



REQUEST FOR PROPOSAL

Request for proposal for an integrated library system for:

Kitsap Regional Library

June 1, 2011

Contact:

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*Due Date:	August 1, 2011
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Time:	4:00 PM
# of Copies:	One paper copy and one electronic copy in Word format

*Late proposals will not be accepted.

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Introduction:

Kitsap Regional Library is seeking firm quotations for a new Integrated Library System (ILS).

1. Mandatory Requirement:

Please provide costs on the enclosed Bid Requirements form, along with 5-year maintenance costs.

The public body shall ensure that evaluation factors include, but are not limited to, proposal price and the ability of the proposer to perform the job order contract. In evaluating the ability of the proposer to perform the job order contract, the public body may consider: The ability of the professional personnel who will work on the job order contract: past performance on similar contracts; ability to meet time and budget requirements; ability to provide a performance and payment bond for the job order contract; recent, current, and projected workloads of the proposer; location; and the concept of the proposal;

2. Background Information on Library

Kitsap Regional Library, a county library system with 9 branch libraries, a Bookmobile, and Outreach Services to homebound residents, seeks a new integrated library system (ILS). Kitsap Regional Library is currently using Symphony from SirsiDynix.

Kitsap Regional Library serves the 251,000 residents of Kitsap County, WA. Kitsap County is the gateway to the Olympic Peninsula and the natural wonders of Olympic National Park and Olympic National Forest. It is a serene ferry ride away from Seattle's exciting downtown core. Located across Puget Sound from Seattle, KRL has more than 102,000 active library cardholder accounts. The system's mission statement says "Kitsap Regional Library serves the community as a center for lifelong learning and a steward of access to stories, information and knowledge." KRL's current 5-year strategic plan includes goals to enhance resources and services for every age group. Kitsap Regional Library is seeking an ILS that will provide customers with robust, seamless access to a variety of online resources as well as enabling the Library to monitor and improve stewardship of library resources.

The Kitsap Regional Library has built a strong and effective team to provide services to our constituents and we are looking for an ILS vendor which can support and enhance our efforts in continuing to implement stable, innovative and comprehensive customer services.

An electronic version of this RFP is available at:

http://www.krl.org/documents/about/ILS_RFP.docx

3. General Information

This section contains general information about the collection, staff size and other details regarding the Kitsap Regional Libraries. Please use this information when you determine hardware configuration and system pricing.

Population served	251,000
Bibliographic records	275,013
Items / holdings	497,514
Customer Records	102,116
Annual circ (charges + renewals)	2,694,351
Branches / Bookmobile	9/1
Self-check units	24
Public workstations	185
Staff workstations	183
Library website	www.krl.org

4. Library's Timetable

Proposals may be submitted electronically, in MS Word, via email to nmanheimer@krl.org.

Event	Date
RFP Released	June 1, 2011
Due date of RFP	August 1, 2011
On-site demonstrations by Top Vendors	Aug & Sept 2011
Final Selection of Vendor	Oct 2011
Desired go live date	2nd Quarter 2012

5. Selection Criteria:

The library will base the selection on:

- Functionality for the library
- Platform suitability (operating system and database)
- 3rd Party Product Support
- Ease-of-use for staff and public
- Initial, add-on subsystems and 5 year costs
- Customer Support Metrics
- References
- Vendor viability and financial strength
- Cost, including ongoing factors such as maintenance fees, additional staffing required, ease of administration, support, and the installation of new enhancements

Network and Workstation Requirements

Please describe the WAN requirements as well as the minimum and recommended PC configuration for staff and public clients.

Vendor Information

Company Profile

- a. Describe your company, including its history, origin, and any affiliation to other corporate entities.
- b. Provide the owners' and/or principal officers' names, length of time in the library automation field, and any other pertinent information.
- c. Describe the staff of the company in terms of total FTEs and the percentage of breakdown of FTE staff among sales, research and development, support, and other functions. If the company is currently for sale or involved in any transactions to expand or to be acquired by another organization, please explain.
- d. Describe the company's involvement with library-related organizations and standard organizations.
- e. Describe the company's strategy for keeping up with industry trends and developments in library software and systems.
- f. Describe the procedure for developing new features, including how customer input is taken, evaluated, and weighed.

Strategic Partnerships/Test Sites

- a. List any partnerships with third-party Vendors, including a brief description of the services they provide. Describe any partnerships with public libraries for developing new products or testing software.

Financial Data

- a. Please provide financial information sufficient to include the vendor's financial stability.

Company Contacts

- a. Provide a list of organizational officers directly involved in the product being bid, with their backgrounds and credentials. Identify the number and location of sales and support personnel accessible to the purchaser.

User Groups

- a. Provide contact information for users groups, including website or listserv addresses. Provide the URL for any website that provides information on the company, press releases, and product information that is relevant to this proposal.
- b. Is the User group member listserv open and available to the public?

Customer References

Please provide 3 references that are similar in size to our library and if possible have migrated from Sirsi Symphony or Unicorn.

Reference 1	
Name:	
Title:	
Library:	
Telephone:	
Email:	
Web address:	
Date of install:	

Reference 2	
Name:	
Title:	
Library:	
Telephone:	
Email:	
Web address:	
Date of install:	

Reference 3	
Name:	
Title:	
Library:	
Telephone:	
Email:	
Web address:	
Date of install:	

Bid Requirements:

Cost quotes and payment terms should be included for all software and recommended equipment. Please use the table below to indicate the costs for the various components.

- If your system does not have a specific line item, indicate that with an N/A in the appropriate columns.
- Please feel free to add items to the cost table if you have items which do not fit into the specific categories.
- Costs for all modules and add-on functionality need to be included in the cost table.
- Prices for the initial purchase, implementation and 5 years of maintenance should be included for each item.
- Kitsap Regional Library may be interested in purchasing hardware independently, please indicate if hardware must be purchased through your company or if other options are available.

Description	Initial/Implementation	Year 1 Maintenance	Year 2 Maintenance	Year 3 Maintenance	5 year Total Maintenance
Required Modules <ul style="list-style-type: none"> • Circulation • Acquisitions • Serials • OPAC • Cataloging • Reports 					
Multilingual OPAC - Please list all languages available and the price for each choice					
Inventory Module					
ILL Interlibrary Loan Module					
Authority Control Processing (if available)					
EDI for Acquisitions					
SIP/SIP2/NCIP					

Description	Initial/Implementation	Year 1 Maintenance	Year 2 Maintenance	Year 3 Maintenance	5 year Total Maintenance
Outreach Module					
Offline Circulation					
Phone Notification Service					
Enhanced Record Content (Syndetics or other service)					
Z39.50 client/server					
eCommerce for Public					
eCommerce for Staff					
Hardware Purchase & Maintenance					
Hardware Installation					
Data Migration Services					
Database Licenses					
Database Software Tools					
Training					
System Monitoring Software					
Optional functionality/modules					

Kitsap Regional Library will not reimburse Vendors for any costs involved in the preparation and submission of responses to this RFP or in the preparation for or participation in any subsequent demonstrations and meetings. This RFP does not obligate Kitsap Regional Library to accept or contract for any expressed or implied services. Kitsap Regional Library reserves the right to request any Vendor to clarify their proposal or to supply any additional material deemed necessary to assist in the evaluation of the ILS. All proposals and submissions shall become the property of Kitsap Regional Library upon receipt and may be used by Kitsap Regional Library in the selection of a vendor and may be incorporated into any final agreement between Kitsap Regional Library and the vendor submitting same.

Key Functionality Requirements:

The items listed in the Key Functionality area are important to Kitsap Regional Library in an ILS.

Size of Collection & Level of Transactions

Your system must have a proven record of handling libraries of this size and complexity plus growth. Kitsap Regional Library record counts and transaction levels are included in the Background Information on Library section on page 3.

Hardware

Your system must provide a robust hardware configuration with failover capabilities. We also require a test environment for upgrade testing and training. While we have historically housed our own ILS servers, Kitsap Regional Library is willing to consider a hosted solution provided the vendor can provide a history of successful hosted solutions of our size.

Public Interfaces – Flexibility & Customization

Kitsap Regional Library is a customer-centered organization. The PAC and other public interfaces are extremely important to Kitsap Regional Library as we make our decision for a new ILS. We strive to provide the best customer experience possible to our clients. Please describe how your system is unique or special in the area of public interfaces and interoperability with 3rd party vendors and the flexibility allowed for the display of the library collection and for integration with the library's web site.

Reports

The flexibility of the reporting module is another key area for Kitsap Regional Library: access to a flexible report module from all staff modules is critical. Flexibility includes the ability to select specific criteria for each report as well as the ability to select the data output and format. Exporting and downloading data from reports to programs such as Excel is also important.

Although the reports available through the staff modules is an important factor, Kitsap Regional Library feels that it is even more important to have direct access to the data in the system. The requirement of direct database access may need to be addressed in the cost area if additional or expanded licenses are required for the underlying database structure. Please summarize the reporting capabilities of your system and make sure you address the ability to access the data directly. Please indicate if there are any reports or batch processing which should be run when the library is closed due to excessive load on the system or when the system is not accessible.

Floating Collection

Some of the Kitsap Regional Library collections 'float', (remain) at the returning branch until circulated or requested by a customer. We are planning to 'float' more of our collection in the future. This is an extremely important aspect of our service and does offer some unique challenges. Different aspects of the floating collection functionality are mentioned in various sections of this RFP but it is also included as a separate item under Key Functionality to not only stress the importance but to also give each vendor a chance to compile all of the different pieces within each system related to floating collections. Please indicate the different reports and functions available which would help Kitsap Regional Library manage their floating collection. This could include inventory, collection management, reports, screen display elements and other parts of the ILS.

Response to Specifications:

Vendors must respond to every requirement contained in the Specifications section of the RFP using the following criteria. Vendor's responses must be in the same order in which questions appear in this RFP, and must use the same numbering scheme used in this RFP.

A	Available	Vendor currently supplies this capability as a part of a general software release.
D	In development	Testing and release planned within 2 years from the due date of this RFP.
P	Planned	Capability is planned; no development is underway.
N	Not available	Not planned, and no development underway.

For any specifications to which the Vendor answers other than A (Available), Vendor must describe:

- The feature, function, product, or service being planned or developed, indicating the date after which the function and feature will be available in general release and operation in the system proposed to the library.
- Whether the library will incur any added cost for the feature, function, product, or service once it becomes available, either as a direct cost of the feature, function, product, or service, or because the feature, function, product, or service will require replacement of or addition to hardware or software originally proposed for initial installation.
- If the feature, function, product, or service is not available, in development or planned, an explanation of how the specification might otherwise be met using alternative features, functions, products, or services available from the Vendor or a third party partner, including availability dates for any such alternative and any added costs, either direct or indirect.

Vendors are advised that the library is interested in receiving proposals from vendors who can offer an integrated library system (ILS) already in use by an installed customer base

Specifications section:

Vendor Name:				
I. System Requirements	A	D	P	N
1. Does the ILS comply fully with the Z39.50 version 3 standard on both the client and the server sides?				

Brief Vendor Comment (if necessary):

2. Is the staff client browser based?				
a. does it require a local installation?				
b. Is it Java based?				

Brief Vendor Comment (if necessary):

3. Does the ILS include the following as the core product:				
a. Circulation (including floating collections, inventory and offline)?				
b. Cataloging with authority control?				
c. Bibliographic Import?				
d. Acquisitions with fund accounting?				
e. Electronic ordering (EDI)?				
f. Selection List import via 9XX?				
g. Serials Control?				
h. System administration?				
j. Public Access Catalog?				
k. Mobile PAC?				
l. Children's PAC?				
m. eCommerce for patrons?				
n. RSS Feeds?				
o. Z39.50 Interface?				
p. Report generation?				
q. Outreach Services (Homebound)?				
o. ILL module?				

Brief Vendor Comment (if necessary):

Vendor Name:				
I. System Requirements (continued)	A	D	P	N
4. What hardware platforms does the ILS support?				
a. Do you provide SaaS or Hosted options?				
b. Do you support in house installations?				
c. What operating systems do you support?				

Brief Vendor Comment (if necessary):

5. Does the ILS integrate with Active Directory for staff member authentication?				
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Brief Vendor Comment (if necessary):

6. Is the following available at the library's option:				
a. Telephone Notification – Outbound?				
b. Telephone Notification – Inbound?				
c. eCommerce for the staff interface?				
d. Self-Check (SIP2 or NCIP) Interface?				
e. Debt Collection Interface?				
f. Book group kit circulation?				
g. Inventory Manager?				
h. Multilingual PAC (List other desired PAC languages)?				
i. Digital Collection Management?				

Brief Vendor Comment (if necessary):

7. Does the ILS support the following third party products?				
a. EnvisionWare? (self checkout, time management, print management, and PAC reservations)				
b. Unique Management Services? (notices and collection services)				
c. Support for eCommerce via public interfaces and for staff interface?				
d. Overdrive? (downloadable)				
e. Remote patron authentication?				
f. Vendors for ACQ module for online ordering and invoicing?				
g. Enhanced Data Content for PAC?				

Brief Vendor Comment (if necessary):

Vendor Name:				
I. System Requirements (continued)	A	D	P	N
8. What other third party vendors do you support?				

Brief Vendor Comment (if necessary):

9. Are general release software updates included under maintenance?				
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Brief Vendor Comment (if necessary):

10. Do you provide customer support for:				
a. System Maintenance?				
b. ILS upgrades?				
c. Operating system upgrades?				

11. Answer the following upgrade questions using the Vendor Comment space.				
a. How and how often are upgrades distributed?				
b. How are ILS system upgrades coordinated with operating system upgrades?				
c. Who is responsible for operating system upgrades?				
d. What types of technical assistance are available from your company to implement upgrades of your ILS software and updates of the server software?				

Brief Vendor Comment (if necessary):

12. Does the ILS support international date formats, such as dd/mm/yyyy, uniformly throughout the system?				
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Brief Vendor Comment (if necessary):

13. Can the library select the appropriate date format to be used throughout the system?				
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Brief Vendor Comment (if necessary):

14. Does the ILS support keyboard shortcuts?				
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Brief Vendor Comment (if necessary):

Vendor Name:				
I. System Requirements (continued)	A	D	P	N
15. Does the ILS support updating in one place to apply across the system?				
a. Library calendars?				
b. Toolbars?				
c. Receipts?				
d. Hold slips?				
e. Checkout slips?				

Brief Vendor Comment (if necessary):

16. While we are currently not a consortium, does the ILS have the capability of supporting multiple branch or independent libraries under separate jurisdictions, with one central computer configuration sharing a common database, with each such library maintaining different delinquency criteria, fine calculation rules, loan period rules, and hold parameters should we join a consortium in the future?				
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Brief Vendor Comment (if necessary):

17. Does the ILS include the following products and services to the full extent required for successful system implementation and operation:				
a. data migration services?				
b. software (operating system, database and application)?				
c. server hardware and any additional hardware components or peripherals specific to the proposed system?				
d. hosted service? If so what operating system is used for Hosted systems?				
e. policy profiling/generation?				
f. installation and database loading?				
g. training on all subsystems?				
h. documentation?				
i. hardware and software maintenance?				

