

Number	Requirement		Union Catalog <i>staff</i> interface		Union Catalog <i>patron</i> interface		Virtual Catalog <i>staff</i> interface		Virtual Catalog <i>patron</i> interface	
			YES	NO	YES	NO	YES	NO	YES	NO
5.0	USER INTERFACE--Union Catalog /Virtual Catalog									
5.1	Access									
5.1.1	Product has a web-based graphical user search interface	M								
5.1.2	Product has been tested and is fully functional with Internet Explorer*	M								
5.1.3	Product has been tested and is fully functional with Netscape Navigator*	D								
5.1.4	Product has been tested and is fully functional with Mozilla (Firefox)*	D								
5.1.5	Product has been tested and is fully functional with browsers in the Macintosh environment*	O								
5.1.6	Product has been tested with text-based web browsers*	O								
5.1.7	Product requires additional browser "plugins" or "viewers" to operate fully*	O								
5.1.8	Product offers keyboard equivalents for all actions that can be performed with a mouse*	O								
5.1.9	Product offers a Windows-based client application (aka "fat client") for some or all functionality	O								
5.1.10	Product has other customized user interfaces available, such as children's catalog or foreign language interfaces*	D								
5.1.11	Product allows for profiling or "branding" by agency staff at the <i>statewide/global</i> level*	D								
5.1.12	Product allows for profiling or "branding" at the <i>regional or local library</i> level*	O								
5.1.13	Product has a pre-set search session time-out after a period of inactivity*	O								
5.1.14	Product allows agency staff at the <i>statewide/global</i> level to set or change the session time-out period	D								
5.1.15	Product allows library staff at the <i>local library</i> level to set or change the session time-out period.	O								
5.1.16	Product allows different search session time-out to be set for library staff access than for public access level	D								
5.1.17	Product allows user preferences to be set so that individual library users may change the look and feel of the product (for a "my library" feature)	O								
5.1.18	Product includes a library user feedback/comment feature that allows library users to email agency support personnel at the <i>statewide/global</i> level	D								
5.1.19	Product includes a library user feedback/comment feature that can be customized at the local library level to allow library users to email support personnel at the <i>local library</i> level	O								
5.2	Searching & Display									
5.2.1	Product has an option for a simple, single term search	M								
5.2.2	Product has an option for advanced or expert searching, using search limiters, qualifiers and/or specific field searching	M								

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5.2.3	Product has an option for combined searches with terms in more than one index	M								
5.2.4	Product has an option for Keyword searching	M								
5.2.5	Product has an option for leading string (browse or scan) searching	D								
5.2.6	Product allows agency to customize or specify which MARC fields are included in each search index	O								
5.2.7	Product allows library users to create or qualify search queries by the following data:									
5.2.7.1	• Author	M								
5.2.7.2	• Title	M								
5.2.7.3	• Subject heading	M								
5.2.7.4	• ISBN number	M								
5.2.7.5	• ISSN number	M								
5.2.7.6	• LCCN number	M								
5.2.7.7	• Date of publication	M								
5.2.7.8	• Date range of publication	D								
5.2.7.9	• Record control number	D								
5.2.7.10	• OCLC number (if different from record control number)	D								
5.2.7.11	• Music publisher number	D								
5.2.7.12	• Notes fields	D								
5.2.7.13	• Format of material	D								
5.2.7.14	• Language	D								
5.2.7.15	• Full-text for databases	D								
5.2.8	Product allows construction of search arguments using the following Boolean search operators:									
5.2.8.1	• “AND” searching	M								
5.2.8.2	• “OR” searching	M								
5.2.8.3	• “NOT” searching	M								
5.2.8.4	• “NEAR” searching (Adjacent term)	D								
5.2.9	Product allows construction of search arguments using specific phrase searching.	O								
5.2.10	Product allows construction of search arguments using the following truncation search operators:									
5.2.10.1	• Right truncation searching	D								
5.2.10.2	• Left truncation searching	D								
5.2.10.3	• Internal truncation or "embedded wildcard" searching	D								

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5.2.11	Product allows library users to launch searches using links in the following fields:									
5.2.11.1	• author fields	O								
5.2.11.2	• subject fields	O								
5.2.11.3	• series fields	O								
5.2.11.4	• links from 856 fields to external web sites	O								
5.2.11.5	• between earlier/later titles (i.e. 780, 785 fields)	O								
5.2.12	Product maintains a history of search queries used during each separate search session, and allows the library user to recall previous search terms	D								
5.2.13	Product allows library users the option to end their session and to clear their search history	D								
5.2.14	Product allows library users the option to stop or end a search in progress	D								
5.2.15	Product allows the library user to back up to a prior result set	D								
5.2.16	Product allows the library user to refine or modify a previous search*	M								
5.2.17	Product allows the option to refine or modify a search from all search results screens using a single click	D								
5.2.18	Product allows the option to initiate a new search from any screen using a single click	D								
5.2.19	Product allows for scrolling between retrieved records using PREVIOUS and NEXT record buttons	D								
5.2.20	Product allows the option to limit or scope a search to titles held by one or more designated libraries	M								
5.2.21	Product allows agency staff to configure pre-set search groups or scoped location groups at the <i>statewide/global</i> level*	D								
5.2.22	Product allows the library user to configure pre-set search groups or scoped location groups at the <i>local library</i> level*	D								
5.2.23	Product begins to display search results as soon as first records are located, and keeps adding to results until search is complete	D								
5.2.24	Product begins to display search results as soon as first records are located, and waits for user to request more results	O								
5.2.25	Product allows the library user to save selected search query information	D								
5.2.26	Product has a spell- checker capacity that recommends “correct” spellings for entered terms that were not found	O								
5.2.27	Product allows library user to move forward and backward within the search result, without retracing the original search	D								
5.2.28	Product displays SEE and SEE ALSO references to direct library users to the correct form of heading	O								

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5.2.29	Product automatically links library user to a correct heading form using SEE references	O								
5.2.30	Product allows library user to link from SEE and SEE ALSO references directly to records with that form	D								
5.2.31	Product supports "smart indexing" wherein searches for names with ambiguous prefixes will retrieve all variants (e.g., Mc and Mac)	O								
5.2.32	Product displays a single bibliographic record for each unique title, with one or more holding statements displayed on the same screen as the bibliographic information	D								
5.2.33	Product displays bibliographic records with holding statements on additional screens accessible by mouse click	O								
5.2.34	Product displays full bibliographic information (every MARC field that is present in the records)	D								
5.2.35	Product allows agency staff to determine at the statewide/global level, which MARC fields in a record are displayed in full bibliographic record displays	D								
5.2.36	Product allows for display of a brief record with field labels*	D								
5.2.37	Product allows for labeled bibliographic record display	D								
5.2.38	Product allows for full MARC-tagged bibliographic record display	D								
5.2.39	Product allows for local library customization of the full record display*	D								
5.2.40	Product can display records in a title list, alphabetically by title ignoring initial articles if indicators are set correctly in record	D								
5.2.41	Product can display records in a title list, alphabetically by title, adjusting for standard English language initial articles if the indicators are not present in the bibliographic record	D								
5.2.42	Product provides a summary screen of records retrieved allowing library user to select among them	D								
5.2.43	Product allows for single hit searches to directly display the bibliographic record without going through a "results" or summary list	D								
5.2.44	Product provides a record count of the number of records retrieved for each search term on the result summary screen	D								
5.2.45	Product provides graphical or textual indication on the search screen of the status of the search (hour glass, bars, clock icon, etc.)	O								
5.2.46	Product displays the term(s) used in a search argument along with the display of search results	D								
5.2.47	Product allows search results for a specific library or resource to be rearranged or moved to the top of the title list display	D								

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5.2.48	Product allows library user an option to select to view search results alphabetically by title	D								
5.2.49	Product allows library user an option to select to view search results alphabetically by author	D								
5.2.50	Product allows library user an option to select to view search results chronologically (ascending or descending) by date of publication	D								
5.2.51	Product allows library users an option to select to view bibliographic search results sorted by most holding locations	O								
5.2.52	Product allows library user an option to view only retrieved records held by a specific holding library	D								
5.2.53	Product allows library users to change the sequence control and resort the display sequence for a set of selected records after they have been retrieved	O								
5.2.54	Agency may request customization of the search screen so that it specifically states that this service is being provided by the State of Wisconsin	O								
5.2.55	Product displays the following data elements for each holding statement :									
5.2.55.1	• Full holding library names.	D								
5.2.55.2	• Codes representing holding library names.	D								
5.2.55.3	• Library location or branch location information when available.	D								
5.2.55.4	• Local call number information.	D								
5.2.56	Product allows for holdings on a bibliographic record to be grouped for display based on the library's profile.	D								
5.2.57	Product allows search results to be sorted or resorted by host or resource catalog.	D								
5.2.58	Product allows search results to be sorted or resorted by title (using de-duplication of title field).	D								
5.2.59	Product allows de-duplicated search results to display holdings from different catalogs under a single bibliographic record	D								
5.2.60	Product allows search results to be sorted or resorted by title field	D								
5.2.61	Product allows search results to be sorted or resorted by author	D								
5.2.62	Product allows search results to be sorted or resorted by publication date	O								
5.2.63	Product allows search results to be sorted or resorted by relevance	O								
5.2.64	Product displays shelf status of items from local catalog if that status is output by the local catalog	D								
5.2.65	Product allows a link from a specific bibliographic holding to a database of that library's lending policies, and other information such as hours open	D								
5.2.66	Product allows a link from a specific bibliographic holding into the same bibliographic record in that library's host catalog	D								

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5.2.67	Product allows for specified holdings on a bibliographic record to be moved to the top of the holdings list, based on the library's profile	O								
5.2.68	Product allows for a library's own holdings on a bibliographic record to be listed first on the holdings list	D								
5.2.69	Product allows for the number of records returned at a time to be set or defaulted by agency staff at the <i>statewide/global</i> level	O								
5.2.70	Product allows for the number of records returned at a time to be set or defaulted at the <i>local library</i> level	O								
5.2.71	Product allows for the number of records returned at a time, on a search by search or on a session basis at the <i>local library</i> level	O								
5.2.72	Product allows library user the option to mask holdings display on a scoped or qualified search, in order to limit the resulting holdings display to only those holding symbols	O								
5.2.73	Product supports displays for serials following the Z39.71 standard	O								
5.2.74	Product displays media format types using popular terms, e.g., CD, VHS, DVD, Books on Cassettes, CD-ROM	D								
5.2.75	Product uses graphical icons to denote various media format item types	D								
5.2.76	Product provides the ability to interface with subscription services that enhance the content of the catalog	O								
5.2.77	Links are available within bibliographic records for book reviews	O								
5.2.78	Links are available within bibliographic records for abstracts and summaries	O								
5.2.79	Links are available within bibliographic records for book jacket cover images	O								
5.2.80	Links are available within bibliographic records for tables of contents	O								
5.2.81	Links are available within bibliographic records for other value-added services	O								
5.3	Printing/Saving/Emailing Results									
5.3.1	Product allows an option for a "printer friendly" format for printing bibliographic records	D								
5.3.2	Product allows an option for a "printer friendly" format for printing title lists of search results	O								
5.3.3	Product allows for printing of selected or highlighted text or a portion of a bibliographic record	O								
5.3.4	Product allows printing of bibliographic records in all display formats available	D								
5.3.5	Product allows printing of the set of all bibliographic records for a given search (e.g. all records that contain a specific holding library)	O								
5.3.6	Product allows a search result set to be saved as an HTML or a text file to a local computer	O								

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			YES	NO	YES	NO	YES	NO	YES	NO
5.3.7	Product allows a user to select the format for saving the results set to a local workstation	O								
5.3.8	Product allows a search result set to be saved in a citation format	D								
5.3.9	Product allows library user's email address to be saved as a default for emailing of search results	D								
5.3.10	Product allows a search result set to be emailed to a library user's email address	O								
5.3.11 DELETED	Product allows library user's email address to be saved as a default for emailing of search results -- (Question deleted; Duplicate to 5.3.9)									
5.4	Help and Error Messages									
5.4.1	Product has help available from all screens	D								
5.4.2	Product has context specific help messages	D								
5.4.3	Product allows library users to access help messages without exiting the search process	D								
5.4.4	Product allows authorized agency staff at the statewide/global level to add or customize help messages	O								
5.4.5	Product allows authorized library staff at the local library level to add or customize help messages	O								
5.4.6	Product provides for language appropriate help messages if non-English language user interfaces are supported	D								
5.4.7	Product provides library users with specific explanations of any errors that occur	D								
5.4.8	Product provides for customization of error messages by agency staff at the <i>statewide/global</i> level	O								
5.4.9	Product uses local library parameters to control introductory help text displayed to library users	O								
6.0	PHYSICAL UNION CATALOG									
6.1	Union Catalog Overall Functionality (See Word file)									
6.2	Union Catalog Creation									
6.2.1	Vendor proposes to build a union database file from a file of existing MARC 21 records supplied by the agency*	O					N/A	N/A	N/A	N/A
6.2.2	Vendor proposes to build a union database file by matching/merging a file of existing MARC 21 records supplied by the agency against another masterfile union database*	O					N/A	N/A	N/A	N/A
6.2.3	Vendor will retain/convert all existing individual holdings statements present in the agency's existing bibliographic union catalog	D					N/A	N/A	N/A	N/A

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			YES	NO	YES	NO	YES	NO	YES	NO
6.2.4	Vendor will retain/convert all existing library ID codes as found in the individual holdings data for each holding library in the existing WISCAT MARC 21 database*	D					N/A	N/A	N/A	N/A
6.2.5	Vendor will retain all existing library location names as found in the individual holdings data (or in a display table) for each holding library in the existing WISCAT MARC 21 database	D					N/A	N/A	N/A	N/A
6.2.6	Vendor will convert or map all existing library ID codes and library location names for each holding library in the existing individual holdings data to a different format or code	O					N/A	N/A	N/A	N/A
6.2.7	Vendor allows unique library identifier codes to be assigned by the agency	D					N/A	N/A	N/A	N/A
6.2.8	Unique library identifier codes are assigned by the vendor	O					N/A	N/A	N/A	N/A
6.2.9	Agency can make additions, deletions or changes to the recognized library names and codes at any time	D					N/A	N/A	N/A	N/A
6.2.10	Vendor is able to process and provide support for Unicode format data for storage and display of non-English characters	D					N/A	N/A	N/A	N/A
6.3	Indexing									
6.3.1	Vendor is able to index the MARC 21 bibliographic data for searching by all of the fields and subfields specified by the agency (See Technical Appendix 18.3 for indexed fields specified)*	D					N/A	N/A	N/A	N/A
6.3.2	Vendor is able to index the MARC 21 bibliographic data by values in the MARC "fixed fields"*	D					N/A	N/A	N/A	N/A
6.3.3	Indexing functions are executed on the entire database at specific intervals in a batch process*	O					N/A	N/A	N/A	N/A
6.3.4	New bibliographic records and bibliographic record updates are indexed as each record is added to the system in "real time"	D					N/A	N/A	N/A	N/A
6.3.5	Product provides options for database re-indexing while library users remain online*	D					N/A	N/A	N/A	N/A
6.3.6	Agency can choose or specify which MARC fields and subfields, or sets of MARC fields and subfields, are mapped for indexing in Author, Title, Subject, Specific Number, or Keyword fields.	O					N/A	N/A	N/A	N/A
6.3.7	Vendor allows creation of customized index points as requested by the agency	O					N/A	N/A	N/A	N/A
6.4	Consolidation of duplicate bibliographic records									
6.4.1	Vendor can perform a duplicate record match and de-duplication/merge as each new record is added to the database	D					N/A	N/A	N/A	N/A
6.4.2	Vendor can perform a consolidation of duplicate bibliographic records on the full database file with each or any batch update*	O					N/A	N/A	N/A	N/A

