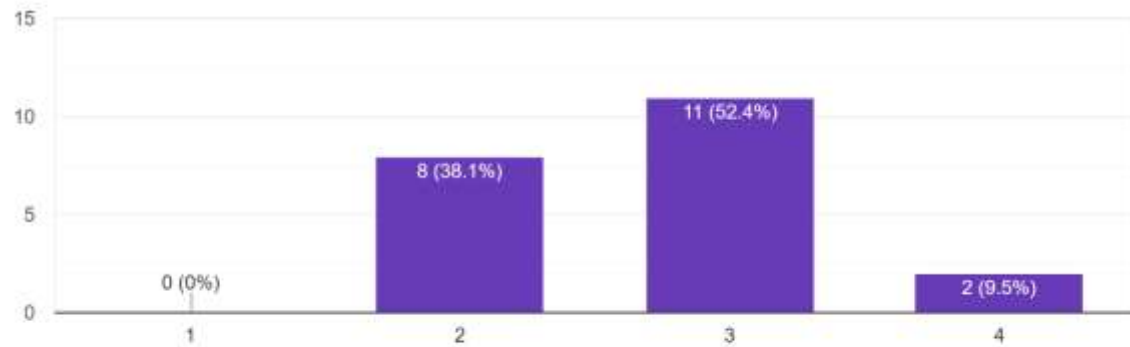
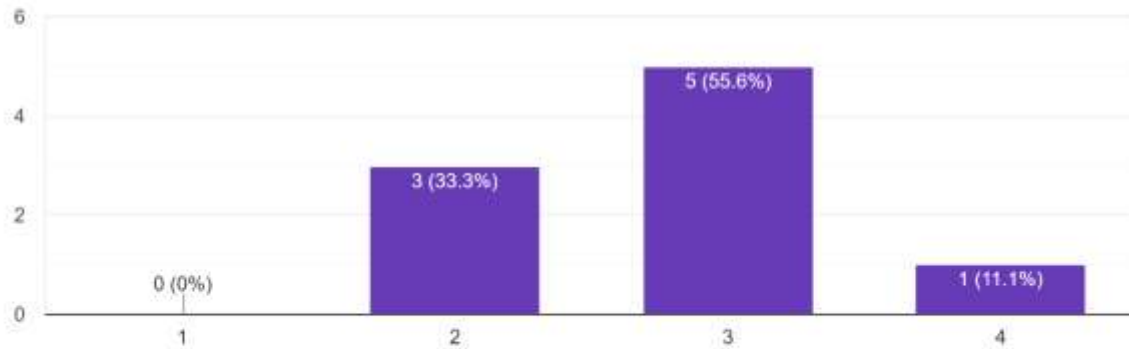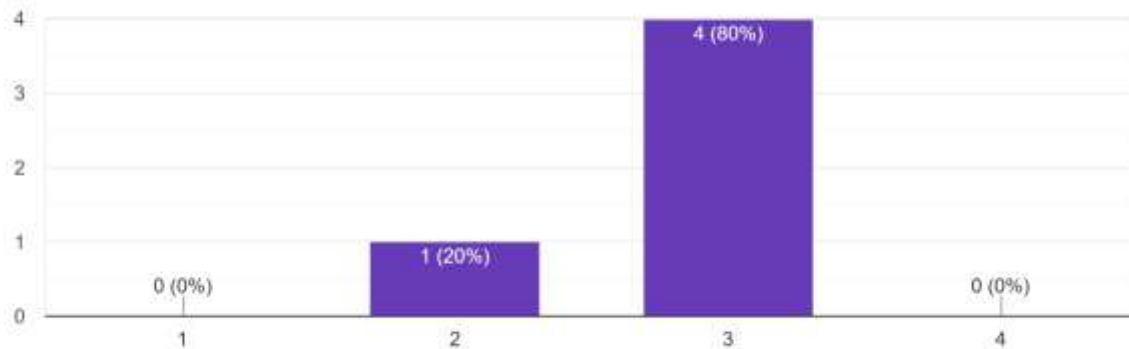How would you rate the Holds & Paging features of Sierra? 1 - Terrible / 2 - Poor / 3 - Good / 4 - Excellent
13 responses
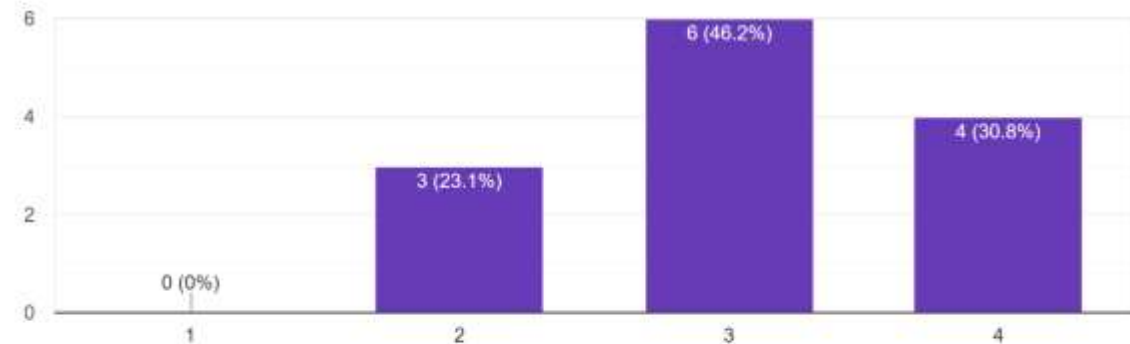
How do you feel Koha's Holds & Paging features compare to Sierra?

30 responses

- Better than Sierra
- Similar to Sierra
- Worse than Sierra
- I don't have enough information or experience to compare products

16.7%
13.3%
36.7%
33.3%
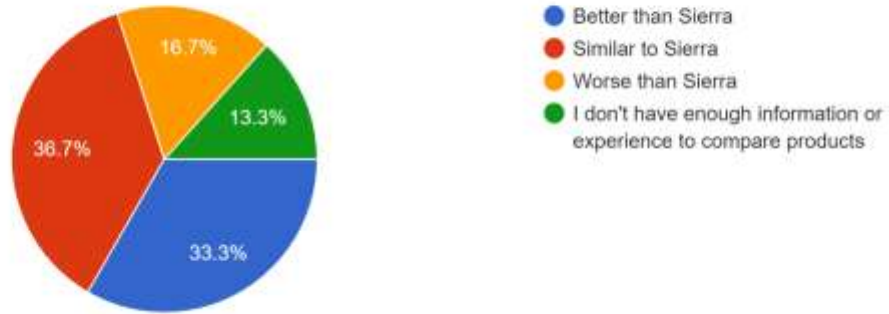
How do you feel Carl's Holds & Paging features compare to Sierra?

21 responses

- Better than Sierra
- Similar to Sierra
- Worse than Sierra
- I don't have enough information to or experience compare products

28.6%
23.8%
9.5%
38.1%
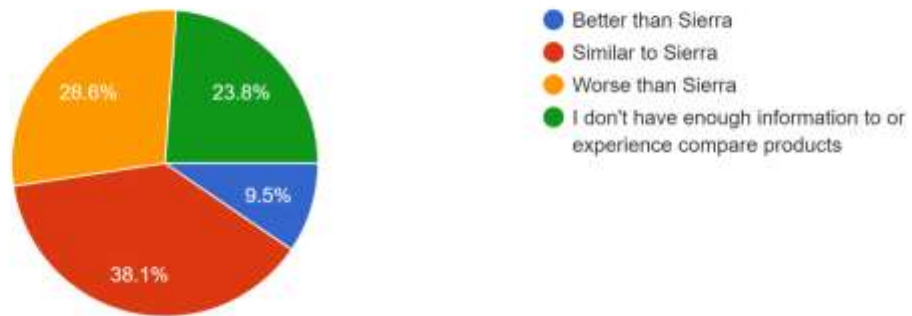
Circulation Notices

How would you rate the Circulation Notices features of Koha? 1 - Terrible / 2 - Poor / 3 - Good / 4 - Excellent
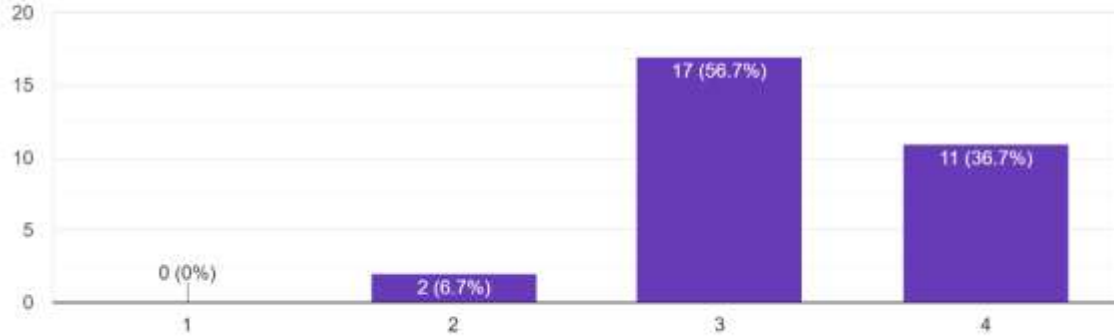
30 responses

How would you rate the Circulation Notices features of Carl? 1 - Terrible / 2 - Poor / 3 - Good / 4 - Excellent
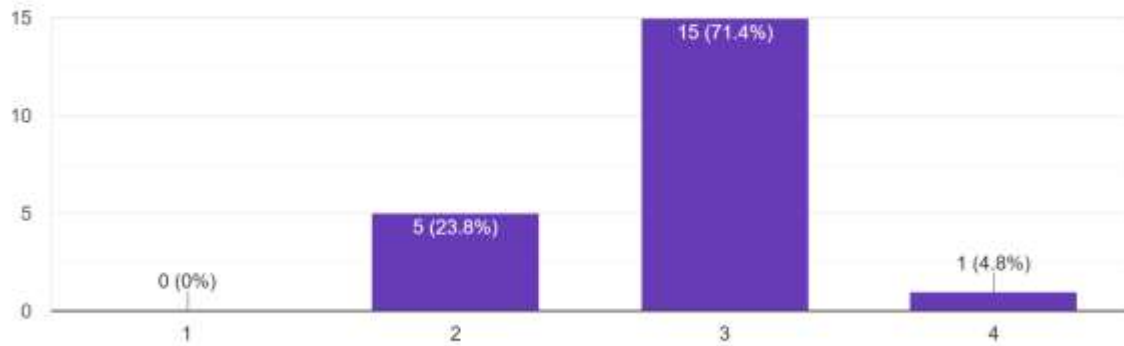
21 responses

How would you rate the Circulation Notices features of Sierra? 1 - Terrible / 2 - Poor / 3 - Good / 4 - Excellent
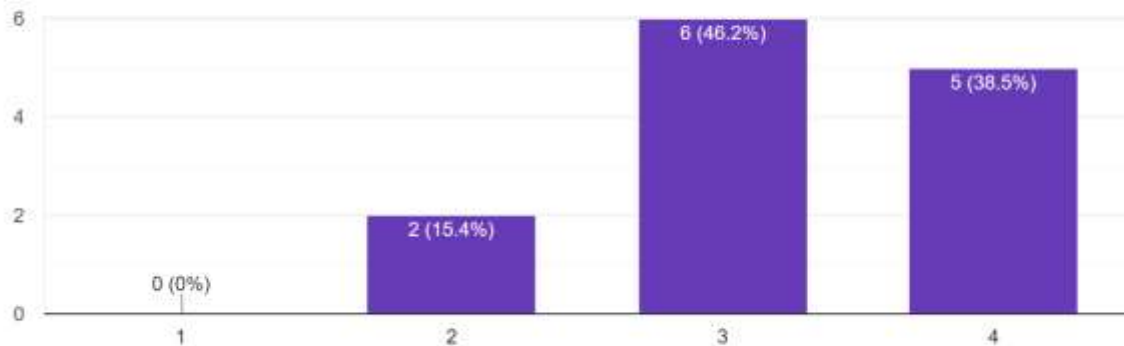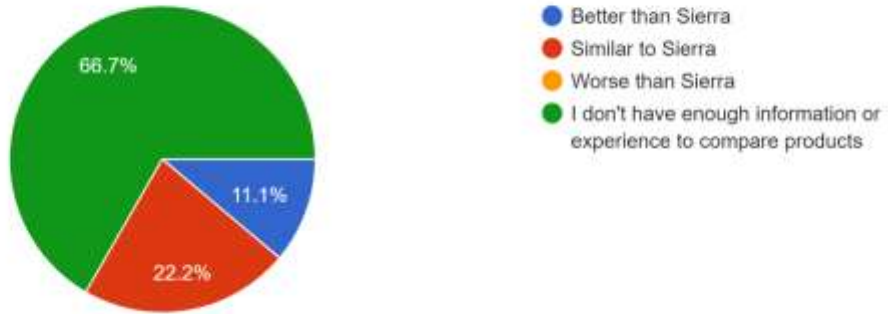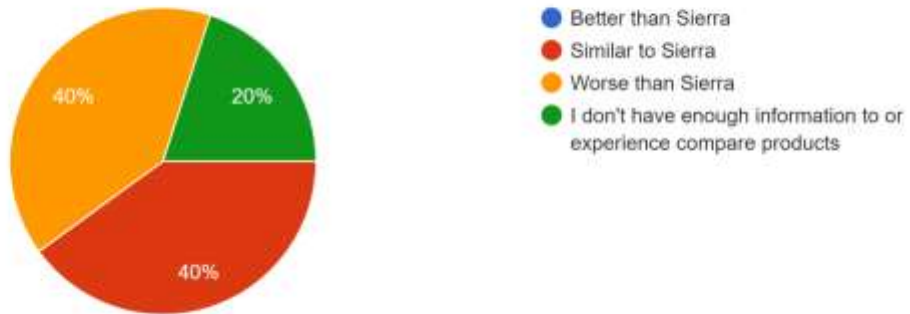
13 responses

How do you feel this Koha's Circulation Notices   features compare to Sierra?
30 responses
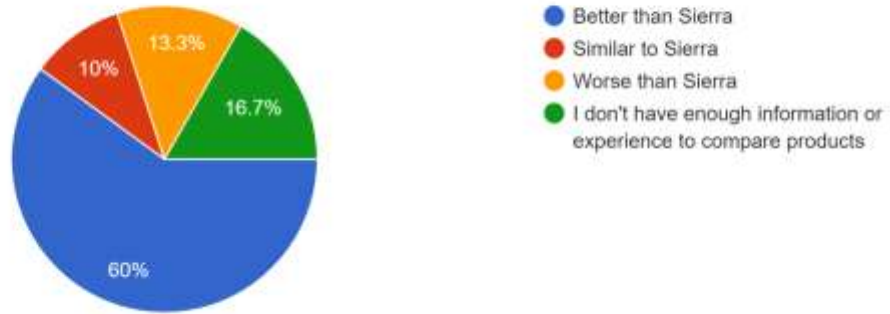
- Better than Sierra
- Similar to Sierra
- Worse than Sierra
- I don't have enough information or experience to compare products

How do you feel this Carl's Circulation Notices   features compare to Sierra?
21 responses

- Better than Sierra
- Similar to Sierra
- Worse than Sierra
- I don't have enough information to or experience compare products
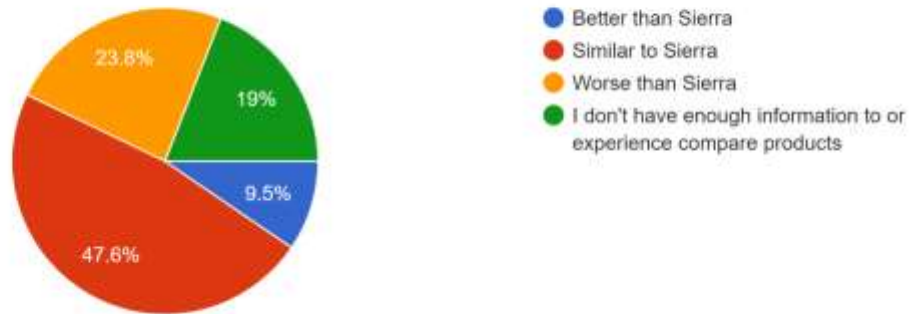
Interlibrary Loan

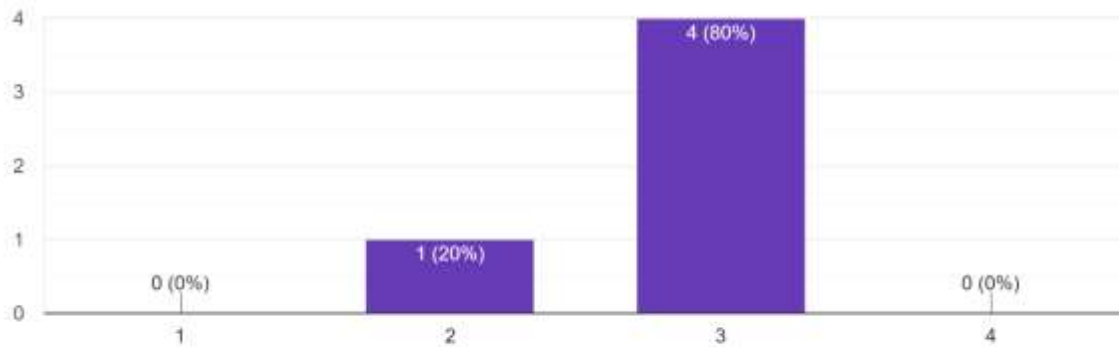How would you rate the Interlibrary Loan features of Koha? 1 - Terrible / 2 - Poor / 3 - Good / 4 - Excellent
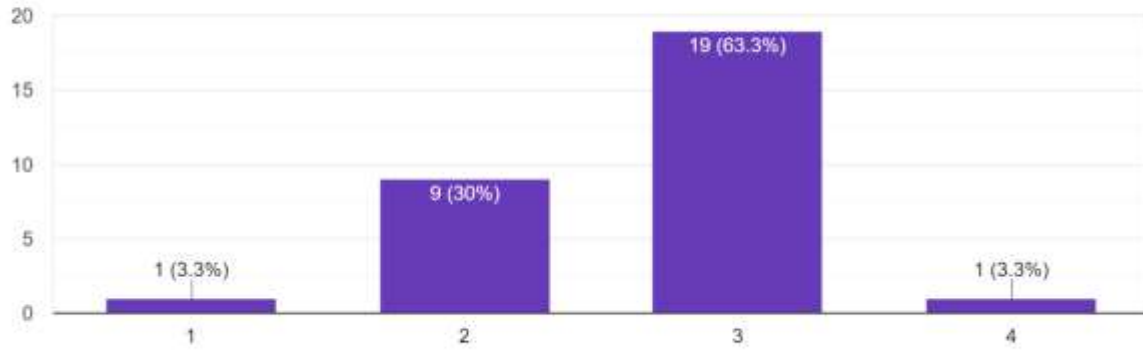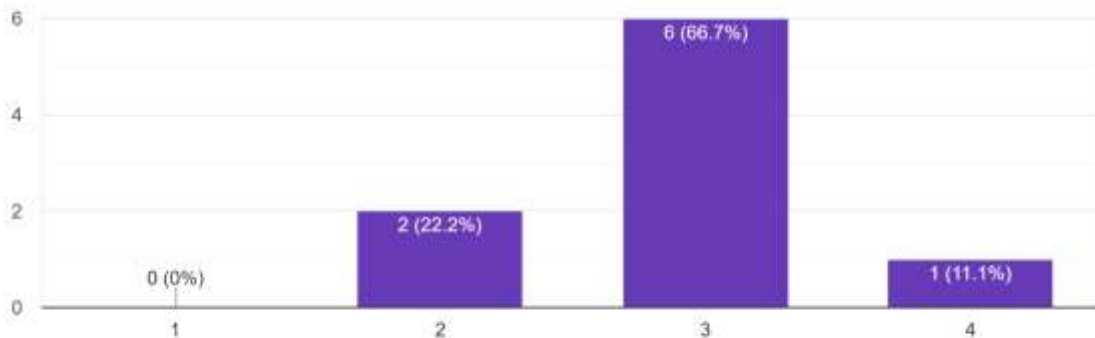
30 responses