Brief Vendor Comment (if necessary):

18. Are there workflow analysis services available to review current procedures and to create new ones that take advantage of the capabilities in the ILS?				
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Brief Vendor Comment (if necessary):

Vendor Name:				
I. System Requirements (continued)	A	D	P	N
19. Does a single client support all staff operations, including, but not limited to, circulation, cataloging, acquisitions, serials control, report generation, policy set-up and management, and operation of any other optional subsystems the library may select?				
a. Please describe your client?				

Brief Vendor Comment (if necessary):

20. Does the initial login set all privileges for users without requiring a separate login to access different subsystems?				
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Brief Vendor Comment (if necessary):

21. Does the staff client clearly display who is logged in?				
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Brief Vendor Comment (if necessary):

22. Is the ILS scalable to manage high volume transactions for large institutions without impacting system performance?				
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Brief Vendor Comment (if necessary):

23. Can the ILS handle generating reports on the production server without impacting the day to day transaction speed and searching response time?				
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Brief Vendor Comment (if necessary):

24. Are there other considerations for impacting response time and search speed?				
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Brief Vendor Comment (if necessary):

25. Is down time required for overnight processing or backups (system maintenance) and how often? How much time is needed?				
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Brief Vendor Comment (if necessary):

26. Is there real time indexing?				
a. does indexing cause downtime?				

Brief Vendor Comment (if necessary):

Vendor Name:				
I. System Requirements (continued)	A	D	P	N
27. Where does the PAC reside:				
a. on the production server?				
b. on a separate server?				

Brief Vendor Comment (if necessary):

28. Does the vendor offer a subscription option to enhance the content of the library's catalog records and PAC through automatic web links to:				
a. book reviews, summaries, and book jacket images?				
b. author biographies and tables of content?				
c. Best seller lists, award winners, etc.?				
d. most popular titles, subjects, and authors, based on automatic analysis of the library's recent circulation statistics?				

Brief Vendor Comment (if necessary):

29. Does the vendor provide a test environment with identical hardware as the production environment?				
a. What is the support for refreshing the test environment?				
b. Is the pricing for hardware and software licensing for both systems included in the bid?				
c. What are the emergency failover options provided in case of a server failure?				

Brief Vendor Comment (if necessary):

30. Does the ILS offer a user-friendly search tool that is the same across all subsystems?				
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Brief Vendor Comment (if necessary):

31. Does the library have the option to set the search tool to use an auto-suggest feature for keyword and phrase searches for patron, item, bibliographic and authority records?				
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Brief Vendor Comment (if necessary):

32. Does the search tool provide search by, limit by and sort by options?				
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Brief Vendor Comment (if necessary):

Vendor to highlight System strengths it feels its ILS has for the library.

Vendor Name:				
II. Circulation	A	D	P	N
The library considers that all ILS vendors provide basic/advanced circulation functionality. Following is a list of specific features desired by Kitsap Regional Library.				
Data and Records Management				
1. Does the ILS support the addition of patron types without vendor intervention?				
<i>Brief Vendor Comment (if necessary):</i>				
2. Does the ILS support permissions that can be set by staff member or workstation to restrict viewing and/or modifying patron records?				
<i>Brief Vendor Comment (if necessary):</i>				
3. Does the ILS support the bulk import of patron records from an external source?				
<i>Brief Vendor Comment (if necessary):</i>				
4. When registering a patron does the ILS check to see if patron is already registered?				
a. Can the ILS merge duplicate patron records?				
<i>Brief Vendor Comment (if necessary):</i>				
5. Is it possible to remove patron identification data from circulation transaction records and item histories?				
<i>Brief Vendor Comment (if necessary):</i>				
6. Does the ILS support the ability to preserve patron account, notification and borrowing activity when merging patron records?				
<i>Brief Vendor Comment (if necessary):</i>				
7. Can default values be set when creating new patron records?				
<i>Brief Vendor Comment (if necessary):</i>				
8. Can the ILS allow the library to define which fields are required in a patron record?				
<i>Brief Vendor Comment (if necessary):</i>				
9. Does the ILS offer an option for patron self-registration from PAC or online? How does this work?				
<i>Brief Vendor Comment (if necessary):</i>				

Vendor Name:				
II. Circulation	A	D	P	N
Data and Records Management (continued)				
10. Can self-registrations from PAC be counted separately in statistical reporting?				
<i>Brief Vendor Comment (if necessary):</i>				
11. Does the ILS offer a self-registered patron immediate, but limited privileges as determined by the library? (Checking for duplicate records and giving the record a temporary status)				
<i>Brief Vendor Comment (if necessary):</i>				
12. Can the patron record accommodate:				
a. multiple patron addresses?				
b. at least two e-mail addresses?				
c. at least two phone numbers?				
<i>Brief Vendor Comment (if necessary):</i>				
13. Does the ILS allow the library to define certain fields in the patron record for its own use (library-defined fields)?				
<i>Brief Vendor Comment (if necessary):</i>				
14. Are library fields able to be defined as free-text fields or drop-menu fields with selectable options?				
<i>Brief Vendor Comment (if necessary):</i>				
15. Is there a limit to the number of library defined statistical categories to be assigned to patron registrations?				
<i>Brief Vendor Comment (if necessary):</i>				
16. Does the ILS display a patron's last activity date and time?				
a. Is the date incremented for online activity as well as circulation?				
b. Is the date incremented by Sip2 activity?				
<i>Brief Vendor Comment (if necessary):</i>				
17. Can the ILS support the ability to enter only the significant digits of the patron barcode for ease of use in the staff client and PAC?				
<i>Brief Vendor Comment (if necessary):</i>				

Vendor Name:				
II. Circulation	A	D	P	N
Data and Records management (continued)				
18. Can the ILS support the ability for the patron to create an alternate ID and can it be used in the staff client and PAC?				

Brief Vendor Comment (if necessary):

19. Does the patron record offer private notes for staff use and “blocking” notes that will alert the staff member during check-out? How does this work?				
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Brief Vendor Comment (if necessary):

20. Does the ILS support searching patron records by, but not limited to, the following access points:				
a. Barcode				
b. Alternate ID				
c. Last name, First name				
d. First name, Last name				
e. Registered library				
f. Address				
g. Phone				
h. E-mail				
i. Fields defined by the library (user-defined fields)				
j. Expiration date				
k. Registration date				
l. Last activity date				
m. Zip code				
n. Notes				
o. Blocks				
p. Birthdates				

Brief Vendor Comment (if necessary):

21. Does the ILS support the ability for staff members to filter or limit a patron search by combining search terms (for example, search by last name and limit by registered library)?				
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Brief Vendor Comment (if necessary):

Vendor Name:				
II. Circulation	A	D	P	N
Data and records management (continued)				
22. Does the ILS support the ability for each individual staff member to set a default search preference? When searching, the system will default to his/her preferred method.				
<i>Brief Vendor Comment (if necessary):</i>				
23. Can the library change the default search preference or return to the system default?				
<i>Brief Vendor Comment (if necessary):</i>				
24. Can the ILS set a different default search preference for searching from check-out, check-in, or from the staff client general functions?				
<i>Brief Vendor Comment (if necessary):</i>				
25. Does the ILS support a patron reading history?				
<i>Brief Vendor Comment (if necessary):</i>				
26. Is the ability to keep a reading history optional with an opt in default?				
<i>Brief Vendor Comment (if necessary):</i>				
27. Does the ILS support the ability to limit how long (period of time) the reading history will be kept?				
<i>Brief Vendor Comment (if necessary):</i>				
28. Does the ILS support the ability to limit the total number of items that will be kept in a reading history?				
<i>Brief Vendor Comment (if necessary):</i>				
29. Does the ILS support the ability to sort the reading history by check-out date, title, and author?				
<i>Brief Vendor Comment (if necessary):</i>				
30. Can the ILS support linked or associated borrowers (family links)?				
<i>Brief Vendor Comment (if necessary):</i>				
31. Does the ILS support the option to exempt specific patrons or patron types from fines?				
<i>Brief Vendor Comment (if necessary):</i>				

Vendor Name:				
II. Circulation	A	D	P	N
Data and records management (continued)				

32. Can the ILS perform global “search and replace” operations on a selected group of patron records?				
a. Are there any limits to the fields that can be changed?				

Brief Vendor Comment (if necessary):

33. Can staff with sufficient privilege delete patron records individually?				
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Brief Vendor Comment (if necessary):

34. Does the ILS support the automatic deletion of patron records based on a library-defined period of inactivity?				
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Brief Vendor Comment (if necessary):

35. Is it possible to define the automatic deletion of patron records based on the following criteria: (We need to be able to delete and/or stop deletion by these reasons.)				
a. an amount of money owed				
b. any charge incurred within x days				
c. items out				
d. items on hold				

Brief Vendor Comment (if necessary):

36. Does the ILS provide an option to allow the staff member to group all records marked for deletion into a record set so they can be reviewed before they are finally deleted?				
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Brief Vendor Comment (if necessary):

37. Does the ILS provide an option to circulate Book group Kits? Checkout, set a due date policy, check in, generate fines etc.				
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Brief Vendor Comment (if necessary):

38. Does the ILS allow more than one staff to access a patron record at a time?				
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Brief Vendor Comment (if necessary):

Vendor to highlight data and records management strengths it feels its ILS has for the library.

Vendor Name:				
II. Circulation	A	D	P	N
Check-Out				
1. Does the ILS support an unlimited number of item types?				
a. Is there a limit?				
<i>Brief Vendor Comment (if necessary):</i>				
2. Does the ILS support an unlimited number of patron types?				
a. Is there a limit?				
<i>Brief Vendor Comment (if necessary):</i>				
3. Can the ILS calculate loan periods and due dates according to the type of borrower and type of material?				
<i>Brief Vendor Comment (if necessary):</i>				
4. Does the ILS support loan periods defined in days, hours and minutes?				
<i>Brief Vendor Comment (if necessary):</i>				
5. Does the ILS support the ability to establish an “overnight” loan policy for hourly loans checked out near closing time?				
<i>Brief Vendor Comment (if necessary):</i>				
6. Does the ILS support the assignment of specific due dates based on exact date or a selected number of days, hours or minutes? (Special loan periods).				
<i>Brief Vendor Comment (if necessary):</i>				
7. Does the ILS support the ability to apply a special loan period to one item during a check-out or to all items checked out to an individual patron, or to all items checked out to all patrons during the entire check-out session?				
<i>Brief Vendor Comment (if necessary):</i>				
8. Does the ILS support the ability for the library to specify a limit on the total number of items any patron may have at one time?				
a. Can the limit be set by library for each patron type?				
<i>Brief Vendor Comment (if necessary):</i>				

Vendor Name:				
II. Circulation	A	D	P	N
Check-Out (continued)				
9. Can the ILS specify a limit on the number of items of any particular type a patron may have at one time?				
a. Can the limit be set by library for each patron type?				
<i>Brief Vendor Comment (if necessary):</i>				
10. Can the ILS specify a limit on the number of overdue items a patron may have at one time?				
a. Can the limit be set by the library for each patron type?				
<i>Brief Vendor Comment (if necessary):</i>				
11. Can the ILS specify a limit on the number of lost items a patron may have at one time?				
a. Can the limit be set by the library for each patron type?				
<i>Brief Vendor Comment (if necessary):</i>				
12. Can the ILS specify a limit on the number of claimed items a patron may have at one time?				
a. Can the limit be set by the library for each patron type?				
<i>Brief Vendor Comment (if necessary):</i>				
13. Does the ILS support the ability for the library to manually add a block (stop) to a patron record?				
<i>Brief Vendor Comment (if necessary):</i>				
14. Does the ILS support the ability for the library to define one or more such blocks to be applied as necessary?				
a. Can a BARRED status be set preventing patron from using any library provided services?				
<i>Brief Vendor Comment (if necessary):</i>				
15. Does the ILS support the ability to manually put a block or stop on an individual item?				
<i>Brief Vendor Comment (if necessary):</i>				

Vendor Name:				
II. Circulation	A	D	P	N
Check-Out (continued)				
16. Does the ILS support the ability for the library to specify a limit on the total number of hold requests any patron may have at one time?				
a. Can a limit be set for each patron type?				
b. Can the limit be set by each format type?				
c. Can the limit be set by each item type?				
<i>Brief Vendor Comment (if necessary):</i>				
17. Does the ILS support the ability for brief item and bibliographic records to be created “on the fly” to allow un-cataloged items to circulate?				
<i>Brief Vendor Comment (if necessary):</i>				
18. Are item records added during “circ on the fly” added to the bibliographic database immediately?				
<i>Brief Vendor Comment (if necessary):</i>				
19. Does the ILS support circulation of un-cataloged and un-barcoded items for statistical counting purposes only?				
<i>Brief Vendor Comment (if necessary):</i>				
20. Does the ILS provide a direct link to the complete patron record from check-out?				
<i>Brief Vendor Comment (if necessary):</i>				
21. Does the ILS display all appropriate blocks or stops on a patron record at the point of check-out?				
<i>Brief Vendor Comment (if necessary):</i>				
22. Does the ILS support the ability for the staff member to link directly to the appropriate screen to manage the block?				
<i>Brief Vendor Comment (if necessary):</i>				

Vendor Name:				
II. Circulation	A	D	P	N
Check-Out (continued)				
23. Does the information displayed in the patron record at check out include, but is not limited to:				
a. All patron registration information				
b. A summary list of the patron's current standing, showing all blocks, number of items out, number of items overdue, total amount owed, number of claimed and lost items, number of items on hold, and notes.				
c. A complete list of all items currently out to the patron, showing barcode, author, title, due date, material type, number of renewals allowed, number of renewals taken and assigned library of the item.				
d. An indication of any item that is overdue.				
e. A summary of notices sent for overdue items including dates sent and notification method. It must be possible to sort the display of this list by any heading on demand.				
f. A complete list of items claimed and lost.				
g. A complete list of all hold and ILL requests, showing author, title, call number, material type, date placed, status, pickup library. This list must distinguish item-specific and title level holds. It must be possible to sort the display of this list by any heading on demand. It must be possible to link directly to the hold request.				
h. A complete list of all outstanding charges and any credits.				
i. A summary list of all prior charges, fines, payments and credits.				

Brief Vendor Comment (if necessary):

24. Does the ILS support the ability to renew items directly from the list of current items out?				
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Brief Vendor Comment (if necessary):

25. Does the ILS support the ability to block renewal of an item if hold requests are open for the title, allowing for staff override?				
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Brief Vendor Comment (if necessary):

Vendor Name:				
II. Circulation	A	D	P	N
Check-Out (continued)				
26. Does the ILS support the ability to renew all or selected items with a single command?				
<i>Brief Vendor Comment (if necessary):</i>				
27. Does the ILS alert the staff member of any blocking conditions on the patron record or the item during renewal?				
<i>Brief Vendor Comment (if necessary):</i>				
28. Does the ILS support the ability for an authorized staff member to override blocks?				
<i>Brief Vendor Comment (if necessary):</i>				
29. Can certain items be designated as non-circulating?				
a. Will these items be stopped at check-out?				
<i>Brief Vendor Comment (if necessary):</i>				
30. Does the ILS support the ability for a staff member with sufficient privilege to override a non-circulating block?				
<i>Brief Vendor Comment (if necessary):</i>				
31. Does the ILS support the ability for the library to determine the text of library-defined blocks?				
<i>Brief Vendor Comment (if necessary):</i>				
32. If a previously overdue or lost item is checked out to a new patron, does the ILS automatically charge the previous patron or waive the charges automatically according to library policy?				
<i>Brief Vendor Comment (if necessary):</i>				
33. Does the ILS support check-out receipts?				
<i>Brief Vendor Comment (if necessary):</i>				
34. Does the ILS support the ability for the library to configure the contents of check-out receipts?				
a. Centralized configuration?				
<i>Brief Vendor Comment (if necessary):</i>				

Vendor Name:				
II. Circulation	A	D	P	N
Check-Out (continued)				
35. Can a custom note to be added to check-out receipts?				