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			YES	NO	YES	NO	YES	NO	YES	NO
6.4.3	Duplicate record consolidation algorithm can be changed or customized by the agency	D					N/A	N/A	N/A	N/A
6.4.4	Duplicate record consolidation algorithm uses:						N/A	N/A	N/A	N/A
6.4.4.1	Field 245, subfield \$a and \$b	D					N/A	N/A	N/A	N/A
6.4.4.2	Field 245, subfield \$h	D					N/A	N/A	N/A	N/A
6.4.4.3	Field 245, subfield \$p	D					N/A	N/A	N/A	N/A
6.4.4.4	Field 245, subfield \$n	D					N/A	N/A	N/A	N/A
6.4.4.5	Field 250, subfield \$a	D					N/A	N/A	N/A	N/A
6.4.4.6	Field 260, subfield \$b and \$c	D					N/A	N/A	N/A	N/A
6.4.4.7	Field 300, subfield \$a	D					N/A	N/A	N/A	N/A
6.4.4.8	Field 010, subfield \$a	D					N/A	N/A	N/A	N/A
6.4.4.9	Field 028, subfield \$a	D					N/A	N/A	N/A	N/A
6.4.4.10	Field 020, subfield \$a	D					N/A	N/A	N/A	N/A
6.4.4.11	Available data from the record Leaders	D					N/A	N/A	N/A	N/A
6.4.4.12	Other fixed field data (e.g. 007, 008)	D					N/A	N/A	N/A	N/A
6.4.5	There is no limitation to the length of each field or data element used in creating a match for duplicate record consolidation	D					N/A	N/A	N/A	N/A
6.4.6	Duplicate record consolidation algorithm can use field 019 data to identify records that have been merged	O					N/A	N/A	N/A	N/A
6.4.7	Duplicate record consolidation algorithm can use all occurrences of the ISBN (020), ISSN (022), or LCCN (010) within a bibliographic record to identify and merge duplicate records	D					N/A	N/A	N/A	N/A
6.4.8	Duplicate record consolidation algorithm uses only the first occurrence of the ISBN (020), ISSN (022), or LCCN (010) within a bibliographic record to identify and merge duplicate records	D					N/A	N/A	N/A	N/A
6.4.9	Vendor provides for manual merging or deletion of MARC bibliographic records by agency staff	D					N/A	N/A	N/A	N/A
6.5	Authority control									
6.5.1	Vendor provides <i>name</i> authority control using the most current and complete Library of Congress authority files (including updates from LC at weekly intervals) for names	D					N/A	N/A	N/A	N/A
6.5.2	Vendor provides <i>subject</i> authority control using the most current and complete Library of Congress authority files (including updates from LC at weekly intervals) for subjects	D					N/A	N/A	N/A	N/A
6.5.3	Vendor provides <i>name</i> authority control in a periodic batch process against the full bibliographic database*	D					N/A	N/A	N/A	N/A

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6.5.4	Vendor provides <i>subject</i> authority control in a periodic batch process against the full bibliographic database	D					N/A	N/A	N/A	N/A
6.5.5	Vendor can validate <i>name</i> headings in real time as records are added to the database	D					N/A	N/A	N/A	N/A
6.5.6	Vendor can validate <i>subject</i> headings in real time as records are added to the database	D					N/A	N/A	N/A	N/A
6.5.7	Product reports back any invalid <i>name</i> heading terms that do not match authorized headings	D					N/A	N/A	N/A	N/A
6.5.8	Product reports back any invalid <i>subject</i> heading terms that do not match authorized headings	O					N/A	N/A	N/A	N/A
6.5.9	Vendor provides manual review of terms and headings that do not match authorized headings	O					N/A	N/A	N/A	N/A
6.5.10	Vendor can validate subject headings or name headings in real time as records are added to the database	O					N/A	N/A	N/A	N/A
6.5.11	Product produces a report of invalid subjects or name headings added, when the vendor validates subject headings or name headings in real time as records are added to the database	O					N/A	N/A	N/A	N/A
6.5.12 DELETED	Product allows the agency to create local authority subject or name headings -- (Question deleted; Duplicate to 6.5.19)	O								
6.5.13	Vendor provides <i>name</i> authority control based on the Library of Congress name authority files	D					N/A	N/A	N/A	N/A
6.5.14	Vendor provides <i>subject</i> authority control based on the Library of Congress subject authority files	D					N/A	N/A	N/A	N/A
6.5.15	Vendor provides <i>subject</i> authority control based on the Medical Subject Heading authority files	O					N/A	N/A	N/A	N/A
6.5.16	Vendor provides <i>subject</i> authority control based on the genre subject headings or other subject control authorities.*	O					N/A	N/A	N/A	N/A
6.5.17	Vendor provides for <i>subject</i> authority control based on more than one authority file. Indicate how the vendor deals with those multiple authority files and see references that may conflict with each other*	O					N/A	N/A	N/A	N/A
6.5.18	Authority control processing results in:*						N/A	N/A	N/A	N/A
6.5.18.1	See-references in the catalog	D					N/A	N/A	N/A	N/A
6.5.18.2	See-Also references in the catalog.	D					N/A	N/A	N/A	N/A
6.5.18.3	Scope or information notes displayed in the catalog.	O					N/A	N/A	N/A	N/A
6.5.18.4	Authority records that reside in the database	O					N/A	N/A	N/A	N/A
6.5.19	Agency may add local authority records to the authority control processing	O					N/A	N/A	N/A	N/A

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			YES	NO	YES	NO	YES	NO	YES	NO
6.5.20	Agency can specify MARC fields and/or subfield and/or indicators to be included or excluded from authority control processing	O					N/A	N/A	N/A	N/A
6.6	Z39.50 services						N/A	N/A	N/A	N/A
6.6.1	Union catalog product includes a Z39.50 host services module*	D					N/A	N/A	N/A	N/A
6.6.2	Indicate with which version of the Z39.50 protocol, vendor's product is fully compliant						N/A	N/A	N/A	N/A
6.6.2.1	Version 3	D					N/A	N/A	N/A	N/A
6.6.2.2	Version 2	O					N/A	N/A	N/A	N/A
6.7	Union Catalog Batch Updating									
6.7.1	Vendor allows for batch submission of MARC 21 data files by one or more local libraries to be merged into the existing union catalog database using a specific match algorithm	M					N/A	N/A	N/A	N/A
6.7.2	Vendor allows for snapshot replacement (strip and replace) files from one or more libraries*	M					N/A	N/A	N/A	N/A
6.7.3	Vendor allows for batch submission of MARC 21 data files by one or more local libraries with DELETE status in the correct leader position to be matched against the existing union catalog for deletion of library holdings from the database	D					N/A	N/A	N/A	N/A
6.7.4	Vendor allows for batch submission of text files of match keys (ISBN, OCLC control number, etc.) from one or more local libraries to be matched against the existing union catalog for <i>addition</i> of library holdings to the database	O					N/A	N/A	N/A	N/A
6.7.5	Vendor allows for batch submission of text files of match keys (ISBN, OCLC control number, etc.) by one or more local libraries to be matched against the existing union catalog for <i>deletion</i> of library holdings from the database	O					N/A	N/A	N/A	N/A
6.7.6	Vendor is able to process standard MARC 21 bibliographic records from any source	D					N/A	N/A	N/A	N/A
6.7.7	Vendor is able to add, incorporate or access records from Library of Congress files or other bibliographic resources into the union catalog database and make them available for libraries to add the records and their holdings into the database*	O					N/A	N/A	N/A	N/A
6.7.8	Vendor is able to process new (ADD) records from Government Printing Office (GPO) monthly subscription tapes	O					N/A	N/A	N/A	N/A
6.7.9	Vendor is able to batch add the holdings for full government depository libraries to the new GPO records in the union catalog each month	O					N/A	N/A	N/A	N/A
6.7.10	Vendor is able to batch add the holdings for partial government depository libraries to the new GPO records in the union catalog each month, based on a profile of specific item numbers	O					N/A	N/A	N/A	N/A

Number	Requirement		Union Catalog staff interface		Union Catalog patron interface		Virtual Catalog staff interface		Virtual Catalog patron interface	
			YES	NO	YES	NO	YES	NO	YES	NO
6.7.11	Vendor is able to process NEW records submitted by local libraries using commercial materials vendors (e.g. Baker & Taylor, MARCIVE)	D					N/A	N/A	N/A	N/A
6.7.12	Vendor is able to process batch files of new records from local online catalogs	D					N/A	N/A	N/A	N/A
6.7.13	Vendor is able to process transaction files from local online catalogs	O					N/A	N/A	N/A	N/A
6.7.14	Vendor is able to review and validate records in the database or an incoming file to determine if any records do not meet a specified level of cataloging accuracy	D					N/A	N/A	N/A	N/A
6.7.15	Vendor is able to isolate records in the database or in an incoming file that do not meet a specified level of cataloging completeness or accuracy, and to process, produce a file of, or eliminate those records	O					N/A	N/A	N/A	N/A
6.7.16	Vendor provides for access to Library of Congress database or other MARC 21 files for record matching	D					N/A	N/A	N/A	N/A
6.8	Online Updating									
6.8.1	Vendor provides a method for local libraries to directly add holdings online to the union catalog file, and have those holdings available in "real-time"*	M					N/A	N/A	N/A	N/A
6.8.2	Vendor provides a method for local libraries to delete their own holdings online from the union catalog file*	M					N/A	N/A	N/A	N/A
6.8.3	Vendor provides a method for local libraries to change or modify their own holdings directly online in the union catalog file*	M					N/A	N/A	N/A	N/A
6.8.4	Vendor provides a method for a local library or library clearinghouse to act as a an agent for another library or group of libraries, in order to add, change and delete that library's holdings online in the union catalog file	D					N/A	N/A	N/A	N/A
6.8.5	Product allows library staff to save local holdings information on the server for later updating to the database*	O					N/A	N/A	N/A	N/A
6.8.6	Product uses a data entry form for input of local holdings data into labeled holdings fields	D					N/A	N/A	N/A	N/A
6.8.7	Product uses a data entry form for input of local holdings data into MARC 21 tagged and subfield delimited holdings fields	O					N/A	N/A	N/A	N/A
6.8.8	Product allows the library user to enter holdings update information directly into the holdings field on the bibliographic record	O					N/A	N/A	N/A	N/A
6.8.9	There is no limitation to the number of characters that may be entered in the holdings field or subfields of the record	D					N/A	N/A	N/A	N/A
6.8.10	Product automatically inserts the library user's library name or ID code into each holding statement so that the library user is not required to re-key the code with each update transaction	D					N/A	N/A	N/A	N/A
6.8.11	Product allows library staff to enter the following data for their holdings:						N/A	N/A	N/A	N/A
6.8.11.1	Local call number or shelf data	D					N/A	N/A	N/A	N/A

Number	Requirement		Union Catalog staff interface		Union Catalog patron interface		Virtual Catalog staff interface		Virtual Catalog patron interface	
			YES	NO	YES	NO	YES	NO	YES	NO
6.8.11.2	Local collection location or branch location information	D					N/A	N/A	N/A	N/A
6.8.11.3	Local library barcode data	D					N/A	N/A	N/A	N/A
6.8.11.4	Local enumeration and chronology data for serial holdings	D					N/A	N/A	N/A	N/A
6.8.11.5	Local holdings notes	D					N/A	N/A	N/A	N/A
6.8.11.6	Local detailed holdings summary data for periodical or serial holdings	D					N/A	N/A	N/A	N/A
6.8.11.7	Local copy level data	O					N/A	N/A	N/A	N/A
6.8.12	Product allows the agency to customize or specify the holdings data entry fields or labels at the statewide/global level	O					N/A	N/A	N/A	N/A
6.8.13	Product allows library staff to customize the holdings data entry fields or labels at the local library level	O					N/A	N/A	N/A	N/A
6.9.	Serial Union List Holdings						N/A	N/A	N/A	N/A
6.9.1	Vendor is able to process serial bibliographic and item holdings data from local online circulation or serials control systems*	D					N/A	N/A	N/A	N/A
6.9.2	Vendor is able to process serial bibliographic and item holdings data from DOCLINE serials union list files	D					N/A	N/A	N/A	N/A
6.9.3	Vendor is able to designate and display the source of each individual serial holding in a subfield within each holding (e.g. DOCLINE, update, WULS, etc.)	O					N/A	N/A	N/A	N/A
6.9.4	Vendor uses MARC 21 holdings format for storage of local holdings data for serials*	O					N/A	N/A	N/A	N/A
6.9.5	Vendor is able to integrate detailed serials holding data into the bibliographic database and to de-duplicate holdings statements by library	O					N/A	N/A	N/A	N/A
6.9.6	Vendor is able to collapse multiple holdings item statements for a library's individual issues into a single summary statement for each library	O					N/A	N/A	N/A	N/A
6.9.7	Vendor is able to batch process serials union list data at least semi-annually	O					N/A	N/A	N/A	N/A
6.9.8	Vendor proposes a library staff web interface for updating serials holdings data online in the union catalog	O					N/A	N/A	N/A	N/A
6.10	MARC Record Downloading									
6.10.1	Vendor provides a method for authorized library staff to download standard full MARC 21 records from the union catalog, for use in local automated catalog projects.	D					N/A	N/A	N/A	N/A
6.10.2	Ability to download MARC records can be "turned on" or authorized on a library-by-library basis.	O					N/A	N/A	N/A	N/A
6.10.3	MARC records can be selected from the union catalog and downloaded to a local drive one at a time.	D					N/A	N/A	N/A	N/A
6.10.4	MARC records can be selected from the union catalog and placed into a batch, group or "shopping cart" function for downloading to a local drive.	D					N/A	N/A	N/A	N/A