How would you rate the Interlibrary Loan features of Carl?   1 - Terrible / 2 - Poor / 3 - Good / 4 - Excellent
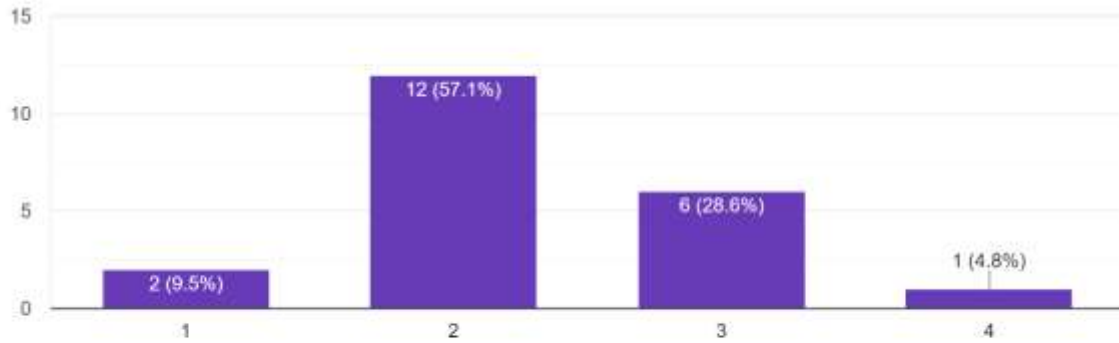
21 responses
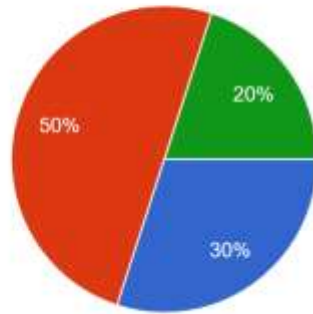

How would you rate the Interlibrary Loan features of Sierra? 1 - Terrible / 2 - Poor / 3 - Good / 4 - Excellent
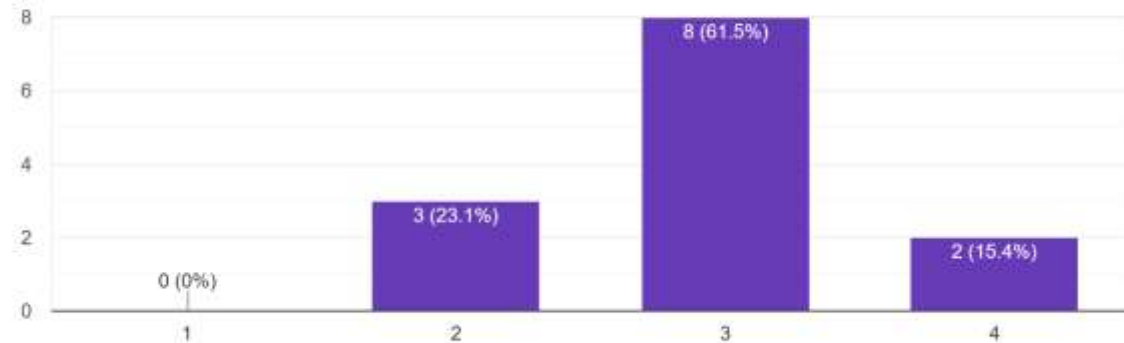
13 responses

How do you feel Koha's Interlibrary Loan features compare to Sierra?
30 responses

- ● Better than Sierra
- ● Similar to Sierra
- ● Worse than Sierra
- ● I don't have enough information or experience to compare products

46.7%
13.3%
33.3%
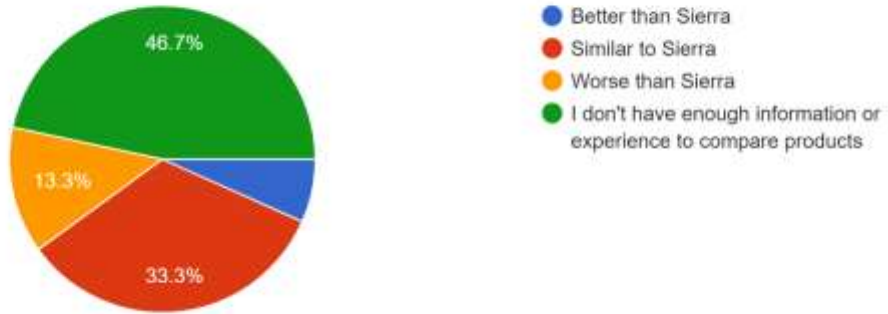
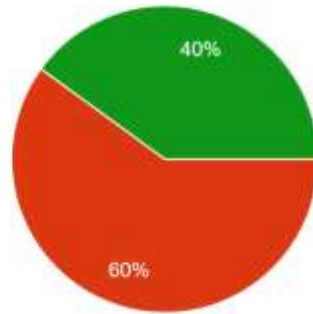How do you feel Carl's Interlibrary Loan features compare to Sierra?
21 responses

- ● Better than Sierra
- ● Similar to Sierra
- ● Worse than Sierra
- ● I don't have enough information to or experience compare products

47.6%
9.5%
38.1%
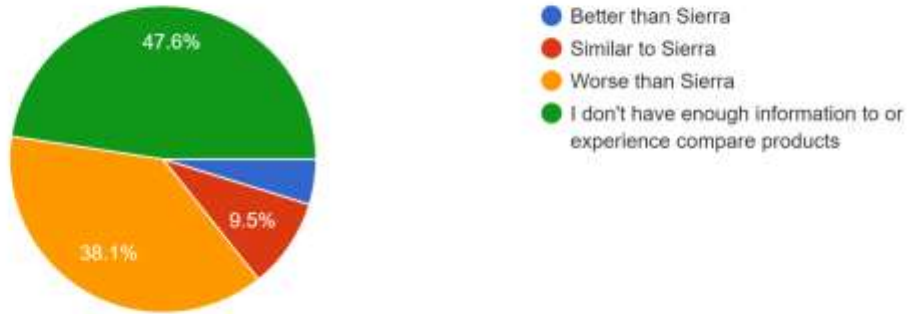
Patron Records & Fines Management

How would you rate the Patron Records & Fines Management features of Koha? 1 - Terrible / 2 - Poor / 3 - Good / 4 - Excellent

23 responses
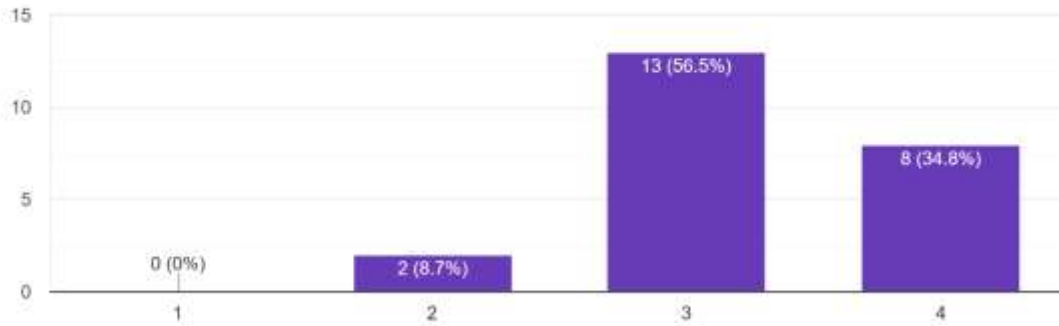
How would you rate the Patron Records & Fines Management features of Carl? 1 - Terrible / 2 - Poor / 3 - Good / 4 - Excellent

16 responses
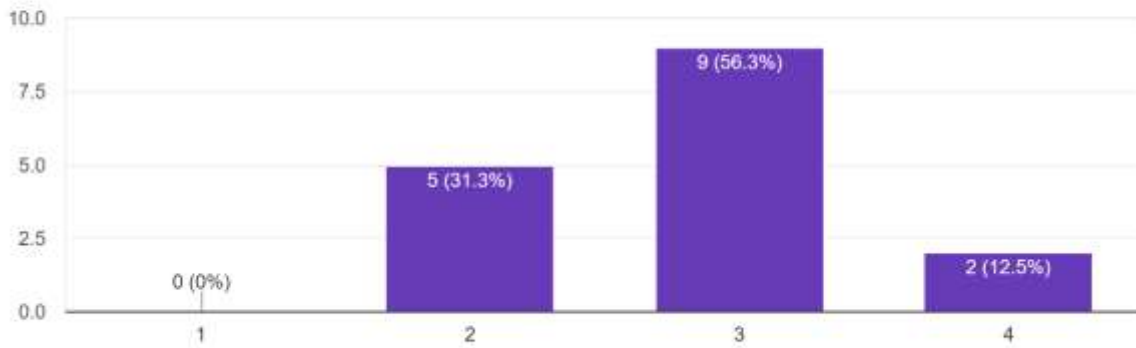
How would you rate the Patron Records / Fines Management features of Sierra? 1 - Terrible / 2 - Poor / 3 - Good / 4 - Excellent
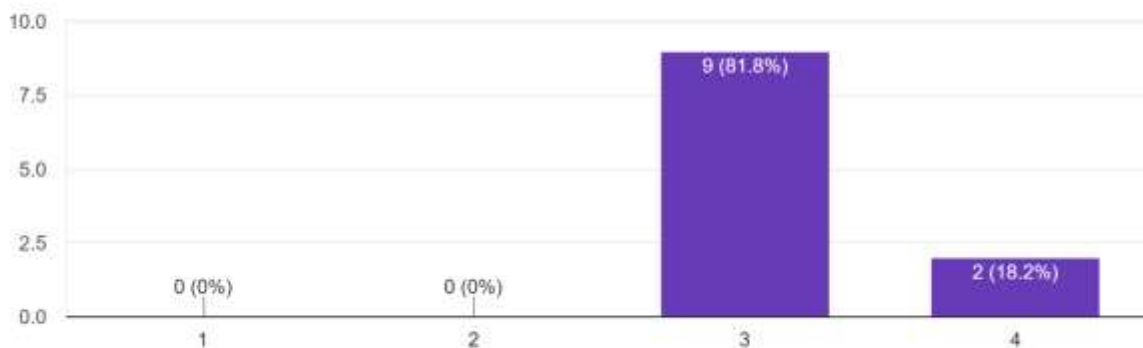
11 responses

How do you feel Koha's   Patron Records & Fines Management   features compare to Sierra?

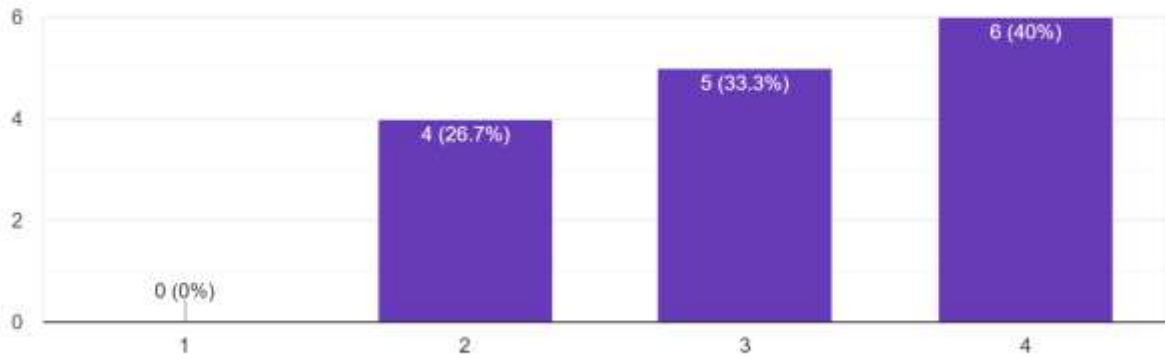23 responses


- Better than Sierra
- Similar to Sierra
- Worse than Sierra
- I don't have enough information or experience to compare products

8.7%
13%
73.9%
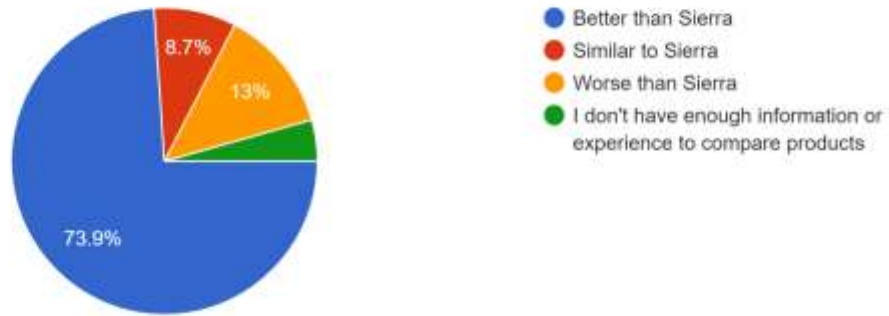
How do you feel Carl's Patron Records & Fines Management features compare to Sierra?

16 responses

- Better than Sierra
- Similar to Sierra
- Worse than Sierra
- I don't have enough information to or experience compare products

50%
43.8%
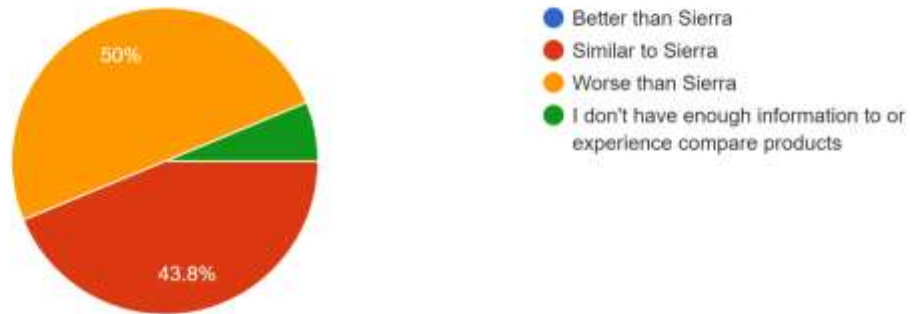
Online Patron Catalog / Discovery Layer

How would you rate the Basic Online Patron Catalog features of Koha? 1 - Terrible / 2 - Poor / 3 - Good / 4 - Excellent
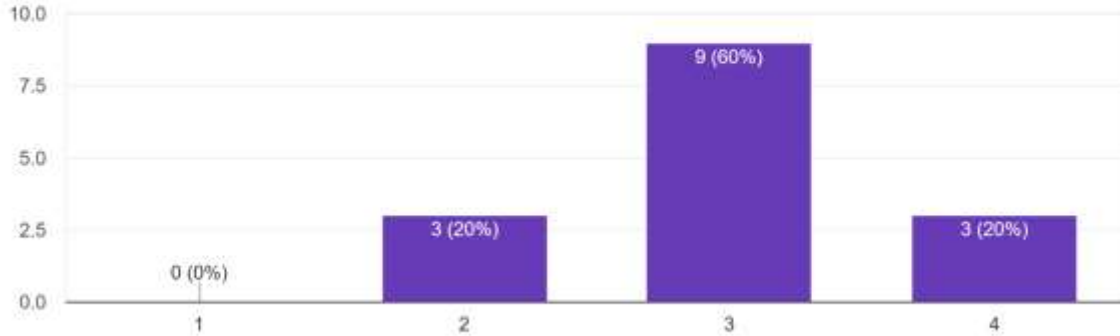
15 responses

How would you rate the Basic Online Patron Catalog features of Carl? 1 - Terrible / 2 - Poor / 3 - Good / 4 - Excellent
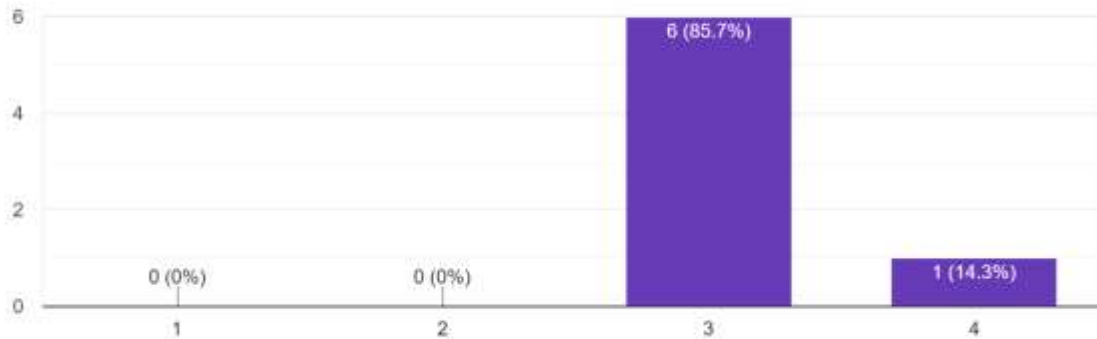
7 responses

How do you feel Koha's Basic Online Patron Catalog features compare to Sierra's Classic V-Cat catalog?

15 responses

- Better than Sierra's Classic Catalog
- Similar to Sierra's Classic Catalog
- Worse than Sierra's Classic Catalog
- I don't have enough information or experience to compare products
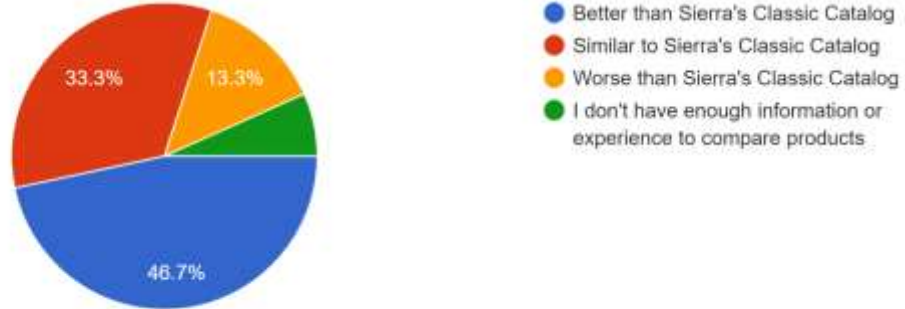
How do you feel Carl's Basic Online Patron Catalog features compare to Sierra?