Brief Vendor Comment (if necessary):

36. Do all check-out transactions update the patron and item records immediately?				
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Brief Vendor Comment (if necessary):

37. Does the ILS support the ability to link to item records from the patron payment record?				
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Brief Vendor Comment (if necessary):

38. Does the ILS allow staff member permissions to be set to not allow override of blocking conditions so that a supervisor override is required to continue?				
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Brief Vendor Comment (if necessary):

39. Can library staff members toggle between check-out and check-in functions with a single keystroke?				
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Brief Vendor Comment (if necessary):

40. Can all alerts and on-screen messages be accompanied by a sound?				
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Brief Vendor Comment (if necessary):

41. Is it possible to configure what sounds accompanying the messages?				
a. Are these sounds optional?				

Brief Vendor Comment (if necessary):

Vendor to highlight check out management strengths it feels its ILS has for the library.

Offline Circulation				
1. Does the ILS provide an offline function to charge and discharge materials on a circulation workstation or on a portable device and to load these transactions into the on-line circulation System at a later time?				

Brief Vendor Comment (if necessary):

Vendor Name:				
II. Circulation	A	D	P	N
Offline Circulation (continued)				

2. Is the offline upload function integrated with the circulation interface, not requiring the staff member to leave the program in order to upload the files?

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Brief Vendor Comment (if necessary):

3. Does the ILS produce a report of uploaded files showing any exceptional conditions such as:

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a. items to be put in transit or items to fill hold requests?

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b. patron accounts that are expired, or blocked etc.?

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c. item barcodes that have been discarded or lost etc.?

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d. incorrectly scanned item or patron barcodes?

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Brief Vendor Comment (if necessary):

4. Does the ILS prevent uploaded transactions from overriding more resent transactions?

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Brief Vendor Comment (if necessary):

5. Does the ILS allow the ability to register patrons offline?

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Brief Vendor Comment (if necessary):

6. Does the ILS allow the ability to compensate for unexpected closed days when offline files are uploaded to prevent patrons from being charged unfairly for over dues?

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Brief Vendor Comment (if necessary):

7. Does the ILS allow the ability to upload multiple offline files to multiple libraries from a central location?

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Brief Vendor Comment (if necessary):

8. Does the ILS allow the ability to change the due date on selected checkouts, for example ILLs?

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Brief Vendor Comment (if necessary):

Vendor Name:				
II. Circulation	A	D	P	N
Offline Circulation (continued)				
9. When used on the Bookmobile does the ILS allow the ability to set different checkout periods from in library checkouts?				

Brief Vendor Comment (if necessary):

Vendor to highlight Offline Services strengths it feels its ILS has for the library.

Check-In				
1. Does the ILS support “book drop” check-in to allow back dating the check-in date?				

Brief Vendor Comment (if necessary):

2. Does the ILS support “in-house” check-in to track the use of materials used but not checked out?				
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Brief Vendor Comment (if necessary):

3. Does the ILS support RFID check-in?				
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Brief Vendor Comment (if necessary):

4. Does the ILS support 3rd party check-in sorting systems?				
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Brief Vendor Comment (if necessary):

5. Does the ILS support a “shelving status”; a temporary status assigned to items just checked-in but not yet on the shelf?				
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Brief Vendor Comment (if necessary):

6. Can the status text displayed for shelving status be customized by the library?				
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Brief Vendor Comment (if necessary):

7. Can each library determine how long the shelving status will display?				
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Brief Vendor Comment (if necessary):

8. Can the time to display the shelving status be set differently by material type?				
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Brief Vendor Comment (if necessary):

Vendor Name:				
II. Circulation	A	D	P	N
Check-In (continued)				

9. Does the ILS retain a link to the previous borrower after the item is checked-in?

Brief Vendor Comment (if necessary):

10. Is the ability to retain a link to the previous borrower optional?

Brief Vendor Comment (if necessary):

11. After an item is checked-in, is it possible to determine:

a. when (date, time) the item was checked-in?

b. where (library, workstation) the item was checked-in?

c. when the item was last checked-out?

d. where the item was last checked-out from?

Brief Vendor Comment (if necessary):

12. Does the ILS alert the user to over dues on an item when checking the item in?

Brief Vendor Comment (if necessary):

13. Does the ILS also alert the user to any pre-existing charges and allow the user to manage all charges at once?

Brief Vendor Comment (if necessary):

14. Does the ILS support check-in receipt?

Brief Vendor Comment (if necessary):

15. Does the ILS alert the staff member if material checked-in belongs to another library?

Brief Vendor Comment (if necessary):

16. Does the ILS support floating collections by offering the option to check-in the item at the receiving library?

Brief Vendor Comment (if necessary):

Vendor Name:				
II. Circulation	A	D	P	N
Check-In (continued)				
17. Does the ILS print an "in transit" slip to be placed on items to be transferred, displaying the destination library, sending library and date?				
a. Can "in transit" slip be configured to take the place of the hold slip?				

Brief Vendor Comment (if necessary):

18. Does the ILS alert the staff member to items that they should trap for a hold request?				
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Brief Vendor Comment (if necessary):

19. When trapping, does the staff member have the ability not to trap the item?				
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Brief Vendor Comment (if necessary):

20. If the staff member does not permit the item to be held, does the ILS prompt to keep or cancel the hold request?				
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Brief Vendor Comment (if necessary):

21. Does the ILS alert the staff member to any specific block on an individual item, allowing him/her to stop the check-in?				
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Brief Vendor Comment (if necessary):

Vendor to highlight check in management strengths it feels its ILS has for the library.

Borrow by Mail				
1. Does the ILS support a borrow-by-mail feature?				

Brief Vendor Comment (if necessary):

2. Is it possible to restrict borrow by mail options by patron code?				
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Brief Vendor Comment (if necessary):

3. Is it possible to charge a fee for borrow by mail service by patron code?				
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Brief Vendor Comment (if necessary):

Vendor Name:				
II. Circulation	A	D	P	N
Borrow by Mail (continued)				
4. Is it possible to exempt homebound patrons, or other specific patron types, from being charged a fee for the service?				

Brief Vendor Comment (if necessary):

Vendor to highlight borrow by mail strengths it feels its ILS has for the library.

Overdues, Fines and Accounting				
1. Does the ILS alert the staff member of overdue fines on incoming items and allow him/her to Pay, Waive or Charge the patron account?				

Brief Vendor Comment (if necessary):

2. Does the ILS support “distributed waivers”, the ability to waive a partial amount from several fines simultaneously?				
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Brief Vendor Comment (if necessary):

3. Does the ILS support the ability for a staff member with sufficient privilege to access a patron account directly from check-in or check-out to manage charges if desirable?				
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Brief Vendor Comment (if necessary):

4. Does the ILS support the ability for overdue fine amounts to account for closed days and holidays?				
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Brief Vendor Comment (if necessary):

5. Does the ILS support the ability to automatically correct fine amounts during check-in to compensate for unexpected closings?				
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Brief Vendor Comment (if necessary):

6. Does the ILS support the ability to manually add a charge to a patron record?				
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Brief Vendor Comment (if necessary):

7. Can the staff member select a reason for the charge from a library-determined list?				
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Brief Vendor Comment (if necessary):

Vendor Name:				
II. Circulation	A	D	P	N
Overdues, Fines and Accounting (continued)				

8. Does the ILS support the ability to add a note to any charge?

Brief Vendor Comment (if necessary):

9. Does the ILS support fine payment by credit card? Are credit card payments supported:

a. in the staff client?

b. by patrons from the PAC?

c. from the self-check unit?

Brief Vendor Comment (if necessary):

10. Are there clearly defined instructions for integration with cash registers?

Brief Vendor Comment (if necessary):

11. Does the ILS allow the ability to pay all fines or apply a partial payment to all monies owed?

Brief Vendor Comment (if necessary):

12. When making payments, can the ILS accept an overpayment and add the amount as a credit to the patron account?

Brief Vendor Comment (if necessary):

13. Is the ability to create a credit for overpayment optional, determined by the library?

Brief Vendor Comment (if necessary):

14. When making payments, can the ILS calculate change due back to the patron?

Brief Vendor Comment (if necessary):

15. Does the ILS keep all completed financial account transactions in a patron account history for a library-determined length of time?

Brief Vendor Comment (if necessary):

16. Does the ILS support the ability to retain item data in the patron financial history (charges/payments) even if the item is deleted?

Brief Vendor Comment (if necessary):

Vendor Name:				
II. Circulation	A	D	P	N
Overdues, Fines and Accounting (continued)				

17. Does the ILS support printing of fine receipts?

Brief Vendor Comment (if necessary):

18. Does the ILS support the ability for fine receipts to be printed from any point in the program where fines can be paid (check-in, check-out, patron account)?

Brief Vendor Comment (if necessary):

19. Does the ILS support the ability for the content of fine receipts to be configured by library? (what was paid, why, how much was paid, how much is still owing)

Brief Vendor Comment (if necessary):

20. Does the ILS support the ability for the staff member to manually declare an item lost?

Brief Vendor Comment (if necessary):

21. Does the ILS automatically set items long overdue to lost when billed?

Brief Vendor Comment (if necessary):

22. Does the ILS support the ability for the library to establish default replacement costs by material type if the replacement cost cannot be determined from the item?

Brief Vendor Comment (if necessary):

23. Does the ILS support the ability for the library to establish default processing fees by material type, to be included in the charges for lost items according to library policy?

Brief Vendor Comment (if necessary):

24. If a lost item is checked in, does the ILS automatically waive or charge the fine amounts according to library policy?

Brief Vendor Comment (if necessary):

Vendor Name:				
II. Circulation	A	D	P	N
Overdues, Fines and Accounting (continued)				
25. Does the ILS support the ability for the library to specify a time period in which the charges may be waived?				

Brief Vendor Comment (if necessary):

26. Does the ILS support the ability to set different policies for Replacement, Processing, and Overdue charges?				
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Brief Vendor Comment (if necessary):

Vendor to highlight over dues, fines and accounting strengths it feels its ILS has for the library.

Notices				
1. Does the ILS support each of the following notice types:				
a. Courtesy or “almost overdue”?				
b. Overdue?				
c. Fine?				
d. Bill?				
e. Statement of all charges?				
f. Collection agency?				
g. Hold pickup?				
h. Hold cancellation?				
i. Registration about to expire?				
j. Patron has not used the library in a library-defined period of time?				

Brief Vendor Comment (if necessary):

2. Does the ILS support the ability to send notices by, print, e-mail, text message, or phone?				
a. Does this include both hold and bill notices?				

Brief Vendor Comment (if necessary):

3. Does the ILS support multilingual notification?				
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Brief Vendor Comment (if necessary):

4. Can the language used in the notification be set automatically according to the language preference specified in the patron record?				
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Brief Vendor Comment (if necessary):

Vendor Name:				
II. Circulation	A	D	P	N
Notices (continued)				
5. Does the ILS have the ability to post predefined and free-text messages to specific patron accounts?				
<i>Brief Vendor Comment (if necessary):</i>				
6. Is the ILS able to specify the staff members who are permitted to post messages to patron accounts?				
<i>Brief Vendor Comment (if necessary):</i>				
7. Are patrons allowed to read and manage these messages from their PAC account?				
<i>Brief Vendor Comment (if necessary):</i>				
8. When the patron marks the message as read, is the read status noted in the patron account in the staff client?				
<i>Brief Vendor Comment (if necessary):</i>				
9. Does the ILS provide the ability to delete patron messages manually or automatically according to a library-defined time limit?				
<i>Brief Vendor Comment (if necessary):</i>				
10. Does the ILS support the ability for the library to determine the method for sending each individual notice, including each separate overdue notice? (for example, 1st overdue by e-mail, 2nd by print, etc)				
<i>Brief Vendor Comment (if necessary):</i>				
11. Does the ILS support the ability for the library to determine the entire text of all notices?				
<i>Brief Vendor Comment (if necessary):</i>				
12. Does the ILS store and display a history of overdue notices and bills sent to the patron for all items currently overdue or billed?				
<i>Brief Vendor Comment (if necessary):</i>				
13. Is the notice history kept until the items are returned?				
a. Can the notice history be kept for a longer period of time as defined by the library?				
<i>Brief Vendor Comment (if necessary):</i>				

Vendor Name:				
II. Circulation	A	D	P	N
Notices (continued)				
14. Does the notice history includes item title, date sent and method (print, e-mail, or phone)?				

Brief Vendor Comment (if necessary):

15. Does the ILS provide notification statistics reports?				
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Brief Vendor Comment (if necessary):

16. Does the ILS support the ability for the staff member to produce on demand a summary statement of all charges owed?				
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Brief Vendor Comment (if necessary):

17. Can the statement be produced for any individual patron or group of patrons?				
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Brief Vendor Comment (if necessary):

Vendor to highlight notices strengths it feels its ILS has for the library.

Holds				
1. Does the ILS support the ability to place requests for any copy of a title (title level hold), a specific item (item level), or the first available copy of an item in a serial or multi-part set (such as the first available copy of season 1 of a TV series)?				