Number	Requirement		Union Catalog <i>staff</i> interface		Union Catalog <i>patron</i> interface		Virtual Catalog <i>staff</i> interface		Virtual Catalog <i>patron</i> interface	
			YES	NO	YES	NO	YES	NO	YES	NO
6.10.5	Batch or group files of MARC records that have been selected for downloading can be:						N/A	N/A	N/A	N/A
6.10.5.1	Viewed online	D					N/A	N/A	N/A	N/A
6.10.5.2	Printed	D					N/A	N/A	N/A	N/A
6.10.5.3	Sorted	D					N/A	N/A	N/A	N/A
6.10.5.4	Edited	O					N/A	N/A	N/A	N/A
6.10.5.5	Emailed	O					N/A	N/A	N/A	N/A
6.10.6	Indicate how the product treats holdings statements on downloaded MARC records						N/A	N/A	N/A	N/A
6.10.6.1	Records can be downloaded without any associated holding statements.	D					N/A	N/A	N/A	N/A
6.10.6.2	Records can be downloaded with all associated holding statements.	O					N/A	N/A	N/A	N/A
6.10.6.3	Records can be downloaded to include only designated holding statements for the local library.	D					N/A	N/A	N/A	N/A
6.11	Union Catalog Reports and Statistics									
6.11.1	The following union catalog reports of Statewide Summary & Individual participant data are available at the statewide/global level						N/A	N/A	N/A	N/A
6.11.1.1	Total number of bibliographic records in the statewide union database.	M					N/A	N/A	N/A	N/A
6.11.1.2	Total number of holdings statements in statewide union database	M					N/A	N/A	N/A	N/A
6.11.1.3	Total number of records in the statewide union database for each material format	M					N/A	N/A	N/A	N/A
6.11.1.4	Total number of records in the statewide union database by language	M					N/A	N/A	N/A	N/A
6.11.1.5	Number of holdings statements in statewide union database for each participating library	M					N/A	N/A	N/A	N/A
6.11.1.6	Total number of library patron logins	M					N/A	N/A	N/A	N/A
6.11.1.7	Total number of library staff logins	M					N/A	N/A	N/A	N/A
6.11.1.8	Total number of simple searches	M					N/A	N/A	N/A	N/A
6.11.1.9	Total number of advanced searches	M					N/A	N/A	N/A	N/A
6.11.1.10	List of all terms used for searching	D					N/A	N/A	N/A	N/A
6.11.1.11	Number of library patron logins broken out by participating library	M					N/A	N/A	N/A	N/A
6.11.1.12	Number of library staff logins broken out by participating library	M					N/A	N/A	N/A	N/A
6.11.1.13	Number of simple searches broken out by participating library	M					N/A	N/A	N/A	N/A
6.11.1.14	Number of advanced searches broken out by participating library	M					N/A	N/A	N/A	N/A
6.11.1.15	List of all terms used for searching broken out by participating library	D					N/A	N/A	N/A	N/A
6.11.1.16	Total number of holdings added to the statewide union catalog via online method	M					N/A	N/A	N/A	N/A
6.11.1.17	Total number of holdings deleted from statewide union catalog via online method	M					N/A	N/A	N/A	N/A

Number	Requirement		Union Catalog <i>staff</i> interface		Union Catalog <i>patron</i> interface		Virtual Catalog <i>staff</i> interface		Virtual Catalog <i>patron</i> interface	
			YES	NO	YES	NO	YES	NO	YES	NO
6.11.1.18	Total number of holdings changed in the statewide union catalog via online method	M					N/A	N/A	N/A	N/A
6.11.1.19	Number of holdings added to the union catalog via online method - broken down by participating library	M					N/A	N/A	N/A	N/A
6.11.1.20	Total number of holdings deleted from statewide union catalog via online method - broken down by participating library	M					N/A	N/A	N/A	N/A
6.11.1.21	Total number of holdings changed via online method broken down by participating library	M					N/A	N/A	N/A	N/A
6.11.1.22	Total number of holdings added via batch method broken down by participating library	M					N/A	N/A	N/A	N/A
6.11.1.23	Total number of holdings deleted via batch method broken down by participating library	M					N/A	N/A	N/A	N/A
6.11.1.24	Total number of bibliographic records submitted via online method broken down by participating library	M					N/A	N/A	N/A	N/A
6.11.1.25	Total number of bibliographic records submitted via batch method broken down by participating library	M					N/A	N/A	N/A	N/A
6.11.1.26	Number of bibliographic records downloaded from the union catalog broken down by participating library	M					N/A	N/A	N/A	N/A
6.11.2	The following union catalog reports of Statewide Summary & Individual participant data are available for web display and/or download at the regional level for all member libraries belonging to that group.						N/A	N/A	N/A	N/A
6.11.2.1	Total number of bibliographic records in the statewide union database.	O					N/A	N/A	N/A	N/A
6.11.2.2	Total number of holdings statements in statewide union database	O					N/A	N/A	N/A	N/A
6.11.2.3	Total number of records in the statewide union database for each material format	O					N/A	N/A	N/A	N/A
6.11.2.4	Total number of records in the statewide union database by language	O					N/A	N/A	N/A	N/A
6.11.2.5	Number of holdings statements in statewide union database for each participating library	O					N/A	N/A	N/A	N/A
6.11.2.6	Total number of library patron logins	O					N/A	N/A	N/A	N/A
6.11.2.7	Total number of library staff logins	O					N/A	N/A	N/A	N/A
6.11.2.8	Total number of simple searches	O					N/A	N/A	N/A	N/A
6.11.2.9	Total number of advanced searches	O					N/A	N/A	N/A	N/A
6.11.2.10	List of all terms used for searching	O					N/A	N/A	N/A	N/A
6.11.2.11	Number of library patron logins broken out by participating library	O					N/A	N/A	N/A	N/A
6.11.2.12	Number of library staff logins broken out by participating library	O					N/A	N/A	N/A	N/A
6.11.2.13	Number of simple searches broken out by participating library	O					N/A	N/A	N/A	N/A
6.11.2.14	Number of advanced searches broken out by participating library	O					N/A	N/A	N/A	N/A
6.11.2.15	List of all terms used for searching broken out by participating library	O					N/A	N/A	N/A	N/A

Number	Requirement		Union Catalog <i>staff</i> interface		Union Catalog <i>patron</i> interface		Virtual Catalog <i>staff</i> interface		Virtual Catalog <i>patron</i> interface	
			YES	NO	YES	NO	YES	NO	YES	NO
6.11.2.16	Total number of holdings added to the statewide union catalog via online method	O					N/A	N/A	N/A	N/A
6.11.2.17	Total number of holdings deleted from statewide union catalog via online method	O					N/A	N/A	N/A	N/A
6.11.2.18	Total number of holdings changed in the statewide union catalog via online method	O					N/A	N/A	N/A	N/A
6.11.2.19	Number of holdings added to the union catalog via online method - broken down by participating library	O					N/A	N/A	N/A	N/A
6.11.2.20	Total number of holdings deleted from statewide union catalog via online method - broken down by participating library	O					N/A	N/A	N/A	N/A
6.11.2.21	Total number of holdings changed via online method broken down by participating library	O					N/A	N/A	N/A	N/A
6.11.2.22	Total number of holdings added via batch method broken down by participating library	O					N/A	N/A	N/A	N/A
6.11.2.23	Total number of holdings deleted via batch method broken down by participating library	O					N/A	N/A	N/A	N/A
6.11.2.24	Total number of bibliographic records submitted via online method broken down by participating library	O					N/A	N/A	N/A	N/A
6.11.2.25	Total number of bibliographic records submitted via batch method broken down by participating library	O					N/A	N/A	N/A	N/A
6.11.2.26	Number of bibliographic records downloaded from the union catalog broken down by participating library	O					N/A	N/A	N/A	N/A
6.11.3	The following union catalog reports of Statewide Summary & Individual participant data are available for web display and/or download at the local library level for each participating library.						N/A	N/A	N/A	N/A
6.11.3.1	Total number of bibliographic records in the statewide union database.	D					N/A	N/A	N/A	N/A
6.11.3.2	Total number of holdings statements in statewide union database	D					N/A	N/A	N/A	N/A
6.11.3.3	Total number of records in the statewide union database for each material format	D					N/A	N/A	N/A	N/A
6.11.3.4	Total number of records in the statewide union database by language	D					N/A	N/A	N/A	N/A
6.11.3.5	Number of holdings statements in statewide union database for each participating library	D					N/A	N/A	N/A	N/A
6.11.3.6	Total number of library patron logins	D					N/A	N/A	N/A	N/A
6.11.3.7	Total number of library staff logins	D					N/A	N/A	N/A	N/A
6.11.3.8	Total number of simple searches	D					N/A	N/A	N/A	N/A
6.11.3.9	Total number of advanced searches	D					N/A	N/A	N/A	N/A
6.11.3.10	List of all terms used for searching	D					N/A	N/A	N/A	N/A
6.11.3.11	Number of library patron logins broken out by participating library	D					N/A	N/A	N/A	N/A
6.11.3.12	Number of library staff logins broken out by participating library	D					N/A	N/A	N/A	N/A
6.11.3.13	Number of simple searches broken out by participating library	D					N/A	N/A	N/A	N/A

Number	Requirement		Union Catalog <i>staff</i> interface		Union Catalog <i>patron</i> interface		Virtual Catalog <i>staff</i> interface		Virtual Catalog <i>patron</i> interface	
			YES	NO	YES	NO	YES	NO	YES	NO
6.11.3.14	Number of advanced searches broken out by participating library	D					N/A	N/A	N/A	N/A
6.11.3.15	List of all terms used for searching broken out by participating library	D					N/A	N/A	N/A	N/A
6.11.3.16	Total number of holdings added to the statewide union catalog via online method	D					N/A	N/A	N/A	N/A
6.11.3.17	Total number of holdings deleted from statewide union catalog via online method	D					N/A	N/A	N/A	N/A
6.11.3.18	Total number of holdings changed in the statewide union catalog via online method	D					N/A	N/A	N/A	N/A
6.11.3.19	Number of holdings added to the union catalog via online method - broken down by participating library	D					N/A	N/A	N/A	N/A
6.11.3.20	Total number of holdings deleted from statewide union catalog via online method - broken down by participating library	D					N/A	N/A	N/A	N/A
6.11.3.21	Total number of holdings changed via online method broken down by participating library	D					N/A	N/A	N/A	N/A
6.11.3.22	Total number of holdings added via batch method broken down by participating library	D					N/A	N/A	N/A	N/A
6.11.3.23	Total number of holdings deleted via batch method broken down by participating library	D					N/A	N/A	N/A	N/A
6.11.3.24	Total number of bibliographic records submitted via online method broken down by participating library	D					N/A	N/A	N/A	N/A
6.11.3.25	Total number of bibliographic records submitted via batch method broken down by participating library	D					N/A	N/A	N/A	N/A
6.11.3.26	Number of bibliographic records downloaded from the union catalog broken down by participating library	D					N/A	N/A	N/A	N/A
7.0 Technical Requirements: VIRTUAL CATALOG										
7.1 Virtual Catalog Overall Functionality										
7.1.1	Vendor provides a method for authorized library staff to download standard full MARC 21 records from participating hosts in the virtual catalog, for use in local automated catalog projects	O	N/A	N/A	N/A	N/A				
7.1.2	Ability to download MARC records can be “turned on” or authorized on a library-by-library basis	O	N/A	N/A	N/A	N/A				
7.1.3	Permission to download MARC records from the virtual catalog can be “turned on” or authorized on a host-by-host basis	O	N/A	N/A	N/A	N/A				
7.1.4	MARC records can be selected from the virtual catalog and downloaded to a local drive one at a time	D	N/A	N/A	N/A	N/A				
7.1.5	MARC records can be selected from the virtual catalog and placed into a batch, group or “shopping cart” function for downloading to a local drive	D	N/A	N/A	N/A	N/A				

Number	Requirement		Union Catalog staff interface		Union Catalog patron interface		Virtual Catalog staff interface		Virtual Catalog patron interface	
			YES	NO	YES	NO	YES	NO	YES	NO
7.1.6	Batch or group files of MARC records that have been selected for downloading can be:									
7.1.6.1	Viewed online	D	N/A	N/A	N/A	N/A				
7.1.6.2	Printed	D	N/A	N/A	N/A	N/A				
7.1.6.3	Sorted	D	N/A	N/A	N/A	N/A				
7.1.6.4	Edited	O	N/A	N/A	N/A	N/A				
7.1.6.5	Emailed	O	N/A	N/A	N/A	N/A				
7.1.7	Records can be downloaded without any associated holding statements	D	N/A	N/A	N/A	N/A				
7.1.8	Records can be downloaded with all associated holding statements	O	N/A	N/A	N/A	N/A				
7.1.9	Records can be downloaded to include only designated holding statements for the local library	D	N/A	N/A	N/A	N/A				
7.2	Virtual Catalog Management									
7.2.1	Product can automatically check on connectivity status for Z39.50 targets	D	N/A	N/A	N/A	N/A				
7.2.2	Product can use Z39.50 connection status history to determine order of searching	D	N/A	N/A	N/A	N/A				
7.2.3	Product identifies hosts that are not responding, and indicates or flags those sites to the library user	D	N/A	N/A	N/A	N/A				
7.2.4	Product reports hosts that are not responding, and sends an alert to administrative staff at the agency	O	N/A	N/A	N/A	N/A				
7.2.5	Product identifies hosts that are consistently not responding, and eliminates them from searches	O	N/A	N/A	N/A	N/A				
7.2.6	Product ignores sites that do not respond to a given search after a specified time, and displays results from responding hosts	D	N/A	N/A	N/A	N/A				
7.3	Host configuration		N/A	N/A	N/A	N/A				
7.3.1	Product can be configured to allow shorter or longer search timeouts for specific hosts*	D	N/A	N/A	N/A	N/A				
7.3.2	Vendor is able to index the MARC 21 bibliographic data by values in the MARC "fixed fields"*	O	N/A	N/A	N/A	N/A				
7.3.3	Vendor allows the agency to add, revise or delete fields and subfields used for indexing*	O	N/A	N/A	N/A	N/A				
7.3.4	Agency can choose or specify which MARC fields and subfields, or sets of MARC fields and subfields, are mapped for indexing in Author, Title, Subject, Specific Number, or Keyword fields	O	N/A	N/A	N/A	N/A				
7.3.5	Vendor allows creation of customized index points as requested by the agency	O	N/A	N/A	N/A	N/A				
7.4	Virtual Catalog Reports and Statistics									
7.4.1	The following virtual catalog reports of Statewide Summary & Individual participant data are available at the statewide/global level									

Number	Requirement		Union Catalog staff interface		Union Catalog patron interface		Virtual Catalog staff interface		Virtual Catalog patron interface	
			YES	NO	YES	NO	YES	NO	YES	NO
7.4.1.1	Total number of virtual catalog searches	M	N/A	N/A	N/A	N/A				
7.4.1.2	Total number of library patron logins (broken out by library)	M	N/A	N/A	N/A	N/A				
7.4.1.3	Total number of library staff logins (broken out by library)	M	N/A	N/A	N/A	N/A				
7.4.1.4	Total number of advanced searches (broken out by library)	M	N/A	N/A	N/A	N/A				
7.4.1.5	Total number of simple searches (broken out by library)	M	N/A	N/A	N/A	N/A				
7.4.1.6	Total number of times a Z39.50 host was not accessible for searching	M	N/A	N/A	N/A	N/A				
7.4.2	The following virtual catalog reports of Statewide Summary & Individual participant data are available for web display and/or download at the regional level for all member libraries belonging to that group.									
7.4.2.1	Total number of virtual catalog searches	O	N/A	N/A	N/A	N/A				
7.4.2.2	Total number of library patron logins (broken out by library)	O	N/A	N/A	N/A	N/A				
7.4.2.3	Total number of library staff logins (broken out by library)	O	N/A	N/A	N/A	N/A				
7.4.2.4	Total number of advanced searches (broken out by library)	O	N/A	N/A	N/A	N/A				
7.4.2.5	Total number of simple searches (broken out by library)	O	N/A	N/A	N/A	N/A				
7.4.2.6	Total number of times a Z39.50 host was not accessible for searching	O	N/A	N/A	N/A	N/A				
7.4.3	The following virtual catalog reports of Statewide Summary & Individual participant data are available for web display and/or download at the local library level for each participating library.									
7.4.3.1	Total number of virtual catalog searches	D	N/A	N/A	N/A	N/A				
7.4.3.2	Total number of library patron logins (broken out by library)	D	N/A	N/A	N/A	N/A				
7.4.3.3	Total number of library staff logins (broken out by library)	D	N/A	N/A	N/A	N/A				
7.4.3.4	Total number of advanced searches (broken out by library)	D	N/A	N/A	N/A	N/A				
7.4.3.5	Total number of simple searches (broken out by library)	D	N/A	N/A	N/A	N/A				
7.4.3.6	Total number of times a Z39.50 host was not accessible for searching	D	N/A	N/A	N/A	N/A				
7.4.4	Reports and statistics can be exported for use in other programs (such as Crystal Reports, Excel, etc.)	O	N/A	N/A	N/A	N/A				
7.4.5	Reports and statistics can be printed to the screen	O	N/A	N/A	N/A	N/A				
9.0	Testing, Training, Support, Documentation									
9.1	Testing (See Word file)									
9.2	General Training									
9.2.1	Vendor provides a training environment that duplicates as much as possible the live production environment, in which new users can be trained in updating, cataloging and interlibrary loan functions/features without affecting the production database(s)*	D								
9.3	Agency Staff Training									

