

# V-Cat ILS Evaluation and Review Update

ILS Product Improvements and Updates Since August 2023

## Koha Improvements since August 2023 ILS Evaluation and Review Process

### Koha Upgrades

Two Koha upgrades have been released since the V-Cat ILS Evaluation and Review Committee wrapped up their work in 2023: 23.11 and 24.05, and 24.11 will be released in November 2024. The 23.05 release information may not have been fully reflected in the evaluation as it was released after the product demonstrations. The links below provide overview videos and documentation for each release.

#### *Koha 23.05*

- [ByWater Solutions Release Notes](#)
- [ByWater Solutions What's New Videos](#)
- [Koha Community Release Notes](#)

#### *Koha 23.11*

- [ByWater Solutions Release Notes and What's New Videos](#)
- [Koha Community Release Notes](#)

#### *Koha 24.05*

- [ByWater Solutions Release Notes and What's New Videos](#)
- [Koha Community Release Notes](#)

#### *Koha 24.11 – to be released on 11/26/2024*

- [Koha Community Roadmap](#)

### Metabase for Koha

ByWater Solutions added Metabase for WWLS libraries to the current quote. Metabase offers an easy to use visual query builder to create reports without the need to learn SQL. See the links below for more information about Metabase.

- ByWater Solutions [Monday Minutes Video Overview of Metabase](#) (9 Minutes)
- Bywater Solutions [Overview of Metabase Video](#) (4 minutes)
- Bywater Solutions [Overview of how Metabase works](#)
- Metabase [product website](#)

## Koha Demo Site

Koha demonstration site access information can be found on the password protected [V-Cat ILS Demonstrations Page](#) of the WVLS website

### Select Koha changes with information from the August 2023 committee report

Aspect	Pro	Con	Change since August 2023
Circulation, Searching, and Patron Records Management	<ul style="list-style-type: none"> <li>• Intuitive and easy for new staff to learn.</li> <li>• Superior keyword searching for all record types that displays partial matches as you type.</li> <li>• Ability to search by multiple patron fields including birth dates and partial matches for names and addresses.</li> <li>• Built in parent/child record management</li> <li>• Visible circulation notice history</li> </ul>	<ul style="list-style-type: none"> <li>• Learning a new product and adjusting to new workflows</li> <li>• Browser based printing</li> </ul>	<ul style="list-style-type: none"> <li>• Add ability to generate custom slips for patrons</li> </ul>
System Administration	<ul style="list-style-type: none"> <li>• Good customer service and support team</li> <li>• Customizable interface</li> <li>• Transparent settings</li> <li>• Opportunity for future developments, and ability to provide input</li> </ul>	<ul style="list-style-type: none"> <li>• Learning a new system</li> </ul>	<ul style="list-style-type: none"> <li>• Multiple Consortium Features / Enhancements</li> <li>• Optimize building of holds queue based on transport cost matrix</li> </ul>

Select Koha changes with information from the August 2023 committee report  
(continued)

Aspect	Pro	Con	Change since August 2023
Compatibility with Other Products	<ul style="list-style-type: none"> <li>• Large open source Koha community working on improvements</li> <li>• Ability to collaborate with others to fund developments</li> <li>• Would work well with Aspen as both products are supported by the same company</li> </ul>	<ul style="list-style-type: none"> <li>• Some difficulties with Edifact ordering setup</li> </ul>	<ul style="list-style-type: none"> <li>• Edifact Ordering Improvements – See Acquisitions 2.0</li> </ul>
Reports	<ul style="list-style-type: none"> <li>• Reports can be scheduled to run and be emailed to staff</li> <li>• Templates can be created for libraries to run their own reports</li> <li>• No limit on the number of reports or item in a report</li> <li>• Advanced reporting capabilities</li> </ul>	<ul style="list-style-type: none"> <li>• Some staff may need to learn SQL reporting</li> <li>• May need to rely on ByWater support or the user community for assistance with some uncommon advanced reports</li> </ul>	<ul style="list-style-type: none"> <li>• Metabase reporting subscription added</li> <li>• Add the ability to download a template rendered report as a file</li> </ul>

Select Koha changes with information from the August 2023 committee report  
(continued)

Aspect	Pro	Con	Change since August 2023
Cataloging and Records Management	<ul style="list-style-type: none"> <li>• record editing and fast cataloging more accessible for staff who do not regularly catalog</li> </ul>	<ul style="list-style-type: none"> <li>• Macros not included</li> <li>• adaptation of cataloging workflows would be required</li> <li>• Difficult to compare records to import</li> <li>• May take longer to select, import and edit records</li> </ul>	<ul style="list-style-type: none"> <li>• Added button to easily toggle between advanced/basic cataloging editors</li> <li>• Ability to add id tags to each MARC note in the display</li> <li>• Allow setting overlay framework for OCLC Connexion imports</li> <li>• Added the ability to lock records to prevent modification through the Koha staff interface.</li> <li>• Added ability to limit editing of items to home library or library group</li> </ul>
Ordering and Acquisitions	<ul style="list-style-type: none"> <li>• No additional cost for multiple libraries to use acquisitions</li> <li>• Hyperlinks to help with searching for order records</li> </ul>	<ul style="list-style-type: none"> <li>• Ability for multiple libraries using acquisitions is in development</li> <li>• Unable to determine full accounting tool capabilities</li> </ul>	<ul style="list-style-type: none"> <li>• Finance Mgmt-Acquisitions 2.0 (<a href="#">Video</a>)</li> <li>• Show bibliographic information of deleted records in acquisition baskets</li> <li>• Allow deletion of cancelled order line</li> <li>• Fixed Performance issues with edifact with large number of messages</li> <li>• Add coded location qualifier, barcode, and enum chron to Marc Item Fields To Order</li> <li>• Add modify order PDF</li> </ul>