Brief Vendor Comment (if necessary):

2. Does the ILS support the ability to place multiple requests for a single patron in one operation, without placing multiple individual requests?				
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Brief Vendor Comment (if necessary):

3. Does the ILS support the ability to place requests for a single title for multiple patrons in one operation, without placing multiple individual requests?				
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Brief Vendor Comment (if necessary):

Vendor Name:				
II. Circulation	A	D	P	N
Holds (continued)				
4. Does the ILS support the ability to group multiple requests in such a way that when any one is filled, the others in the group are cancelled (For example, to get the first available copy of any of several Shakespeare plays.)?				
<i>Brief Vendor Comment (if necessary):</i>				
5. Does the ILS support the ability to allow the patron to enter a note along with the request?				
<i>Brief Vendor Comment (if necessary):</i>				
6. Is the ability for the patron to add notes to the request from PAC optional and determined by library?				
<i>Brief Vendor Comment (if necessary):</i>				
7. Does the ILS support the ability to designate an expiration or “not needed after” date when placing a request?				
<i>Brief Vendor Comment (if necessary):</i>				
8. Does the ILS support the ability to distinguish requests placed from the PAC, both visually and for reporting purposes?				
<i>Brief Vendor Comment (if necessary):</i>				
9. Does the ILS support the ability for patrons or staff to “suspend” a request after it is placed so that it can be filled at a later time?				
a. Can a limit be set on the length of time a request can be suspended?				
b. Are both the suspend and un-suspend date required when suspending a request?				
c. Does the ILS allow patrons to revise the suspend or un-suspend dates?				
<i>Brief Vendor Comment (if necessary):</i>				
10. Does the ILS support the ability for a suspended request to maintain its position in the queue, move up in the queue when other holds are filled or to be placed at the end of the queue when reactivated, according to library policy?				
<i>Brief Vendor Comment (if necessary):</i>				

Vendor Name:				
II. Circulation	A	D	P	N
Holds (continued)				
11. Does the ILS support the ability to suspend requests on items in floating collections?				
<i>Brief Vendor Comment (if necessary):</i>				
12. Does the ILS support the ability for staff to add notes to a request from the staff client?				
<i>Brief Vendor Comment (if necessary):</i>				
13. Does the ILS support the ability to add a note to the request that will print on the hold slip when the request is filled?				
<i>Brief Vendor Comment (if necessary):</i>				
14. Does the ILS support the ability to set a charge for hold requests?				
<i>Brief Vendor Comment (if necessary):</i>				
15. If there is a charge for hold requests, is it possible to display a library-customizable message, advising the patron of the cost?				
<i>Brief Vendor Comment (if necessary):</i>				
16. Does the ILS support the ability to either permit or disallow hold requests on titles that have no items attached, according to library policy?				
<i>Brief Vendor Comment (if necessary):</i>				
17. If requests are not allowed because no items are attached, does the ILS display a message to alert the staff member?				
<i>Brief Vendor Comment (if necessary):</i>				
18. Does the ILS support the ability to either stop a check out or permit check out if the item will fill a hold for another patron?				
<i>Brief Vendor Comment (if necessary):</i>				
19. Does the ILS support the ability to allow or disallow requests for items that are On-order?				
<i>Brief Vendor Comment (if necessary):</i>				

Vendor Name:				
II. Circulation	A	D	P	N
Holds (continued)				
20. Does the ILS support the ability to allow or disallow requests for items that are In?				
<i>Brief Vendor Comment (if necessary):</i>				
21. If requests are not allowed on items that are In, does the ILS display an appropriate message when the request is placed?				
<i>Brief Vendor Comment (if necessary):</i>				
22. Does the ILS support the ability to allow staff to override any restrictions to place a hold?				
<i>Brief Vendor Comment (if necessary):</i>				
23. Does the ILS support the ability for staff to quickly transfer hold requests from one title to another?				
<i>Brief Vendor Comment (if necessary):</i>				
24. Does the ILS support the ability (at the library's option) to adjust the hold request queue for specific circumstances: to favor requests for "my" patrons or to favor filling requests locally before shipping items to fill requests at distant branches?				
<i>Brief Vendor Comment (if necessary):</i>				
25. Does the ILS support the ability for a staff member with sufficient privilege to adjust the order of requests in a queue at any time?				
<i>Brief Vendor Comment (if necessary):</i>				
26. Does the ILS support the ability to display information about the hold queue? Does this include when and where the hold was placed?				
<i>Brief Vendor Comment (if necessary):</i>				
27. Does the ILS allow holds to be placed on items directly from the results set as well as from the detailed display?				
<i>Brief Vendor Comment (if necessary):</i>				
28. Are the number of copies and number of current holds displayed?				
<i>Brief Vendor Comment (if necessary):</i>				

Vendor Name:				
II. Circulation	A	D	P	N
Holds (continued)				
29. Does the ILS automatically route requests out to other libraries to be filled?				
<i>Brief Vendor Comment (if necessary):</i>				
30. Does the ILS support the ability to route requests to a list of primary lenders (e.g. affiliates or geographically close libraries) and a list of secondary lenders to be contacted if the primary lenders are unable to fill the request?				
<i>Brief Vendor Comment (if necessary):</i>				
31. Does the ILS support the ability for staff with sufficient permission to manually fill a request at any time with an item in hand that is appropriate to the request, rather than wait for the system to identify and hold an item?				
<i>Brief Vendor Comment (if necessary):</i>				
32. Does the ILS support the ability for the library to specify a limit on the total number of requests a patron may have on an item type at any one time?				
<i>Brief Vendor Comment (if necessary):</i>				
33. Does the ILS support the ability to restrict specific items or material types from filling hold requests?				
<i>Brief Vendor Comment (if necessary):</i>				
34. Does the ILS support the ability to prevent items with certain statuses (such as Lost or Withdrawn) from filling holds?				
<i>Brief Vendor Comment (if necessary):</i>				
35. Does the ILS support the ability for each library receiving a request to deny the request?				
<i>Brief Vendor Comment (if necessary):</i>				
36. Does the ILS support the ability for the library to add a reason why the request could not be filled?				
<i>Brief Vendor Comment (if necessary):</i>				

Vendor Name:				
II. Circulation	A	D	P	N
Holds (continued)				
37. Does denying a request automatically route the request to the next library?				
<i>Brief Vendor Comment (if necessary):</i>				
38. Does the ILS produce a printed list of requests to be filled?				
<i>Brief Vendor Comment (if necessary):</i>				
39. Does the ILS support the ability for staff to view and respond to routed requests on line in real time?				
<i>Brief Vendor Comment (if necessary):</i>				
40. Does the ILS support the ability for the library to determine which fields in an item record will display on printed lists of requests?				
<i>Brief Vendor Comment (if necessary):</i>				
41. Does the ILS support the ability to change the sort order of the displayed or printed list to suit the library's needs?				
<i>Brief Vendor Comment (if necessary):</i>				
42. Does the ILS generate a notice to the patron when an item is held?				
<i>Brief Vendor Comment (if necessary):</i>				
43. Does the ILS generate a notice to the patron if a request is cancelled or cannot be filled?				
<i>Brief Vendor Comment (if necessary):</i>				
44. Does the ILS print a slip when the item is trapped for the request?				
<i>Brief Vendor Comment (if necessary):</i>				
45. Does the ILS support the ability to customize the content of a hold slip?				
<i>Brief Vendor Comment (if necessary):</i>				
46. Does the ILS support the ability to print a "hold slip" with extra large print for libraries that set held items out for patron self-pickup?				
a. Is the hold slip customizable?				
<i>Brief Vendor Comment (if necessary):</i>				

Vendor Name:				
II. Circulation	A	D	P	N
Holds (continued)				
47. Does the hold slip preserve patron privacy? How is this accomplished? <i>Brief Vendor Comment (if necessary):</i>				
48. Is the hold slip printable as a slip to be inserted in the item? a. a wrapper for the outside? <i>Brief Vendor Comment (if necessary):</i>				
49. Is a transit slip customizable and can it take the place of a hold slip? <i>Brief Vendor Comment (if necessary):</i>				
50. Does the ILS display and print a list of items not picked up and need to be returned to circulation. (Expired/unclaimed hold shelf requests.)? <i>Brief Vendor Comment (if necessary):</i>				
51. Does the ILS support the ability to change the sort of the displayed and printed list of expired/unclaimed items? <i>Brief Vendor Comment (if necessary):</i>				
52. Does the ILS support the ability to automatically delete all cancelled, unfilled or expired requests after a library specified period of time? <i>Brief Vendor Comment (if necessary):</i>				
53. Does the ILS support the ability to link to all records associated with a hold request in one step (patron record, bibliographic record, item record)? <i>Brief Vendor Comment (if necessary):</i>				
54. Does the ILS support the ability to link from any bibliographic, item or patron record back to the hold in one step? <i>Brief Vendor Comment (if necessary):</i>				

Vendor Name:				
II. Circulation	A	D	P	N
Holds (continued)				
55. Does the ILS support the ability to search for hold requests by:				
a. Author?				
b. Title?				
c. Requestor (patron)?				
d. Patron type?				
e. Pickup library?				
f. Format?				
g. Date placed?				
h. Pickup date (Unclaimed date)?				
i. Expiration date?				
j. Request status?				

Brief Vendor Comment (if necessary):

56. Does the ILS support the ability to view all active hold requests attached to a bibliographic record at any time?				
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Brief Vendor Comment (if necessary):

57. Does the ILS support the ability to view all active hold requests for a patron at any time?				
---	--	--	--	--

Brief Vendor Comment (if necessary):

58. Does the ILS offer a report that shows how many days it took to fill hold requests from the date the request was placed to the date the item was placed on the hold shelf?				
--	--	--	--	--

Brief Vendor Comment (if necessary):

59. Does the ILS offer a report that counts pending requests per day for a selected pick-up branch or branches?				
---	--	--	--	--

Brief Vendor Comment (if necessary):

Vendor to highlight holds strengths it feels its ILS has for the library.

Vendor Name:				
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II. Circulation	A	D	P	N
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ILL	A	D	P	N
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1. Does the ILS have a process for borrowers to request an ILL, verifying that the local library does not have the material in their collection prior to requesting from other library systems?				
---	--	--	--	--

Brief Vendor Comment (if necessary):

2. Does the ILS support the ability to route a local hold request out to OCLC for ILL?				
--	--	--	--	--

Brief Vendor Comment (if necessary):

3. Does the ILS support the ability to designate an ILL for "use in library only"?				
--	--	--	--	--

Brief Vendor Comment (if necessary):

4. Does the ILS support the ability for the library to specify a limit on the total number of ILL requests any patron may have at one time? For example, limit the total number of outstanding ILL requests; limit the ability to place new ILL requests before current ILL items are returned; limit ability to place new ILL requests based on standard patron blocks, account balance, etc.				
--	--	--	--	--

a. Can a limit be set for each patron type?				
---	--	--	--	--

b. Can a limit be set for each item type?				
---	--	--	--	--

Brief Vendor Comment (if necessary):

5. Does the ILS support the ability to restrict specific items or material types from filling ILL hold requests?				
--	--	--	--	--

Brief Vendor Comment (if necessary):

6. Does the ILS support the ability to create temporary bibliographic and item records for materials received from other library systems?				
---	--	--	--	--

a. Can the temporary record be automatically deleted when the ILL is sent back to owning system?				
--	--	--	--	--

Brief Vendor Comment (if necessary):

7. Does the ILS support the ability to track movement of ILLs between branches, to patrons, and back to the lending library?				
--	--	--	--	--

Brief Vendor Comment (if necessary):

Vendor Name:				
II. Circulation	A	D	P	N
ILL (continued)				
8. Does the ILS support the ability to track ILL fines and charges separately from other charges?				

Brief Vendor Comment (if necessary):

9. Is the ILL module integrated with the rest of the system and with external loan systems (OCLC, Illiad) to the extent that the external system supports it, the ILL module is able to use borrower records and item records from the external system, to avoid the necessity of manually creating temporary records?				
a. Can imported records be easily distinguished from non-ILL records?				

Brief Vendor Comment (if necessary):

10. Does the ILS support the ability to retrieve the owning library's due date and renewal rules from external interlibrary loan system?				
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Brief Vendor Comment (if necessary):

11. Does the ILS support the ability to print mailing labels?				
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Brief Vendor Comment (if necessary):

12. Does the ILS support the ability to generate reports on ILL use on material being requested and borrowed?				
---	--	--	--	--

Brief Vendor Comment (if necessary):

Vendor to highlight ILL strengths it feels its ILS has for the library.

Vendor Name:				
II. Circulation	A	D	P	N
Searching Item Records (continued)				
1. Does the item record display the following information:				
a. Number of total copies in item record?				
b. Number of holds?				
c. List of patrons on hold for item?				
d. Where items are located? Branch				
e. Status of item: checked in, checked out, in transit?				
f. History of checkouts?				
g. History of holds?				
h. Price?				
i. When the copy was added to the collection?				
j. Are there any orders?				

Brief Vendor Comment (if necessary):

2. Does the ILS allow for keyword, exact, and browse searching?

Brief Vendor Comment (if necessary):

3. Does the ILS allow for the use of Boolean operators in a general search query?

Brief Vendor Comment (if necessary):

4. Does the ILS search function provide spell check?

Brief Vendor Comment (if necessary):

5. Does the ILS allow for the searching of multiple fields simultaneously?

Brief Vendor Comment (if necessary):

6. Does the ILS allow for limiting searches by availability?

Brief Vendor Comment (if necessary):

7. Does the ILS allow for limiting searches by branch?

Brief Vendor Comment (if necessary):

Vendor Name:				
II. Circulation	A	D	P	N
Searching Item Records (continued)				

8. Does the ILS provide “search options” with which to limit a search?

Brief Vendor Comment (if necessary):

9. Does the ILS allow for customizability of the limiters within these search options?

Brief Vendor Comment (if necessary):

10. Does the ILS search module display the current status of all items in real time?

Brief Vendor Comment (if necessary):

11. Does the ILS group identical items, in different formats, together?

Brief Vendor Comment (if necessary):

12. Does the item record display allow for active links to other item information such as added authors, subject headings, series info, etc.

Brief Vendor Comment (if necessary):

13. How is punctuation, such as the hyphen, treated in your ILS?

Brief Vendor Comment (if necessary):

14. Does the ILS provide a breadcrumb trail of the search path?

Brief Vendor Comment (if necessary):

15. Does the ILS provide a count of the results in the results set?

Brief Vendor Comment (if necessary):

16. Are all records in the search results set accessible immediately? In other words, is there any delay in accessing all the catalog records in result set regardless of the size of the results set?

Brief Vendor Comment (if necessary):

Vendor Name:				
II. Circulation	A	D	P	N
Searching Item Records (continued)				
17. Does the ILS allow for sorting of results set? For example, alphabetically by title, or author, or pub year?				

Brief Vendor Comment (if necessary):

18. Does the ILS allow the results set to be printed in a “print-friendly” view?				
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Brief Vendor Comment (if necessary):

19. Does the item record display the following statistics:				
a. Number of checkouts to date?				
b. Number of checkouts within the last year?				
c. Number of renewals?				

Brief Vendor Comment (if necessary):

Vendor to highlight searching strengths it feels its ILS has for the library.

Vendor Name:				
III. Self Check	A	D	P	N
1. Does the ILS interface with self-checkout software from EnvisionWare that allows borrowers to check out their own materials.				

Brief Vendor Comment (if necessary):

2. What is the communication protocol and is it available for testing?				
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Brief Vendor Comment (if necessary):

3. What are the licensing requirements for the Sip2 connection?				
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Brief Vendor Comment (if necessary):

Vendor to highlight Self-Check strengths it feels its ILS has for the library.

Vendor Name:

IV. Cataloging

The library considers that all ILS vendors provide full MARC 21 support, authority control and import/export functionality. Following is a list of specific cataloging features desired by the library.

General

1. Does the ILS incorporate MARC21 validation tables to verify a high quality and consistency of cataloging input? Do these tables apply to both imported and manually created records?

Brief Vendor Comment (if necessary):

2. Does the vendor update our MARC21 validation tables when changes are made?

Brief Vendor Comment (if necessary):

3. Does the ILS include ALA/MARC21 character set fonts?

Brief Vendor Comment (if necessary):

4. Does the ILS accept, store, retrieve, print, and display diacritical marks?

Brief Vendor Comment (if necessary):

5. Does the ILS support UNICODE?

Brief Vendor Comment (if necessary):

6. Is the ILS able to convert MARC-8 records to UNICODE during migration?

Brief Vendor Comment (if necessary):

7. Does the ILS have a plan to implement RDA?

Brief Vendor Comment (if necessary):

8. Does the ILS have a plan to implement FRBR?

Brief Vendor Comment (if necessary):

9. Does the ILS support the ability for library staff to export all or part of the bibliographic database in full MARC21 format without vendor intervention?