Number	Requirement		Union Catalog <i>staff</i> interface		Union Catalog <i>patron</i> interface		Virtual Catalog <i>staff</i> interface		Virtual Catalog <i>patron</i> interface	
			YES	NO	YES	NO	YES	NO	YES	NO
9.3.1	Vendor will supply training to agency staff in all configuration options that can be made on a <i>statewide/global</i> level*	M								
9.3.2	Vendor will supply training to agency staff in all configuration options that can be made on a <i>local library</i> level*	M								
9.3.3	Vendor will train agency staff in how to use all functions of the automated systems proposed*	M								
9.3.4	Vendor will train agency staff on all of the methods that can be used to contribute records and holdings to the union catalog*	M								
9.3.5	Vendor will provide training for other trainers ("train the trainer" sessions)*	D								
9.3.6	Vendor will supply agency staff with training materials and/or scripts for training library users	D								
9.3.7	Vendor will supply training to agency staff on site	D								
9.3.8	Vendor will supply training using interactive web training tools (e.g. Placeware, Live Meeting) or an equivalent service available to library staff	O								
9.3.9	Vendor will provide ongoing training over a period of five years as upgrades or changes are made to the product*	D								
9.4	Local Library Training									
9.4.1	Vendor can lead or take part in a minimum of 20 initial training sessions throughout the state for local library staff	D								
9.4.2	Vendor can provide hands-on training in a minimum of 20 initial training sessions for local library staff in training labs around Wisconsin arranged for by the agency	O								
9.4.3	Vendor can provide end-user training materials in the form of instructional video cassettes or DVDs	O								
9.4.4	Vendor can provide on-line tutorials for library users	D								
9.4.5	Vendor can provide copies of <i>standard or generic</i> printed training materials for use in training sessions with local library staff	D								
9.4.6	Vendor can provide copies of printed training materials <i>customized for Wisconsin's</i> implementation for use in training sessions with local library staff	O								
9.4.7	Vendor provides "train the trainer" manuals and/or materials so that regional level library staff or local onsite trainers can train other users	D								
9.4.8	Vendor provides training staff that could provide training for local library staff via compressed video or satellite training sessions	D								
9.4.9	Vendor can provide copies of generic printed training materials for use in training sessions with local library patrons	O								
9.4.10	Vendor can provide copies of printed training materials customized for Wisconsin's implementation for use in training sessions for use in training sessions with local library patrons	O								

Number	Requirement		Union Catalog <i>staff</i> interface		Union Catalog <i>patron</i> interface		Virtual Catalog <i>staff</i> interface		Virtual Catalog <i>patron</i> interface	
			YES	NO	YES	NO	YES	NO	YES	NO
9.5	Support									
9.5.1	Vendor support services are available through an 800 number	M								
9.5.2	Telephone technical support is available to agency staff, Monday through Friday from 7:00 a.m. to 7:00 p.m. (CST and CDT)	M								
9.5.3	Vendor will provide technical support at a level that can diagnose and resolve technical problems in relation to the products and services proposed	M								
9.5.4	Agency staff can contact the vendor support services by email	M								
9.5.5	Agency staff can contact the vendor support services by telephone	M								
9.5.6	Telephone technical support is available to agency staff, Saturday and Sunday from 8:00 a.m. to 5:00 p.m. (CST and CDT)	D								
9.5.7	Telephone technical support is available to agency staff during additional hours*	D								
9.5.8	Telephone technical support is available to local library staff in Wisconsin, Monday through Friday from 7:00 a.m. to 7:00 p.m. (CST and CDT)	O								
9.5.9	Vendor will provide emergency telephone technical support response for agency staff any day during the year*	D								
9.5.10	Vendor will acknowledge procedural or informational requests from agency staff within one hour during working hours	D								
9.5.11	All technical support phone calls will be answered within two minutes of connection*	D								
9.5.12	Vendor will provide a system to record and track all requests (open and closed) for technical support and their status	D								
9.5.13	Technical support staff is available in languages other than English*	O								
9.6	Documentation									
9.6.1	Vendor will provide agency staff with ongoing information about any new products, product or service enhancements, and pricing	M								
9.6.2	Vendor will maintain software version control documentation including any and all customizations made by the vendor to the Agency's system, to ensure that those customizations are retained throughout the continued development of the system in the event of system patches, upgrades, etc.	M								
9.6.3	Vendor will make available current web-based documentation for library staff for the services that are a part of this RFP	M								
9.6.4	Vendor will make available updated and maintained web-based documentation for library patrons for the services that are a part of this RFP	D								

Number	Requirement		Union Catalog <i>staff</i> interface		Union Catalog <i>patron</i> interface		Virtual Catalog <i>staff</i> interface		Virtual Catalog <i>patron</i> interface	
			YES	NO	YES	NO	YES	NO	YES	NO
9.6.5	Vendor supplies at least one copy of its database training manuals and other library user documentation to each Wisconsin library and branch participating under this contract	D								
9.6.6	Vendor will customize documentation to conform to the agency's configuration as mutually agreed to with the vendor	O								
9.6.7	Vendor will permit agency to customize vendor's standard documentation to conform to the agency's configuration as mutually agreed to with the vendor	D								
9.6.8	Vendor will provide short "quick-reference" guides for using the essential features of the library staff interface	O								
9.6.9	Vendor will provide short "quick-reference" guides for using the essential features of the interlibrary loan management system	O								
9.6.10	Documentation for library staff and/or patrons has been subjected to usability testing with library users	D								
10.0	Performance Requirements									
10.1	General Performance									
10.1.1	If system is operated by the vendor, the server is available 24 hours per day 365 days per year with minimal downtime for maintenance*	M								
10.1.2	If system is operated by the vendor, the server is available at least 99% of the time between the hours of 6:00 a.m. and 11:00 p.m. CST/CDT*	M								
10.1.3	Vendor will notify the agency by phone or email of any scheduled downtime 48 hours in advance of the scheduled downtime	M								
10.1.4	Vendor will upgrade underlying infrastructure and server-related hardware as needed to maintain performance standards	M								
10.1.5	Vendor can notify the agency via phone or email of any unscheduled downtime or performance problems as soon as the vendor's staff recognizes the downtime	M								
10.1.6	Whenever possible, scheduled maintenance that affects availability or performance will be performed between 9:00 pm and 6:00 am CST/CDT	M								
10.1.7	Vendor has the capability to determine how many Wisconsin library users are logged into a module at any one time	D								
10.1.8	Vendor has the capability to track Internet outages and problems to assist in diagnosing access and performance problems	D								
10.1.9	Vendor can monitor and troubleshoot the performance of web access servers separately from application servers	D								

Number	Requirement		Union Catalog <i>staff</i> interface		Union Catalog <i>patron</i> interface		Virtual Catalog <i>staff</i> interface		Virtual Catalog <i>patron</i> interface	
			YES	NO	YES	NO	YES	NO	YES	NO
10.1.10	Vendor will log all failures affecting service availability including, but not limited to, time of failure, length of outage, and reason for failure and make these logs available to the agency	D								
10.1.11	Vendor will provide a complete and accurate description of all product upgrades at least four weeks prior to implementation of the upgrade	M								
10.1.12	Vendor will provide agency staff with an opportunity to see and use all upgraded functions/features at least four weeks prior to implementation for library users	D								
10.1.13	Vendor will provide an ongoing or continuous test environment that duplicates as much as possible the live production environment, in which Agency staff can test specific new functions/features	D								
10.2	System Performance									
10.2.1	Vendor's product provides a method for the following monitors of system use:									
10.2.1.1	Peak load times by individual institution and statewide (by day of week and time of day)	M								
10.2.1.2	Average system response time during peak periods	M								
10.2.1.3	Number of times library users tried to connect, but were unable to make a connection	M								
10.2.1.4	Number and type of error messages received by library users due to server malfunction	D								
10.2.1.5	Date of activity	D								
10.2.1.6	Time of activity	D								
10.2.1.7	Error log file	D								
10.2.1.8	Resource allocation	D								

Technical Requirements		Interlibrary Loan Management System	
		YES	NO
8.0	INTERLIBRARY LOAN		
8.1	ILL Overall Functionality		
8.1.1	Product allows library users to access interlibrary loan services via the World Wide Web.	M	
8.1.2	Product allows library users to send and receive requests for loan or copy of materials directly between libraries.	M	
8.1.3	Product allows library patrons to send requests for loan or copy of materials to be mediated by requesting library staff*	M	
8.1.4 REVISED	Product allows patron-initiated request creation to be enabled/disabled at the <i>requesting</i> library level -- (Revised wording to add "requesting")	M	
8.1.5	Product allows library patrons to send requests for loan or copy of materials that are unmediated by requesting library staff*	D	
8.1.6	Product can be configured to allow library staff to designate by loan or media type which requests must be mediated.	D	
8.1.7	Product allows library patrons to check on the status of their own requests via the World Wide Web	D	
8.1.8	Indicate what interlibrary loan management system services your company typically provides:		
8.1.8.1	Server hosting	O	
8.1.8.2	Internet troubleshooting	O	
8.1.8.3	Configuration of features	O	
8.1.8.4	Technical support of state agency personnel	O	
8.1.8.5	End-user training	O	
8.1.8.6	End-user technical support	O	
8.1.9	Indicate what interlibrary loan management services you expect the agency to provide:		
8.1.9.1	Server hosting	O	
8.1.9.2	Internet troubleshooting	O	
8.1.9.3	Configuration of features	O	
8.1.9.4	Technical support of state agency personnel	O	
8.1.9.5	End-user training	O	
8.1.9.6	End-user technical support	O	
8.1.10	Requesting library staff and responding library staff may access and interact on a request at the same time.	O	
8.1.11	Product has a pre-set search session time-out after a period of inactivity*	O	
8.1.12	Product allows the search session time-out to be set at the <i>statewide/global</i> level	O	
8.1.13	Product allows the search session time-out to be set at the <i>local library</i> level	O	
8.1.14	Product allows different search session time-out periods to be set at the <i>statewide/global</i> level for library staff access and for public access.	O	
8.1.15	Product allows different search session time-out periods to be set at the <i>local library</i> level for library staff access and for public access.	O	

Technical Requirements		Interlibrary Loan Management System	
		YES	NO
8.2	Creating ILL requests		
8.2.1	Product allows <i>library staff</i> to create formatted electronic requests from an identified bibliographic record in a union or virtual catalog in order to borrow or copy materials from other libraries.	M	
8.2.2	Product allows <i>library patrons</i> to create formatted electronic requests from an identified bibliographic record in a union or virtual catalog in order to borrow or copy materials from other libraries.	M	
8.2.3	Product allows <i>library staff</i> to create blank formatted electronic requests in order to borrow or copy materials from other libraries.	M	
8.2.4	Product allows <i>library patrons</i> to create blank formatted electronic requests in order to borrow materials from other libraries	M	
8.2.5	Product allows the pre-formatted ILL request form to be customized at the <i>statewide/global</i> level as to:		
8.2.5.1	Which fields are present	D	
8.2.5.2	Which fields are auto-populated	D	
8.2.5.3	Which fields have a designated default value	D	
8.2.5.4	Which fields are mandatory for completion by the requester	D	
8.2.5.5	What text label displays with each field	D	
8.2.6	Product designates a request as either Loan or Copy non-returnable	D	
8.2.7	Product allows a library user to select a service type of Copy non-returnable on either Monograph or Serial requests	D	
8.2.8	Product request form design provides:		
8.2.8.1	Library staff request forms where request data can be entered on a single screen.	D	
8.2.8.2	Library patron request forms where request data can be entered on a single screen.	D	
8.2.8.3	Library staff request forms where data elements are grouped on multiple screens, pages or tabs.	O	
8.2.8.4	Library patron request forms where data elements are grouped on multiple screens, pages or tabs.	O	
8.2.9	Product can be configured so that a copyright compliance statement appears as a warning or popup window for library users prior to submitting a request	O	
8.2.10	Copyright compliance field allows the library user to choose the level of compliance Copyright Law (CCL) or Copyright CONTU Guidelines (CCG) from a pre-set list.	D	
8.2.11	Indicate which ISO data element fields are available on ILL request forms created using the vendor's system.		
8.2.11.1	Requester library name	M	
8.2.11.2	Requester library code	M	
8.2.11.3	Requester library address	D	
8.2.11.4	Requester ship to or delivery address	D	
8.2.11.5	Requester staff initials or name	D	
8.2.11.6	Item author	M	
8.2.11.7	Item title	M	
8.2.11.8 REVISED	Item subtitle (indicate if separate field or combined with Item title field) -- (Explain requirement deleted. No narrative response required)	D	

Technical Requirements		Interlibrary Loan Management System	
		YES	NO
8.2.11.9	Item uniform title	D	
8.2.11.10	Item physical description	M	
8.2.11.11	Item edition	M	
8.2.11.12	Item publisher	M	
8.2.11.13	Item publication date	M	
8.2.11.14	Item place of publication	D	
8.2.11.15	Item series title or no.	D	
8.2.11.16	Item ISBN	M	
8.2.11.17	Item ISSN	M	
8.2.11.18	Item LCCN or other national bibliography number	M	
8.2.11.19	Item author of article	M	
8.2.11.20	Item title of article	M	
8.2.11.21	Item volume (enumeration)	M	
8.2.11.22	Item issue (enumeration)	M	
8.2.11.23	Item publication date of component (chronology)	M	
8.2.11.24	Item pagination	M	
8.2.11.25	Item additional numbers or letters	D	
8.2.11.26	Item copyright compliance declaration	M	
8.2.11.27	Item type of material	M	
8.2.11.28	Item type of media	M	
8.2.11.29	Item type of request (loan/copy)	M	
8.2.11.30	Item verification source	D	
8.2.11.31	Client/patron borrowing note or special instructions	D	
8.2.11.32	Client/patron need by date	M	
8.2.11.33	Client/patron name	M	
8.2.11.34	Client/patron barcode or other unique ID	M	
8.2.11.35	Client/patron street address	M	
8.2.11.36	Client/patron city	M	
8.2.11.37	Client/patron state	D	
8.2.11.38	Client/patron zip	M	
8.2.11.39	Client/patron phone number	M	
8.2.11.40	Client/patron email	M	
8.2.11.41	Client/patron pickup location	M	
8.2.11.42	Requester's library system or regional affiliation	D	
8.2.11.43	Requester's staff borrowing note or special instructions	D	
8.2.11.44	Client/patron fax number	D	
8.2.11.45	Client/patron preferred method of notification (e.g. email, phone, fax, electronic delivery)	D	