7 responses

- Better than Sierra's Classic Catalog
- Similar to Sierra's Classic Catalog
- Worse than Sierra's Classic Catalog
- I don't have enough information to or experience compare products
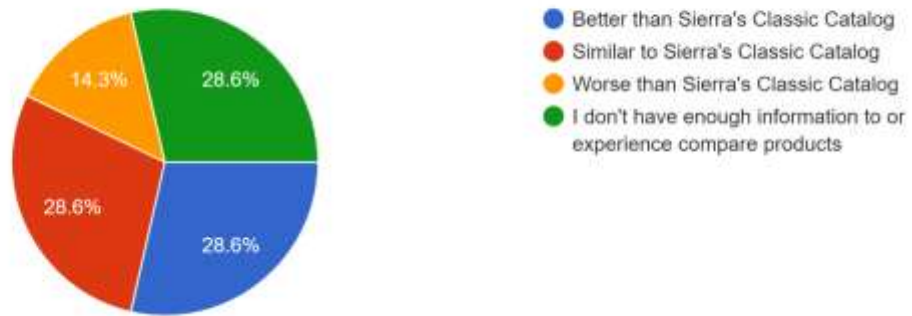
Discovery Catalog

How would you rate the Discovery Catalog features of Sierra? 1 - Terrible / 2 - Poor / 3 - Good / 4 - Excellent
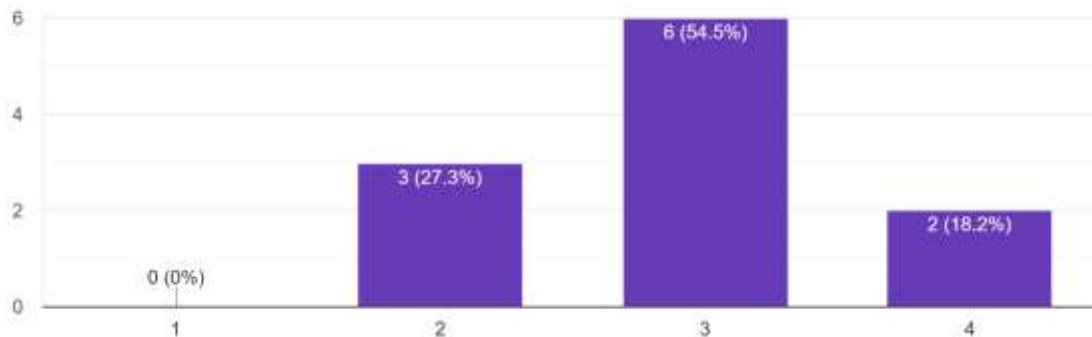
11 responses

Systems Administration

How would you rate the Systems Administration features of Koha? 1 - Terrible / 2 - Poor / 3 - Good / 4 - Excellent
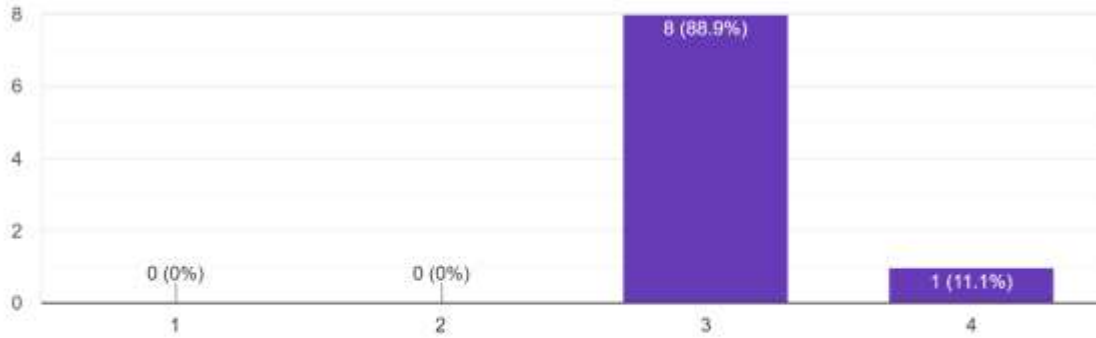
9 responses

How would you rate the Systems Administration features of Sierra? 1 - Terrible / 2 - Poor / 3 - Good / 4 - Excellent
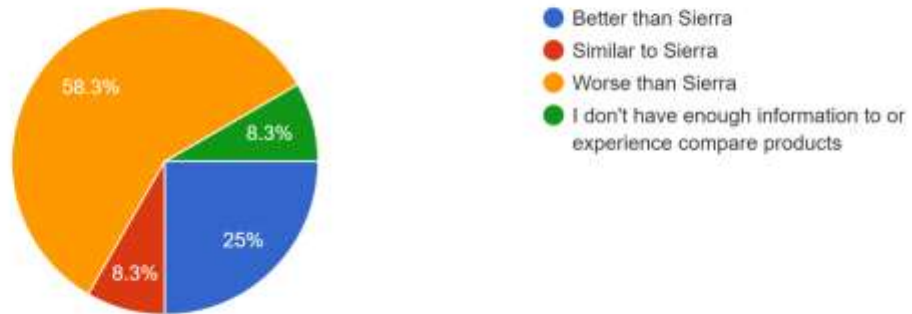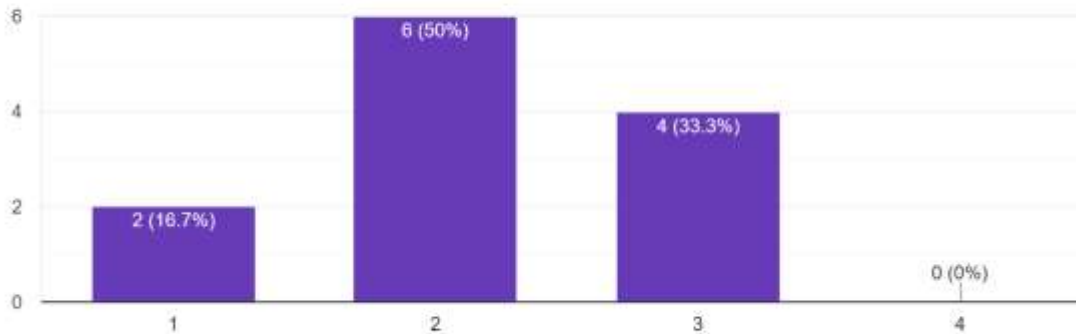
9 responses

How would you rate the Systems Administration features of Carl? 1 - Terrible / 2 - Poor / 3 - Good / 4 - Excellent
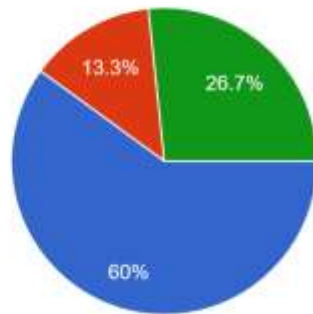
5 responses

How do you feel Koha's Systems Administration features compare to Sierra?
9 responses

- Better than Sierra
- Similar to Sierra
- Worse than Sierra
- I don't have enough information or experience to compare products

66.7%
11.1%
22.2%

How do you feel Carl's Systems Administration features compare to Sierra?
5 responses

- Better than Sierra
- Similar to Sierra
- Worse than Sierra
- I don't have enough information to or experience compare products

40%
20%
40%

Compatibility with Other Products

How would you rate the Compatibility with other products features of Koha? 1 - Terrible / 2 - Poor / 3 - Good / 4 - Excellent
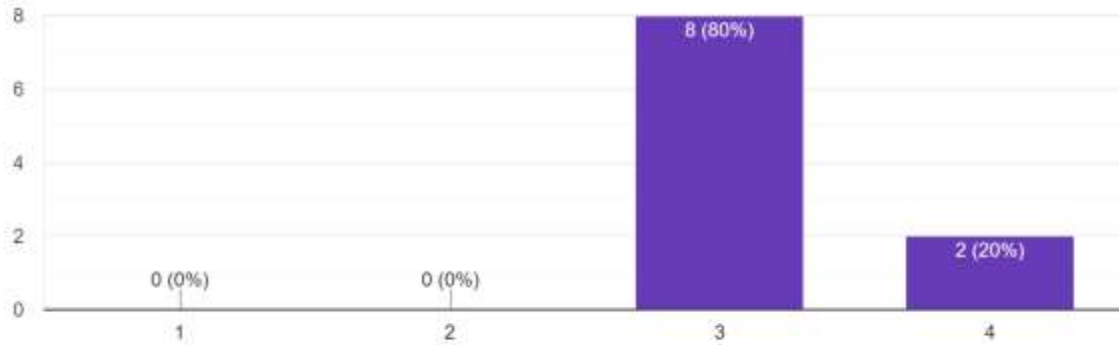
10 responses

How would you rate the Compatibility with other products features of Carl? 1 - Terrible / 2 - Poor / 3 - Good / 4 - Excellent

5 responses

How would you rate the Compatibility with other products features of Sierra? 1 - Terrible / 2 - Poor / 3 - Good / 4 - Excellent

9 responses

How do you feel Koha's Compatibility with other products features compare to Sierra?
10 responses


- Better than Sierra
- Similar to Sierra
- Worse than Sierra
- I don't have enough information or experience to compare products

How do you feel Carl's Compatibility with other products features compare to Sierra?
5 responses

- Better than Sierra
- Similar to Sierra
- Worse than Sierra
- I don't have enough information to or experience compare products

Reports
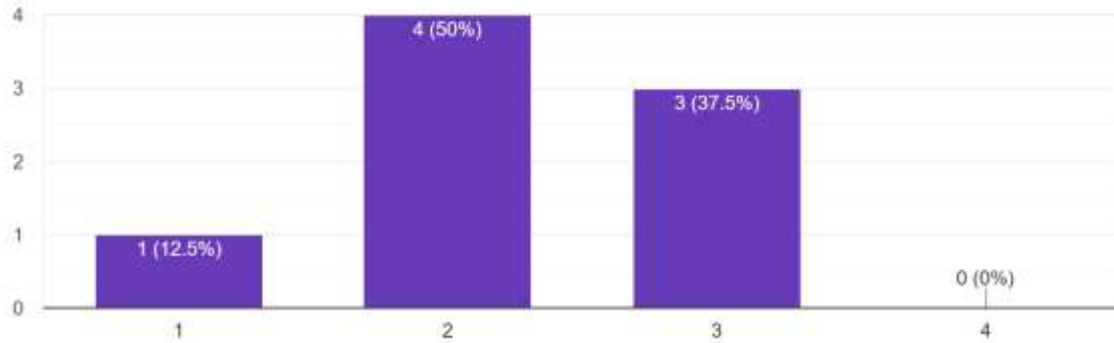
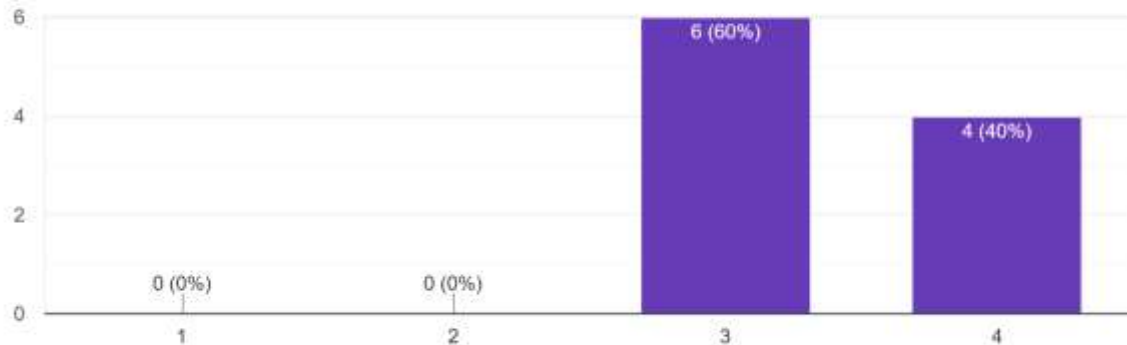How would you rate the Reports features of Koha? 1 - Terrible / 2 - Poor / 3 - Good / 4 - Excellent
15 responses

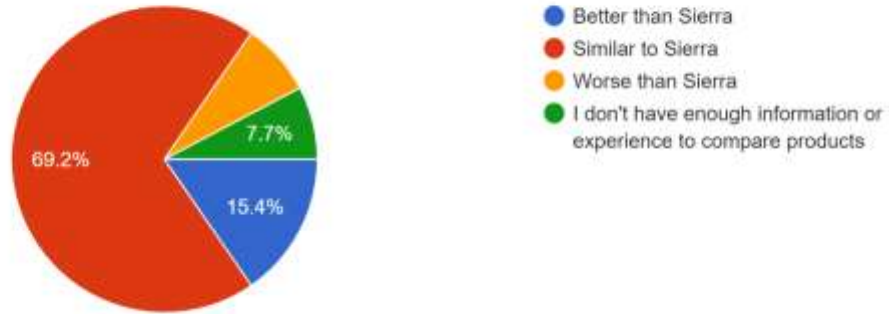How would you rate the Reports features of Carl? 1 - Terrible / 2 - Poor / 3 - Good / 4 - Excellent
12 responses
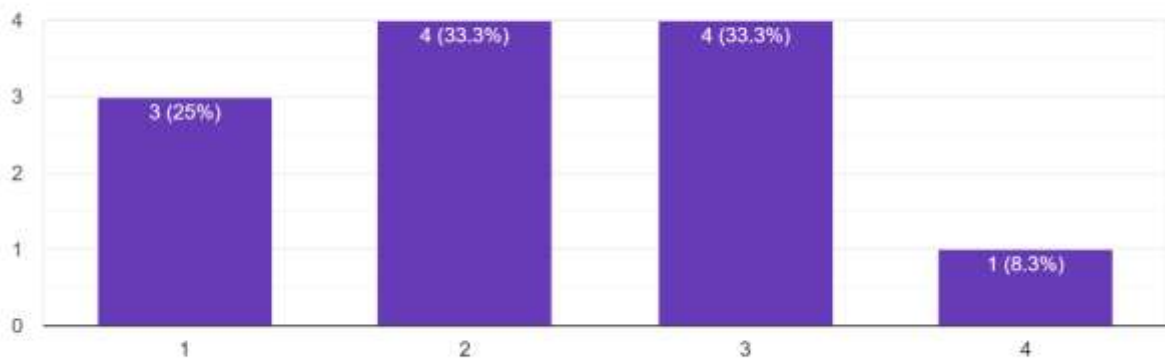
How would you rate the Reports features of Sierra? 1 - Terrible / 2 - Poor / 3 - Good / 4 - Excellent
11 responses
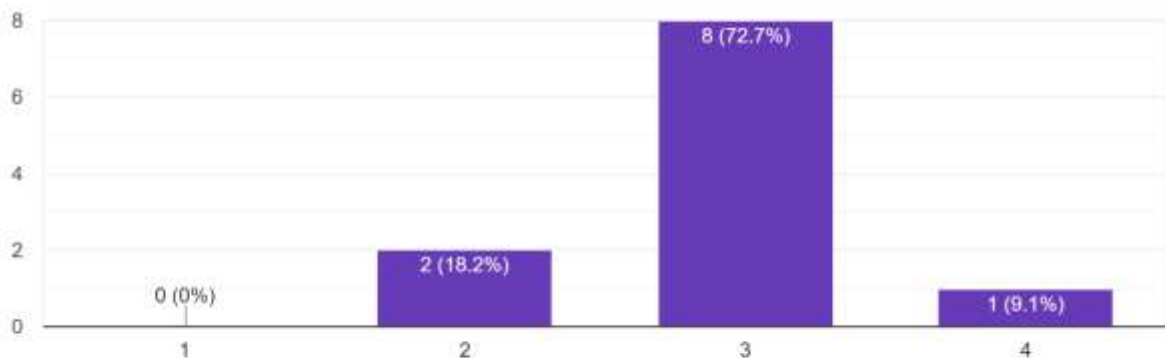
How do you feel Koha's Reports features compare to Sierra?
15 responses

- Better than Sierra
- Similar to Sierra
- Worse than Sierra
- I don't have enough information or experience to compare products
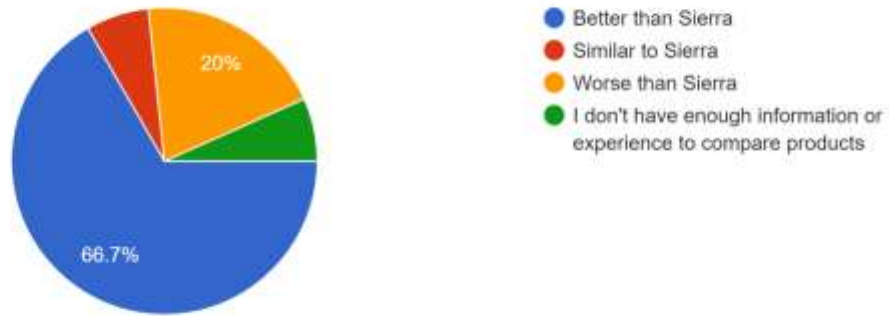
How do you feel Carl's Reports features compare to Sierra?
12 responses

- Better than Sierra
- Similar to Sierra
- Worse than Sierra
- I don't have enough information to or experience compare products

Inventory

How would you rate the Inventory features of Koha? 1 - Terrible / 2 - Poor / 3 - Good / 4 - Excellent
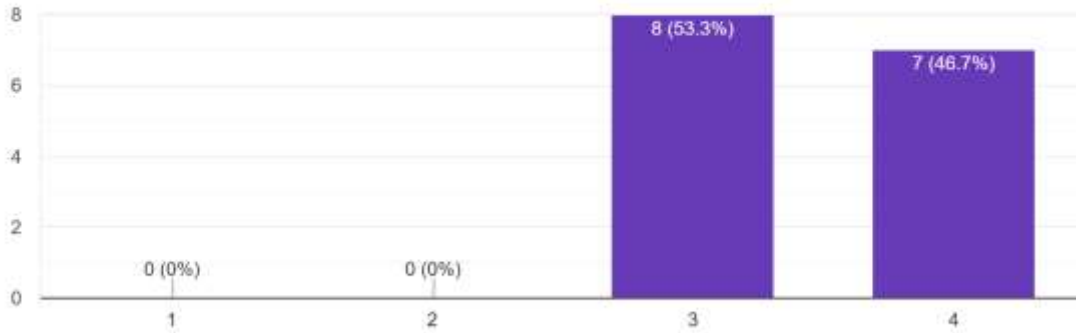
15 responses

How would you rate the Inventory features of Carl? 1 - Terrible / 2 - Poor / 3 - Good / 4 - Excellent