Brief Vendor Comment (if necessary):

Vendor Name:				
IV. Cataloging (continued)	A	D	P	N
10. Does the ILS supply templates containing required and recommended bibliographic fields?				
a. Are these templates modifiable by library staff?				

Brief Vendor Comment (if necessary):

11. Does the ILS accommodate default templates that are user-specific for a given cataloging session?				
---	--	--	--	--

Brief Vendor Comment (if necessary):

12. Does the ILS provide macros for repetitive data entry tasks?				
--	--	--	--	--

Brief Vendor Comment (if necessary):

13. Does the ILS support the ability for authorized staff to copy existing bibliographic records from selected Z39.50 sites directly into the system?				
---	--	--	--	--

Brief Vendor Comment (if necessary):

14. Does the ILS support varieties of import template capabilities, including item level information mappings?				
--	--	--	--	--

Brief Vendor Comment (if necessary):

15. Does the ILS support the ability to create a new bibliographic record by copying an existing record?				
--	--	--	--	--

Brief Vendor Comment (if necessary):

16. Does the ILS support the ability to create a new item record from an existing item record?				
--	--	--	--	--

Brief Vendor Comment (if necessary):

17. Does the ILS allow the ability to set a preferred view when the Bibliographic Workform is opened?				
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Brief Vendor Comment (if necessary):

18. Does the ILS show a preview version of the bibliographic record as it will appear in the PAC, including active urls?				
--	--	--	--	--

Brief Vendor Comment (if necessary):

Vendor Name:				
IV. Cataloging (continued)	A	D	P	N
19. Does the ILS combine and overlay records from bibliographic utilities, using library-defined match points?				
<i>Brief Vendor Comment (if necessary):</i>				
20. When the ILS combines records, are hold queues combined in chronological order?				
<i>Brief Vendor Comment (if necessary):</i>				
21. During the duplicate detection process, does the ILS offer the ability to overlay some or all of the duplicates with the open bibliographic record?				
<i>Brief Vendor Comment (if necessary):</i>				
22. Does the ILS support both the 10-digit and 13-digit ISBN standard for searching for bibliographic records and in the duplicate detection process?				
<i>Brief Vendor Comment (if necessary):</i>				
23. Does the ILS include a spell checker in cataloging?				
<i>Brief Vendor Comment (if necessary):</i>				
24. Does the ILS allow cut, copy and paste commands for MARC record editing?				
<i>Brief Vendor Comment (if necessary):</i>				
25. Does the ILS support the ability to bulk change bibliographic and item records?				
<i>Brief Vendor Comment (if necessary):</i>				
26. Does the ILS provide a url checking utility?				
<i>Brief Vendor Comment (if necessary):</i>				
27. Does the ILS have the ability to check bibliographic records for such errors as bad filing indicators?				
<i>Brief Vendor Comment (if necessary):</i>				

Vendor Name:				
IV. Cataloging (continued)	A	D	P	N
28. Does the cataloger have the ability to indicate that a bibliographic and/or item record not be available for retrieval in the PAC?				
<i>Brief Vendor Comment (if necessary):</i>				
29. Does the ILS support the ability to create many items for the same bibliographic record and to distribute those items across different branches, all in one operation?				
<i>Brief Vendor Comment (if necessary):</i>				
30. Does the ILS support the ability to create items from information in an acquisition order, all in one operation?				
<i>Brief Vendor Comment (if necessary):</i>				
31. Does the ILS support the ability to set a default shelving scheme for new item records?				
<i>Brief Vendor Comment (if necessary):</i>				
32. Does the ILS have an auto-fill feature when filling out code fields? For instance, will typing BO in the location field fill in BOOK GROUP KIT?				
<i>Brief Vendor Comment (if necessary):</i>				
33. Does the ILS support the ability to create indicate volume numbers on multi-volume bibliographic records?				
<i>Brief Vendor Comment (if necessary):</i>				
34. When saving an item record, does the ILS provide an optional warning if the existing barcode is changed?				
<i>Brief Vendor Comment (if necessary):</i>				
35. Does the ILS have a way to tell the pull hold report that a newly created item is still in Cataloging, not on the shelf at the branch?				
<i>Brief Vendor Comment (if necessary):</i>				
36. Does the ILS allow staff to make selected changes to item records without requiring access to the full item record?				
<i>Brief Vendor Comment (if necessary):</i>				

Vendor Name:				
IV. Cataloging (continued)	A	D	P	N
37. Does the ILS support the ability to link from an open item directly to all other items linked to the same bibliographic record?				
<i>Brief Vendor Comment (if necessary):</i>				
38. Does the ILS show statistical usage details on the bibliographic and item records?				
<i>Brief Vendor Comment (if necessary):</i>				
38. Does the ILS support search features on any data element within any cataloging record?				
<i>Brief Vendor Comment (if necessary):</i>				
39. Does the ILS support limitation features on any data element within any cataloging record? The library would like to limit by:				
a. audience level (we have four: adult, young adult, juvenile, easy)? What information would be used to limit for this?				
b. physical format (regular print, large print, DVD, CD-ROM, CD, various kinds of kits, etc.)? What information would be used to limit for this?				
c. content (audio book or music, nonfiction or fiction, etc.)? What information would be used to limit for this?				
<i>Brief Vendor Comment (if necessary):</i>				
38. Does the ILS support any data element within any item record?				
<i>Brief Vendor Comment (if necessary):</i>				
39. Does the ILS support limitation features on any data element within any item record? The library would like to limit by:				
a. audience level (we have four: adult, young adult, juvenile, easy)? What information would be used to limit for this?				
b. physical format (regular print, large print, DVD, CD-ROM, CD, various kinds of kits, etc.)? What information would be used to limit for this?				
c. content (audio book or music, nonfiction or fiction, etc.)? What information would be used to limit for this?				
<i>Brief Vendor Comment (if necessary):</i>				

Vendor Name:				
IV. Cataloging	A	D	P	N
Z39.50				
1. Does the ILS include a Z39.50 version 3 compliant catalog without additional charge?				

Brief Vendor Comment (if necessary):

2. Does the ILS support the ability to search a remote Z39.50 database from the Staff client, edit the record as required, and save it to the database without invoking a separate record import function?				
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Brief Vendor Comment (if necessary):

3. Does the ILS allow Z39.50 version 3 searches of multiple databases simultaneously for a single search?				
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Brief Vendor Comment (if necessary):

4. Does the ILS comply with the Z39.50 ANSI standard?				
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Brief Vendor Comment (if necessary):

Authority Control				
1. Does the ILS support the ability for authorized staff to copy existing authority records from selected Z39.50 sites directly into the system?				

Brief Vendor Comment (if necessary):

2. Does the ILS support an import process that performs authority control on imported bibliographic records and has the ability to automatically link to a remote subscription authority database if no matching heading is found in the local database?				
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Brief Vendor Comment (if necessary):

3. Does the ILS accommodate:				
a. personal, corporate and topical name headings in a name authority file?				
b. title, uniform title and series entries in a title index?				
c. subject headings in a subject authority file?				

Brief Vendor Comment (if necessary):

4. Does the ILS support the ability to match LC or other national standard authority records against the local file?				
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Brief Vendor Comment (if necessary):

Vendor Name:				
IV. Cataloging	A	D	P	N
Authority Control (continued)				
5. Does the ILS support the ability for automatic matching to remote authority records?				

Brief Vendor Comment (if necessary):

6. Does the ILS generate SEE and SEE ALSO references from authority records to direct online catalog users to other headings as follows?				
a. see references (aeroplanes to airplanes)?				
b. narrower terms (automobiles to sports cars)?				
c. broader terms (automobiles to motor vehicles)?				
d. related terms (airplanes to flying machines)?				

Brief Vendor Comment (if necessary):

7. Is the ILS set up so that changing an authority record automatically changes the term in the bibliographic records?				
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Brief Vendor Comment (if necessary):

Label Management				
1. Does the ILS offer a label manager?				

Brief Vendor Comment (if necessary):

2. Does the label manager support the ability to produce spine labels individually on demand or batch run, on standard (non-proprietary) printers?				
--	--	--	--	--

Brief Vendor Comment (if necessary):

3. Does the label manager support printing of labels to single sheets or to continuous form feed stock?				
---	--	--	--	--

Brief Vendor Comment (if necessary):

4. Does the label manager support labels to be printed as they are generated or print all labels generated in a single operation?				
---	--	--	--	--

Brief Vendor Comment (if necessary):

5. Does the ILS support a quick print option to print labels without opening the label manager?				
---	--	--	--	--

Brief Vendor Comment (if necessary):

Vendor Name:				
IV. Cataloging	A	D	P	N
Label Management (continued)				
6. Does the label manager support the ability for staff to choose which label type will open by default?				

Brief Vendor Comment (if necessary):

7. Does the label manager support the ability to indicate which content elements will appear on the label and in what order?				
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Brief Vendor Comment (if necessary):

8. Does the label manager support the ability to create custom labels?				
--	--	--	--	--

Brief Vendor Comment (if necessary):

9. Does the label manager support the ability to set up default printers for different types of labels?				
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Brief Vendor Comment (if necessary):

Discards				
1. Does the ILS remove discarded items from the system?				

Brief Vendor Comment (if necessary):

2. Does the ILS automatically remove the bibliographical record when the last item is removed?				
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Brief Vendor Comment (if necessary):

3. Does the ILS furnish a list of 001 tags from the removed bibliographic records that we can export to OCLC to batch delete our holdings?				
--	--	--	--	--

Brief Vendor Comment (if necessary):

4. Does the ILS support a process to deal with discarded items that have bills or holds attached to them?				
---	--	--	--	--

Brief Vendor Comment (if necessary):

5. Does the ILS have a way to convert inactive items to discard after a certain length of time (old missing items at 9 months, old claims-returned items at 1 year, etc.)?				
--	--	--	--	--

Brief Vendor Comment (if necessary):

Vendor to highlight Cataloging strengths it feels its ILS has for the library.

Vendor Name:				
V. Serials Control	A	D	P	N
General				
1. Does the ILS include the following serials control capabilities:				
a. Holdings and Publication Pattern Maintenance?				
b. Check-in?				
c. Claiming (including email and print claim notices)?				
d. Routing?				
e. Summary holdings, by copy?				
f. Subscription Maintenance (including payments)?				

Brief Vendor Comment (if necessary):

2. Does the ILS support the ability to accommodate all type of serials, including:				
a. periodicals?				
b. continuations?				
c. Newspapers?				
d. annuals?				
e. governmental?				
f. supplements?				
g. indexes?				

Brief Vendor Comment (if necessary):

Vendor Name:				
V. Serials Control	A	D	P	N
General (continued)				
3. For serials and continuations, does the ILS store data pertaining to:				
a. subscription dates (start, expiration)?				
b. source?				
c. frequency?				
d. subscription price?				
e. fund?				
f. location information?				
g. claiming information?				
h. prediction information?				
i. date of payment?				
j. holdings?				
k. routing information?				
l. note fields?				
m. active or non-active indicator?				

Brief Vendor Comment (if necessary):

4. Does the ILS allow for different staff to have varying levels of access to the serial control (i.e. able to check in issues, but not modify control)?				
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Brief Vendor Comment (if necessary):

5. Does the ILS have tools or reports to assess the use of titles (checkout statistics, etc.)?				
--	--	--	--	--

Brief Vendor Comment (if necessary):

6. Does the ILS have a way to track in-house use of professional titles?				
--	--	--	--	--

Brief Vendor Comment (if necessary):

7. Does the ILS have a way to discard issues after a set period?				
--	--	--	--	--

Brief Vendor Comment (if necessary):

Holdings & Publication Pattern Maintenance				
1. Does the ILS support the ability to generate prediction patterns for determining when the next expected issue of a serial is scheduled to arrive?				

Brief Vendor Comment (if necessary):

Vendor Name:				
V. Serials Control	A	D	P	N
Holdings & Publication Pattern Maintenance (continued)				
2. Does the ILS support the ability to save patterns as templates for future use?				
<i>Brief Vendor Comment (if necessary):</i>				
3. Does the ILS support regular, normalized irregular and totally irregular prediction patterns?				
<i>Brief Vendor Comment (if necessary):</i>				
4. Does the ILS support the ability to predict the issue chronology and enumeration based upon a pattern entered in the control record by the operator?				
<i>Brief Vendor Comment (if necessary):</i>				
5. Does the ILS support the ability to review a pattern's expected issues prior to generating them in the system?				
<i>Brief Vendor Comment (if necessary):</i>				
6. Does the ILS support the ability to record staff and public notes at the holdings record, pattern record, and issue level?				
<i>Brief Vendor Comment (if necessary):</i>				
7. Does the ILS allow a publication pattern to be closed and re-opened?				
<i>Brief Vendor Comment (if necessary):</i>				
8. Does the ILS support the ability to delete issues or parts even if they are linked to an item record?				
<i>Brief Vendor Comment (if necessary):</i>				
9. Does the ILS support the ability to enter a unit price per issue in the holdings record?				
a. Is the price automatically copied to the item and can it be modified at check-in?				
<i>Brief Vendor Comment (if necessary):</i>				

Vendor Name:				
V. Serials Control	A	D	P	N
Check-In				
1. With each check-in, does the ILS automatically record the issue enumeration and/or chronology, date received, notes, and claim any copies expected and not received?				
<i>Brief Vendor Comment (if necessary):</i>				
2. Does the ILS support the ability for branch specific check-in?				
<i>Brief Vendor Comment (if necessary):</i>				
3. Does the ILS support the ability for multiple issues to be checked-in from the search results list?				
<i>Brief Vendor Comment (if necessary):</i>				
4. Does the ILS support the ability for multiple issues to be deleted from the search results list?				
<i>Brief Vendor Comment (if necessary):</i>				
5. Does the ILS support the ability for check-in to be performed by scanning the SICI?				
<i>Brief Vendor Comment (if necessary):</i>				
6. Does the ILS support the ability to record identity of staff checking in (receiving) an item?				
<i>Brief Vendor Comment (if necessary):</i>				
7. When checking in an issue, if the received issue is not the expected issue, but does conform to the predicting pattern, does the ILS allow the user to override the predicted number?				
<i>Brief Vendor Comment (if necessary):</i>				
8. Does the ILS support the ability to combine issues that arrive unexpectedly as a combined issue?				
<i>Brief Vendor Comment (if necessary):</i>				
9. Does the ILS support the ability to undo check-in of issues checked in by mistake?				
<i>Brief Vendor Comment (if necessary):</i>				

Vendor Name:				
V. Serials Control	A	D	P	N
Check-In (continued)				
10. Does the ILS support the option to print labels for each issue received as needed, individually and in batch?				
<i>Brief Vendor Comment (if necessary):</i>				
11. Does the ILS support the ability to print routing slips at serials check-in, individually and in batch?				
<i>Brief Vendor Comment (if necessary):</i>				
12. Does the ILS support the ability to view and edit serials holdings statements, summary holdings, missing volumes, etc. during routine check-in process?				
<i>Brief Vendor Comment (if necessary):</i>				
13. Does the ILS support the ability to modify chronology and enumeration during check-in?				
<i>Brief Vendor Comment (if necessary):</i>				
14. Does the ILS support the ability to check-in an incomplete batch of issues and create a claim for the missing copies?				
<i>Brief Vendor Comment (if necessary):</i>				
15. Does the ILS support the ability to temporarily mask display of received issues to facilitate check-in of expected/claimed issues?				
<i>Brief Vendor Comment (if necessary):</i>				
PAC Display of Serials				
1. Does the ILS support the ability to suppress all issues linked to a particular Holdings Record from displaying in PAC?				
<i>Brief Vendor Comment (if necessary):</i>				
2. Does retention information (e.g. last six issues retained) and concise holdings statement display in PAC?				
<i>Brief Vendor Comment (if necessary):</i>				
3. Does the ILS support the ability to automatically summarize individual issue holdings into a consolidated statement of holdings?				
<i>Brief Vendor Comment (if necessary):</i>				