Technical Requirements		Interlibrary Loan Management System	
		YES	NO
8.2.11.46	Client/patron preference for “substitute edition” or “this edition only”	D	
8.2.12	Product provides different request form designs with different available data elements for:		
8.2.12.1	Loan requests	O	
8.2.12.2	Copy requests	O	
8.2.12.3	Subject or Reference requests	O	
8.2.12.4	Monograph requests	O	
8.2.12.5	Serial requests	O	
8.2.12.6	Audiovisual requests	O	
8.2.13	Product allows a library patron to create more than one request without having to log in or be authenticated for each request	D	
8.2.14	Request form allows library users to select a preferred pickup location from a menu, which can then be used in the shipping process	D	
8.2.15	Request form allow library users to select a preferred media type from a menu.	D	
8.2.16	Request form allows library users to select an alternate acceptable media type from a menu.	D	
8.2.17	Product can provide an alert or error message to the library patron if the media type requested does not match the physical description in the bibliographic record selected for loan	D	
8.2.18	Library patrons may specify email as their preferred method of being contacted	O	
8.2.19	Library patrons may specify postal mail as their preferred method of being contacted	O	
8.2.20	Library patrons may specify telephone as their preferred method of being contacted	O	
8.2.21	Product can notify library patrons by email of the following conditions:		
8.2.21.1	Item they requested is ready for pickup	D	
8.2.21.2	Item they have on loan is overdue	O	
8.2.21.3	Item they requested is not being authorized by library staff	O	
8.2.21.4	Item they have on loan is being recalled by the lending library	O	
8.2.22	Product can determine if a library user attempts to create an interlibrary loan request for an item that is:		
8.2.22.1	Owned locally in their library	D	
8.2.22.2	Owned by other libraries in the shared automated system of which they are a part	D	
8.2.22.3	Owned by other designated libraries	D	
8.2.23	Indicate what options are available to library staff when product determines that a library user is creating a request for locally held material:		
8.2.23.1	Library staff can override the block on a request by request basis	D	
8.2.23.2	Library staff can cancel or complete the request before it is moved on	D	
8.2.23.3	Library staff can re-search the available catalogs without exiting the request and can “reissue” the request using a different record or different lending string	D	
8.2.24	Product determines if a library user attempts to create an interlibrary loan request for an item that is available in electronic form only.	O	
8.2.25	Product allows library users to indicate a date by which they need the requested item.	M	

Technical Requirements		Interlibrary Loan Management System		
		YES	NO	
8.2.26	Product sets a default need-by date	D		
8.2.27	Product allows library users to change the default need-by date	D		
8.2.28	Product allows library users to indicate a specific need-by date	O		
8.2.29	Product allows library users to choose a need-by date from a preset list of date values*	O		
8.2.30	Product allows library users to enter as text any date they wish in a standard or preset date format	O		
8.2.31	Product allows library users to choose a need-by date from a calendar where users can select any date	O		
8.2.32	Product allows requests to be flagged as rush, or priority based on the need by date*	D		
8.2.33	Product allows library users to determine from the list of holdings on a source bibliographic record, which owning libraries are actually participating in interlibrary loan	D		
8.2.34	Product facilitates creation of multiple requests for a single title (e.g. for book clubs, or class assignments)*	D		
8.3	Routing and Referral of ILL Requests			
8.3.1	Product allows for automatic routing of the requests according to the lender string	M		
8.3.2	Product allows requests to be dynamically processed and available to other participating libraries immediately or in real time	M		
8.3.3	Product allows requests to stay at a responding site in the lender string for a pre-set number of days, after which they are automatically moved on to the next potential lender	M		
8.3.4	Product allows agency staff to set a global number of days in which an unfilled request will expire at any lender and move on to the next potential lender	M		
8.3.5	Product allows agency staff to set the number of days in which an unfilled request will expire and move on to the next potential lender on a location by location basis	D		
8.3.6	Product provides a method of balancing request levels among libraries	D		
8.3.7	Product allows individual participating libraries to set the number of days in which an unfilled request will expire at their location and move on to the next potential lender	O		
8.3.8	Product allows agency staff to set weekly schedules or exception days (e.g. holidays) that are not included or counted in the number of response days at the statewide/global level	O		
8.3.9	Product allows individual participating libraries to set their own weekly schedules or exception days (e.g. holidays) that are not included or counted in the number of response days	O		
8.3.10	Product counts the number of days for all transactions based on calendar days	O		
8.3.11	Product counts the number of days for all transactions based on work week days	O		
8.3.12	Product counts the number of days for all transactions based on work days as defined by agency staff at the <i>statewide/global</i> level	D		
8.3.13	Product counts the number of days for all transactions based on work days as defined by library staff at the <i>local/library</i> level	D		
8.3.14	Product allows library staff at the requesting library to create a lender string with one or more potential lending libraries	D		
8.3.15	Product allows library staff to enter a specified number of potential responders*	O		
8.3.16	Product allows library staff to enter an unlimited number of potential responders to the lender string	O		

Technical Requirements		Interlibrary Loan Management System		
		YES	NO	
8.3.17	Product allows library staff to create a lender string of potential lending libraries from a list of available holding libraries	O		
8.3.18	Product automatically selects potential lending locations based on pre-set requesting library profiles*	D		
8.3.19	Product can be configured or profiled to limit the number of lending locations that the system will automatically select	O		
8.3.20	Product allows a pre-set profile to be configured so that the system will require library users to borrow from their own library or region prior to requesting materials from other libraries outside their region	D		
8.3.21	Product allows library staff at the requesting library to edit the lender string (add, change or delete locations) before the request is sent	D		
8.3.22	Product allows library staff at a participating library to suspend their own library from lending for a specific period of time	D		
8.3.23	Product allows library staff at a participating library to create and maintain multiple suspension periods in a year during which their library is to be skipped from lending	O		
8.3.24	Product skips a suspended library and responds with a message indicating that a potential location in the lending string is suspended when that lending library comes up as the next potential lender in the lending string	D		
8.3.25	Product allows agency staff to set a default calendar of holidays or days closed for routing of requests on a statewide/global level	D		
8.3.26	Product allows library staff to set a default calendar of holidays or days closed for routing of requests on a local lending library level	O		
8.4	Blocking, Skipping or Filtering of ILL Request Locations			
8.4.1	Product can filter or block requests based on the following situations:			
8.4.1.1	If a library is designated as a nonsupplying or non-participating library	M		
8.4.1.2	If a library has temporarily suspended itself from lending	M		
8.4.1.3	If a library's copy of the item is indicated to be not available by the local catalog circulation status	D		
8.4.1.4	If a library has been profiled as not lending a particular type of media, based on the responding library's policy for lending media	D		
8.4.1.5	If a library has been profiled as having a max cost that exceeds the requester's acceptable cost.	D		
8.4.2	Product can be configured to check interlibrary loan policies based on the type of request, and filter out or skip locations from the lending string whose lending policies indicate they do not comply with that type of request*	D		
8.4.3	Product can filter or block requests based on the following media types:			
8.4.3.1	Broad audio-visual materials category	D		
8.4.3.2	Serial	D		
8.4.3.3	Broad sound recording category	D		
8.4.3.4	Compact disc (CD)	D		
8.4.3.5	Audio-cassette	D		
8.4.3.6	Musical sound recording	D		
8.4.3.7	Spoken word sound recording	D		

Technical Requirements			Interlibrary Loan Management System	
			YES	NO
8.4.3.8	Broad film-videorecording category	D		
8.4.3.9	DVD	D		
8.4.3.10	Videocassette	D		
8.4.4	Product can filter or block requests based on the following formats:			
8.4.4.1	Abridged	O		
8.4.4.2	Unabridged	O		
8.4.4.3	Large print	O		
8.4.5	Product can filter or block requests based on the following local holdings situations:			
8.4.5.1	Responder's serial summary holding statement does not match the requested article date	O		
8.4.5.2	Responder's holding statement indicates the item is in Reference, reserves, archives or other non-circulating collection	O		
8.4.6	Product can be configured to limit the number of requests any one library patron can have by maximum outstanding or time period	D		
8.4.7	Product checks prior to a request moving on to a new responder for the following conditions			
8.47.1	Request has passed the stated need-by date	D		
8.47.2	Next potential lender indicates a non-availability status on their Z39.50 host output	D		
8.5	ILL Library Location/Policy Database			
8.5.1	Product maintains a profile database of location information about each participating library location	M		
8.5.2	Product maintains a database of policy or services information about participating library locations	M		
8.5.3	Product allows agency staff to easily change the interlibrary loan status of any library location participating in the system	M		
8.5.4	Product allows library staff at participating libraries to maintain their own data in the <i>location</i> database	D		
8.5.5	Product allows library staff at participating libraries to maintain their own data in the <i>policy</i> database	D		
8.5.6	Product allows library staff to maintain different or separate interlibrary loan policies for different material types or loan types	O		
8.5.7	Each location record in the database indicates the date and time that the record was last updated	D		
8.5.8	Each policy record in the database indicates the date and time that the record was last updated	D		
8.5.9	There is no limitation on the length of the library name or on the type of characters that can be included in a library name (e.g. hyphens, numbers, slashes, commas, etc.)*	D		
8.5.10	Product allows agency staff at the <i>statewide/global</i> level to specify which data elements in the location record are available for viewing and/or editing at the local level	D		
8.5.11	Location database allows library staff to easily edit their own location record to indicate periods of time when their library will be closed, and should be suspended from receiving new requests (e.g. summer for schools, holiday breaks, staff vacations)	D		
8.5.12	Suspension periods require a starting and ending date	D		
8.5.13	When a suspension period is past, the system ignores any suspension, even if the library does not remove it	D		
8.5.14	Location database allows authorized library staff to easily edit location records on behalf of other locations	D		

Technical Requirements			Interlibrary Loan Management System	
			YES	NO
8.5.15	Location database provides the means to use arrays in which to store multiple values (e.g. multiple phone numbers or contact persons)	D		
8.5.16	Location database provides customizable or user defined fields can be defined on a statewide/global level*	D		
8.5.17	User defined fields can be configured or customized to include pulldown menus for entry controlled text	D		
8.5.18	Indicate which location data fields are contained in the library location database:			
8.5.18.1	Location code	M		
8.5.18.2	Location name	M		
8.5.18.3	Alternative location codes, aliases, or symbols used in ISO transactions	M		
8.5.18.4	Current interlibrary loan status (participant, requesting only, etc)	M		
8.5.18.5	Physical address	M		
8.5.18.6	Telephone number	M		
8.5.18.7	Email address	M		
8.5.18.8	Delivery or Ship To address	M		
8.5.18.9	ILL method or protocol used	M		
8.5.18.10	Suspension status	M		
8.5.18.11	Suspension dates	M		
8.5.18.12	Alternative location name	D		
8.5.18.13	Fax number	D		
8.5.18.14	Interlibrary loan contact person	D		
8.5.18.15	Additional contact person	D		
8.5.18.16	Return To address	D		
8.5.18.17	Pickup address	D		
8.5.18.18	Region or system	D		
8.5.18.19	Clearinghouse or referral agent	D		
8.5.18.20	Type of library	D		
8.5.18.21	Free text note or comment field	D		
8.5.18.22	Courier or van delivery route	D		
8.5.18.23	Days that location receives van delivery	O		
8.5.18.24	Hours/days open	O		
8.5.18.25	Web home page URL link	O		
8.5.18.26	Web catalog URL link	O		
8.5.19	Indicate which policy data fields are contained in the library policy database			
8.5.19.1	Material types loaned	M		
8.5.19.2	Will photocopy	M		
8.5.19.3	Lending fee	M		
8.5.19.4	Photocopy fee	M		
8.5.19.5	Photocopy restrictions (e.g. number of pages willing to photocopy)	M		

Technical Requirements			Interlibrary Loan Management System	
			YES	NO
8.5.19.6	Loan period	D		
8.5.19.7	Renewals accepted	D		
8.5.19.8	Renewal period	D		
8.5.19.9	Place holds accepted	D		
8.5.19.10	Free text lending notes	D		
8.5.19.11	Shipping methods accepted or preferred	O		
8.5.19.12	Request methods accepted	O		
8.5.19.13	Service level (rush, etc.) supported	O		
8.5.20	Product allows media type loan policies to be specific to the following format levels:			
8.5.20.1	Printed	D		
8.5.20.2	Photocopy	D		
8.5.20.3	Microform	D		
8.5.20.4	Film-videorecording	D		
8.5.20.5	Audiorecording	D		
8.5.20.6	Machine Readable	D		
8.5.20.7	DVD	D		
8.5.20.8	VHS Videorecording	D		
8.5.20.9	Filmstrip	O		
8.5.20.10	16mm Film	O		
8.5.20.11	Slide	O		
8.5.20.12	Audio Cassette	D		
8.5.20.13	Audio Compact Disc	D		
8.5.20.14	Audio LP Record	D		
8.5.20.15	Kit	O		
8.5.20.16	Microform newspapers	O		
8.5.21	Product allows library staff to search the library location and/or ILL policy database by the following data elements:			
8.5.21.1	Library name	M		
8.5.21.2	Library code	M		
8.5.21.3	Region name or code	D		
8.5.21.4	City	D		
8.5.21.5	Type of lending policy	D		
8.5.21.6	ILL participation level or status	D		
8.5.21.7	Alternate library name	O		
8.5.21.8	ILL protocol in use	D		
8.5.22	Product allows library staff to search the library location and/or ILL policy database using the following search types:			

Technical Requirements			Interlibrary Loan Management System	
			YES	NO
8.5.22.1	Keyword	D		
8.5.22.2	Browse or initial string (first part of term)	D		
8.5.22.3	Exact string	D		
8.5.23	Product allows agency staff at the statewide/global level to determine search defaults for the location and/or ILL policy databases	O		
8.5.24	Product allows agency staff at the local library level to determine search defaults for the location and/or ILL policy databases	O		
8.6	ILL User/Library Patron Validation			
8.6.1	Product protects the confidentiality of the library patron*	M		
8.6.2	Product can utilize existing library patron barcodes for library patron login	D		
8.6.3	Product can use SIP or SIP2 library patron authentication for validating library patron to local file	D		
8.6.4	Product can use NCIP library patron authentication for validating library patron to local file	D		
8.6.5	Product maintains a database of patron users which are validated for sending of requests*	D		
8.6.6 DELETED	If product maintains a patron database, patron file is only accessible to authorized library staff of the library associated with that library patron -- (Question deleted. See narrative for question 8.6.5)			
8.6.7 DELETED	If product maintains a patron database, indicate which of the following data fields are included in the library patron database -- (Question deleted. See narrative for question 8.6.5)			
8.6.7.1 DELETED	Patron surname -- (Question deleted. See narrative for question 8.6.5)			
8.6.7.2 DELETED	Patron barcode -- (Question deleted. See narrative for question 8.6.5)			
8.6.7.3 DELETED	Patron password -- (Question deleted. See narrative for question 8.6.5)			
8.6.7.4 DELETED	Patron category or user privileges -- (Question deleted. See narrative for question 8.6.5)			
8.6.7.5 DELETED	Patron address -- Question deleted. (See narrative for question 8.6.5)			
8.6.7.6 DELETED	Patron telephone number -- (Question deleted. See narrative for question 8.6.5)			
8.6.7.7 DELETED	Patron fax number -- (Question deleted. See narrative for question 8.6.5)			
8.6.7.8 DELETED	Patron E-Mail address -- (Question deleted. See narrative for question 8.6.5)			
8.6.7.9 DELETED	Patron record creation date -- (Question deleted. See narrative for question 8.6.5)			
8.6.7.10 DELETED	Patron preferred method of notification -- (Question deleted. See narrative for question 8.6.5)			

