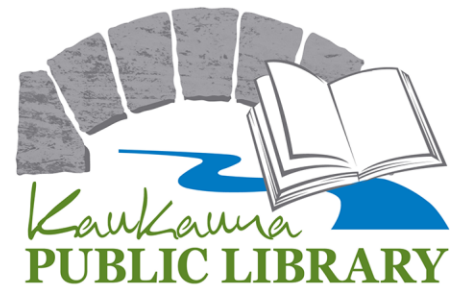


To: Kaukauna Public Library Board of Trustees
From: Library Director Ashley Thiem-Menning
Date: 9/17/25
Re: ILS RFI



In 2020, we migrated our ILS (Integrated Library System), our primary software, from Sierra to CarlX. This was an OWLS AAC (Administrative Advisory Council) vote, based on a committee recommendation. Unfortunately, regardless of how difficult and time-consuming a migration of patron data and records can be, the software selected has not been serving us well. We were promised a fully cloud-based software within the five year contract, and five years later, the company cannot give us any estimated date for which their product will be fully operational in that cloud-based format. James, our Adult Services Librarian, is an official member of the newest software search committee, as we wanted to ensure that we had a staff member participating.

Our current product, CARLX requires us to utilize both of their products day to day. Products include the actual software, which we call Carl Client, and the cloud-based site, called Carl Connect. Both products are not fully functional, so we must train staff to use both products. This can be confusing because some things can only be done on one product and not on the other, but also because we have strong preferences of why things need to be done in one software versus the other. This can be difficult in terms of training, because you may be able to complete a function in both pieces of the product, just not to the same level of detail.

We no longer allow items to be checked in using the cloud-based software; the error rate is too high. Further, both products are so inaccurate in the check in process that combined with human error (as we hand check-in) we have to scan every item that comes in three times to ensure it is being removed from accounts. This equates to more than 380,000 unnecessary scans a year. This software has been so difficult to work with that OWLS has had to dedicate a fulltime staff member to training on the products.

As we have been complaining about the software steadily since it was launched, there have been efforts to move away from it. The first attempt to search for new software did not pass an AAC vote. It was not until we were back to in-person AAC meetings that we could have in person dialogue about the challenges of the software we are using and what it is costing us/the library system to continue using it. The second time the vote to search for a new ILS came up it did pass.

Demos for new products started this September. We are currently demoing apps, discovery layers (search catalogs), as well as the ILS software itself. In total, we will have spent roughly 18 hours in demos this month, which is not a small commitment.

To date, we had an online demo with Bibliocommons for their app, which is currently the discovery layer (search catalog) we are using. Kaukauna's position on Bibliocommons as our discovery layer is not positive. We do not like how items that are long tenured, like *Charlotte's Web* for example, (which has over 10 book ISBNs alone associated with it) displays. You can only see one record at a time and have to click through multiple records, if you are trying to find a specific copy. Further, patrons may end up inadvertently putting a hold on the copy that is the furthest away, which will take the longest to arrive because they did not click through 10 different records to see which is closest. While the app itself was much more attractive than the current app we have, which seems almost prehistoric in its simplicity, I am concerned that the lack of usability of the discovery layer may also translate into the app.

Sarah, the Youth Services Librarian, and I attended a full day demo of ILS software at Appleton Public Library on 9/10. That day we learned that Polaris, a product of Clarivate/Innovative, has an entire package, which includes an app, discovery layer, and the ILS. This is very attractive to me. Further, there are optional package adds like their programming calendar, which works directly with their app, as well as text notice service, and even more exciting, automated phone calls for holds. Currently, staff must watch the screen for a letter C in a pop-up window to note that the item requires a phone call. Then, staff must go to the patron's account to get the phone number, write it down, and then stop what they are doing to go over and make a phone call. It would be more efficient and have fewer errors if the system would allow for automated calls. This is something we have been asking OWLS to consider for several years for efficiency and accuracy.

The Polaris software presented to us was so user friendly in core functions (check in & check out) that if someone put it on my computer today, without training, I could probably successfully manage the entire account side of a patron record. While we did not get to play with the software hands-on, that would be a coming step if we get closer to selecting them. Sarah and I left feeling very enthused at the prospect of this vendor and their product.

We do have several more demos scheduled for this month, but so far, things are looking more promising. We had a discovery layer demo with Aspen this afternoon. The product does seem to have a better layout for records; however, it does not look as visually appealing as some of the other products.

We also have another full day demo on 9/24 for another ILS software, Symphony, from SirsiDynix, a company that we have worked with before, when we used their product Sierra. While we felt many years ago that Sierra was not serving our needs, it was still a better product, in my opinion, than our current software.

This has been a very labor-intensive process. However, this time around, I feel it is critical to ensure that the software selected does what public facing staff need it to do.

A migration could be happening as soon as next year. From Kaukauna's perspective that cannot come soon enough and that is in full understanding of the work required in re-training an entire staff and the public on new products. However, it will be well worth it based on the quality of the current product we have.