Vendor Name:				
V. Serials Control	A	D	P	N
PAC Display of Serials (continued)				
4. Does the ILS support the ability for the library to control the number of issues displayed in the PAC, e.g. latest 1 year of a regular monthly publication should only display the most current 12 issues?				
<i>Brief Vendor Comment (if necessary):</i>				
5. Does the ILS support the ability to display serial issues in a compressed format?				
<i>Brief Vendor Comment (if necessary):</i>				
6. Does the ILS support the ability for the user to expand the compressed holdings in an itemized display?				
<i>Brief Vendor Comment (if necessary):</i>				
7. Does the ILS support the ability to manually enter/edit summary holdings statement?				
<i>Brief Vendor Comment (if necessary):</i>				
Subscription Maintenance				
1. Is the ILS able to manage subscriptions (renewals, cancellations)?				
<i>Brief Vendor Comment (if necessary):</i>				
2. Does the ILS support the ability to cancel a single serial subscription title where multiple copies are being received without disabling the ability to continue receipt of remaining subscriptions?				
<i>Brief Vendor Comment (if necessary):</i>				
3. Does the ILS support the ability to view a subscription list, where all subscriptions eligible to be renewed display?				
<i>Brief Vendor Comment (if necessary):</i>				
4. Does the ILS support the ability to cancel and reopen a subscription?				
<i>Brief Vendor Comment (if necessary):</i>				
5. Does the ILS support the ability to optionally generate a purchase order at subscription renewal?				
<i>Brief Vendor Comment (if necessary):</i>				

Vendor Name:				
V. Serials Control	A	D	P	N
Claiming				
1. Are claim notices available in print and electronic formats?				
<i>Brief Vendor Comment (if necessary):</i>				
2. What vendors are the electronic formats compatible with?				
<i>Brief Vendor Comment (if necessary):</i>				
3. How does the ILS alert the user to late issues?				
<i>Brief Vendor Comment (if necessary):</i>				
4. Does claim data include:				
a. supplier data?				
b. subscription ID?				
c. claim response?				
d. claim reason?				
e. notes?				
f. claim (transaction) history?				
<i>Brief Vendor Comment (if necessary):</i>				
5. When a claimed issue is checked-in, does the claim history reflect this?				
<i>Brief Vendor Comment (if necessary):</i>				
6. Does the ILS support the ability to enter claim data for subscriptions?				
<i>Brief Vendor Comment (if necessary):</i>				
7. Does the ILS support the ability for the user to claim issues from a list of pending claims?				
<i>Brief Vendor Comment (if necessary):</i>				
8. Does the ILS allow for customizing claim intervals and frequencies?				
<i>Brief Vendor Comment (if necessary):</i>				

Vendor Name:				
V. Serials Control	A	D	P	N
Routing				
1. Does the ILS allow a routing list to be maintained for each copy of a title to be received?				
<i>Brief Vendor Comment (if necessary):</i>				
2. Do route lists support routing of all issues of a serial or of a single issue?				
<i>Brief Vendor Comment (if necessary):</i>				
3. Are automatic prompts for routing available at Check-In?				
<i>Brief Vendor Comment (if necessary):</i>				
4. Does the ILS support route slips in two print output formats: Receipt printer width, or 8.5x11?				
<i>Brief Vendor Comment (if necessary):</i>				

Vendor to highlight Serials Control strengths it feels its ILS has for the library.

Vendor Name:				
VI. Acquisitions	A	D	P	N
General				
1. Does the ILS provide a fully functional, integrated acquisitions subsystem that automatically manages encumbrances, disencumbrances, and expenditures in multiple library-defined accounts based on acquisitions activities including, but not limited to, selecting, ordering, receiving, claiming, cancelling, invoicing and reporting?				
<i>Brief Vendor Comment (if necessary):</i>				
2. Does the ILS maintain a complete audit trail for fund allocations and adjustments by staff members?				
<i>Brief Vendor Comment (if necessary):</i>				
3. Do all accounting activities take place in real-time?				
<i>Brief Vendor Comment (if necessary):</i>				
4. Does the ILS support the ability to move between acquisitions, serials, cataloging, and circulation subsystems without having to log in to each subsystem?				
<i>Brief Vendor Comment (if necessary):</i>				
5. Does the ILS provide support for different order types, including firm orders, subscriptions, continuations, donations, depository agreements, and gifts?				
<i>Brief Vendor Comment (if necessary):</i>				

Vendor Name:				
VI. Acquisitions	A	D	P	N
General (continued)				
6. Does data stored and displayed in the acquisitions file include but is not limited to:				
a. bibliographic information?				
b. acquisitions type (firm, gift, blanket...)?				
c. status information (on order, cancelled, received...)?				
d. library/branch/copy/fund information?				
e. invoice information?				
f. vendor information?				
g. vendor report information?				
h. accounting information?				
i. requestor information?				
j. instructions to vendor?				
k. internal processing instructions and notes?				
l. public notes?				

Brief Vendor Comment (if necessary):

7. Are Acquisitions records accessible through at least the following access points:				
a. purchase order number?				
b. title?				
c. author?				
d. Library of Congress card number?				
e. ISSN/ISBN?				
f. bib number?				
g. vendor?				
h. UPC code?				
i. notes field?				

Brief Vendor Comment (if necessary):

8. Does the ILS support the ability to bring over all orders and the corresponding information (holds, etc.) during migration?				
--	--	--	--	--

Brief Vendor Comment (if necessary):

Vendor Name:				
VI. Acquisitions	A	D	P	N
Fund Accounting				
9. Is there a holds to copy or holds purchase alert report available?				
a. Does the report include information such as the number of items on order, number of current copies and item status?				
b. Is the output of this report configurable?				

Brief Vendor Comment (if necessary):

1. Does the ILS have the ability to support multiple overlapping fiscal periods in its fund accounting structure?				
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Brief Vendor Comment (if necessary):

2. Is the ILS capable of producing fund summary reports that include fund allocations, amount encumbered and expended, remaining available, and percentage encumbered and expended for a given fiscal year?				
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Brief Vendor Comment (if necessary):

3. Does the audit trail track date, time and user who made manual adjustments to the fund?				
--	--	--	--	--

Brief Vendor Comment (if necessary):

4. Does the ILS support the ability to adjust the amount encumbered and expended in a fund?				
---	--	--	--	--

Brief Vendor Comment (if necessary):

5. Does the ILS support the ability to transfer monies between funds?				
---	--	--	--	--

Brief Vendor Comment (if necessary):

6. Does the ILS support the conversion of foreign currency prices?				
--	--	--	--	--

Brief Vendor Comment (if necessary):

7. Does the ILS support the ability to create, manipulate, and order/receive in multiple fiscal years?				
--	--	--	--	--

Brief Vendor Comment (if necessary):

8. Do fund file records include amount budgeted, amount encumbered, amount expended, fund limits, uncommitted balance and total fund balance?				
---	--	--	--	--

Brief Vendor Comment (if necessary):

Vendor Name:				
VI. Acquisitions	A	D	P	N
Fund Accounting (continued)				

9. Does the ILS support the ability to roll over funds at the end of the fiscal year, including options to roll over only encumbrances, add in new allocations, retain or purge orders and other features related to end-of-year fiscal transactions?

Brief Vendor Comment (if necessary):

10. Does the ILS support the ability to roll over pending purchase orders, purchase order templates, and open invoices?

Brief Vendor Comment (if necessary):

11. Does the ILS support the ability to display linked funds from the Purchase Order, Selection List or Invoice work form?

Brief Vendor Comment (if necessary):

Acquiring and Processing Materials				
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1. Can the library pre-define URL links to web-based selection tools to support automatic launching from the acquisition client?

Brief Vendor Comment (if necessary):

2. Does the ILS allow staff to download titles from selected Z39.50 sites directly into selection lists, purchase orders and invoices?

Brief Vendor Comment (if necessary):

3. Are the purchase order and invoice number fields 30 characters long?

Brief Vendor Comment (if necessary):

4. Does the ILS allow the ability to edit purchase order number and suffix until the purchase order is released?

Brief Vendor Comment (if necessary):

5. Does the ILS allow the ability to edit invoice number and suffix until the invoice is paid?

Brief Vendor Comment (if necessary):

Vendor Name:				
VI. Acquisitions	A	D	P	N
Acquiring and Processing Materials (continued)				
6. Does the ILS support electronic submission of orders to:				
a. AudioGo?				
b. Baker & Taylor?				
c. Book Wholesalers, Inc. (BWI)?				
d. Brodart?				
e. Ingram Books?				
f. Library Bound?				
g. Micro Marketing?				
h. Midwest Tape?				
i. Quality Books?				
j. Rainbow Books?				
k. Recorded Books?				
l. S&B Books?				
m. United Library Services?				
n. Whitehots, nc.?				

Brief Vendor Comment (if necessary):

7. Does the ILS support Open URL from web-based selection vendors to the library's public access catalog?				
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Brief Vendor Comment (if necessary):

8. Does the ILS support Electronic Data Interchange (EDI) X12 version 4010 or higher?				
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Brief Vendor Comment (if necessary):

9. Does the ILS offer the ability to include or restrict the number of branches and fund accounts that display in selection lists, orders and invoices?				
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Brief Vendor Comment (if necessary):

10. Does the ILS permit the recording of holds against titles on order and in process?				
--	--	--	--	--

Brief Vendor Comment (if necessary):

Vendor Name:				
VI. Acquisitions	A	D	P	N
Acquiring and Processing Materials (continued)				
11. Does the ILS support the ability to determine the format (e.g., DVD, CD) when manually adding titles to an order for the purpose of ordering materials?				
<i>Brief Vendor Comment (if necessary):</i>				
12. Does the ILS automatically transfer holds placed on on-order items to full MARC records when they are cataloged?				
<i>Brief Vendor Comment (if necessary):</i>				
13. Does the ILS support receive and un-receive functions and the ability to change the status of orders and individual items?				
<i>Brief Vendor Comment (if necessary):</i>				
14. Is full electronic invoicing, including automatic generation of vendor invoices in the ILS database, available?				
<i>Brief Vendor Comment (if necessary):</i>				
15. Does the ILS include an X12 transaction manager supported by the vendor?				
<i>Brief Vendor Comment (if necessary):</i>				
16. Does the ILS allow the operator to receive and invoice in one step?				
<i>Brief Vendor Comment (if necessary):</i>				
17. Does the ILS support the ability to place orders using overspent funds?				
<i>Brief Vendor Comment (if necessary):</i>				
18. Does the ILS support invoices where links to the MARC database or vendor records are not required?				
<i>Brief Vendor Comment (if necessary):</i>				
19. Does the ILS enable an authorized user to cancel line items, reverse fund encumbrances allow hold requests to be transferred or deleted as needed?				
<i>Brief Vendor Comment (if necessary):</i>				

Vendor Name:				
VI. Acquisitions	A	D	P	N
Acquiring and Processing Materials (continued)				
20. Does the ILS support the ability to set up automatic patron notification when an on-order title is cancelled?				
<i>Brief Vendor Comment (if necessary):</i>				
21. Does the ILS show circulation use statistics, as an indication of how heavily the title is being circulated or requested, to aid in collection development?				
<i>Brief Vendor Comment (if necessary):</i>				
22. Does the ILS support the ability to split funds per order record?				
<i>Brief Vendor Comment (if necessary):</i>				
23. Does the ILS support the ability to receive entire cartons of shelf-ready items in one operation, simultaneously checking them in so they can circulate?				
<i>Brief Vendor Comment (if necessary):</i>				
24. Does the ILS support the ability to receive items not ordered via the acquisitions subsystem?				
<i>Brief Vendor Comment (if necessary):</i>				
25. Does the ILS support the ability to receive and pay for incomplete orders?				
<i>Brief Vendor Comment (if necessary):</i>				
26. Does the ILS support the ability to optionally prevent EDI invoices from being created automatically for partial shipments?				
<i>Brief Vendor Comment (if necessary):</i>				
27. Does the ILS support the ability to accept invoices, prepayments, and credit memos for non-electronic orders?				
<i>Brief Vendor Comment (if necessary):</i>				

Vendor Name:				
VI. Acquisitions	A	D	P	N
Acquiring and Processing Materials (continued)				

28. Does the ILS support the ability, when paying, to edit amounts and funds, which automatically adjust encumbrances at payment?				
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Brief Vendor Comment (if necessary):

29. Is it possible to undo an invoice payment, automatically reversing the expenditures in linked funds and re-encumbering the amounts?				
---	--	--	--	--

Brief Vendor Comment (if necessary):

30. Does the ILS support the ability to suppress on-order items and on-order bibliographic records from display in the PAC?				
---	--	--	--	--

Brief Vendor Comment (if necessary):

31. Does the ILS support the ability to detect duplicate orders and provide an alert of duplication at the time the order is created?				
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Brief Vendor Comment (if necessary):

32. Does the ILS support the ability to create and activate new vendor accounts without ILS vendor intervention?				
--	--	--	--	--

Brief Vendor Comment (if necessary):

33. Does the ILS provide an acquisition status report that includes appropriates, encumbrances, expenditures, and funds available (purchasing power)?				
---	--	--	--	--

Brief Vendor Comment (if necessary):

Vendor to highlight Acquisitions strengths it feels its ILS has for the library.

Vendor Name:				
VII. Public Access Catalog	A	D	P	N
Public Access Catalog (PAC) refers to an integrated subsystem that allows patrons to search and browse the bibliographic database according to library specified parameters.				

1. Is the PAC web accessible and does it support the current version of:				
a. Internet Explorer?				
b. Netscape Navigator?				
c. Mozilla Firefox?				
d. Opera?				
e. PWB?				
f. Google Chrome?				
g. Safari?				

Brief Vendor Comment (if necessary):

2. Is the PAC backwards compatible to the latest two versions of the above browsers?				
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Brief Vendor Comment (if necessary):

3. What data field is the icon associated with and can it accommodate audio book formats of WMA, MP3 and PDF, as well as standard Book, CD and DVD formats?				
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Brief Vendor Comment (if necessary):

4. Does the PAC offer the ability to toggle between regular font and large font?				
a. Does the PAC have accommodations for visually impaired persons?				