Technical Requirements		Interlibrary Loan Management System	
		YES	NO
8.6.8 DELETED	If product maintains a patron database, indicate which of the following data fields can be searched by library staff -- (Question deleted. See narrative for question 8.6.5)		
8.6.8.1 DELETED	Patron surname -- (Question deleted. See narrative for question 8.6.5)		
8.6.8.2 DELETED	Patron barcode -- (Question deleted. See narrative for question 8.6.5)		
8.6.8.3 DELETED	Patron category or user privileges -- (Question deleted. See narrative for question 8.6.5)		
8.6.8.4 DELETED	Patron record creation date -- (Question deleted. See narrative for question 8.6.5)		
8.6.9 DELETED	If product maintains a patron database, library staff at the local library can create new library patron records associated with their library -- (Question deleted. See narrative for question 8.6.5)		
8.6.10 DELETED	If product maintains a patron database, library staff at local library can edit library patron records associated with their library -- (Question deleted. See narrative for question 8.6.5)		
8.6.11 DELETED	If product maintains a patron database, library staff at local library can delete library patron records associated with their library -- (Question deleted. See narrative for question 8.6.5)		
8.6.12 DELETED	If product maintains a patron database, library staff at local library can merge duplicate library patron records associated with their library -- (Question deleted. See narrative for question 8.6.5)		
8.7	Transmission of ILL Requests		
8.7.1	Product allows for transmission of requests between libraries or a library and a clearinghouse using the Internet or TCP/IP protocol	M	
8.7.2 DELETED	Product allows for transmission of requests between libraries or a library and a clearinghouse using the ISO protocol -- (Question deleted; Duplicate to 8.7.13 & 8.7.14)		
8.7.3	All of the mandatory features of ISO 10161-I are implemented in the vendor's interlibrary loan management product*	M	
8.7.4	Product allows for transmission of requests between participating libraries or a library and a clearinghouse using a Formatted Email or SMTP protocol	D	
8.7.5	Product can send formatted email requests to library participants that do not use the proposed automated resource sharing system	D	
8.7.6	Product allows for unlimited simultaneous connections for transmission purposes	D	
8.7.7	Requests for material can be transmitted to the first potential lender on the lender list without any staff mediation	M	
8.7.8	Indicate which of the following ISO Roles your interlibrary loan management product supports:		
8.7.3.1	Requester	M	
8.7.3.2	Responder	M	
8.7.3.3	Intermediary	D	
8.7.9	Indicate which of the following ISO Service Types your interlibrary loan management product supports:		
8.7.9.1	Loan	M	

Technical Requirements		Interlibrary Loan Management System	
		YES	NO
8.7.9.2	Copy/Non-returnable	M	
8.7.10	Indicate which of the following ISO Transaction Types your interlibrary loan management product supports:		
8.7.10.1	Simple	M	
8.7.10.2	Chained	<input type="radio"/>	
8.7.10.3	Partitioned	<input type="radio"/>	
8.7.11	Indicate which of the following ISO Requester States (statuses) your interlibrary loan management product supports:		
8.7.11.1	Idle	M	
8.7.11.2	Pending	M	
8.7.11.3	Not-supplied	M	
8.7.11.4	Conditional	M	
8.7.11.5	Cancel-pending	M	
8.7.11.6	Cancelled	M	
8.7.11.7	Shipped	M	
8.7.11.8	Received	M	
8.7.11.9	Renew/pending	M	
8.7.11.10	Renew/overdue	M	
8.7.11.11	Overdue	M	
8.7.11.12	Not received/overdue	M	
8.7.11.13	Recall	M	
8.7.11.14	Returned	M	
8.7.11.15	Lost	M	
8.7.12	Indicate which of the following ISO Responder States (statuses) your interlibrary loan management product supports:		
8.7.12.1	Idle	M	
8.7.12.2	In-process	M	
8.7.12.3	Forward	M	
8.7.12.4	Not-supplied	M	
8.7.12.5	Conditional	M	
8.7.12.6	Cancel-pending	M	
8.7.12.7	Cancelled	M	
8.7.12.8	Shipped	M	
8.7.12.9	Renew/pending	M	
8.7.12.10	Renew/overdue	M	
8.7.12.11	Overdue	M	
8.7.12.12	Recall	M	
8.7.12.13	Checked-in	M	

Technical Requirements		Interlibrary Loan Management System	
		YES	NO
8.7.12.14	Lost	M	
8.7.13 REVISED	Product allows for transmission of requests <i>to the lender between from locations external to the product</i> using the ISO ILL protocol as a lender -- (Revised wording to add "to the lender from locations external to the product")	M	
8.7.14 REVISED	Product allows for transmission of requests <i>to the borrower between from locations external to the product</i> using the ISO ILL protocol as a lender -- (Revised wording to add "to the borrower from locations external to the product")	M	
8.7.15	Product allows for sending of requests from libraries using the vendor's ILL management system directly to potential responding libraries that do not use the vendor's ILL management system via ISO ILL protocol.	D	
8.7.16	Indicate all ILL management systems to which the vendor has successfully transmitted requests as a <i>REQUESTER</i> in a production environment.		
8.7.16.1	Worldcat Resource Sharing (WRS)	D	
8.7.16.2	OCLC ILLiad	D	
8.7.16.3	Auto-Graphics	O	
8.7.16.4	Fretwell-Downing	O	
8.7.16.5	Clio	O	
8.7.16.6	Sirsi/Dynix	O	
8.7.16.7	Innovative Interfaces	O	
8.7.16.8	TLC/Carl	O	
8.7.16.9	Endeavor	O	
8.7.16.10	DOCLINE	D	
8.7.17	Indicate all ILL management systems to which the vendor has successfully transmitted requests as a <i>RESPONDER</i> in a production environment		
8.7.17.1	Worldcat Resource Sharing (WRS)	D	
8.7.17.2	OCLC ILLiad	D	
8.7.17.3	Auto-Graphics	O	
8.7.17.4	Fretwell-Downing	O	
8.7.17.5	Clio	O	
8.7.17.6	Sirsi/Dynix	O	
8.7.17.7	Innovative Interfaces	O	
8.7.17.8	TLC/Carl	O	
8.7.17.9	Endeavor	O	
8.7.17.10	DOCLINE	D	
8.7.18	Product has the ability to allow responders to send electronic documents as email attachments	D	
8.7.19	Product has the ability to allow responders to send electronic documents to an FTP site for email notification	D	
8.7.20	Product supports sending scanned images to fill an ILL copy request	D	

Technical Requirements			Interlibrary Loan Management System	
			YES	NO
8.7.21	Product supports the transfer of electronic documents in compliance with ISO 17933, General Electronic Document Interchange (GEDI) protocol	D		
8.7.22	Indicate with which products the product has been tested and proven compatible:			
8.7.22.1	Ariel	O		
8.7.22.2	Prospero	O		
8.7.22.3	DocView (word processing files, text files, rich text format files, or HTML files)	O		
8.7.22.4	Docmorph (word processing files, text files, rich text format files, or HTML files)	O		
8.7.23	Product allows library users to place holds on the automated library system of the library holding the item	D		
8.7.24	Product can exchange appropriate transaction messages with a local NCIP compliant circulation system to change the status of an item when:			
8.7.24.1	Item is actioned to Shipped in the ILL system	D		
8.7.24.2	Item is actioned to Returned in the ILL system	D		
8.7.24.3	Item is actioned to Checked In in the ILL system	D		
8.7.24.4	Item is actioned to Overdue in the ILL system	D		
8.7.24.5	Item is actioned to Renewed in the ILL system	D		
8.8	Managing ILL Requests			
8.8.1	Product maintains a database of requester and responder requests	M		
8.8.2	Product allows library staff to process like transactions in a batch or bulk process	M		
8.8.3	Product allows library staff to view the current status of each request online	M		
8.8.4	Product allows library staff to batch requests and update statuses in batch mode -- (Question deleted. DELETED Duplicate to 8.8.2)			
8.8.5	Product provides an action that allows a request to remain at a location indefinitely if library staff at the responding location wish to retain it while they refer to a non-participating library.	D		
8.8.6	Product allows a responding library to change the service type of a request, if they are supplying a different type of material (e.g. if request is for a Non-returnable, but the library is supplying an item for Loan)	D		
8.8.7	Product allows a requesting library to change the service type of a request, if they have received a different type of material than requested. (e.g. if request is for a loan, but the responder supplied a Non-returnable photocopy)	D		
8.8.8	Product allows library staff to limit the number of requests a library patron can make or have active at any given time, on a library-by-library basis.	D		
8.8.9	Product allows the database of requests to be accessed by both creating site and borrowing site, if those are different.	D		
8.8.10	Product allows library staff to view a list or table of requests they have made (as a requesting library) based on certain statuses	M		
8.8.11	Product allows library staff to view a single list/chart or multiple lists/charts on a single screen, of requests they have made or received based on certain statuses. (workqueue / status browse / resource sharing list)	D		
8.8.12	Product allows library staff to click on a link from a status list in order to display those requests	D		
8.8.13	Indicate which request statuses display in the standard requester workflow table/list display:			

Technical Requirements			Interlibrary Loan Management System	
			YES	NO
8.8.13.1	Cancel pending	D		
8.8.13.2	Lost	D		
8.8.13.3	Not supplied	D		
8.8.13.4	Pending	D		
8.8.13.5	Received	D		
8.8.13.6	Returned	D		
8.8.13.7	Shipped	D		
8.8.13.8	Messages	D		
8.8.14	Product allows library staff to view a list or table of requests they have received (as a responding library) based on certain statuses	M		
8.8.15	Indicate which request statuses display in the standard responder workflow table/list display:			
8.8.15.1	Cancel pending	D		
8.8.15.2	Checked-in	D		
8.8.15.3	In-Process	D		
8.8.15.4	Lost	D		
8.8.15.5	Not supplied	D		
8.8.15.6	Overdue	D		
8.8.15.7	Recall	D		
8.8.15.8	Renew/Pending	D		
8.8.15.9	Shipped	D		
8.8.15.10	Messages	D		
8.8.16	Agency staff at the statewide/global level can determine or customize which statuses display in the requesting and responding workflow tables	O		
8.8.17	Product can alert the mediating library staff or provide an error message if the media type requested on a specific request does not match the physical description in the bibliographic record selected for loan	D		
8.8.18 DELETED	Product allows requesting library staff to change the service type of a request they are receiving, if they requested a specific type of material, but have received a different type (e.g. if request is for a photocopy but were sent a loanable item) -- (Question deleted. Duplicate to 8.8.7)			
8.8.19	Product allows library staff to navigate from a request in the ILL management system, back to the corresponding bibliographic record and holdings display in the union/virtual catalog for verification purposes	D		
8.8.20	Product displays or permits only those actions that are allowable for a given request at any point in the transaction	D		
8.8.21	Product can check for duplicate requests by the same library patron and alert requesting library staff for mediation	D		
8.8.22	Product maintains a history of requests showing which libraries have processed the request and any reasons the request was not filled	D		
8.8.23	Product automatically converts request status from filled to complete in a pre-set number of days.	D		

Technical Requirements			Interlibrary Loan Management System	
			YES	NO
8.8.24	Product automatically removes from the active data file, any canceled and completed requests within one day of being given a complete status	D		
8.8.25	Product allows agency staff at the <i>statewide/global</i> level to batch purge completed transactions by a variety of criteria such as time period or status.	O		
8.8.26	Product allows <i>local library</i> staff to batch purge completed transactions by a variety of criteria such as time period or status	O		
8.8.27	Product deletes from the system all requests that have completed the lending string after a preset number of days	D		
8.8.28	Product deletes from requests all library patron specific data after a preset number of days that those requests have been completed or are no longer active in the system	D		
8.8.29	Product allows the agency to determine the length of time that library patron data is maintained with requests	D		
8.8.30	Product can automatically generate an email library user alert to the library patron for the following conditions:			
8.8.30.1	When a requested item is updated to received at the requesting library	D		
8.8.30.2	When a borrowed item is updated to overdue	D		
8.8.30.3	When a borrowed item is updated to recall	D		
8.8.30.4	When a requested item is updated to unfilled as a final transaction	D		
8.8.30.5	When a requested item is updated to unauthorized by the library patron's home requesting library	D		
8.8.31	Product can automatically generate an email alert to library staff at a responding library (for low volume or infrequent responding libraries, so they do not have to check for new activity every day), for the following conditions:			
8.8.31.1	When a new pending request is received	D		
8.8.31.2	When a new cancel pending transaction is received	D		
8.8.31.3	When a new renew pending transaction is received	D		
8.8.32	Product can automatically send an email alert to the library staff at a requesting library (for low volume or infrequent requesting libraries, so they do not have to check for new activity every day), for the following conditions:			
8.8.32.1	When a new library patron request is received and needs to be mediated	O		
8.8.32.2	When a requested item is updated to unfilled as a final transaction	O		
8.8.32.3	When a borrowed item is updated to overdue	O		
8.8.32.4	When a borrowed item is updated to recall	O		
8.8.33	Product allows agency staff at the <i>statewide/global</i> level to customize the email alert messages to library patrons at the <i>statewide/global</i> level	D		
8.8.34	Product allows agency staff at the <i>statewide/global</i> level to customize the email alert messages to library staff at requesting and responding libraries	D		
8.8.35	Product allows library staff at the local library level to customize the email alerts to library patrons	O		
8.8.36	Product supports and facilitates interlibrary loan standard reply codes	D		
8.8.37	Product displays call number at the lending library	D		

Technical Requirements		Interlibrary Loan Management System	
		YES	NO
8.8.38	Product allows library patrons to initiate their own renewal requests	D	
8.8.39	Library patron's renewal request is mediated by their home library before being transmitted to the lending library	D	
8.8.40	Library patrons can view the status of the renewal request	D	
8.8.41	Product allows the library patron renewal function to be activated or not activated on a library by library basis	O	
8.8.42	Product allows library staff to designate alternative shipping options, such as:		
8.8.42.1	Lending library directly to requesting library	D	
8.8.42.2	Lending library to another library that works cooperatively with another library in a community to delivery materials	D	
8.8.42.3	Lending library directly to library patron (for copy requests)	D	
8.8.43 REVISED	Product allows library staff to undo the last update action taken, in order to correct an error: for example, if an item is incorrectly marked shipped* Explain how this is done or if there is a timeframe for the undo action -- (Explain requirement deleted. Added asterisk (*) for narrative explanation)	D	
8.8.44	Product allows library staff to indicate that a fee is charged for lending	D	
8.8.45	Borrowing library can set a limit of maximum cost it wishes to pay for a filled request	D	
8.8.46	Lending library can input the fee they charge a borrowing library for a filled request	D	
8.8.47	Product alerts lending library staff of lending requests on their last referral day	O	
8.8.48	Indicate what action the system takes when product determines that a library user is creating a request for an item that is only available in electronic form:		
8.2.48.1	System alerts the library user and blocks the library user from making that request	O	
8.2.48.2	System alerts the library user but allows the library user to create the request anyway	O	
8.2.48.3	System blocks the library user from making the request	O	
8.2.48.4	System does not alert the library user, but informs the library staff at the requesting library that a library patron has requested electronic material	O	
8.8.49	Product allows library staff at the requesting library to edit or delete request information anytime during the life of the request	D	
8.9	Clearinghouse Functions		
8.9.1	Product allows clearinghouse staff to create requests on behalf of another library	D	
8.9.2	Product allows clearinghouse staff to create requests on behalf of multiple originating libraries without the need to log in and out separately as each local library	D	
8.9.3	Product allows requests created by a clearinghouse on behalf of another library to be shipped directly to the original requesting library rather than to the clearinghouse	D	
8.9.4	Product allows requests created by a clearinghouse on behalf of another library to be shipped to the central clearinghouse	D	
8.9.5	Product allows each library to be assigned a default responding location where requests are automatically routed if the library wishes to have another location manage the interlibrary loan responding for their library	D	
8.9.6	Product allows clearinghouse staff to respond to incoming requests on behalf of another library	D	
8.9.7	Product allows clearinghouse staff to manage requests for multiple originating libraries without the need to log in and out separately as each local library	D	