12 responses

How would you rate the Inventory features of Sierra? 1 - Terrible / 2 - Poor / 3 - Good / 4 - Excellent
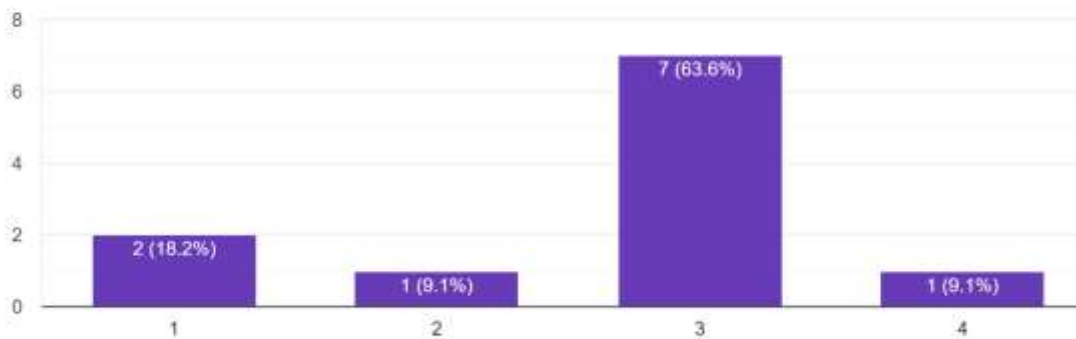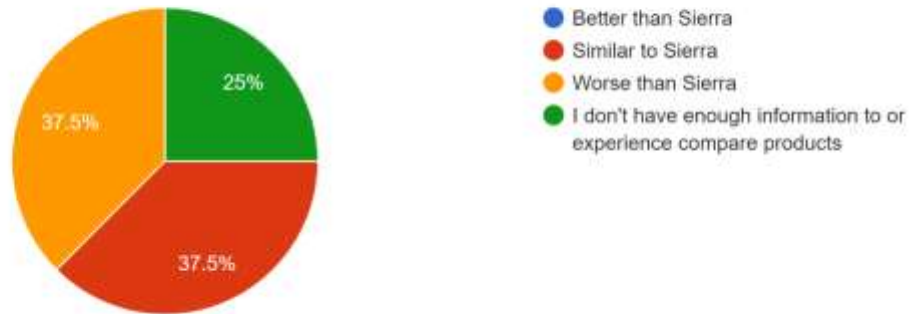
11 responses

How do you feel Koha's   Inventory features compare to Sierra?
15 responses

- Better than Sierra or Circa
- Similar to Sierra or Circa
- Worse than Sierra or Circa
- I don't have enough information or experience to compare products

13.3%
26.7%
60%

How do you feel Carl's   Inventory features compare to Sierra?
12 responses
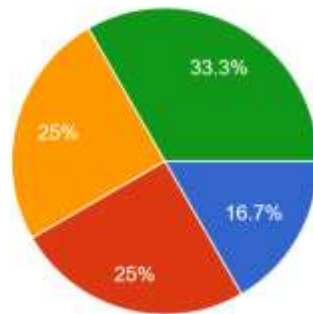
- Better than Sierra or Circa
- Similar to Sierra or Circa
- Worse than Sierra or Circa
- I don't have enough information to or experience compare products
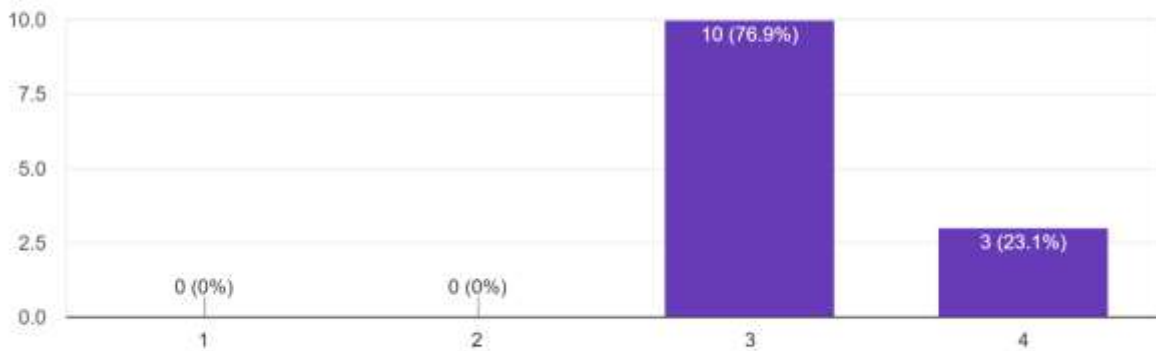
33.3%
25%
25%
16.7%

Adding Item Records
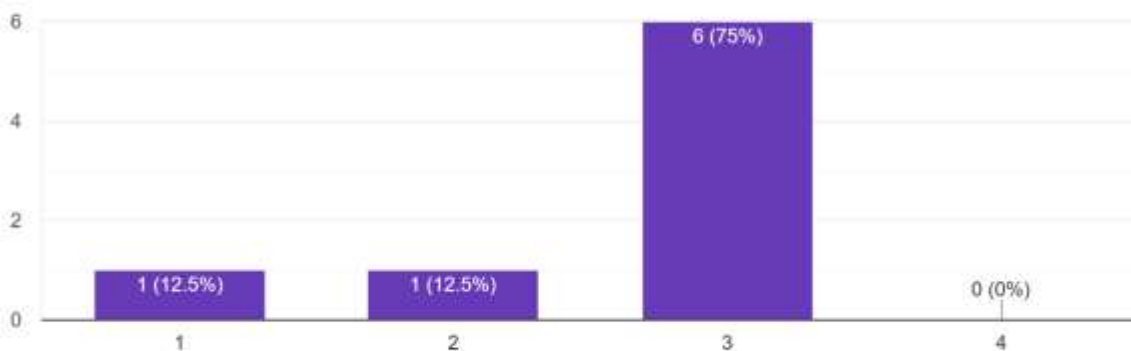
How would you rate the Adding Item Records features of Koha? 1 - Terrible / 2 - Poor / 3 - Good /
4 - Excellent
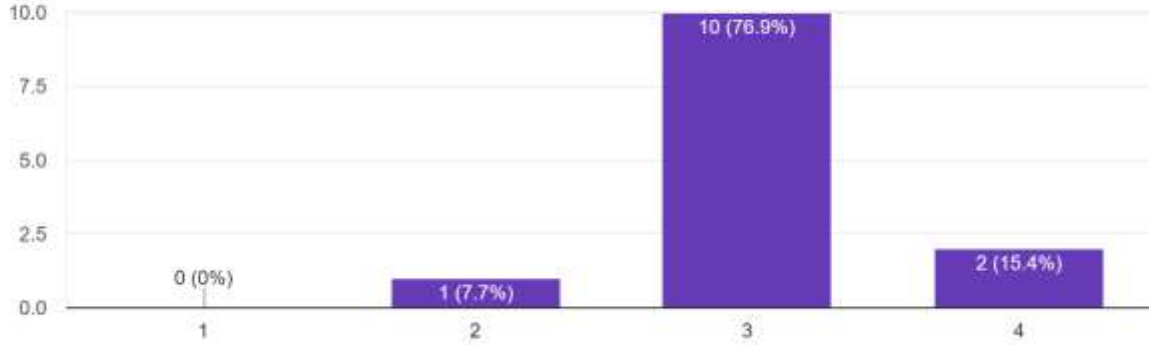
13 responses

How would you rate the Adding Item Records features of Carl? 1 - Terrible / 2 - Poor / 3 - Good /
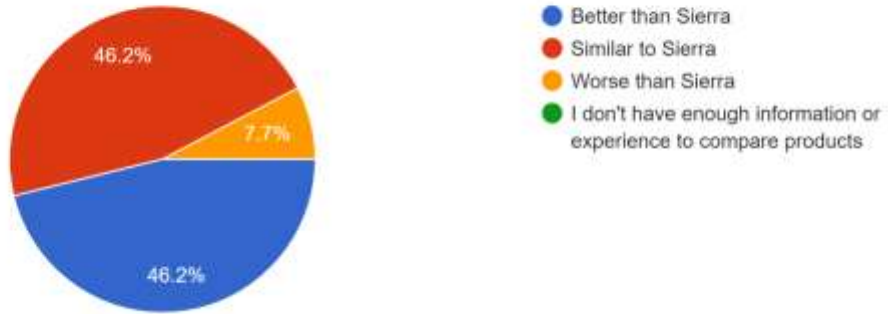4 - Excellent

8 responses

How would you rate the Adding Item Records features of Sierra? 1 - Terrible / 2 - Poor / 3 - Good
/ 4 - Excellent

10 responses

How do you feel Koha's features for Adding Item Records compare to Sierra?

13 responses

- Better than Sierra
- Similar to Sierra
- Worse than Sierra
- I don't have enough information or experience to compare products

How do you feel Carl's features for Adding Item Records compare to Sierra?

8 responses

- Better than Sierra
- Similar to Sierra
- Worse than Sierra
- I don't have enough information to or experience compare products

General Records Management

How would you rate the General Records Management features of Sierra? 1 - Terrible / 2 - Poor / 3 - Good / 4 - Excellent
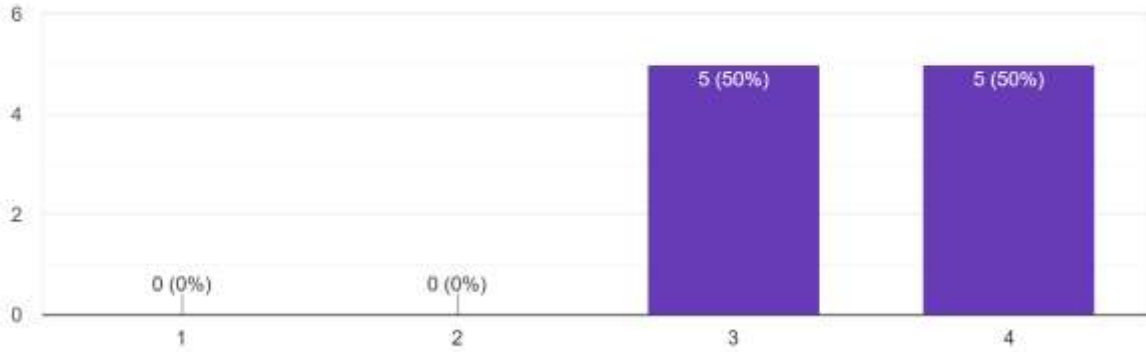
10 responses

How would you rate the General Records Management features of Koha? 1 - Terrible / 2 - Poor / 3 - Good / 4 - Excellent

13 responses

How would you rate the General Records Management features of Carl? 1 - Terrible / 2 - Poor / 3 - Good / 4 - Excellent
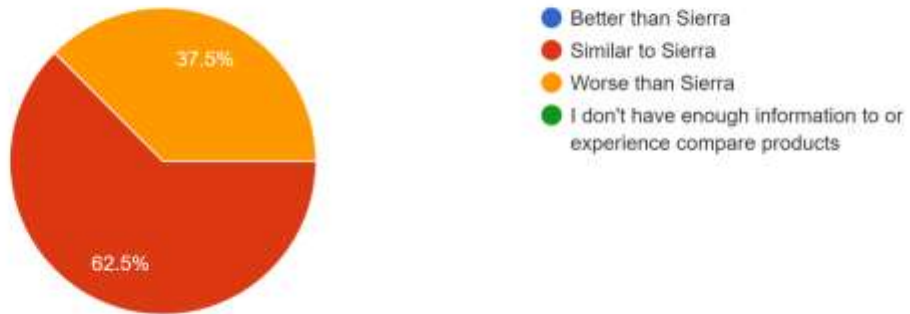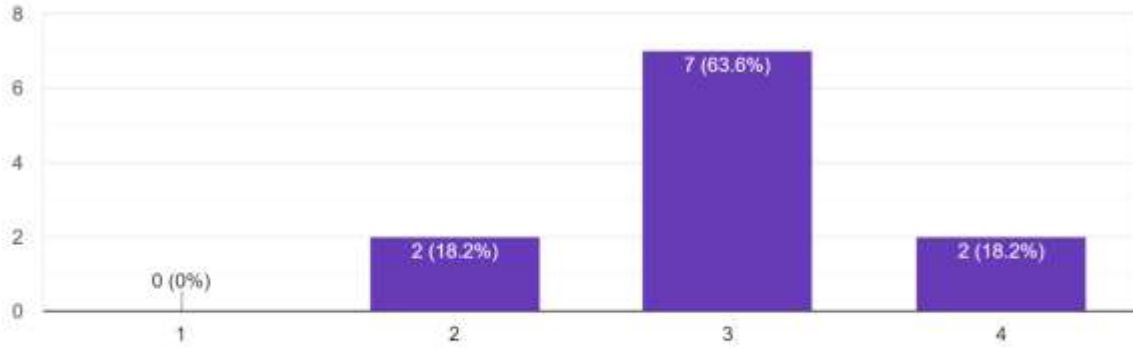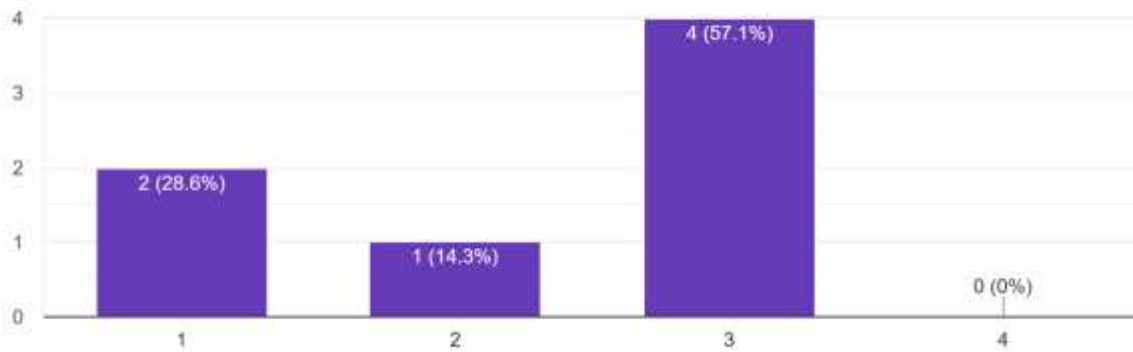
8 responses

How do you feel Koha's features for General Records Management   compare to Sierra?
13 responses

- Better than Sierra
- Similar to Sierra
- Worse than Sierra
- I don't have enough information or experience to compare products

46.2%

7.7%

46.2%

How do you feel Carl's features for General Records Management   compare to Sierra?
8 responses

- Better than Sierra
- Similar to Sierra
- Worse than Sierra
- I don't have enough information to or experience compare products

37.5%

62.5%

Cataloging

How would you rate the Cataloging features of Koha? 1 - Terrible / 2 - Poor / 3 - Good / 4 - Excellent
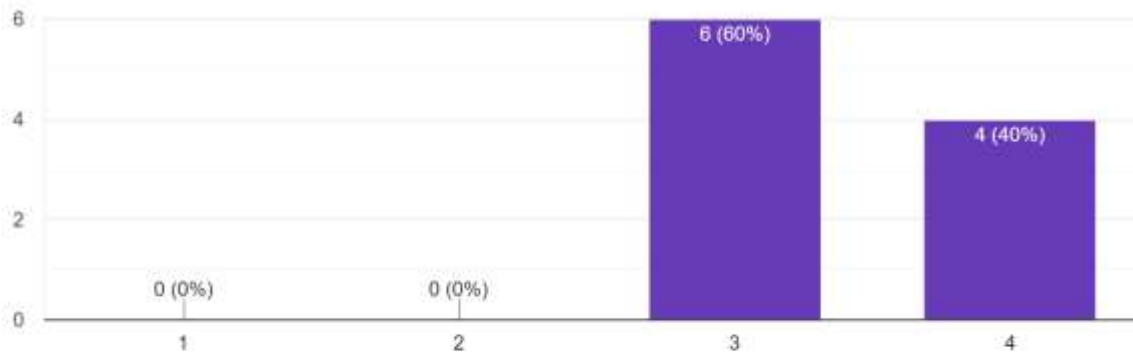
11 responses

How would you rate the Cataloging features of Carl? 1 - Terrible / 2 - Poor / 3 - Good / 4 - Excellent
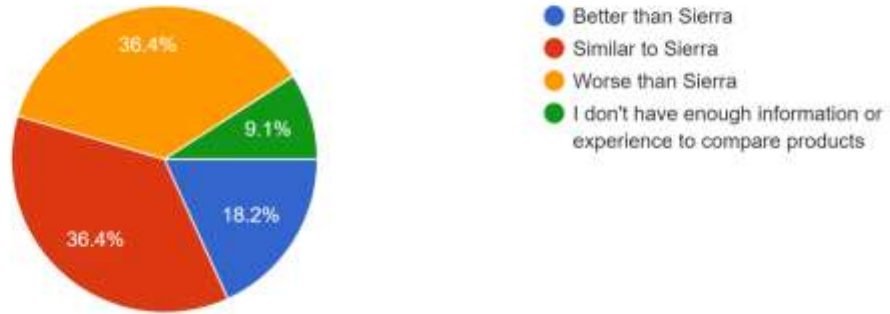
7 responses

How would you rate the Cataloging features of Sierra? 1 - Terrible / 2 - Poor / 3 - Good / 4 - Excellent
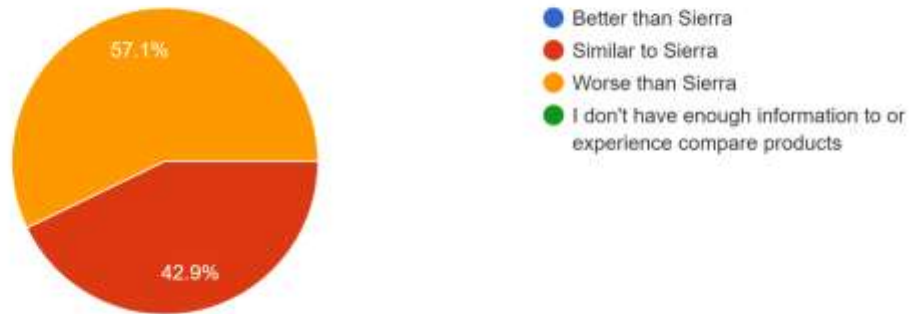
10 responses

How do you feel Koha's features for Cataloging compare to Sierra?
11 responses

- ● Better than Sierra
- ● Similar to Sierra
- ● Worse than Sierra
- ● I don't have enough information or experience to compare products