Brief Vendor Comment (if necessary):

5. Does the ILS support the ability for the library to create lists of records and publish the URL for those records on the PAC portal page, dashboard or website page?				
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Brief Vendor Comment (if necessary):

6. Can the help files available in the PAC be customized by the library?				
--	--	--	--	--

Brief Vendor Comment (if necessary):

Vendor Name:				
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VII. Public Access Catalog (continued)	A	D	P	N
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7. Does the ILS acknowledge who the patron is when they are signed in? How does this display?				
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Brief Vendor Comment (if necessary):

8. Does the ILS allow the library the option to set a limit on the number of times a patron can attempt to log into the PAC without success?				
--	--	--	--	--

Brief Vendor Comment (if necessary):

9. Does the ILS support the ability to designate which of the library-assigned blocks will display in the PAC?				
--	--	--	--	--

Brief Vendor Comment (if necessary):

10. Does the ILS support the ability for the library to customize the PAC display of data, labels, and the order of data elements?				
--	--	--	--	--

Brief Vendor Comment (if necessary):

11. Does the ILS support a persistent login? No matter where the patron is in the catalog when they log in they remain logged in during that visit to place holds, check their account, search, etc.				
--	--	--	--	--

Brief Vendor Comment (if necessary):

7. Does the PAC support a multilingual interface, (Spanish, French, Arabic, Chinese, Korean, Vietnamese, etc.) ?				
--	--	--	--	--

Brief Vendor Comment (if necessary):

Searching				
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1. Does the PAC provide basic and advanced searching?				
---	--	--	--	--

a. Can the library determine the default search type for Basic and Advanced searches? For example Keyword or Browse.				
--	--	--	--	--

Brief Vendor Comment (if necessary):

2. Does the PAC accommodate enhanced content display such as that provided by 3rd party products like Syndetics, Novelist or LibraryThing and capabilities such as customer ratings and customer added reviews?				
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Brief Vendor Comment (if necessary):

Vendor Name:				
VII. Public Access Catalog	A	D	P	N
Searching (continued)				
3. Does the ILS support the ability for item level detail availability to display in the PAC without leaving the results set?				
<i>Brief Vendor Comment (if necessary):</i>				
4. Does the PAC offer the patron the ability to send a text message containing the item call number to his or her mobile phone, and is the patron's cell phone number filled in automatically from the patron's account?				
<i>Brief Vendor Comment (if necessary):</i>				
5. Does the PAC offer an online automatic Spell Checker and how does it work?				
<i>Brief Vendor Comment (if necessary):</i>				
6. Does the PAC offer a "did you mean" feature? If so how is it compiled?				
<i>Brief Vendor Comment (if necessary):</i>				
7. Does the PAC have the ability to enable (or disable) automatic suggestions as patrons type quick, keyword or phrase searches in the PAC?				
<i>Brief Vendor Comment (if necessary):</i>				
8. Does the ILS have the ability to enable (or disable) suggested alternate search terms when patrons get no search results?				
<i>Brief Vendor Comment (if necessary):</i>				
9. Does the ILS have the ability to enable (or disable) suggested search terms when patrons do get search results?				
<i>Brief Vendor Comment (if necessary):</i>				
10. Does the system provide a report of often missed search terms for staff review?				
<i>Brief Vendor Comment (if necessary):</i>				

Vendor Name:				
VII. Public Access Catalog	A	D	P	N
Searching (continued)				
11. Does the ILS support the ability for the library to specify its own alternate suggestions for specified search terms instead of the program's suggestions? How does this display?				
<i>Brief Vendor Comment (if necessary):</i>				
12. Does the PAC save previous searches done during a single session?				
<i>Brief Vendor Comment (if necessary):</i>				
13. Does the PAC offer the ability to limit searches? How?				
a. By fields in the MARC record?				
b. By fields in the item record?				
<i>Brief Vendor Comment (if necessary):</i>				
14. Does the PAC offer the ability to limit searches by collection?				
<i>Brief Vendor Comment (if necessary):</i>				
15. Does the PAC provide a strong relevancy in the results when performing searches? How does this work?				
<i>Brief Vendor Comment (if necessary):</i>				
16. Does the PAC display item call number (location) on both the results and details pages?				
<i>Brief Vendor Comment (if necessary):</i>				
17. Is there a limit to the number of items that can be resorted in a search?				
<i>Brief Vendor Comment (if necessary):</i>				
18. When searching the PAC does the ILS support the ability for patrons to do the following:				
a. browse indexes (title, author, or subject) in alphabetical order?				
b. sort by (title, author, pub date, etc.)?				
c. limit search to available items only?				
d. limit search by format?				

Brief Vendor Comment (if necessary):

Vendor Name:				
VII. Public Access Catalog	A	D	P	N
Searching (continued)				
19. In the PAC does the holdings record display:				
a. a list of libraries where the item is located?				
b. what is immediately available?				
c. what is checked out and the due date?				
d. the number of holds on the item?				

Brief Vendor Comment (if necessary):

20. Are there links to place a hold/request on both the results and details page?				
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Brief Vendor Comment (if necessary):

21. Can more than one hold be placed at a time in the PAC? Select a number of titles then place holds on all titles at once.				
--	--	--	--	--

Brief Vendor Comment (if necessary):

22. Does the PAC display a clear friendly message notifying patrons when their card is about to expire?				
---	--	--	--	--

Brief Vendor Comment (if necessary):

23. Does the PAC support the ability for patrons to sort their checkouts, holds, and bills by title, author, date, etc?				
---	--	--	--	--

Brief Vendor Comment (if necessary):

24. Do browse title search results show a summary view with different physical formats (how many books, how many DVDs, etc. for a title)?				
---	--	--	--	--

Brief Vendor Comment (if necessary):

25. Does the ILS support the ability for the library to determine PAC default search settings?				
--	--	--	--	--

Brief Vendor Comment (if necessary):

26. Does the patron have ready access to related subjects, authors, publishers, years, etc. for the purpose of navigating related information or faceting their search?				
---	--	--	--	--

Brief Vendor Comment (if necessary):

Vendor Name:				
VII. Public Access Catalog	A	D	P	N
Searching (continued)				

27. Does the PAC offer the ability for libraries to allow patrons to share bookmarks to titles through sites such as Facebook™, Twitter™, etc?

Brief Vendor Comment (if necessary):

28. Is the patron able to link to a requested title directly from their patron account Requests list?

Brief Vendor Comment (if necessary):

29. Is the patron able to link to a title directly from their patron account Items Out list?

Brief Vendor Comment (if necessary):

30. Does the PAC support the ability for patrons to save searches? How easy is this to do?

Brief Vendor Comment (if necessary):

31. Are saved searches:				
a. able to be modified and reinitiated?				
b. able to provide automated updates of what is new since the last search and provide alerts of these new materials to patrons?				

Brief Vendor Comment (if necessary):

32. Does the PAC support the ability for patrons to easily create and save a title list or bibliography?				
a. Can the library define how long the lists are kept?				
b. Can these lists be maintained until deleted by the user?				

Brief Vendor Comment (if necessary):

Vendor Name:				
VII. Public Access Catalog	A	D	P	N
Searching (continued)				
33. Does the PAC support the ability to print, e-mail or save to disk a bibliography or saved list in several formats:				
a. brief bibliographic display?				
b. full bibliographic display?				
c. American Psychological Association (APA)?				
d. Chicago Manual of Style?				
e. HTML?				
f. MARC?				

Brief Vendor Comment (if necessary):

34. Is the patron able to add a title from the search results list directly to a saved title list?				
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Brief Vendor Comment (if necessary):

35. Do titles in a saved list link back to the catalog?				
---	--	--	--	--

Brief Vendor Comment (if necessary):

Self-Service				
1. Does the PAC allow patrons to register online for a library card?				

Brief Vendor Comment (if necessary):

2. Does the ILS allow patrons to set up a user name that can be used instead of a barcode when logging in, and can that be changed online if necessary?				
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Brief Vendor Comment (if necessary):

3. Does the ILS allow patrons to have forgotten passwords sent to their e-mail addresses?				
---	--	--	--	--

Brief Vendor Comment (if necessary):

Vendor Name:				
VII. Public Access Catalog	A	D	P	N
Self-Service (continued)				
4. Does the PAC allow authenticated patrons to:				
a. change their password?				
b. submit requested address changes for review and acceptance by staff?				
c. review their items out, on-hold items and outstanding fines/fees?				
d. place, suspend, unsuspend, and cancel holds?				
e. create a username to use instead of a barcode for authentication?				

Brief Vendor Comment (if necessary):

5. Does the ILS allow patrons to reset their password (PIN) in real time once they are signed in?				
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Brief Vendor Comment (if necessary):

6. Suspending a hold:				
a. does the PAC require both a suspend and unsuspend date be entered?				
b. is it easy to suspend and unsuspend a hold?				
c. can a limit be set on how long a hold can be suspended?				
d. do suspended holds create problems with floating items or collections?				

Brief Vendor Comment (if necessary):

7. When an authenticated patron is in their account:				
a. does the PAC allow the patron to select all materials checked out on their account to be renewed?				
b. does the PAC allow all holds to be cancelled at once?				
c. does the PAC showing the patron's account indicate when the item is due, whether it is eligible for renewal, and how much is owed on the item when returned or renewed?				
d. does the PAC list where a patron is in a hold list and how many copies are in the system?				

Brief Vendor Comment (if necessary):

Vendor Name:				
VII. Public Access Catalog	A	D	P	N
Self-Service (continued)				
8. Does the PAC provide a default pickup location as defined in the customer's account record when a user is placing a hold?				
a. Can the user select a different location, if desired?				

Brief Vendor Comment (if necessary):

6. Does the ILS support the option of allowing patrons to renew items from the PAC, even if the patron registration would expire before the item's new due date?				
a. Do their items check out for the full check out period as defined by the library?				

Brief Vendor Comment (if necessary):

7. Does the PAC provide a "reading history" option?				
a. Can the library disable this feature?				
b. Can individual patrons opt-in and opt-out of this feature?				
c. Can the library set the default to opt-in in the PAC?				
d. Can that default be changed?				

Brief Vendor Comment (if necessary):

8. Does the ILS support the ability for the library to offer online credit card payments to patrons (for fines/fees) or guests (for donations)?				
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Brief Vendor Comment (if necessary):

Vendor to highlight Public Access Catalog strengths it feels its ILS has for the library.

Vendor Name:				
VIII. Mobile PAC	A	D	P	N
1. Does the ILS provide a mobile PAC that is a web-based, browser-based public access library catalog that has been optimized for mobile devices?				
a. Is it device-independent?				
b. Does it require an application to be downloaded and installed by the mobile device user?				
c. Is there an additional charge for this feature?				

Brief Vendor Comment (if necessary):

2. If a mobile device user enters the library's main web page address, does the server determine that the request is coming from a mobile device and automatically connect to the mobile PAC interface?				
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Brief Vendor Comment (if necessary):

3. Does the mobile PAC allow patrons to perform real-time searches via keyword?				
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Brief Vendor Comment (if necessary):

4. Can the patron sort and limit their searches?				
--	--	--	--	--

Brief Vendor Comment (if necessary):

5. Does the mobile PAC display book, CD and DVD jacket covers, if available?				
--	--	--	--	--

Brief Vendor Comment (if necessary):

6. Does the mobile PAC allow the patron to determine preferences for their mobile experience?				
a. # of records to display on their device?				
b. whether or not to display jacket covers?				
c. select the language preference?				

Brief Vendor Comment (if necessary):

7. Does the mobile PAC support a multilingual interface, (Spanish, French, Arabic, Chinese, Korean, Vietnamese, etc.)?				
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Brief Vendor Comment (if necessary):

Vendor Name:				
VIII. Mobile PAC (continued)	A	D	P	N
8. Does the mobile PAC allow the patron to access their account for renewals, holds, and other data?				

Brief Vendor Comment (if necessary):

9. Does the ILS gather statistics on the type of mobile phones being used to access the catalog?				
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Brief Vendor Comment (if necessary):

Vendor to highlight Mobile PAC strengths it feels its ILS has for the library.

Vendor Name:				
IX. Digital Collection Management System	A	D	P	N
1. Does the ILS offer a stand-alone digital collection management system that allows the library to expose, maintain, and manage digital collections?				
<i>Brief Vendor Comment (if necessary):</i>				
2. Does the digital collection management system integrate digital media with the catalog?				
<i>Brief Vendor Comment (if necessary):</i>				
3. Does each file or digital asset link to a MARC record.				
<i>Brief Vendor Comment (if necessary):</i>				
4. Does the digital collection management system have the ability to import Dublin Core and other non-MARC records?				
<i>Brief Vendor Comment (if necessary):</i>				
5. Does the digital collection management system have the ability to export MARC records?				
<i>Brief Vendor Comment (if necessary):</i>				
6. Does the system give the library the ability to create templates for easy creation of MARC records for digital media?				
<i>Brief Vendor Comment (if necessary):</i>				
7. Does the digital collection management system have the ability to manage the content for one or more digital repositories?				
<i>Brief Vendor Comment (if necessary):</i>				
8. Is the library able to add, delete, or modify the digital content?				
<i>Brief Vendor Comment (if necessary):</i>				
9. Is the digital management system able to manage OAI-PMH collection (sets)?				
<i>Brief Vendor Comment (if necessary):</i>				

Vendor Name:				
IX. Digital Collection Management System (continued)	A	D	P	N

10. Is the digital content accessible through the public access catalog?				
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Brief Vendor Comment (if necessary):

11. Does the public access catalog display include a thumbnail image?				
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Brief Vendor Comment (if necessary):

12. Is the library able to control access to the digital media?				
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Brief Vendor Comment (if necessary):

13. Does the library have the ability to expose digital content to Web crawlers?				
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Brief Vendor Comment (if necessary):

Vendor to highlight Digital Collection Management strengths it feels its ILS has for the library.

Vendor Name:				
X. Reports and Statistics	A	D	P	N
1. Does the ILS offer a separate interface reporting function?				
a. is there an extra cost?				
b. is it Web-Based?				

Brief Vendor Comment (if necessary):

2. Does this reporting function allow user to:				
a. create custom reports?				
b. generate report output files in a variety of file formats including Excel, PDF, HTML and CSV?				
c. save custom report parameters?				
d. schedule saved reports?				
e. schedule saved reports in groups?				
f. execute saved reports?				
g. execute saved reports in groups?				
h. manage saved report parameters?				
i. administer user security and various configuration options?				
j. manage saved report output files?				

Brief Vendor Comment (if necessary):

3. Can the ILS handle report generation on the production server without impacting the day to day transaction speed and searching response time?				
a. Are there other considerations for impacting response time and search speed?				

Brief Vendor Comment (if necessary):

4. What is the scope of delivered reports?				
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Brief Vendor Comment (if necessary):

5. How are custom reports created?				
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Brief Vendor Comment (if necessary):

6. Are there email capabilities for the finished reports?				
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Brief Vendor Comment (if necessary):

7. What is the email mechanism?				
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Brief Vendor Comment (if necessary):

Vendor Name:				
X. Reports and Statistics (continued)	A	D	P	N
8. How is data analysis handled?				

Brief Vendor Comment (if necessary):

Vendor to highlight Reports and Statistics strengths it feels its ILS has for the library.