Select Koha changes with information from the August 2023 committee report  
(continued)

Aspect	Pro	Con	Change since August 2023
Financial Cost	<ul style="list-style-type: none"> <li>• Dedication to product improvement in the open source community</li> <li>• Cost savings are possible</li> <li>• Improved features are included in annual cost or are a one time development cost.</li> </ul>	<ul style="list-style-type: none"> <li>• Migration costs</li> <li>• Concerns about indirect costs due to increased staff time needed for acquisitions and cataloging</li> </ul>	Possible improvement (see Acquisitions and Cataloging sections)
Costs tied to change/Lack of change	<ul style="list-style-type: none"> <li>• Easier to train new circulation staff</li> <li>• Updated training for all staff may have a unifying effect</li> </ul>	<ul style="list-style-type: none"> <li>• Long migration and post migration adjustment period</li> </ul>	No Change

# Sierra Improvements since the ILS Evaluation and Review Process

## Sierra Upgrades

Two Sierra upgrades have been released since the V-Cat ILS Evaluation and Review Committee wrapped up their work in 2023. Sierra 6.3 will be released by the end of 2024. Highlighted forthcoming and past improvements are documented on the [Sierra Product Roadmap](#). The links below provide brief documentation for each release.

### *Sierra 6.1*

(This upgrade was released in December 2023. V-Cat has not upgraded to this release due to concerns about known issues with patron notices and search functions.)

- [Brief release notes.](#)
- [What's New Video](#)

### *Sierra 6.2*

(This upgrade was released in June 2024 and requires an upgraded server. V-Cat will need to migrate to a new upgraded server or migration to Innovative cloud hosting.)

- [Brief release notes](#)
- [What's New Video](#)

### *Sierra 6.3*

(In beta testing. To be released fourth quarter 2024.)

Full release notes cannot be shared in public meeting documents, but can be provided to V-Cat member library staff upon request.

## Sierra Cloud Hosting

Innovative has included cloud hosting in the current quote. A migration to cloud hosting would mean that the Sierra application and database would be hosted on virtual servers managed by Innovative instead of on LeanWI managed servers in the shared data center. Innovative would manage updates, security, and backups.

## Sierra Test Server

Innovative has included a test server in the current quote. This would allow ILS Administration staff to test out planned upgrades and changes to global and library specific settings without impacting the day to day workflows of library staff.

## Select Sierra changes with information from the August 2023 committee report

Aspect	Pro	Con	Change since August 2023
Circulation, Searching, and Patron Records Management	<ul style="list-style-type: none"> <li>Familiar to current staff</li> </ul>	<ul style="list-style-type: none"> <li>Very picky searching (exact match often required)</li> <li>Not intuitive for new staff</li> </ul>	<ul style="list-style-type: none"> <li>6.1 Release has search issues, resolved in 6.2</li> </ul>
System Administration	<ul style="list-style-type: none"> <li>Familiar to current staff, and existing support at other libraries is in place.</li> </ul>	<ul style="list-style-type: none"> <li>Innovative's service is notably poor.</li> <li>Some settings cannot be assessed or adjusted without contacting with the vendor</li> </ul>	<ul style="list-style-type: none"> <li>Minimal change. Slight improvement with a few settings shifting to be managed locally.</li> </ul>
Compatibility with Other Products	<ul style="list-style-type: none"> <li>Aspen and other products are already implemented with Sierra, and work mostly as intended</li> </ul>	<ul style="list-style-type: none"> <li>As Innovative's attention moves away from Sierra, it may not be compatible with future products/features.</li> </ul>	No change
Reports	<ul style="list-style-type: none"> <li>Familiar and convenient tools for large-scale searching and record editing</li> </ul>	<ul style="list-style-type: none"> <li>Limited ability to query the database. The tools take significant time for new staff to learn.</li> </ul>	No change
Cataloging and Records Management	<ul style="list-style-type: none"> <li>Fits well with existing cataloging model and high-volume workflow for record comparison.</li> </ul>		No change
Ordering and Acquisitions	<ul style="list-style-type: none"> <li>Capable of handling detailed accounting for multiple locations in a way that works for a consortium.</li> </ul>	<ul style="list-style-type: none"> <li>Additional acquisitions units will cost considerably more</li> </ul>	<ul style="list-style-type: none"> <li>Improved lower cost in current quote</li> </ul>

Select Sierra changes with information from the August 2023 committee report  
(continued)

Aspect	Pro	Con	Change since August 2023
Financial Cost	<ul style="list-style-type: none"> <li>The cost of migration will be delayed until the next evaluation process.</li> </ul>	<ul style="list-style-type: none"> <li>All additional features would come at an additional annual cost.</li> <li>Once migration cost is set aside, the cost of the product and the service agreement will be greater than it would for others.</li> </ul>	<ul style="list-style-type: none"> <li>Some improvement in current quote</li> </ul>
Costs tied to change/Lack of change	<ul style="list-style-type: none"> <li>There is no change cost, because there will be no change.</li> </ul>	<ul style="list-style-type: none"> <li>New staff training will remain time-consuming due to unintuitive elements.</li> <li>Existing problems will continue to require workarounds.</li> <li>Possible stagnation with product development</li> </ul>	<ul style="list-style-type: none"> <li>Some product improvements</li> <li>Continued concern with development focus on other products.</li> </ul>