How do you feel Carl's features for Cataloging compare to Sierra?
7 responses

- ● Better than Sierra
- ● Similar to Sierra
- ● Worse than Sierra
- ● I don't have enough information to or experience compare products
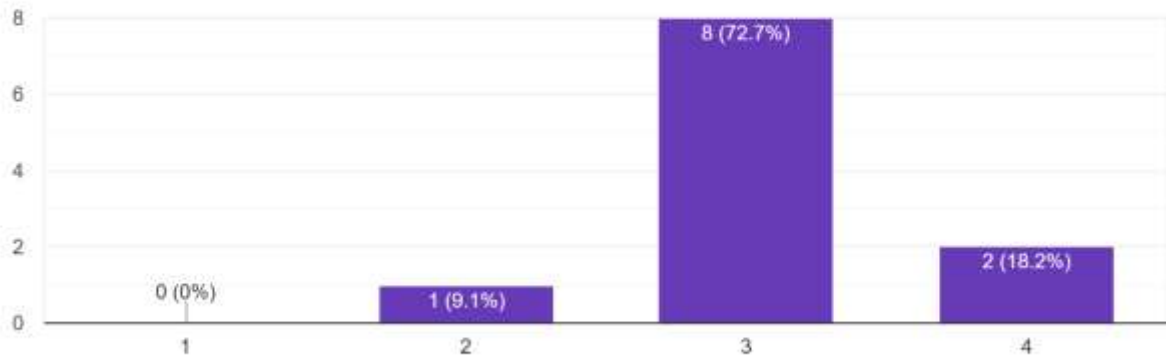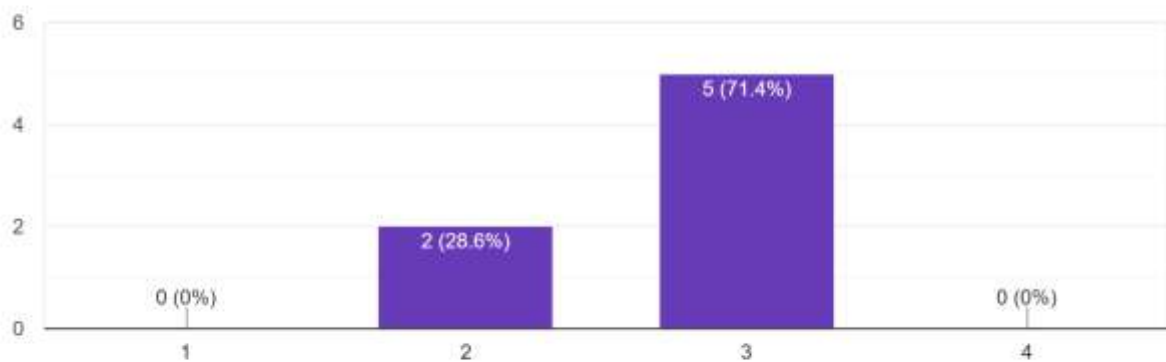
Serials

How would you rate the Serials features of Koha? 1 - Terrible / 2 - Poor / 3 - Good / 4 - Excellent
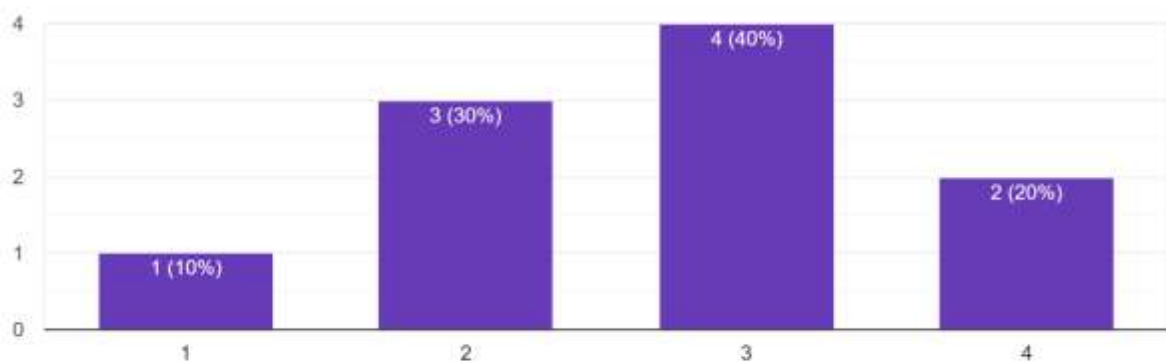
11 responses

How would you rate the Serials features of Carl? 1 - Terrible / 2 - Poor / 3 - Good / 4 - Excellent

7 responses

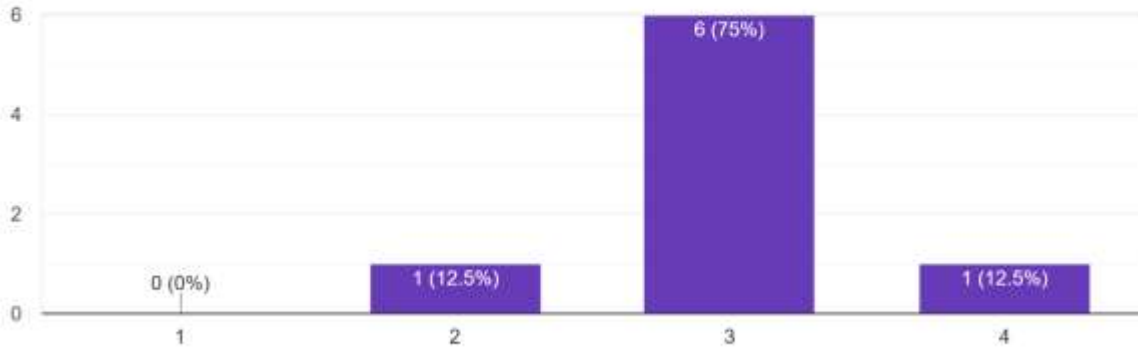How would you rate the Serials features of Sierra? 1 - Terrible / 2 - Poor / 3 - Good / 4 - Excellent

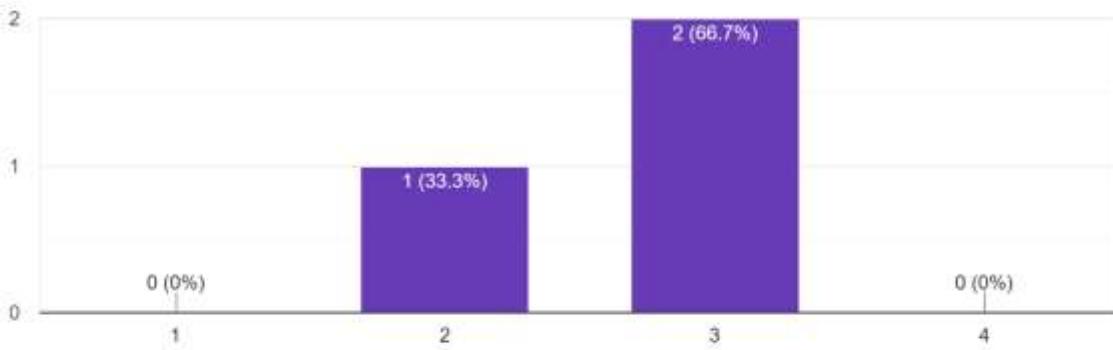10 responses

Ordering / Acquisitions

How would you rate the Ordering / Acquisitions features of Koha? 1 - Terrible / 2 - Poor / 3 - Good / 4 - Excellent
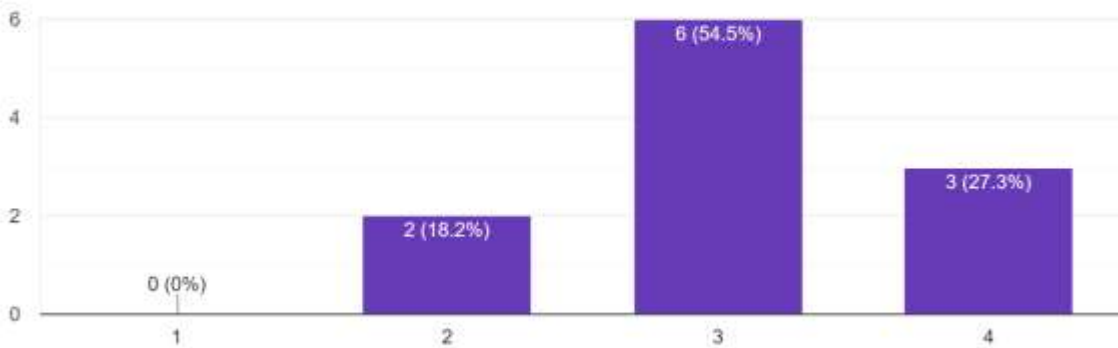
8 responses

How would you rate the Ordering / Acquisitions features of Carl? 1 - Terrible / 2 - Poor / 3 - Good / 4 - Excellent

3 responses

How would you rate the Ordering / Acquisitions features of Sierra? 1 - Terrible / 2 - Poor / 3 - Good / 4 - Excellent

11 responses

How do you feel Koha's features for Ordering / Acquisitions compare to Sierra?
8 responses

- Better than Sierra
- Similar to Sierra
- Worse than Sierra
- I don't have enough information or experience to compare products

How do you feel Carl's features for Ordering / Acquisitions compare to Sierra?
3 responses

- Better than Sierra
- Similar to Sierra
- Worse than Sierra
- I don't have enough information to or experience compare products

Batch Record Loading

How would you rate the Batch Record Loading features of Koha? 1 - Terrible / 2 - Poor / 3 - Good / 4 - Excellent

8 responses

How would you rate the Batch Record Loading features of Carl? 1 - Terrible / 2 - Poor / 3 - Good / 4 - Excellent
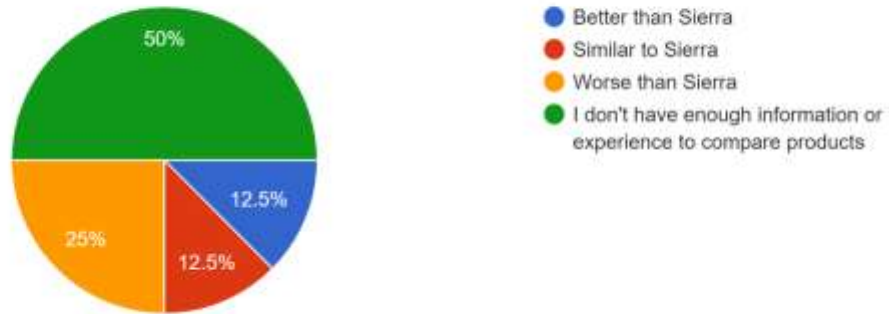
3 responses

How would you rate the Batch Record Loading features of Sierra? 1 - Terrible / 2 - Poor / 3 - Good / 4 - Excellent
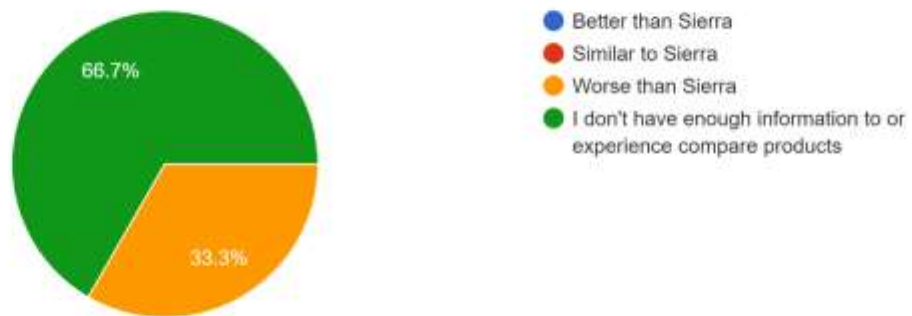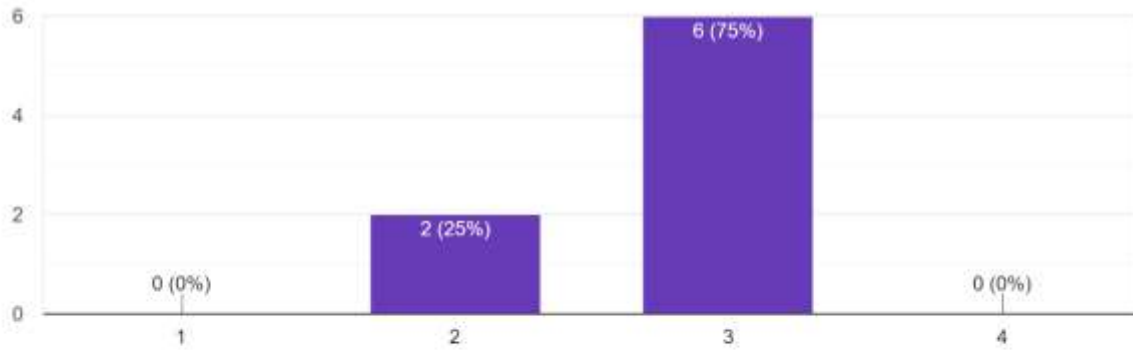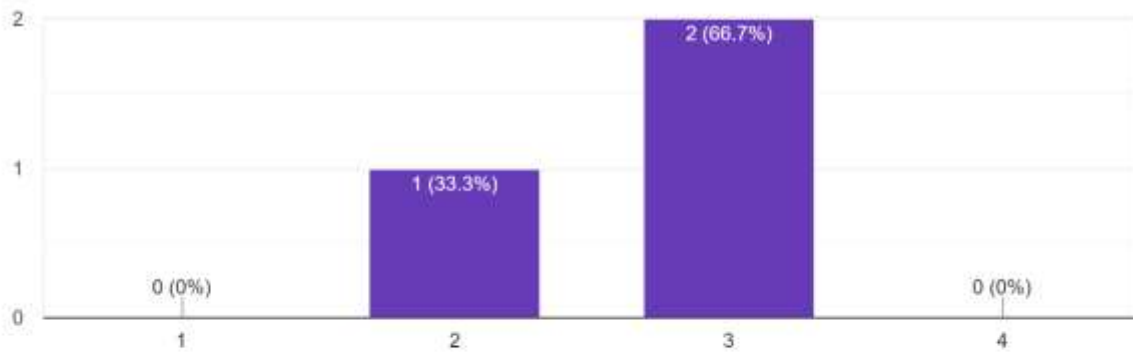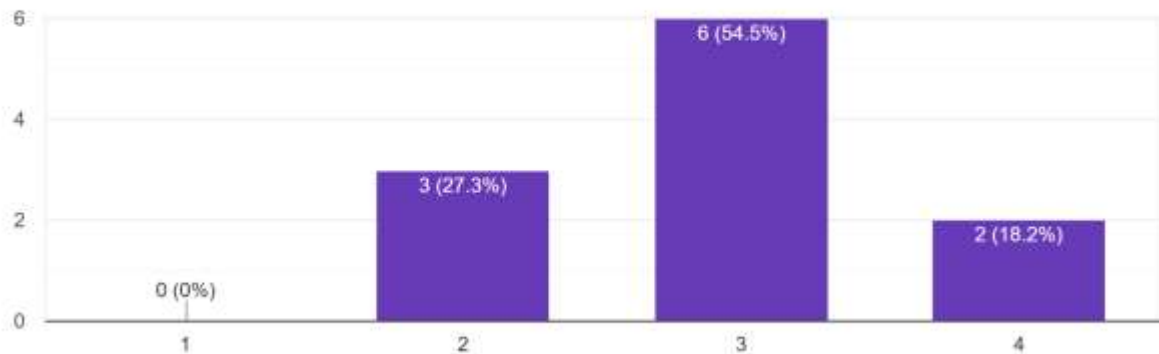
11 responses

How do you feel Koha's features for Batch Record Loading compare to Sierra?
8 responses
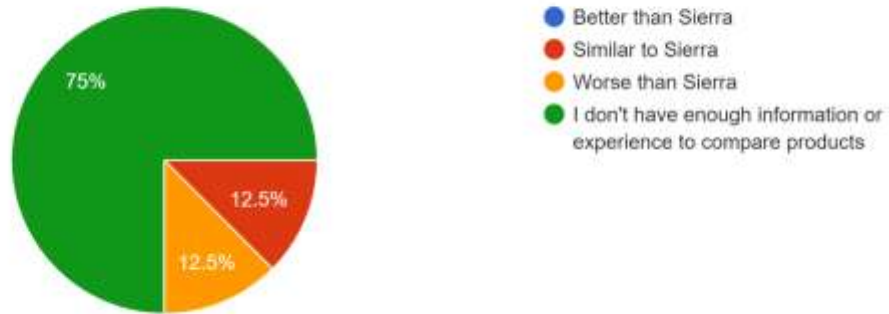
- Better than Sierra
- Similar to Sierra
- Worse than Sierra
- I don't have enough information or experience to compare products

75%

12.5%

12.5%

How do you feel Carl's features for Batch Record Loading compare to Sierra?
3 responses

- Better than Sierra
- Similar to Sierra
- Worse than Sierra
- I don't have enough information to or experience compare products

66.7%

33.3%
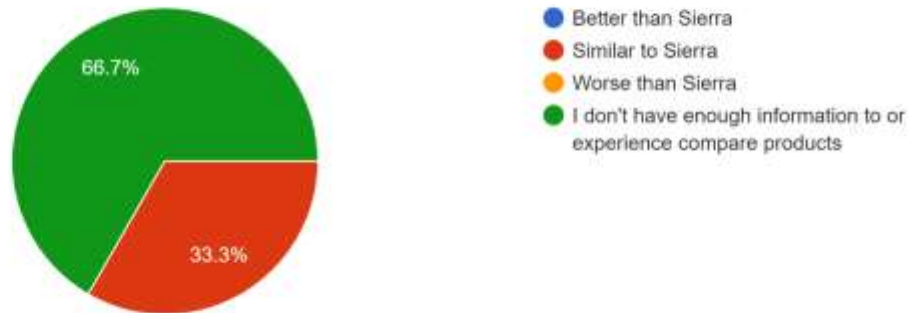
Necessary Functions

Does Koha have the necessary functions for your individual library?
35 responses

- Yes
- No

94.3%
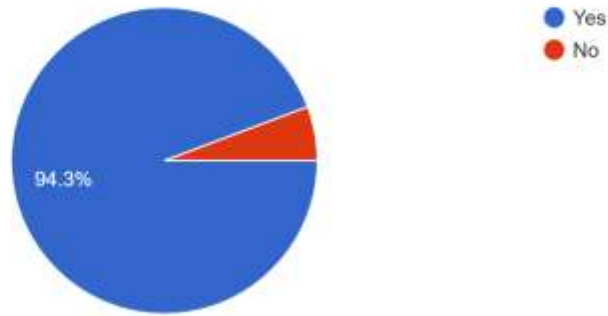
Does Carl have the necessary functions for your individual library?
25 responses

- Yes
- No

48%

52%
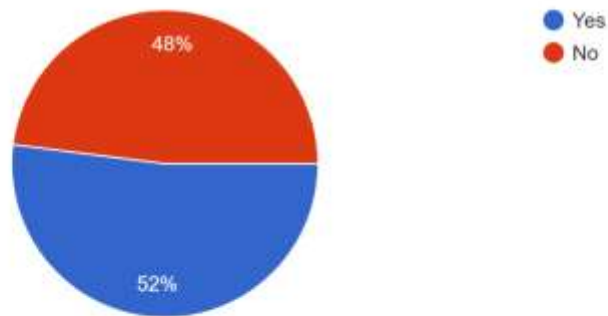
Does Sierra have the necessary functions for your individual library?
15 responses