Vendor Name:				
XI. Outreach Services (Homebound)	A	D	P	N
1. Does the ILS support the ability for the creation of a patron reading profile or preferences?				
<i>Brief Vendor Comment (if necessary):</i>				
2. Does the reading profile permit the entry of preferred authors, subjects and genre?				
a. Preferred format (CD, cassette, etc.)?				
<i>Brief Vendor Comment (if necessary):</i>				
3. Does the ILS support the ability to limit the patron preferences by publication date range, language, and/or format?				
<i>Brief Vendor Comment (if necessary):</i>				
4. Does the ILS support the ability for the library to define delivery schedules?				
<i>Brief Vendor Comment (if necessary):</i>				
5. Does the ILS support the ability for the library to define delivery routes?				
<i>Brief Vendor Comment (if necessary):</i>				
6. Does the ILS support the ability to assign patrons to delivery routes or schedules and note a delivery method (van, bookmobile)?				
<i>Brief Vendor Comment (if necessary):</i>				
7. Does the ILS support the ability to add additional notes such as delivery directions?				
<i>Brief Vendor Comment (if necessary):</i>				
8. Does the ILS support the ability for staff to identify and group all patrons due for delivery based on delivery route, method and/or schedule?				
<i>Brief Vendor Comment (if necessary):</i>				
9. Does the ILS support the ability to designate an authorized "Pick up person" who can take items to the patron?				
<i>Brief Vendor Comment (if necessary):</i>				

Vendor Name:				
XI. Outreach Services (Homebound) (continued)	A	D	P	N
10. Does the ILS support the ability to create selection lists for patrons based on a reading preference profile for each patron?				
a. are these lists optional?				

Brief Vendor Comment (if necessary):

11. Does the selection list processing:				
a. have an option to limit list to titles at selected branches?				
b. avoid titles previously checked out by the patron?				
c. allow a designation of the total number of items to send and an alert when the patron has reached their limit?				
d. allow the ability to place holds on selected titles?				
e. allow staff to override the automated process, manually add or remove titles from the list created by the program?				

Brief Vendor Comment (if necessary):

12. Does the ILS support the ability to automatically exclude specified items from consideration in processing (such as Lost or Discarded)?				
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Brief Vendor Comment (if necessary):

13. Does the ILS support the ability to print a check-list to be reviewed by the patron who may choose what materials he or she would like to receive?				
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Brief Vendor Comment (if necessary):

14. Is the ILS able to process selection lists:				
a. For individual patrons?				
b. For all patrons on a route or schedule for delivery at a given time?				

Brief Vendor Comment (if necessary):

15. Does the ILS support the ability to maintain a reading history of all titles including format, checked out by the patron?				
a. can reading history lists be sorted by title and author?				
a. do titles in a reading list link back to the catalog record?				

Brief Vendor Comment (if necessary):

Vendor Name:				
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XI. Outreach Services (Homebound) (continued)	A	D	P	N
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16. Is the reading history optional for all patrons who are in the Outreach program?				
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Brief Vendor Comment (if necessary):

17. Does the ILS support the ability to allow staff members to remove selected titles from patrons' reading histories?				
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Brief Vendor Comment (if necessary):

18. Does the ILS support the ability to allow patrons to remove selected titles from their own reading history in the PAC?				
--	--	--	--	--

Brief Vendor Comment (if necessary):

19. Can the library determine the length of time a history is kept and total number of items?				
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Brief Vendor Comment (if necessary):

20. Does the ILS support the ability to process all patrons assigned to a given route or due for services according to a time schedule?				
---	--	--	--	--

Brief Vendor Comment (if necessary):

21. Does the ILS alert staff at normal checkout if an Outreach patron has had an item previously?				
---	--	--	--	--

a. Is this optional?				
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Brief Vendor Comment (if necessary):

22. When items are ready to send, does the ILS support the ability to:				
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a. Check items out in bulk?				
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b. Print packing slips?				
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c. Print mailing labels?				
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Brief Vendor Comment (if necessary):

23. Does the ILS support the ability to limit the editing of outreach patron preferences to specific staff members?				
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Brief Vendor Comment (if necessary):

Vendor Name:				
XI. Outreach Services (Homebound) (continued)	A	D	P	N
24. When trapping items for outreach or homebound patrons, does the ILS alert the staff member that the patron is an outreach patron?				

Brief Vendor Comment (if necessary):

25. Does the ILS support separate circulation statistics reports for outreach services?				
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Brief Vendor Comment (if necessary):

26. Does the ILS support the ability to either combine or separate outreach circulation statistics in circulation reports?				
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Brief Vendor Comment (if necessary):

Vendor to highlight Outreach Services strengths it feels its ILS has for the library.

Vendor Name:				
XII. Inventory Manager	A	D	P	N
1. Does the ILS provide an inventory utility that can be used on a notepad, laptop or similar device?				

Brief Vendor Comment (if necessary):

2. Does the inventory utility:				
a. download call number ranges of the library's collection for easy shelf comparison?				
b. scan barcodes on shelves or view list of items on shelves?				
c. work in offline mode when out of wireless range?				
d. be able to be used as a collection weeding tool?				
e. alert for items out of place or unaccounted for?				
f. run reports to identify exceptions or out of place items?				

Brief Vendor Comment (if necessary):

Vendor to highlight Inventory Manager strengths it feels its ILS has for the library.

Vendor Name:				
XIII. Telephone Notification	A	D	P	N
Outbound. (Notification)				
1. Does the ILS provide an automated method to alert patrons to available holds and/or overdue items via telephone?				
a. Is it third party software?				
b. Is it compatible with a VOIP phone system?				
<i>Brief Vendor Comment (if necessary):</i>				
2. Does the telephone notification system support the ability for the library to optionally choose to use the vendor's pre-recorded messages or create their own?				
<i>Brief Vendor Comment (if necessary):</i>				
3. Does the telephone notification system offer the option to speak the patron name?				
<i>Brief Vendor Comment (if necessary):</i>				
4. Does the telephone notification system support the option to read the title, material type and due date?				
<i>Brief Vendor Comment (if necessary):</i>				
5. Does the telephone notification system provide scheduling options:				
a. To specify days and dates not to call?				
b. To specify times during the day to call?				
<i>Brief Vendor Comment (if necessary):</i>				
6. Does the telephone notification system support an option to allow or disallow long distance calls?				
<i>Brief Vendor Comment (if necessary):</i>				
7. Does the telephone notification system provide an option to determine the number of attempts (re-tries) in case of busy signal or no answer?				
<i>Brief Vendor Comment (if necessary):</i>				
8. Does the telephone notification system support the ability to detect the presence of an answering machine?				
<i>Brief Vendor Comment (if necessary):</i>				

Vendor Name:				
XIII. Telephone Notification	A	D	P	N
Outbound. (Notification)				
9. Does the telephone notification system support the ability to detect and cancel a call for each of the following: Disconnect tone; silence; hang up?				
<i>Brief Vendor Comment (if necessary):</i>				
10. Does the telephone notification system support the ability to specify how long to wait between re-tries?				
<i>Brief Vendor Comment (if necessary):</i>				
11. Is it possible to determine which notices are to be called by phone, including which specific overdue notice, hold notice, pre-overdue, etc.?				
<i>Brief Vendor Comment (if necessary):</i>				
12. Does the telephone notification system give the option to automatically direct the notice to print or not to print if the call cannot be completed?				
<i>Brief Vendor Comment (if necessary):</i>				
13. Does the ILS offer a series of reports that provides the call statistics made for each notice type with their statuses, including failure reasons and paper notices that are generated, in a specified date range?				
<i>Brief Vendor Comment (if necessary):</i>				
Inbound				
1. Does the telephone notification system provide an "inbound" option whereby patrons can access their account information?				
<i>Brief Vendor Comment (if necessary):</i>				
2. Does the telephone notification system support a text-to-speech capability allowing the library to determine the messages to the patron?				
<i>Brief Vendor Comment (if necessary):</i>				
3. Does the telephone notification system support the ability for the library to modify and correct the automated voice in case of mispronunciation?				
<i>Brief Vendor Comment (if necessary):</i>				

Vendor Name:				
XIII. Telephone Notification	A	D	P	N
Inbound (continued)				
4. Does the telephone notification system support the ability for the library to modify the text of all messages?				
<i>Brief Vendor Comment (if necessary):</i>				
5. Does the telephone notification system play an introductory message explaining the options that can be modified by the library?				
<i>Brief Vendor Comment (if necessary):</i>				
6. Does the telephone notification system support the ability for the library to set a time out in case of no caller response?				
<i>Brief Vendor Comment (if necessary):</i>				
7. Does the telephone notification system require a patron ID?				
<i>Brief Vendor Comment (if necessary):</i>				
8. Does the telephone notification system require the caller to enter a password?				
a. Is this optional?				
<i>Brief Vendor Comment (if necessary):</i>				
9. Does the telephone notification system support the ability for the patron to access the following account information:				
a. A list of items out (must include author, title, material type, check-out branch)?				
b. A list of overdue items (must include author, title, material type, check-out branch)?				
c. A list of all hold requests?				
d. A list of all held items?				
e. A statement of all fines and fees?				
<i>Brief Vendor Comment (if necessary):</i>				
10. Is the library able to determine which of these options will be available to the patron?				
<i>Brief Vendor Comment (if necessary):</i>				

Vendor Name:				
XIII. Telephone Notification	A	D	P	N
Inbound (continued)				
11. Does the telephone notification system support the ability to renew single items or renew all items?				
<i>Brief Vendor Comment (if necessary):</i>				
12. Does the telephone notification system support the ability to set blocking conditions for renewal?				
<i>Brief Vendor Comment (if necessary):</i>				
13. Does the telephone notification system support the ability to identify phone renewals separately for reporting purposes?				
<i>Brief Vendor Comment (if necessary):</i>				
13. Does the telephone notification system support the ability to alert the caller if his/her registration is about to expire?				
<i>Brief Vendor Comment (if necessary):</i>				
14. Does the telephone notification system offer an option to record additional special announcements?				
<i>Brief Vendor Comment (if necessary):</i>				
15. Does the telephone notification system allow the patron to dial "O" to get speak to a staff member?				
<i>Brief Vendor Comment (if necessary):</i>				
16. Is the telephone notification system, as installed, capable of upgrading to more than one telephone line for expansion?				
<i>Brief Vendor Comment (if necessary):</i>				
17. Does the telephone notification system produce reports for inbound calls?				
<i>Brief Vendor Comment (if necessary):</i>				

Vendor to highlight Telephone Notification strengths it feels its ILS has for the library.

Vendor Name:				
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XIV. Debt Collection Management	A	D	P	N
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1. Does the ILS support the ability to report to a collection agency?				
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Brief Vendor Comment (if necessary):

2. Does the ILS support the ability for the library to establish thresholds for reporting based on account balance, age of fine and cutoff date?				
--	--	--	--	--

Brief Vendor Comment (if necessary):

3. Does the ILS support the ability to export files automatically in a format that can be used by any collection agency?				
--	--	--	--	--

Brief Vendor Comment (if necessary):

4. Does the ILS support the ability for individual patron records to be manually flagged for inclusion in a collection report?				
--	--	--	--	--

Brief Vendor Comment (if necessary):

5. Does the ILS support the ability for designated patron types to be automatically excluded from reporting?				
--	--	--	--	--

Brief Vendor Comment (if necessary):

6. Does the ILS export a file of patrons with associated overdue/lost items based on library-defined time periods?				
--	--	--	--	--

Brief Vendor Comment (if necessary):

7. Does the ILS export an update file on patrons previously submitted to the debt collection company?				
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Brief Vendor Comment (if necessary):

8. Does the ILS support the ability to manually review the file prior to submission to the debt collection company?				
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Brief Vendor Comment (if necessary):

9. Does the ILS automatically put a stop or block on a reported patron record to alert staff during check-out and other library processes?				
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Brief Vendor Comment (if necessary):

10. Does the ILS support the ability for a collection agency block to be cleared automatically when all debts are paid or at any time by authorized staff?				
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Brief Vendor Comment (if necessary):

Vendor Name:				
XIV. Debt Collection Management (continued)	A	D	P	N
11. Does the ILS support the ability for the library to configure certain fields to be included in reporting?				

Brief Vendor Comment (if necessary):

12. Does the ILS support the ability to report minors on behalf of [or 'care of'] a designated parent or guardian?				
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Brief Vendor Comment (if necessary):

Vendor to highlight Debt Collection Management strengths it feels its ILS has for the library.

Vendor Name:				
XVI. Customer Support	A	D	P	N
1. State the customer support hours of operation and describe emergency procedures if the library system goes down outside of these hours of support. (Attach separate pages if necessary)				

Vendor Comment:

2. Does the vendor perform preventative maintenance with daily scans of the library's servers as part of maintenance? Please describe and indicate if this is included in the basic maintenance or costs extra.				
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Vendor Comment:

3. Does the vendor track all support incidents reported by the library?				
a. Can the library view all incidents (including open and closed) via the vendor's extranet?				

Brief Vendor Comment (if necessary):

4. For the last two ILS upgrades, what has been the average downtime to complete the upgrade? (based on a comparable site to ours)				
Version number:				
Date Released:				
# of Hours to Upgrade:				
Version number:				
Date released:				
# of Hours to Upgrade:				

Brief Vendor Comment (if necessary):

5. Is 100% of the database schema available online to library customers for purposes of developing custom reports? If not 100%, please describe extent.				
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Brief Vendor Comment (if necessary):

6. Can library staff search the vendor's knowledge base as a self-service?				
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Brief Vendor Comment (if necessary):

7. Is the full documentation available on-line and fully searchable?				
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Brief Vendor Comment (if necessary):

Vendor Name:				
XVI. Customer Support (continued)	A	D	P	N
8. Does the vendor provide an extranet for customers as part of maintenance?				

Brief Vendor Comment (if necessary):

9. Does the extranet allow the library access to customer developed custom reports?				
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Brief Vendor Comment (if necessary):

10. Is there an independent user's group and list serves?				
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Brief Vendor Comment (if necessary):

Vendor to highlight Customer Support strengths it feels its ILS has for the library.

Vendor Name:				
XVII. Training	A	D	P	N
1. Does the vendor provide basic training in all functioning subsystems for the independent operation of the system, including regular maintenance and troubleshooting?				
<i>Brief Vendor Comment (if necessary):</i>				
2. Does the vendor provide user's training for personnel who will manage the system?				
<i>Brief Vendor Comment (if necessary):</i>				
3. Is training planned in accordance with a mutually agreeable schedule between the library and the vendor?				
<i>Brief Vendor Comment (if necessary):</i>				
4. Is library staff trained to manage and operate the system on a daily basis?				
<i>Brief Vendor Comment (if necessary):</i>				
5. Does training include the following:				
a. Project Implementation Visit to cover the implementation process, policy files creation, data migration issues, project planning, and staff client system administration?				
b. Application training to cover PAC, Patron Services, Cataloging, Acquisitions, Serials Control and Workflow?				
c. System Administration training to cover the System Administration Interface, ILS database structure and reports, Database maintenance, User management, PAC management and customization, Client installation and Report Writing?				
<i>Brief Vendor Comment (if necessary):</i>				
6. What format of training is available, online, on-site, etc.?				
<i>Brief Vendor Comment (if necessary):</i>				
7. Does your company provide operating system training or is it outsourced?				
<i>Brief Vendor Comment (if necessary):</i>				

Vendor Name:				
XVII. Training	A	D	P	N
8. Are procedural manuals provided?				
a. Is the documentation indexed?				
b. Crossed referenced?				
c. Clearly outlined procedural manuals for all modules?				

Brief Vendor Comment (if necessary):

Vendor to highlight Training strengths it feels its ILS has for the library.