Technical Requirements		Interlibrary Loan Management System	
		YES	NO
8.9.8	Product allows each library to be assigned a default clearinghouse location where requests are automatically routed if no other library is designated in the request string	D	
8.9.9	Product allows each library to be assigned a hierarchy of multiple default clearinghouse locations where requests are automatically routed in a pre-determined order if no other library is designated in the request string	D	
8.9.10	Product allows library users to create and submit a request with no holding locations, to be automatically sent to a default clearinghouse(s) for verification and referral	D	
8.9.11	Product allows clearinghouse staff to refer a request to another location(s) either inside the interlibrary loan system or via ISO without re-keying the request	D	
8.9.12	Product allows clearinghouse staff to edit any bibliographic information on a request they have received prior to their referral of the request to other potential responding locations	D	
8.9.13	Product allows clearinghouse staff to edit or adjust the lending string on a request they have received, in order to refer the request on to another location(s)	D	
8.9.14	Product allows clearinghouse staff to place a request into a status that will permit the request to remain at the clearinghouse location while staff manually refer the request to libraries not directly participating in the interlibrary loan management system	D	
8.9.15	Product allows new pending requests at a clearinghouse to be automatically changed to a status that will allow them to remain at the clearinghouse location while staff manually refer the request off system	D	
8.9.16	Product displays a message/note to requesting library staff, on requests that have been held at a clearinghouse to indicate that the request may be in referral to multiple libraries, and a delayed final reply should be expected	D	
8.9.17	Product displays a message/note to requesting library patron users, on requests that have been held at a clearinghouse to indicate that the request may be in referral to multiple libraries, and a delayed final reply should be expected	D	
8.9.18	Product allows clearinghouse staff to view the full lender string on a request they are referring for another library, to identify locations the request has already been, along with the reasons that the request was not filled at those earlier location	D	
8.9.19	Product allows any ILL fees incurred for a referred request to be charged to the clearinghouse location rather than back to the original requesting library	D	
8.9.20	Product allows actions that occur on a request that has been referred by a clearinghouse to be viewed by originating library	D	
8.9.21	Product allows statuses that change on a request that has been referred by a clearinghouse to be viewed by originating library	D	
8.9.22	Product allows actions that occur on a request that has been referred by a clearinghouse to be viewed by the requesting patron at the originating library	D	
8.9.23	Product allows statuses that change on a request that has been referred by a clearinghouse to be viewed by the requesting patron at the originating library	D	
8.9.24	Product allows clearinghouse staff to check the status of requests that it has referred for other libraries without the need to log in and out separately as each local library	D	

Technical Requirements			Interlibrary Loan Management System	
			YES	NO
8.9.25	Product allows clearinghouse staff to make a decision on a request by request basis whether and where to refer each request	D		
8.9.26	Product allows some or all new pending requests at a clearinghouse to be automatically referred to another site based on profile	D		
8.9.27	Product allows original requesting library to be informed that their request has been referred by a clearinghouse to another location	D		
8.9.28	Product allows referred requests that have been filled to indicate to the original requesting library, which library actually lent the material to them	D		
8.9.29 REVISED	Product allows pick lists, shipping lists, and any other workflow reports associated with a referred report request to accurately reflect the actual original requesting library and the actual responding library -- (Typo. Revised wording to change "report" to "request")	D		
8.9.30 REVISED	Product allows pick lists, shipping lists, and any other workflow reports associated with a referred report request to accurately reflect the actual original requesting library's shipping address and the actual responding library's address - (Typo. Revised wording to change "report" to "request")	D		
8.9.31	Product allows requests that are being referred by a clearinghouse to use the same profiling and automatic routing features as are in effect for the original requesting library	D		
8.9.32	Product allows clearinghouse staff to invoke different profiling and automatic routing features on requests they are referring than are in effect for the original requesting library	D		
8.10	Searching the Requests Database			
8.10.1	Request database can be searched by one or a combination of the following data elements:			
8.10.1.1	Requester ILL number	M		
8.10.1.2	Responder ILL number	M		
8.10.1.3	Requesting library	M		
8.10.1.4	Responding library	M		
8.10.1.5	Status of request	M		
8.10.1.6	Request title	M		
8.10.1.7	Patron surname	M		
8.10.1.8	Creating location or clearinghouse (if different from requesting library)	D		
8.10.1.9	Borrowing library	D		
8.10.1.10	Patron barcode	D		
8.10.1.11	Patron category, dept. or type	O		
8.10.1.12	Request author	D		
8.10.1.13	Item call number	O		
8.10.1.14	Creation date or date range	D		
8.10.1.15	Type of request	D		
8.10.2	Product allows the request database to be searched using the following methods:			
8.10.2.1	Keyword search of all indexed fields	D		

Technical Requirements		Interlibrary Loan Management System	
		YES	NO
8.10.2.2	Initial string/browse/scan search of all indexed fields	O	
8.10.2.3	Adjacent word search of all indexed fields	O	
8.10.2.4	Use of wildcard characters in all indexed fields	O	
8.10.3	Product allows agency staff at the <i>statewide/global</i> level to determine search defaults for the request database	O	
8.10.4	Product allows library staff at the <i>local library</i> level to determine search defaults for the request database	O	
8.11	Display of Requests		
8.11.1	Product returns a brief list display of active requests	D	
8.11.2	Product allows agency staff to customize the brief display as to fields and data displayed, at the <i>statewide/global</i> level	O	
8.11.3	Library staff can take appropriate actions on the requests from the brief display list	D	
8.11.4	Library staff can see a more detailed view of the request by clicking on it from the brief display screen	D	
8.11.5	Product returns a full request display of active requests that includes all bibliographic data contained in the request	D	
8.12	Tracking Requests		
8.12.1	Product allows agency staff to track and record evidence of copyright compliance at the <i>statewide/global</i> level*	O	
8.12.2	Product allows each participating library's staff to track and record evidence of copyright compliance at the <i>local library</i> level	D	
8.12.3	Product allows library patrons to log in via the World Wide Web to check status or track their own requests	D	
8.12.4	Product restricts library patron status checking to be password protected for the privacy of the library patron	D	
8.12.5	Product allows status messages and field labels that are visible to library patrons, to be customized by agency staff at the <i>statewide/global</i> level	D	
8.13	Printing		
8.13.1	Product allows library staff to print interlibrary loan requests from the database one at a time as a result of a search	M	
8.13.2	Product allows for printing all data elements available on each type of request	M	
8.13.3	Product prints new pending requests as a group of "pick slips" for retrieval of items	M	
8.13.4	Product prints pending requests based on date received	M	
8.13.5	Product prints pending requests based on current status	M	
8.13.6	Product allows for printing of a list of brief records	D	
8.13.7	Product allows agency staff to configure at the <i>statewide/global</i> level, the number of requests that will be printed per page	D	
8.13.8	Product allows library staff to profile at the <i>local library</i> level, the number of requests that will be printed per page	D	
8.13.9	Product formats pending requests for printing to include relevant data elements	O	
8.13.10	Product re-sets requests for printing again, if they have been changed once the responder originally printed the pending request, alerting library staff that it is a changed request	O	
8.13.11	Agency staff can customize or specify at the <i>statewide/global</i> level, <i>which data elements</i> to print on pick slips	D	

Technical Requirements			Interlibrary Loan Management System	
			YES	NO
8.13.12	Agency staff can customize or specify at the statewide/global level, the <i>placement of data elements</i> on the printed pick slips	D		
8.13.13	System uses an alert flag or other display mechanism to indicate requests in the pick list that have a rush priority, or that have a short need by date	D		
8.13.14	Indicate whether the product uses any of the following printed reports:*			
8.13.14.1 REVISED	Pick List report -- (Requirement level revised from Optional to Desired)	D		
8.13.14.2	Shipping List report	D		
8.13.14.3	Received List report	D		
8.13.14.4	Returned List report	O		
8.13.15 REVISED	If product uses a formatted pick list report <i>or uses full request printouts in lieu of a formatted picklist</i> , indicate whether the following ISO data elements print on the standard pick list: -- (Revised wording to include "or uses full request printouts in lieu of a picklist")			
8.13.15.1	Responder ILL number	D		
8.13.15.2	Requester ILL number	D		
8.13.15.3	Requester library name	D		
8.13.15.4	Requester library code	D		
8.13.15.5	Requester library address	D		
8.13.15.6	Requester ship to or delivery address	D		
8.13.15.7	Requester staff initials or name	D		
8.13.15.8	Item author	D		
8.13.15.9	Item title	D		
8.13.15.10	Item subtitle (indicate if separate field or combined with Item title field)	D		
8.13.15.11	Item uniform title	D		
8.13.15.12	Item physical description	D		
8.13.15.13	Item edition	D		
8.13.15.14	Item publisher	D		
8.13.15.15	Item publication date	D		
8.13.15.16	Item place of publication	D		
8.13.15.17	Item series title or no.	D		
8.13.15.18	Item ISBN	D		
8.13.15.19	Item ISSN	D		
8.13.15.20	Item LCCN or other national bibliography number	D		
8.13.15.21	Item author of article	D		
8.13.15.22	Item title of article	D		
8.13.15.23	Item volume (enumeration)	D		
8.13.15.24	Item issue (enumeration)	D		

Technical Requirements		Interlibrary Loan Management System	
		YES	NO
8.13.15.25	Item publication date of component (chronology)	D	
8.13.15.26	Item pagination	D	
8.13.15.27	Item additional numbers or letters	D	
8.13.15.28	Item copyright compliance declaration	D	
8.13.15.29	Item type of material	D	
8.13.15.30	Item type of media	D	
8.13.15.31	Item type of request (loan/copy)	D	
8.13.15.32	Item verification source	D	
8.13.15.33	Item local call number	D	
8.13.15.34	Other item fields: List	D	
8.13.15.35	Client/patron borrowing note or special instructions	D	
8.13.15.36	Client/patron need by date	D	
8.13.15.37	Client/patron name	D	
8.13.15.38	Client/patron barcode or other unique ID	D	
8.13.15.39	Client/patron street address	D	
8.13.15.40	Client/patron city	D	
8.13.15.41	Client/patron state	D	
8.13.15.42	Client/patron zip	D	
8.13.15.43	Client/patron phone number	D	
8.13.15.44	Client/patron email	D	
8.13.15.45	Client/patron pickup location	D	
8.13.16 REVISED	If product uses a formatted pick list report <i>or uses full request printouts in lieu of a picklist</i> , indicate whether the following non-ISO data elements print on the standard picklist: -- (Revised wording to include "or uses full request printouts in lieu of a picklist")		
8.13.16.1	Requester's library system or regional affiliation	O	
8.13.16.2	Requester's staff borrowing note or special instructions	O	
8.13.16.3	Client/patron preferred method of notification (e.g. email, phone, fax, electronic delivery)	O	
8.13.16.4	Client/patron preference for "substitute edition" or "this edition only"	O	
8.13.17 REVISED	If product uses a formatted <i>shipping list</i> report <i>or uses full request printouts in lieu of a shipping list</i> , indicate whether the following data elements print on the standard shipping list: -- (Revised wording to include "or uses full request printouts in lieu of a shipping list")		
8.13.17.1	Requester ILL number	D	
8.13.17.2	Requester library name	D	
8.13.17.3	Requester library code	D	
8.13.17.4	Requester library address	D	
8.13.17.5	Requester ship to or delivery address	D	
8.13.17.6	Responder ILL number	D	

Technical Requirements		Interlibrary Loan Management System	
		YES	NO
8.13.17.7	Responder library name	D	
8.13.17.8	Responder library code	D	
8.13.17.9	Responder library address	D	
8.13.17.10	Item author	D	
8.13.17.11	Item title	D	
8.13.17.12	Item physical description	D	
8.13.17.13	Item edition	D	
8.13.17.14	Item publisher	D	
8.13.17.15	Item publication date	D	
8.13.17.16	Item author of article	D	
8.13.17.17	Item title of article	D	
8.13.17.18	Item volume (enumeration)	D	
8.13.17.19	Item issue (enumeration)	D	
8.13.17.20	Item publication date of component (chronology)	D	
8.13.17.21	Client/patron need by date	D	
8.13.17.22	Client/patron name	D	
8.13.17.23	Client/patron barcode or other unique ID	D	
8.13.17.24	Client/patron phone number	D	
8.13.17.25	Client/patron email	D	
8.13.17.26	Client/patron pickup location	D	
8.13.18	If product uses a formatted <i>received list</i> report indicate whether the following data elements print on the standard report:		
8.13.18.1	Requester ILL number	D	
8.13.18.2	Responder ILL number	D	
8.13.18.3	Responder library name	D	
8.13.18.4	Responder library code	D	
8.13.18.5	Item author	D	
8.13.18.6	Item title	D	
8.13.18.7	Item physical description	D	
8.13.18.8	Client/patron need by date	D	
8.13.18.9	Client/patron name	D	
8.13.18.10	Client/patron barcode or other unique ID	D	
8.13.18.11	Client/patron phone number	D	
8.13.18.12	Client/patron email	D	
8.13.18.13	Client/patron pickup location	D	
8.13.19	Product prints pickslips or requests based on date action was taken	D	
8.13.20	Product allows pick slips to be printed in call number order	D	

Technical Requirements		Interlibrary Loan Management System	
		YES	NO
8.13.21	Product allows pick slips to be printed in alphabetical title order	O	
8.13.22	Product allows slips or labels to be customized by agency staff at the <i>statewide/global</i> level as to sort and print order	D	
8.13.23	Product allows slips or labels to be customized by agency staff at the statewide/global level, as to selection and placement of data elements	D	
8.13.24	Product slips/labels/workflow printouts allow for numerical data elements (e.g. request numbers) to print as barcodes fonts.	D	
8.13.25	Product allows for slips or lists to be printed one request per page	D	
8.13.26	Product allows for slips or lists to be printed with multiple requests per page	D	
8.13.27	Product allows for workflow reports or lists (i.e. pick slips, shipping, received, returned lists) to be printed or re-generated again after the initial printing	D	
8.14	Interlibrary Loan Reports and Statistics		
8.14.1	The following ILL reports of <u>Statewide Summary</u> & <u>Individual participant</u> data are available at the statewide/global level.		
8.14.1.1	Overall statewide ILL activity (total number of requests created and total number of requests filled)	M	
8.14.1.2	Date and time of each ILL request sent (to determine times of most activity)	M	
8.14.1.3	Total number of requests re-sent or referred by a location by type of request (monograph, serial, audiovisual, reference), and by specified date range	M	
8.14.1.4	Total number of requests sent to each location by specified date range	M	
8.14.1.5	Total number of requests received by each location, by specified date range	M	
8.14.1.6	Total number of requests filled by each location by specified date range	M	
8.14.1.7	Total number of days between the date each request was created and date that request was filled by each location by specified date range	M	
8.14.1.8	Total number of days between the date each request was created and the date that request receives an unavailable status by each library, system, or clearinghouse by specified date range	M	
8.14.1.9	Number of requests filled - broken out by each library as borrower	M	
8.14.1.10	Number of requests received - broken out by each library as a lender	M	
8.14.1.11	Number of requests filled - broken out by each library as a lender	M	
8.14.1.12	Total number of requests generated by library patrons	M	
8.14.1.13	Number of requests generated by library patrons – broken out by each library	M	
8.14.1.14	Total number of requests cancelled	M	
8.14.1.15	Total number of requests expired as lender	M	
8.14.1.16	Average turnaround time for filled requests - broken out by each library	M	
8.14.1.17	Average turnaround time for unfilled requests - broken out by each library	M	
8.14.2	The following ILL reports of <u>Individual Participant</u> data are available for web display and/or download at the <i>local library</i> level for each participating library		