- Yes
- No

100%
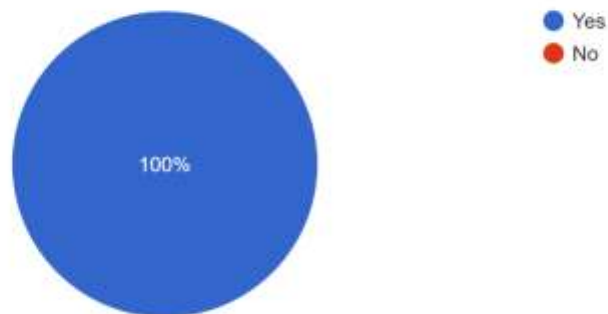
Product Recommendation

Would you recommend Koha for our libraries?
35 responses

- Yes
- No

25.7%

74.3%
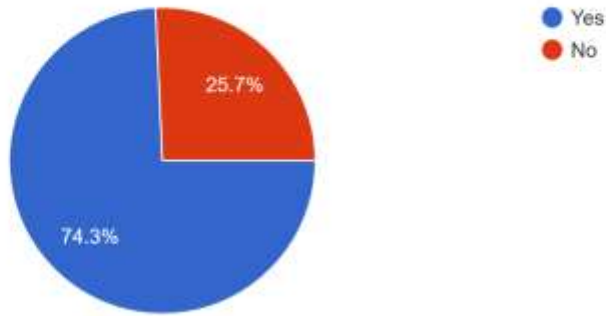
Would you recommend Carl for our libraries?
25 responses

- Yes
- No

88%

12%
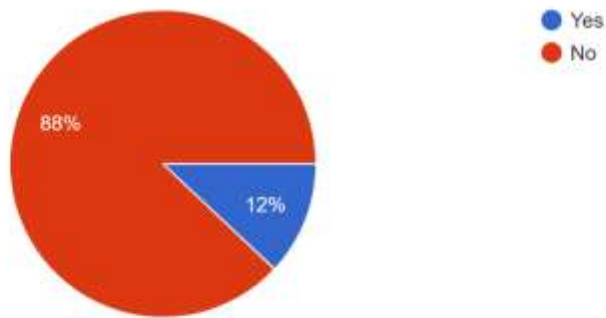
Would you recommend Sierra for our libraries?
15 responses

- Yes
- No

100%
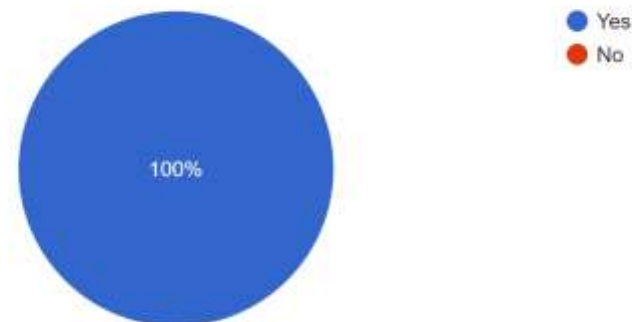
Appendix E – Committee Post Demonstration Survey Results

How would you rate Koha overall? 1 - Terrible / 2 - Poor / 3 - Good / 4 - Excellent
11 responses
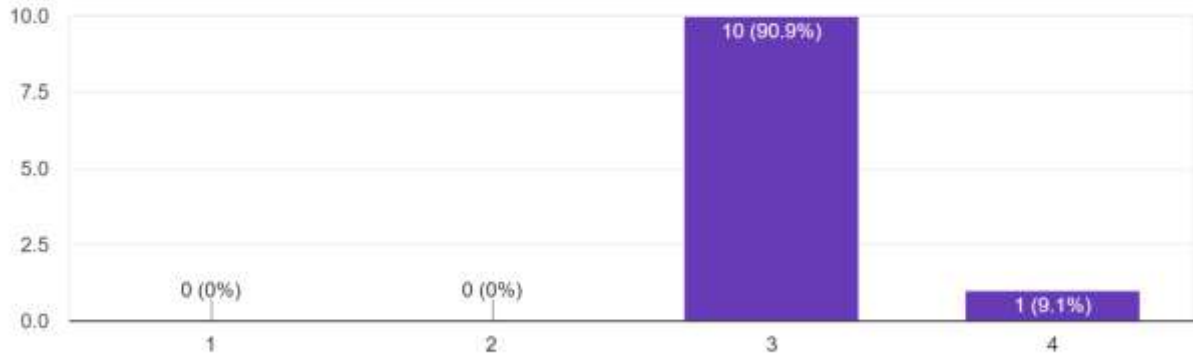
How would you rate Carl overall? 1 - Terrible / 2 - Poor / 3 - Good / 4 - Excellent
11 responses
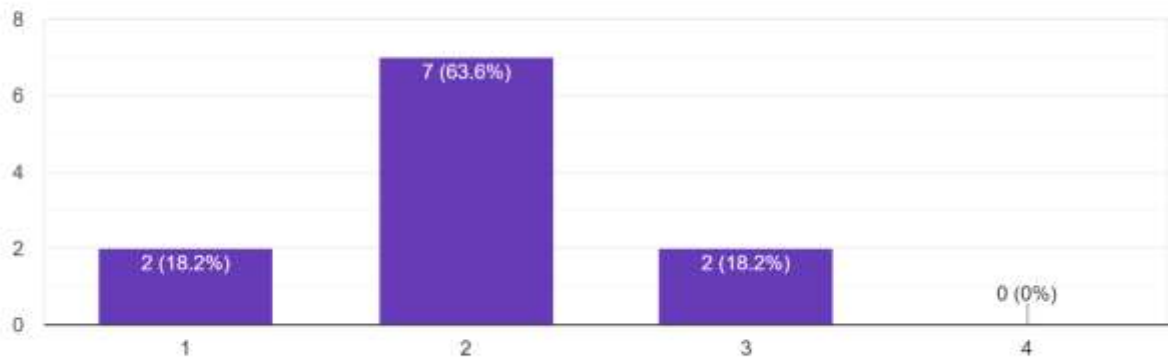
How would you rate Sierra overall? 1 - Terrible / 2 - Poor / 3 - Good / 4 - Excellent
11 responses
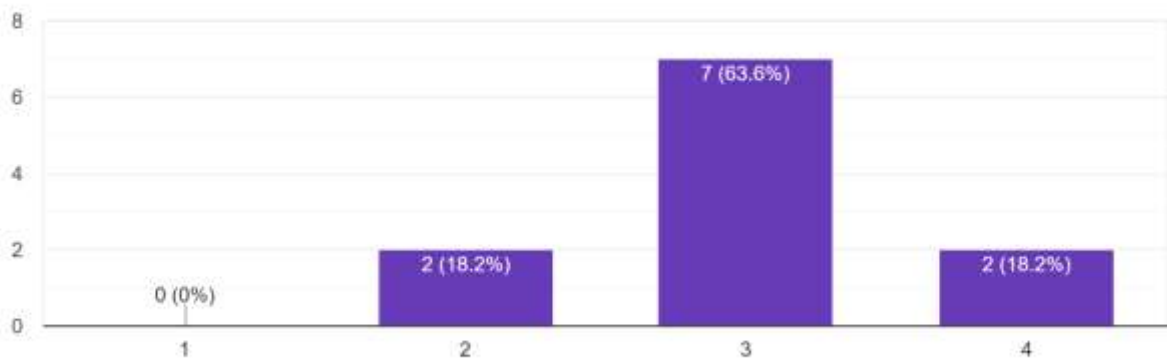
What reasons would you give to support your rating of Koha?

11 responses

I really liked their circulation and cataloging features. I feel they would be an easy transition from Sierra.

Koha matches or outperforms Sierra in the functions that most staff use most often, and will likely be easier to train new staff on than Sierra is. I do have some concerns based on staff perspectives of the more niche functions like cataloging and ILL, though I imagine those can be addressed with additional questions and workflow adjustment. The higher quality of Koha's search feature (compared to Sierra's) in particular stands out as an improvement to most work functions - Sierra has always seemed deficient in this area. Additionally, the demonstrators at ByWater were the most knowledgeable, engaged, and responsive of the three we spoke with, so I have reasonable hope that issues we encounter can be addressed well.

Flexible & capable.

I really liked the customization, it had a lot of good features for my library. I like the updated view and the multiple ways to do things. Inventory looked good, but hard to tell in demo

I think Koha could be a nice alternative to Sierra that is completely browser based.

flexible, modern, good integration with Aspen

Functional. I really liked the presenting team and the Koha culture is interesting to me. Their support documentation seems stellar.

The layout looks great and has many features that would be useful. Seems to be easy to use as well.

I like the look of it, it seems to have all of the functions we currently have and so much more. I would say Koha is the forward moving option for Vcat. I read through all of the survey responses. I feel that we as librarians, it is our job to adapt to change and stay up-to-date and keen on ever changing trends/technology. Furthermore, the aging population is more and more tech savy as time goes by, 10 years ago our senior outreach librarian was lucky to get a patron to try using a tablet, today half of those patrons have their own devices and habitually use our catalog or libby. I don't think "there's too many options" or "we will have to teach our patrons" are good excuses to not update our system.

It seems to be a well developed product with a robust development community. We have been pleased with Bywater support of Aspen. A few medium to large consortia are in the process of migrating from Sierra to Koha.

I like the setup and it views as being very user friendly and easy to follow.

What reasons would you give to support your rating of Carl?

11 responses

If I'm honest, I wasn't impressed by their presentation. I felt as though they were trying to un-sell themselves. Also, I am a HUGE macros user. The possibility of no longer having them makes me a little nervous.

CARL currently appears to be in an identity crisis - the software's functions being split between two interfaces is a significant and unnecessary barrier for staff to overcome to perform daily functions. Additionally, there was a concerning amount of disagreement and disorder among the staff giving the demonstration, so I do not have confidence that we would get what we need from the vendor if issues arise. CARL did have some useful features, but nowhere near enough to overcome the other issues. It may be worth considering again in a few years after the product is made whole and the company provides a unified customer relations front.

2 mediocre products required, no apparent will on part of the company to really improve them.

It was very cumbersome and difficult to understand between the two systems- nothing seemed straight forward- lots of things in development

I don't think Carl is Poor. I don't think it's the right choice for us at this moment in its development.

I do not like the two places to work. No future in the desktop carl, no plans to enhance cataloging in the web version.

I really like their passion for their product. I do feel as if this will be an excellent product...in a few years.

Doesn't seem to be as user friendly.

I feel like the software version look very 90's and that fact that there are 2 seperate system that make up one is not ok.Carl may evolve sometime but at this time it seems to be out backward moving option. I don't see that we are gaining much with Carl.

The web interface is still in development, and the desktop client is no longer being improved, which leaves users stuck in the middle. It may be a great product in five years, but doesn't seem like the right fit for our libraries now.

At this time Carl does not have the all the features and user friendliness/ set-up.

What reasons would you give to support your rating of Sierra?

11 responses

Even though I've been using Sierra for nearly ten years, I learned a lot I didn't know with their demos.

While it's true that staff have learned to make Sierra work, the number of peculiarities that staff have to work around every day is too high. It is a drain on day-to-day operations and a roadblock to bringing new staff on board. In particular, its searching is subpar for a modern system, and it relies too much on staff memorizing the values of codes and particular paths to find things (rather than a more "linked data" approach). Innovative's moderate support gives me enough confidence to say that the system will continue to function, but I haven't seen enough to indicate that our experience will notably improve. This is not a system we would choose if we were just starting out and did not yet have an ILS. Given a viable alternative, the only sound case I can see for using Sierra going forward is that we are already using it.

Flexible, capable, excellent Cataloging interface & Create Lists. Fast, reliable and WE ALREADY know how to use it.

It is comfortable, most of us have strong work around in place- no migration times or money

Overall Sierra is stable and known.

We have had good success with Sierra. If we improve a few things, we may even happier with it.

Sierra works fine. but their support is abysmal. Their organization continues to frustrate me.

Learned some new things that I didn't know before. Since it is the ILS we already use also know how it works and are familiar with.

I have never been fond of Sierra, in 2013, I remember thinking, "This is it, this is the extent of our upgrade?" It is clunky and if it weren't for the hot keys Kyle programmed, any little function was 5 steps to change between the basic functions. I'll admit, the demo, they were selling it. After 10 years, I just don't trust that what they are selling is fully functional.

I have concerns about some functionality, as well as the limited nature of future developments and support from Innovative. It is possible that some changes may improve our experience with Sierra as a product. Most staff know how to use the necessary functions.

Features, and understanding that more features are possible or a "reset" to enable some of the things we would like to be able to do. Also, I hate the functionality and creating in reports.

Which product would you recommend for your individual library?
11 responses

- Koha
- Carl
- Sierra

54.5%

45.5%
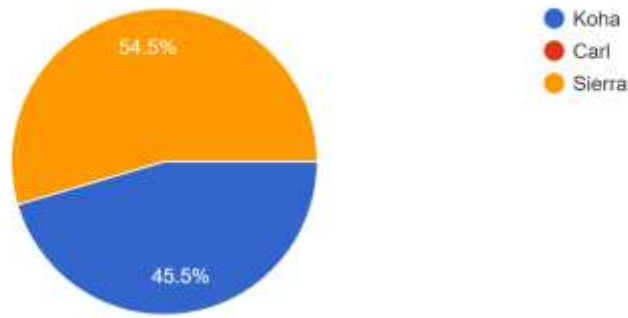
What reasons would you give to support your answer?

11 responses

Sierra - We are all familiar with the product, and continued use would make for less training.

Koha - Koha matches or outperforms Sierra in the functions that most staff use most often, and will likely be easier to train new staff on than Sierra is.

Sierra - Great product. Added benefit is that we already have it.

Koha - It had a lot of really great features for the school. I like that I can customize my own preferences, but not necessarily mess up things for the system.

Koha - Cost is the biggest reason I would think a change is needed.

Sierra - We know Sierra well and can improve it to better suit us.

Koha - Cost saving compared to Sierra.

Sierra - Everyone knows how Sierra works and know what to expect when using this product. Main complaint from staff is when something is wrong with Sierra it takes a while for it to get fixed and some issues are not fixed.

Koha - We like the interface, we like the record options, the advanced circ options, the notice options, and the create list structure of Koha over the other options.

Sierra - The limited capacity of library staff to collectively support each other through a migration is a concern. There may be additional administrative costs for migration and support.

Sierra - At this time, it has the best features for our work.

Which product would you recommend for the consortia as a whole?
11 responses
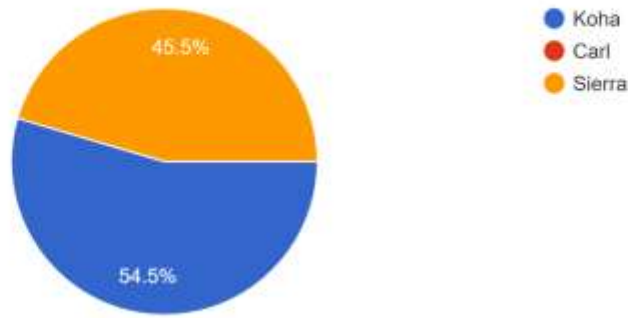
What reasons would you give to support your answer?

11 responses

Sierra - Koha or Sierra. Based on the feedback I've received from some staff, they would feel comfortable with either or.

Koha- Koha matches or outperforms Sierra in the functions that most staff use most often, and will likely be easier to train new staff on than Sierra is.

Sierra - We don't have to waste half a decade learning a new system when it is not necessary.

Sierra - Unsure- I want to hear more about the large library concerns. The overall opinions said it would be easier and cheaper to stay- have systems in place that are working

Koha - Cost is the biggest reason I would think a change is needed.

Sierra - We know Sierra well and can improve it to better suit us.

Koha - They seem to have an excellent track record with consortia.

Koha - Koha has many great features. It was very overwhelming with all the information but seems to have everything any library would ever need. Looks user friendly and would do well with our Aspen catalog.

Koha - The Koha survey recieved more responses that the other two surveys and 75% would recommend Koha.

Koha - Although the capacity of system and library staff to collectively support each other through a migration is uncertain, it would be in our collective interest to further consider the potential for continued development and improved support with Koha supported by Bywater Solutions.

Sierra - At this time, it has the best features for our work.

Appendix F - Koha Post Site Visit Evaluation Survey Results

Presenting Library
21 responses

- AspenCat / CLiC (Colorado Library Consortium)
- SEKnFind / SEKLS (Southeast Kansas Library System)
- Round Rock Public Library

47.6% — 28.6% — 23.8%
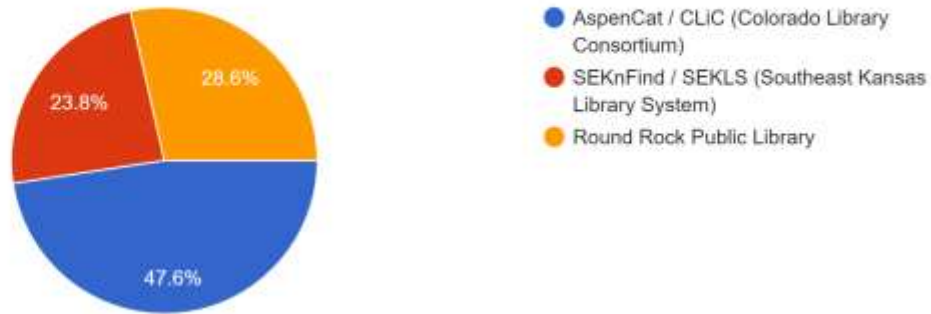
What did you like Koha, as explained/demonstrated by this library/library consortium?

21 responses

I like all the customization.

Much improved circulation experience (relative to Sierra - better searching, automatic notice setup, hyperlinks between records). Glad to see confirmation of two things: 1) that barcodes appear on pull lists and 2) due dates can be edited at checkout.

Easy to use, intuitive

Good circulation functionality.

Circulation is very easy to use, and has good options for most of our question/concern areas.

The ability to have multiple tabs open, and open different records in another tab/window will allow staff to toggle back and forth or have information open side by side.

Centralized and automatic reporting/circulation notices that can be sent based on triggers or scheduled at a set time.

The vast majority of reports that libraries run on a regular or semi-regular basis can be scheduled or created as a saved report. Staff who know how to use Sierra Create Lists, and/or alter existing searches, have the aptitude to learn how to edit a simple SQL query template. CLiC's staff felt that Koha has better reporting and back end than Sierra, and Koha has improved significantly with Bywater since 2019.

The Koha community is actively making product improvements of interest to us. An item record template equivalent will soon be available, as well as linking of adult patrons. There is opportunity for customization and to request additional developments as part of the migration. (For example: a request to alter the workflow for printing transit slips.)

Training for circulation, cataloging, reporting is not extensive, and users seem to catch on fairly quickly.

Administrators contact with Koha staff has been good, customer service experience has been great. Administrators are involved in the Koha community and consortia special interest group. Administrators noted that a test server is worth the extra money.

ease of use for most functions. customizability. intuitive

Easy to learn, and flexibility in circulation functions. Can accommodate many loan rules.

Strong circulation module; very easy to train people on; more granular control over loan rules; cataloging module looked somewhat more promising than in CLiC implementation

I liked the ways it could be adapted to work in different settings. With some of our libraries serving within schools, this was ideal. I was also a big fan of their wholehearted enthusiasm.

It really has a lot of customizable features for my library. Seems easy to use

I really liked everything about it, it seems easy to use. I like the multiple ways do to things

I like that they never said, "Nope, you can't do that."

The invoice number will show up by ordered item.

seems easy to create a new budget

I liked the overall look of item records, how detailed they were and how that accomidates acquisitions processes. I also love all of the customizations, the holds queue visuals.

The "test " mode, test server. Auto complete (great for staff and people use to having when interacting on a computer. Screen is easier to read and like set-up.

I love that you can search for patrons using date of birth and email address, especially for those that may be difficult to understand on the phone. I liked how easy it was to link parents to child as well. Circulating to patrons seems pretty straightforward; however, I can see having to click print after every transaction may cause some issues.

I saw nothing to convince me that switching from Sierra to Koha would be worth it.

I loved the budget feature that was demonstrated at the Round Rock Library as well as how it helps keep track of collection purchases.

Custom development is a real possibility. The ability to apply jquery or javascript to customize the interface is a plus. If there is something you need there are ways to make the needed changes.

The system is intuitive and it is easy to train staff.

There settings are all available for ILS Admin to see and configure (not hidden settings that you need to ask Bywater how they are set or ask for them to be changed).

Seemed confident that there could be a fairly easy fix for the transit slip printing workflow.

Helpful features:

The ability to set standard notice preferences by patron type.

Guarantors setup has check boxes for fines and records sharing.

Ability for staff to see previous cko's if enabled by the patron (good for homebound and select patrons)

Book Club feature to manage multiple copy holds

Reports can be created as templates for library staff

Ability to use jquery to alter heading column names and other customization.

What problems do you anticipate with Koha as explained/demonstrated by this library/library consortium?

21 responses

Change is hard. Nothing to do with this demonstration.

1) Still sounds like we can't make transit slips print automatically - I'm not sure whether that will be an inefficiency or just a need for a workflow change. 2) Reporting tool may or may not be as user-friendly as Sierra's (regardless of its reporting capability) - need updated staff opinion on this 3) Cataloging tool may not work well with existing workflows - need updated opinion from catalogers.

intimidation by SQL/learning curve. missing create lists. learning new screens and workflows for cataloging

Reports/Acquisitions/Cataloging are less functional than Sierra.

Although 3 FTE staff and two servers are supporting 157 libraries, with nearly all admin features limited to just the centralized admin staff, it seems that CLiC, as a Union Catalog (not a consortium) does not provide all of the services V-Cat offers. (cataloging, consortium and resource sharing facilitation etc.)

Since things change considerably in updates 2x a year, there is not much documentation created by CLiC.

reporting, change of workflow for cataloging

Cataloging, Acquisitions, Reports.

Ad hoc reporting may require delays (relative to Sierra), knowledge of SQL, or extensive pre-configuration; Serials module "clunky"; Cataloging module still not quite capable of the level of integration with other workflows that we've come to expect from Sierra; Acquisitions module not consortium-friendly when they last looked at it

I think the thing that will be most challenging about Koha is that it can do so much that it will take some wrangling to figure out what we want to do and the best ways to do it. When I was in Georgia we were the beta state for Evergreen and it was a similar situation although Koha looks like a better product than Evergreen was at that time, at least.

The printing seemed to be a bit clunky, "ILL doesn't work" but has Potential" not sure what this comment meant, but raised a flag

There still is some confusion about the inventory piece- but I think it is better than we currently have and I think I can make something work with the last seen date

I think that both of our systems are just touching the surface of acquisitions. I see us learning how to do acquisitions in tandem with learning Koha.

There aren't necessarily any anticipated problems but since they do not use it in the same capacity as we do here, I cannot accurately say that they won't occur.

it seemed like koha did not do quite as much to manage the budget as we've been used to

I'm not sure how I feel about the fact that there doesn't seem to be an override to check out a patron that owes to much. I feel that I know in my experience that are endless situations that we run into in libraryland.

Huge concern about web base. Our front desk was a test site for a Sierra web base. Our computers would need to talk with the computers in Wausau and it was very difficult. Delay would happen daily and offline every three to four weeks. Since we are no longer part of the test we have had no problems.

The only issue I foresee with Koha is that is it solely app based. If it's not an easy process to log back in, I can see it becoming a problem with library workers closing the tab. I can also see panic rising if the internet is down and people are left not knowing to handle the situation.

Koha's Acquisitions module is nothing but (partial) record-keeping software. Additional spreadsheets are still required. Difference between actual and ordered price can't be tracked. Invoices can't be paid within Koha. There is a reason so few libraries are using it - it is not very functional.

N/A

ILS Support staff will need to learn jquery or javascript to assist with customization of the interface. Custom developments may require extra ILS support staff time or money.

Multiple ways to do things could be confusing. It will be necessary to have a simplified training session/materials so that all staff can get started quickly with the basics to avoid confusion. A tips and tricks part 2 training session could give more in depth information/training.

"ILL module has potential but needs some work"

Printing slips / using multiple browsers or browser profiles could be confusing - but good training could help.

Poor internet can slow down Koha.

Browser upgrades and cookies clearing can cause big issues

Pull list can only be sorted by one column - so there is not a way to present in shelf order by location code and call number.

Sometimes Koha can be slow if there is poor internet service.

Considering the additional information from this library/library consortium, would you recommend this product for your library?

21 responses
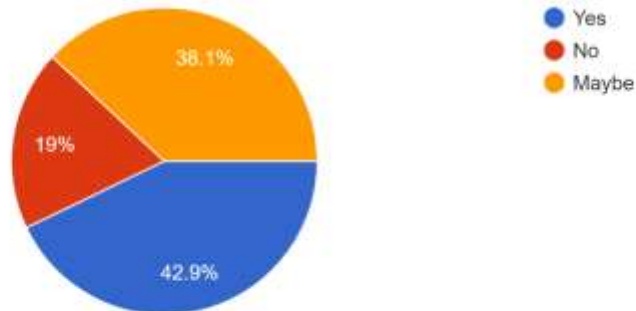
Please briefly explain your answer.

21 responses

His enthusiasm was so infectious!

My hesitation with Koha comes mostly from the back-of-house modules. The Acquisitions module saves us a lot of time, so if Koha's doesn't work well, it could end up costing us a lot in time - I'd like to hear from libraries using that module. My doubts about the cataloging module and the reporting tool haven't been resolved either. Whether I could support Koha for this library depends on whether these doubts can be resolved by future site visits and discussions with stakeholders.

I think most of the things that are "problems" could be over come with time and training

Overall no cost savings. Would need to add staff to pay invoices. Would probably not add staff in cataloging and collection development - but would be forced to cope with reduced effectiveness.

This visit helped increase comfortability with Koha as a product for consortium libraries in general.

I said yes last time, but we did not hear the same info about Bywater. It's obvious that both consortiums love the Koha product, but SEKnFIND was more critical of the turnaround time with ByWater and not very enthusiastic about the support. They do not receive the monthly meeting that CLiC gets.

Cataloging process slower - our current model probably not sustainable. Acquisitions functions are less automated - we may not have enough staff. Reports unwieldy.

Similar to answer from CLiC "site visit": Circulation module has notable improvements over Sierra, but I have enough doubts about reporting, cataloging, and acquisitions that I'm unsure whether this would be a net positive for us.

I think a product like this would fit our situation well. There would be a learning curve for our staff which would be challenging, but the end result seems very worth it.

I really like it for my individual library. I think training new people will be easy, training current staff to think differently might be an issue

I really like it and think it would be good to move forward with an updated system

Round Rock seemed very content with their selection of Koha.

I do not see any additional gains from switching to this product for those tasks within my responsibility. And there may be unforeseen losses.

I do not use acquisitions now, but I had the sense that koha's is not as powerful as Sierra's

I think Koha would be a great improvement from our current ILS

Web base concerns me because of past hardships with patron service and front desk work.

There are some things that will need to be worked out, but I don't see why Koha wouldn't be a good fit for WVLS.

Additional Acquisitions staff may be required.

It has a lot of features that would be very useful

There are as many pros as cons in my notes.

I would like to talk with a consortium using the acquisitions features to be able to understand how they use the features across multiple libraries before committing yes or no.

Considering the additional information from this library/library consortium, would you recommend this product for V-Cat as a whole?

21 responses
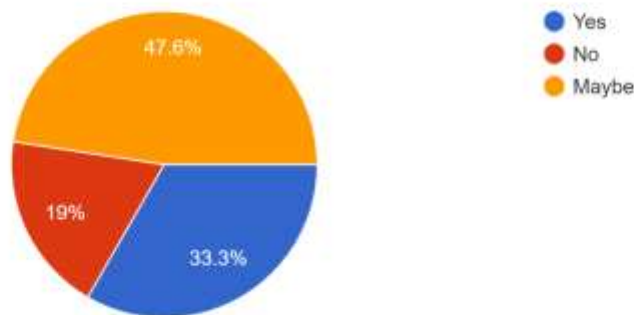
Please briefly explain your answer.

21 responses

I appreciate that they have so many libraries using the product without an enormous staff to support it. I don't believe he ever said, "You can't do that."

Most libraries mostly use the Circulation module, and Koha's circulation is much better than Sierra's. Koha also has the potential to save some staff time across the consortium by automating notices without significant complications. However, at this point, there's a risk that Koha's additional modules may not be robust enough to handle the bulk of processing that MCPL does. That gives me some hesitation, since time saved by improved Circulation functionality may be lost in Acquisitions, Cataloging, and reporting, mostly at MCPL.

I think there are many benefits to moving on, even though it will likely be a hard challenge to migrate. The new workflows might frustrate some people and perhaps not feel as easy, but all the things we currently do are possible in KOHA.

Every ILS can do checkout/checkin - our consortium needs effective higher-level functionality.

Concerns remain about V-Cat libraries' capacity for change at this time.

The product works, is customizable, and does what we need. we just need to be sure we understand the service quality.

Any ILS can do checkout/checkin - we higher-level functions (Cataloging, Acquisitions, Reports) to work well.

Koha seems like the best choice for most V-CAT libraries due to the strength of the circulation module. However, it might not be the best choice for how a large portion of the V-CAT materials are processed. The struggles of the other modules (reporting, cataloging, acquisitions) make it so that this may not be a net positive for the consortium as a whole - partially due to how this might impact high-volume workflows at MCPL, but also because this might make it more difficult for other libraries to begin using those modules if they would like to in the future. We will need to learn more about those modules to know whether Koha will work for the consortium.

I think that the flexibility of this product makes it ideal for a consortium with a diversity of library situations. There will be a learning curve, but the enthusiasm from this site visit makes it seem worth it.

I feel I cannot make a decision for the other libraries, but I think our staff at WVLS could make this a viable product for us- but I am concerned about how much time that would take staff.

I don't feel confident making a decision for all the libraries. I am very torn between really liking it but worried about the set up time. I think it is time for an updated product, but is it cost and time effective?

All the libraries we've "visited" seem to have no regrets.

I have a limited lens from which to make my assessment but from my perspective there are no gains and potentially some losses for my role.

libraries that do not use acquisitions will likely be satisfied with much of koha. Still not sure about the reporting. I will miss create lists

I think Koha would be a great improvment over our current system.

Web base, do any of our libraries have problems with internet connection? I do like the community aspect and solutions. Also, how problems are being worked on at the Koha and system level.

I'd like to see us move with technology. I feel Koha can give us more options that Innovative is still working towards.

Sierra is more functional overall. Koha is not good enough to justify a change.

Yes, I would recommend this product since it seems to have lots of features that would make things easier on staff.

There are as many pros as cons in my notes.

I would like to talk with a consortium using the acquisitions features to be able to understand how they use the features across multiple libraries before committing yes or no.

Appendix G – August 2023 Product Rating Survey Results

Rating meanings:	Circulation, Searching, and Patron Records Management		System Administration		Compatibilty with other Products		Reports		Cataloging and Records Management		Ordering and Acquisitions		Financial Cost		Costs tied to change/Lack of change	
	Koha	Sierra	Koha	Sierra	Koha	Sierra	Koha	Sierra	Koha	Sierra	Koha	Sierra	Koha	Sierra	Koha	Sierra
4 = Excellent	3	3			4	4	2	4	2	4	1	4	2	3	2	4
3 = Good	4	2			4	2	3	1	3	3			4	1	3	3
2 = Poor	3	3			2	3	2	3	1	3	2	2	4	2	2	4
1 = Terrible	4	2			3	3	2	3	2	3	2	3	4	2	2	3
	3	2			4	3	3	4	3	3			4	3	3	3
	3	3			3	3	1	4	1	3			4	2	3	1
	4	3			3	3	3	3	3	3			3	2	3	3
	4	3	4	2	4	3	3	4	2	4			4	2	2	4
	4	3	4	2	4	3	4	3	3	3	2	3	4	2	2	2
	3	2			3	2	4	2	3	3	3	2	4	2	3	2

	Circ Koha	Circ Sierra	SysAdmin Koha	SysAdmin Sierra	Compat Koha	Compat Sierra	Reports Koha	Reports Sierra	Catalog Koha	Catalog Sierra	Order Koha	Order Sierra	Financial Koha	Financial Sierra	Costs Koha	Costs Sierra
Total Score by area	**35**	26	**8**	4	**34**	29	27	31	23	32	10	14	**37**	21	25	**29**
Average score by Area	**3.5**	2.6	**4.0**	2.0	**3.4**	2.9	2.7	**3.1**	2.3	**3.2**	2.0	**2.8**	**3.7**	2.1	2.5	**2.9**

Difference in average score	0.9	2.0	0.5	0.4	0.9	0.8	1.6	0.4

	Koha	Sierra
Total Score Overall	199	186
Average Score*	3.0	2.7

*(sum of averages from each area / 8)

Appendix G – August 2023 Product Rating Survey Results - Comments

What is favorable about Koha's Circulation, Searching, and Patron Records Management features?

Intuitive, flexible

That you are able to put any variation of a name in to pull results.

Easy to manage

Lots of nice features, seems to search items well and patron records management seems to be good. Searching is easier and less time consuming than with our current system.

Partial matches in searching as you type, guarantors / guarantee records linked directly rather than as plain text, registration information can be auto-filled by scanning driver's license, files can be easily attached (e.g. sign-up form), etc.

The format is easy to use. I appreciate that the staff can view all of the fields required on one screen.

The user interface is much more user friendly than Sierra, and looks easier to learn.

It seems very easy to use. I like that you can get close with hyphenated names, etc.

flexibility when searching for patrons, intuitive design

Koha has superior searchability by keyword, birthdate etc. for patron records and managing parent/child records. The interface is intuitive and will allow libraries to spend less time training staff. Staff may also feel more confident in completing their day to day work. The ability to further customize the interface for our needs is desirable. The Book Club feature for placing holds could help streamline the process for library staff. Scheduled circulation notices could be more efficient for library staff, and can be customized by patron group, as well as notice history to show when a notice was delivered to patrons.

What is problematic about Koha's Circulation, Searching, and Patron Records Management features

learning something new

There may be fewer patron type templates for creating new patron records. Browser based printing will be an adjustment for staff who need to print other letter sized web based documents on a regular printer as well as receipts and transit slips to a receipt printer. (Note that Sierra has its own printing challenges.) There will be an adjustment period for configuring holds fulfillment.

Slowness

Web based

There's more on screen than there needs to be in some places.

I notice that the patron email and phone numbers are used on transit slips. I'm wondering if this can be customized per library due to patron privacy issues.

n/a

So many options that it is overwhelming, however once set up should be okay. Wasn't a fan of the picture on the patron profiles option.

What is favorable about Koha's Systems Administration features?
 WVLS Staff ONLY (others please skip)

We already have Bywater for our catalog, so they are compatible, and it seems like most problems with compatibility are addressed and taken care of to the best of ability.

Great support team, more flexibility, lots of options and control

We anticipate that support from ByWater will be superior to support from Innovative. Documentation and admin settings are visible to system administrators. There is more transparency with settings and more ability to customize the system to fit our needs.

What is problematic about Koha's   Systems Administration   features?
WVLS Staff ONLY (others please skip)

It will require that ILS support staff learn a new system, and gain new skills. There will be an adjustment period.

N/A

What is favorable about Koha's   Compatibility with other products   features?

It sounds like the transition to Koha and Aspen will go smoothly.

Koha seems to be able to work with the products we'd like to use

The possibility of future developments and improvements in compatibility with other products is greater with Koha than Sierra. There is a large open source Koha community working on improvements, and the ability to collaborate with others to fund developments.

It interacts very well with Aspen.

Seems to be very straightforward, labels everything, has no limit on reports and has lots of saved reports which will save time with things ran every month. Also, no limit on the amount of items for each report like currently in Sierra

love that it connects well with Aspen

Seems to be compatible with everything we are currently using (or are likely to consider using in the future.)

Based on reviews Koha is compatible with most 3rd party vendor or this will work to be (by Koha standars not like innovative).

Works welll with most or all of our current products

Koha would work well with Aspen because both would be administered by the same company. External devices (self-checkout machines, materials sorters, etc) are also compatible (according to vendors).

What is problematic about Koha's Compatibility with other products features?

Compatible, but not easy. Setup of edifact will be long and difficult (CLAMS experience).

It isn't compatible with everything. That means more changes and more training.

It would be nice if it could integrate more with Overdrive.

Unsure how it interacts with z39.50 for cataloging.

not sure

N/A

What is favorable about Koha's Reports features?

They can be emailed to me at a certain time.

Seems very flexible

The ability for cron job reporting built into the Koha interface will make regular reporting more efficient for WVLS staff and library staff. It can also help with regularly scheduled cron jobs for batch record updates. The ability to make templates for libraries to run their own frequently request reports by selecting fields from a series of drop down menus is desirable. There is support from ByWater and from the user community for assistance with report development.

I really like the built in report options. However, the settings for the reports will take some getting used to/training.

Staff who rarely run reports like it.

Seems to be very straightforward, labels everything, has no limit on reports and has lots of saved reports which will save time with things ran every month. Also, no limit on the amount of items for each report like currently in Sierra

That they don't use "create lists" and SQL seems fairly simple to learn.

The common reports are simple to run.

Full SQL read access is very powerful. We could learn nearly anything about the data in the ILS - more than we currently can.

What is problematic about Koha's Reports   features?

That some staff will not be excited to learn SQL. (Continuing Ed is a good thing)

Laid out a bit differently than Sierra so will take time to get used to and use efficiently. SQL needed to run the occasional, unusual reports

Taking full advantage of the reporting tools (or using them to meet current needs) requires either learning some SQL or working with ByWater and waiting for new reports to be written.

n/a

Specialized reports used for weeding/collection development/marketing/displays that we cannot generate in-house to allow for our workflow and special projects. Example: looking up a specific author to see their checkouts to see if we want to keep ordering their books.

Super-users who run many reports will find it lacks functionality. "Learn SQL or suffer."

They might be harder to build the way we want

The learning curve for SQL reporting may be a challenge

It will require that ILS support staff and Sierra Create Lists super users learn a new system, and gain new skills. There will be an adjustment period.

What is favorable about the Cataloging and Records Management features of Koha?

Easy to create item records

Based on feedback from libraries that have switched to Koha, the current process with use works flawlessly in koha.

Nothing

The structure of the record editing and fast cataloging tool may be more accessible (than Sierra) for staff who do not regularly catalog.

Being that I know what most of the fields are used for, I like the layout of record editing; that said, for those that aren't familiar with the use of the fields, I'm hoping they're customizable.

I didn't look at the cataloging as closely so I don't have a good answer

With training it should be fine

The simple editor may be preferred by some catalogers in system. nice to have the option

The option to upload cover images in the staff interface is nice.

What is problematic about the Cataloging and Records Management features of Koha?

Extra steps required to view multiple bibs side by side, tabs, clunky interface. Neither Basic nor Advanced editor is as clear as Sierra. No macros.

There is potential for the cataloging process to be more time consuming in Koha.

After our own trials in the sandbox provided and the discussion with CLAMS catalogers, we are extremely concerned about workload once training is complete. The amount of time it will take to create a single record in KOHA verses the time it currently takes in Sierra with our templates and z39.50 is our biggest concern .

It might be a different work flow-hard to get the flow in a "sandbox" environment

I heard from my employee who does cataloging that the one problem is the longer process of cataloging compared to Sierra however she did say that it was a minor problem.

bib frameworks cannot have prefilled text, process for comparison between records may be slower, more scrolling to see the entire record, having multiple records open may not be smooth to set up

Everything. Too much retraining needed!

Koha isn't as suited to high-volume cataloging as Sierra is, and the way it is set up would require adaptation of our workflows, which might ultimately be slower.

The record editing will be very confusing for those that aren't familiar with the language/ field numbers used.

It will require that catalogers learn a new system, and workflows. There is some concern that in some cases it may take longer to bring in new Bibliographic records. There will be an adjustment period.

What is favorable about features for   Ordering / Acquisitions with Koha?

V-Cat libraries other than MCPL may like it

N/a I don't work with it enough to evaluate it

Koha is more generally full of hyperlinks than Sierra - this may be useful for finding items from order records.

Acquisitions can be used by a single library for accounting purposes.

I loved that it tracked how much was spent in each area of the library. Seemed easy to manage. We currently don't utilize the Acquistions in Sierra but loved how Koha had this set up.

What is problematic about features for Ordering / Acquisitions with Koha?

We still haven't found a library that has functioning edifact in Koha, there must be a reason for that

N/A

N/A

We have not seen a full-scale implementation of Koha's accounting tools working the way they do in Sierra, so the way it is set up is likely to require adaptation of our workflows.

It is not currently possible for multiple libraries to use Acquisitions in Koha, but it is in development. This could be a concern if the development stalls or if multiple libraries want to use the feature in the future. Some libraries have struggled to configure some aspects of Koha acquisitions with vendors.

What is favorable about the financial cost of Koha?

[As financial cost information is confidential and was clarified during the meeting, comments have been removed]

What is problematic about the financial cost of Koha?

[As financial cost information is confidential and was clarified during the meeting, comments have been removed]

What is favorable about the costs tied to change/lack of change for system staff and member libraries with Koha?

If we switch to Koha, training Circ staff will be easier

I don't feel this should be considered at all. A better system is a better system, we will be forced to make a change later as Sierra is phased out anyway.

I'm not sure yet

What is favorable is that the costs tied to the change is having everything switched over and some good training for staff on how to use the new system.

After an adaptation period, Koha would allow us to do more than we can currently do with Sierra (mostly with its powerful reporting tools, potential for customization, and the potential for improvements from ByWater or the open source community). Training future staff on core circulation aspects would be easier as well.

New features are always being developed and we can also pay for a feature to be developed.

again you get what you pay for

The system is intuitive and basic functionality will likely be easy to grasp

Updated training for all staff with a migration may have a unifying effect to even out the varying levels of knowledge/expertise among member library staff. Bywater has documentation and training materials available.

What is problematic about the costs tied to change/lack of change for system staff and member libraries with Koha?

After spending a great deal of money for implementation, it will take many years to realize yearly cost savings

I'm not sure yet

The adaptation period for Koha may be long and complex, and certain high-volume workflows may never be as efficient as they are now with Sierra. The complexity of this adjustment may outweigh the potential for improvement in other areas.

n/a

The cost is higher than Sierra by quite a large margin.

wondering if small libraries can afford the costs

Change is hard and with many other changes occurring (staffing, potentially NICE) it may be difficult to feel comfortable with an ILS change now.

There will be time needed for attending training sessions, and training staff. Staff will need to learn new workflows. There will be snags, troubleshooting and adjustments along the way. Additional communication will be needed. A migration to Koha will be most successful if member library staff are open to change and understand the reasons for migration.

What is favorable about Sierra's Circulation, Searching, and Patron Records Management features?

We already have it, and years of training material. Seems fast, reliable. Create lists and Global/Rapid update make changes to records easy.

I have used Sierra for about 10 years on and off. The circulation features are good and easy to understand. Patron records are okay.

It works for our libraries now. Experienced staff know how to use it and what workaround are necessary. Ability to have multiple patron record templates for each library is a plus.

Easy to find everything

The screens are generally sparse, making it easier to find the functions that are there.

It is fairly easy unless you misspell something.

Once you understand it, it works well.

it is comfortable

It's what we know.

It works for our libraries now. Experienced staff know how to use it and what workaround are necessary. Ability to have multiple patron record templates for each library is a plus. Staff can't go backward when creating a new record with a template and have to start over or save an edit after the fact.

What is problematic about Sierra's Circulation, Searching, and Patron Records Management features

Sierra is very picky when searching for items, if one thing is misspelled it won't pull the item up from a search. When marking items as damaged on a patron record it can sometimes get a bit complicated. Depending on what is used it might leave the item checked out on patron account once fee is paid even though it was paid for to be replaced (no paid for item status for damaged items.)

Loan rules hard to manage, limited function in Patron blocks table.

You have to switch between screens to use any functions. You have to type names in exact format to get the results you want. If you are off/missing any little bit of a whole title, you wont get results even close to what you are looking for.

Training brand new people can be challenging.

doesn't always show me what I am looking for-

Patron search could be more flexible

We desire improvements, some of which include searching (for items and patrons), holds placement and fulfillment, patron blocks, marking damaged items. It is unlikely that Innovative will invest much time or money in improving these features as they are focusing on Vega.

Too many options that rarely get used

Sierra's searching is outdated and picky - using it effectively requires learning index characters and choosing exactly the correct search term.

Unlike Horizon, Sierra doesn't give you an option of "did you mean," or closely related search terms. Also, the lag of searching in Z39.50 and the amount of times it crashes it between searching is bothersome.

What is favorable about Sierra's Systems Administration features?
WVLS Staff ONLY (Others please skip)

It is familiar. We have Sierra ILS admin and support colleagues at other public library consortia in Wisconsin.

We know this product well

What is problematic about Sierra's Systems Administration features?
WVLS Staff ONLY (Others please skip)

Service with Innovative can be unsatisfactory and slow

There are many system settings that are not transparent - ILS admin staff cannot tell if they are enabled without contacting Innovative. Support is poor. Questions sometimes are not unanswered or we are referred to reach out to the user community. The company is large and support staff are siloed in their areas. It is not uncommon to find out about unintended consequences of setting changes not communicated during a support request.

What is favorable about Sierra's   Compatibility with other products   features?

It is working with other products and appears ready to work with possible future products.

N/A

Based on feedback

Seems to be working okay with other products

The integrations we have now are working. Sierra APIs allow for a good amount of compatibility as long as the other product is API compatible.

Sierra seems to work fine with Aspen. External devices (self-checkout machines, materials sorters, etc) are also mostly compatible.

I imagine finding products with an existing compatibility has not been easy. That said, once the products are fully implemented, the process of learning the new products have been pretty easy.

It works well with everything we currently use.

works fine with aspen

What is problematic about Sierra's Compatibility with other products features?

Integration with Aspen.

Getting Sierra to work well with Aspen has required a lot of experimentation. Also, It would be nice if Sierra could integrate more with Overdrive.

I have not been heavily involved in the process of choosing other products up until this point. However, I will say that implementation of newer databases (i.e. discovery layers, catalogs) have not been painless.

When switching to the Aspen catalog it seemed like Sierra had a hard time syncing with it. Even now if a patron pays for their fines online and their record is open in Sierra it causes a problem. Sierra seems like it is clunky when working with other products.

I don't use with other products

nothing

We have concerns about stagnation with developments for additional product compatibility, and support/development of future API improvements.

What is favorable about Sierra's Reports features?

I think I know how to get the information I need, mostly

I like Create Lists and Browse Query for bib/item related searching and updating.

Experienced staff know how to use Create Lists, Rapid Update and Global Update, and they are powerful tools. Sierra has a distinct inventory field, which other products considered do not have. Mobile worklists may be an option for reports improvement at an additional cost.

What is favorable is that I can use it and it will give me a list as long as I put in the parameters perfectly lol.

Create Lists is easier to learn than SQL

Nothing

Create list gets easier the more you use it

Sierra's Create Lists interface is familiar to staff, and allows for conveniently editing the record results.

It's easy to go back and fix a mistake if you realize a piece of the search is incorrect. It's also very simple to import/export.

Once you understand the coding, you can generate generally any report that you need.

What is problematic about Sierra's Reports   features?

Create Lists is not very easy to learn. Staff whose jobs don't require many reports find it difficult.

Everything

A problem is that their are limited spots for reports to run and each spot runs a limited amount of items.

Create list is complicated to learn

Sierra's data structure is proprietary, so we are limited in what we can report on and how we can do it.

Depending on the information you're searching for, running reports can go at a snails pace.

Learning the coding for someone who doesn't know coding.

I feel that I have to ask WVLS staff if I am looking for something very specific

Web management reports gives us reports in older excel file format, no updates to that product since 2007

The reporting tools are not intuitive. There is a learning curve to using Create Lists and Web Management Reports - even with saved queries and exports. Library staff that are not power users and would benefit from easier to use canned reports. Training from Innovative is costly.

What is favorable about the Cataloging and Records Management features of Sierra?

The templates are easy to use, and whether using z39.50 or generating a MARC alert, it can be done in a time efficient manner.

I don't use it much but it was very easy and fluid when I did some cataloging. Easy to find records and bring in an outside record through z-39. Not very time consuming.

It is fine, comfortable

browse query and create lists work well for gathering together many bib/items. global update assists with changes in many records quickly. Displaying 2 or more bib records for comparison is quick and easy. Flexible macros allow for fast cataloging for repeat fields.

The ability to have many bib and item record templates is a plus. It works for our libraries now and experienced staff know how to use it. Catalogers report that they feel Sierra's cataloging tools, workflows, and processes are superior to Koha.

Ease of interface makes pulling a quality catalog record easy even for staff who only catalog occasionally.

We are used to it.

Templates make things so easy. z39.50 and overlaying OCLC records goes quickly.

Sierra's cataloging tools are familiar to staff, and suited to current high volume workflows.

The templates for cataloging are easy to create and create training from. They are also very customizable for each library/branch.

What is problematic about the Cataloging and Records Management features of Sierra?

Nothing

Currently we do not have any problems with cataloging and record management features.

Sometimes I see double records for an item, not sure If I added it twice or what happened

fixed field in bibs allow for changes that only occur in fixed fields and not in leader/008 etc. can cause problems in Aspen

I like the cataloging and records management in Sierra.

I'm not aware of major cataloging issues with Sierra.

n/a

Staff can't go backward when creating a new record with a template and have to start over or save an edit after the fact.

N/A

What is favorable about features for Ordering / Acquisitions with Sierra?

Streamlines ordering/acquisitions processes. Frees staff person for other duties.

N/a I don't know enough to have an opinion.

n/a we have never used the feature

Staff are familiar with Sierra's acquisitions setup, and Sierra is capable of handling most of our accounting needs internally (with minimal external software use).

Interactivity with vendors allows immediate creation of order records, importing of bibs. It can be used for accounting purposes.

What is problematic about features for Ordering / Acquisitions with Sierra?

Nothing

Same as above

Searching old records is cumbersome, and its record retention could be better.

If additional libraries besides MCPL are interested in using Sierra Acquisitions there will be added costs.

n/a we have never used the feature don't know enough to answer

What is favorable about the financial cost of Sierra?

[As financial cost information is confidential and was clarified during the meeting, comments have been removed]

What is problematic about the financial cost of Sierra?

[As financial cost information is confidential and was clarified during the meeting, comments have been removed]

What is favorable about the costs tied to change/lack of change for system staff and member libraries with Sierra?

We already have it, Innovative is willing to lock in decent price for several years.

Theres no change

There shouldn't be a need for a lot of training or change needed

Staff would not need to do further adaptation work and could devote that energy to other tasks.

Those that have been with WVLS long enough know Sierra well and (somewhat) comfortable with what they can/cannot do.

Cost is lower and we know what we are working with and have work arounds for areas that are a problem.

It is not drastically higher than what we pay now

no significant change would occur if we stay on Sierra.

Library staff and ILS administration/support staff will not need to spend time on a migration effort.

What is problematic about the costs tied to change/lack of change for system staff and member libraries with Sierra?

Continuing to deal with Innovative's mediocre customer service, lack of flexibility, harder training.

I don't feel this should be considered when upgrading to a new system.

Many staff don't know what how to use sierra effectively and there are quite a few bugs where each library has their own way of handling it.

"The main cost would be unmet potential, since Sierra does not have much credible hope for improvement, whereas Koha does.

We would need to continue with the workarounds that we have built over the years to address Sierra's issues.

Any new staff would have to be taught these workarounds, and training on the core circulation tasks would take more time with Sierra than it would with Koha."

n/a

For the price we should have better customer service.

is the lack of customer service and not moving forward worth the money

We have concerns about stagnation with developments in general due to the focus on Vega / LX Starter. The nagging problems that library staff and system staff have been dealing with for years are unlikely to change. If the price rises and the product/service does not improve will we be satisfied to continue in 3 years or will we need to repeat the ILS Evaluation and Review process again in a few years.

Do you have any other thoughts about recommending an ILS to V-Cat that hasn't been addressed in the ratings above?

Regardless of the ILS selected, the product should be reviewed again for potential change at the end of the next contract. Staff should use the intervening time to actively examine and document what they like/dislike about the ILS so that future reviews can be simpler and more ready for change.

While we understand that on our level and in our library, we do not have problems with Sierra as our ILS. We are concerned about Sierra's customer service and ILS development for our system's upkeep and changing needs. However, cataloging is so essential to libraries, and we aren't confident in Koha's day-to-day workload time for cataloging. The change in cataloging work hours will have an impact on our labor budget and division of duties, since most libraries do not have a devoted cataloger.

I'm all for change, and honestly, I'm all for giving Koha a shot (simply because I'm up for a challenge). However, given the amount of turn over and changing of positions in our consortium as of late, I would be more inclined to stay with Sierra for the time being.

It will take many years to begin to recoup the costs of switching our ILS. By then the library-world landscape will have changed again, probably in ways we can't predict, and we don't know if making a switch now will in hindsight appear to have been a good choice. My opinion: since we do not have to change right now, it is best not to. Thank you.

What are our libraries capacities for change in 2024-2026? What efficiencies could Koha provide to reduce the amount of workload on member library staff in the long run?

Are similar efficiencies available with adaptations if we continue to use Sierra?

I honestly have not seen enough from either Koha or Sierra to warrant a change. Too much work for not much improvement. We're just changing one set of problems for a different set.

From a cataloging only perspective – Sierra is better. Overall, their experience with Koha/ByWater is better than their experience with Innovative/Sierra.""

Koho has some nice features for my specific library. Sierra is fine with all the work arounds we have

N/A

Appendix H – Lessons Learned and Advice for Future ILS Evaluations

Having experienced the value of consulting other ILS Evaluation processes, and wishing for more institutional memory from the last V-Cat ILS Evaluation and migration process, the committee would like to record assorted other aspects of this experience in order to facilitate the work of the next evaluation process:

- Consider committee makeup carefully. Ensure that the needs of varying member libraries are represented, and that the committee includes staff with expertise in each function area of the ILS. Consider balancing experienced staff with fresh perspectives of newer capable staff.
- Consider ILS selection within the larger scope of member library needs and the V-Cat strategic plan.
- During non-decision periods (i.e. in the middle of an ILS contract, before a committee is formed), maintain an ongoing list of positives/negatives about the current ILS. This will save time developing a list of points to examine during the evaluation process and may also help to minimize familiarity bias.
- During non-decision periods, maintain awareness of ILS products and improvements that could change the viability of products for V-Cat.
- It would be useful to clarify every aspect of the final decision-making process at the very beginning of the committee's work. While this committee's recommendation was ultimately based on a majority of votes cast at the final meeting (in response to a motion to recommend Sierra), there was a great deal of discussion at that same meeting about whether this was the best way to render a recommendation. Determining all of the following details ahead of time would be useful for establishing confidence in the committee's recommendation:
  - Whether the ILS recommendation should be based on:
    - a pre-defined scoring matrix (i.e. an aggregate of each committee member's rating of different aspects of the ILS proposal, with those aspects defined concretely ahead of time),
    - a motion to approve an individual system (as was the case in this committee's work), or
    - an election with the ILS options as candidates (e.g. with ranked-choice voting).

- o Clarify V-Cat Committee decision making processes including allocation of votes, proxy voting, and definition of majority vote.
- Request itemized quotes (including itemized service agreement costs) to facilitate cost comparison. The fact that V-Cat already uses products from two of the vendors considered (Innovative and ByWater) meant that different services were included in the different quotes, and parsing them delayed the evaluation process.
- The process of reviewing the vendors' RFI responses in general (for ILS features, not just cost) was much more time-consuming than expected. Subsequent committees should be aware of this in project planning, and may wish to submit RFIs to a smaller number of vendors (provided that the pool of vendors who do receive RFIs is still representative of available products).
- Depending on the length of the evaluation process, the quotes may expire before the committee makes a decision. Budget for time to request and receive updated quotes if need be.
- Schedule demonstrations and requests for staff feedback for less-busy times of year. The demonstrations for this process were during the November-December holiday season, and this may be why the committee did not receive as much feedback from library staff as hoped. Consider other ways to increase feedback as well (e.g. scheduling demonstrations by module, and making recordings available, so staff could attend the portion relevant to them - this committee did that, which helped).
- Carefully consider the need for additional information-gathering sessions beyond the demonstrations. This committee held several of them, and while they were broadly reassuring of initial impressions, they prolonged the process and did not ultimately shift the assessment very much.
- Recognize that (barring a significant shift in the market since this committee's work) no individual ILS will meet all expectations, and that most will likely fall within a narrow range of quality (or fit for V-Cat's particular needs). This committee had initially hoped to find a product that stood out clearly above the others, but it appears that no such product exists. Entering the evaluation with this tempered expectation will help to frame the discussion less as a question of whether to remain with the current ILS (or not), and more as a question of which ILS will best serve the consortium in the future.