Technical Requirements			Interlibrary Loan Management System	
			YES	NO
8.14.2.1	Total number of requests re-sent or referred by a location by type of request (monograph, serial, audiovisual, reference), and by specified date range	D		
8.14.2.2	Total number of requests sent to each location by specified date range	D		
8.14.2.3	Total number of requests received by each location, by specified date range	D		
8.14.2.4	Total number of requests filled by each location by specified date range	D		
8.14.2.5	Total number of days between the date each request was created and date that request was filled by each location by specified date range	D		
8.14.2.6	Total number of days between the date each request was created and the date that request receives an unavailable status by each library, system, or clearinghouse by specified date range	D		
8.14.2.7	Number of requests filled - broken out by each library as borrower	D		
8.14.2.8	Number of requests received - broken out by each library as a lender	D		
8.14.2.9	Number of requests filled - broken out by each library as a lender	D		
8.14.2.10	Number of requests generated by library patrons – broken out by each library	D		
8.14.2.11	Total number of requests cancelled	D		
8.14.2.12	Total number of requests expired as lender	D		
8.14.2.13	Average turnaround time for filled requests - broken out by each library	D		
8.14.2.14	Average turnaround time for unfilled requests - broken out by each library	D		
8.14.3	The following ILL reports of <u>Regional Summary & Individual Participant</u> data are available for web display and/or download at the <i>regional level</i> for all member libraries belonging to that group			
8.14.3.1	Overall regional ILL activity (total number of requests created and total number of requests filled)	O		
8.14.3.2	Total number of requests re-sent or referred by all libraries in the specified regional group by type of request (monograph, serial, audiovisual, reference), and by specified date range	O		
8.14.3.3	Total number of requests sent to each location in the specified regional group by specified date range.	O		
8.14.3.4	Total number of requests received by each location in the specified regional group, by specified date range	O		
8.14.3.5	Total number of requests filled by each location in the specified regional group by specified date range	O		
8.14.3.6	Number of requests generated by library patrons – broken out by each library in the specified regional group	O		
8.14.3.7	Average turnaround time for filled requests - broken out by each library in the in the specified regional group	O		
8.14.3.8	Average turnaround time for unfilled requests - broken out by each library in the in the specified regional group	O		
8.15	Other Reports and Statistics			
8.15.1	Product can produce a report of libraries that are temporarily suspended from interlibrary loan participation, with the date range of their suspension.	O		
8.15.2	Product can produce a list report of participating libraries with their own specific or profiled preferred lender list	O		
8.15.3	Product can produce a report to track copyright usage (CCG) on filled requests (including book copies)	O		
8.15.4	Product can produce a monthly list report of the 100 titles most often requested for that month.	O		
8.15.5	Product can produce a monthly report of 100 titles most often requested for that month – broken out by media type (e.g. books, music CDs, DVDs, serials)	O		
8.15.6	Reports and statistics can be exported for use in other programs (such as Crystal Reports, Excel, etc.)	D		

	Technical Requirements		Interlibrary Loan Management System	
			YES	NO
8.15.7	Reports and statistics can be printed to the screen	D		

Number	Technical Requirements		Portal patron interface		Portal staff interface		Cataloging staff interface	
			YES	NO	YES	NO	YES	NO
11.0	USER INTERFACE							
11.1	Access							
11.1.1	Product has a web-based graphical user search interface	M						
11.1.2	Product has been tested and is fully functional with Internet Explorer*	M						
11.1.3	Product has been tested and is fully functional with Netscape Navigator*	D						
11.1.4	Product has been tested and is fully functional with Mozilla (Firefox)*	D						
11.1.5	Product has been tested and is fully functional with browsers in the Macintosh environment*	O						
11.1.6	Product has been tested with text-based web browsers*	O						
11.1.7 REVISED	Product offers a Windows-based client application (aka "fat client") for some or all functionality -- (Question will only be scored for Cataloging Interface, not for Portal Interface)	D	N/A	N/A	N/A	N/A		
11.1.8	Product requires additional browser "plugins" or "viewers" to operate fully*	O						
11.1.9	Product offers keyboard equivalents for all actions that can be performed with a mouse*	O						
11.1.10 REVISED	Product has other customized user interfaces available, such as children's catalog or foreign language interfaces* -- (Question will only be scored for Portal Interface, not for Cataloging Interface)	D					N/A	N/A
11.1.11	Product allows for profiling or "branding" by agency staff at the <i>statewide/global</i> level*	D						
11.1.12	Product allows for profiling or "branding" at the regional or <i>local library</i> level*	O						
11.1.13	Product has a pre-set search session time-out after a period of inactivity*	O						
11.1.14	Product allows agency staff at the <i>statewide/global</i> level to set or change the session time-out period	D						
11.1.15	Product allows library staff at the <i>local library</i> level to set or change the session time-out period	O						
11.1.16 REVISED	Product allows different search session time-out to be set for library staff access than for public access level -- -- (Question will only be scored for Portal Interface, not for Cataloging Interface)	D					N/A	N/A
11.1.17	Product allows user preferences to be set so that individual library users may change the look and feel of the product (for a "my library" or "my portal" feature)	O						
11.1.18	Product includes a library user feedback/comment feature that allows library users to email agency support personnel at the <i>statewide/global</i> level	D						
11.1.19	Product includes a library user feedback/comment feature that can be customized at the local library level to allow library users to email support personnel at the <i>local library</i> level	O						
11.2	Searching & Display							
11.2.1	Product has an option for a simple, single term search.	M						

Number	Technical Requirements		Portal patron interface		Portal staff interface		Cataloging staff interface	
			YES	NO	YES	NO	YES	NO
11.2.2	Product has an option for advanced or expert searching, using search limiters, qualifiers and/or specific field searching.	M						
11.2.3	Product has an option for combined searches with terms in more than one index.	M						
11.2.4	Product has an option for Keyword searching.	M						
11.2.5	Product has an option for leading string (browse or scan) searching.	D						
11.2.6	Product allows library users to create or qualify search queries by the following data:							
11.2.6.1	• Author	M						
11.2.6.2	• Title	M						
11.2.6.3	• Subject heading	M						
11.2.6.4	• ISBN number	M						
11.2.6.5	• ISSN number	M						
11.2.6.6	• LCCN number	M						
11.2.6.7	• Date of publication	M						
11.2.6.8 REVISED	• Date range of publication -- (Numbering should not display in Bold Face because Requirement Level is Desired not Mandatory)	D						
11.2.6.9 REVISED	• Format of material -- (Numbering should not display in Bold Face because Requirement Level is Desired not Mandatory)	D						
11.2.6.10 REVISED	• Language -- (Numbering should not display in Bold Face because Requirement Level is Desired not Mandatory)	D						
11.2.6.11 REVISED	• Full-text or abstract/summary -- (Numbering should not display in Bold Face because Requirement Level is Desired not Mandatory) & (Question will only be scored for Portal Interface, not for Cataloging Interface)	D					N/A	N/A
11.2.7	Product allows construction of search arguments using the following Boolean search operators:							
11.2.7.1	• "AND" searching	M						
11.2.7.2	• "OR" searching	M						
11.2.7.3	• "NOT" searching	M						
11.2.7.4	• "NEAR" searching (Adjacent term)	D						
11.2.8	Product allows construction of search arguments using specific phrase searching	O						
11.2.9	Product allows construction of search arguments using the following truncation search operators:							
11.2.9.1	• Right truncation searching	D						
11.2.9.2	• Left truncation searching	D						
11.2.9.3	• Internal truncation or "embedded wildcard" searching	D						
11.2.10	Product allows library users to launch searches using links in the following fields:							

Number	Technical Requirements		Portal patron interface		Portal staff interface		Cataloging staff interface	
			YES	NO	YES	NO	YES	NO
11.2.10.1	<ul style="list-style-type: none"> author fields 	O						
11.2.10.2	<ul style="list-style-type: none"> subject fields 	O						
11.2.10.3	<ul style="list-style-type: none"> series fields 	O						
11.2.11	Product maintains a history of search queries used during each separate search session, and allows the library user to recall previous search terms.	D						
11.2.12	Product allows library users the option to end their session and to clear their search history.	D						
11.2.13	Product allows library users the option to stop or end a search in progress.	D						
11.2.14	Product allows the library user to back up to a prior result set.	D						
11.2.15	Product allows the library user to refine or modify a previous search*	M						
11.2.16	Product allows the option to refine or modify a search from all search results screens using a single click.	D						
11.2.17	Product allows the option to initiate a new search from any screen using a single click.	D						
11.2.18	Product allows for scrolling between retrieved records using PREVIOUS and NEXT record buttons.	D						
11.2.19 REVISED	Product begins to display search results as soon as first records are located, and keeps adding to results until search is complete -- (Question will only be scored for Portal Interface, not for Cataloging Interface)	D					N/A	N/A
11.2.20	Product begins to display search results as soon as first records are located, and waits for user to request more results	O						
11.2.21	Product allows the library user to save selected search query information.	D						
11.2.22	Product has a spell- checker capacity that recommends "correct" spellings for entered terms that were not found.	O						
11.2.23	Product allows library user to move forward and backward within the search result, without retracing the original search.	D						
11.2.24	Product supports "smart indexing" wherein searches for names with ambiguous prefixes will retrieve all variants (e.g., Mc and Mac)	O						
11.2.25 REVISED	Product displays a single bibliographic record for each unique title, with one or more holding statements displayed on the same screen as the bibliographic information -- (Question will only be scored for Portal Interface, not for Cataloging Interface)	D					N/A	N/A
11.2.26 REVISED	Product allows for display of a brief record with field labels.* Indicate what fields are used in the standard brief record and who determines brief display fields -- (Explain requirement deleted. Added asterisk (*) for narrative explanation) & (Question will only be scored for Portal Interface, not for Cataloging Interface)	D					N/A	N/A
11.2.27	Product allows for local library customization of the record display*	D						
11.2.28	Product can display records in a title list, alphabetically by title ignoring initial articles if indicators are set correctly in record.	D						

Number	Technical Requirements		Portal patron interface		Portal staff interface		Cataloging staff interface	
			YES	NO	YES	NO	YES	NO
11.2.29	Product provides a summary screen of records retrieved allowing library user to select among them.	D						
11.2.30	Product allows for single hit searches to directly display the full record without going through a "results" or summary list.	D						
11.2.31	Product provides a record count of the number of records retrieved for each search term on the result summary screen.	D						
11.2.32	Product provides graphical or textual indication on the search screen of the status of the search (hour glass, bars, clock icon, etc.)	O						
11.2.33	Product displays the term(s) used in a search argument along with the display of search results.	D						
11.2.34 REVISED	Product allows search results for a specific resource to be rearranged or moved to the top of the title list display (Question will only be scored for Portal Interface, not for Cataloging Interface)	D					N/A	N/A
11.2.35	Product allows library user an option to select to view search results alphabetically by title.	D						
11.2.36	Product allows library user an option to select to view search results alphabetically by author.	D						
11.2.37	Product allows library user an option to select to view search results chronologically (ascending or descending) by date of publication.	D						
11.2.38	Product allows library users to change the sequence control and resort the display sequence for a set of selected records after they have been retrieved.	O						
11.2.39	Agency may request customization of the search screen so that it specifically states that this service is being provided by the State of Wisconsin.	O						
11.2.40 REVISED	Product allows search results to be sorted or resorted by host or resource catalog -- (Question will only be scored for Portal Interface, not for Cataloging Interface)	D					N/A	N/A
11.2.41 REVISED	Product allows search results to be sorted or resorted by title (using de-duplication of title field).* Indicate index points used in the title duplication -- (Explain requirement deleted. Added asterisk (*) for narrative explanation) & (Question will only be scored for Portal Interface, not for Cataloging Interface)	D					N/A	N/A
11.2.42 REVISED	Product allows de-duplicated search results to display holdings from different catalogs under a single bibliographic record -- (Question will only be scored for Portal Interface, not for Cataloging Interface)	D					N/A	N/A
11.2.43	Product allows search results to be sorted or resorted by author (using de-duplication of title field)	D						
11.2.44	Product allows search results to be sorted or resorted by publication date.	O						
11.2.45 REVISED	Product allows search results to be sorted or resorted by relevance* -- (Added asterisk (*) for narrative explanation) & (Question will only be scored for Portal Interface, not for Cataloging Interface)	O					N/A	N/A

Number	Technical Requirements		Portal patron interface		Portal staff interface		Cataloging staff interface	
			YES	NO	YES	NO	YES	NO
11.2.46	Product allows for the number of records returned at a time to be set or defaulted by agency staff at the <i>statewide/global</i> level.	O						
11.2.47	Product allows for the number of records returned at a time to be set or defaulted at the <i>local library</i> level	O						
11.2.48	Product allows for the number of records returned at a time, on a search by search or on a session basis at the <i>library user</i> level	O						
11.2.49	Product uses graphical icons to denote various media format item types.	D						
11.2.50	Product provides the ability to interface with subscription services that enhance the content of the catalog.	O						
11.2.51	Links are available within bibliographic records for book reviews.	O						
11.2.52	Links are available within bibliographic records for abstracts and summaries.	O						
11.2.53	Links are available within bibliographic records for tables of contents.	O						
11.3	Printing/Saving/Emailing Results							
11.3.1	Product allows an option for a "printer friendly" format for printing full records.	D						
11.3.2	Product allows for printing of selected or highlighted text or a section of a record	O						
11.3.3	Product allows a search result set to be saved as a text file to a local computer.	O						
11.3.4	Product allows a search result set to be emailed to a library user's email address.	O						
11.3.5	Product allows a search result set to be saved as an HTML or a text file to a local computer.	O						
11.3.6	Product allows a user to select the format for saving the results set to a local workstation.	O						
11.3.7	Product allows a search result set to be saved in a citation format.	O						
11.3.8	Product allows a search result set to be saved in a full text format	O						
11.3.9	Product allows a search result set to be saved in a citation abstract format.	O						
11.3.10	Product allows a search result set to be saved as a tagged metadata record.	O						
11.3.11	Product allows library user's email address to be saved as a default for emailing of search results.	D						
11.3.12	Product allows printing of records in all display formats available.	D						
11.3.13	Product allows printing of the set of all records for a given search (e.g. all records that contain a specific holding library).	O						
11.4	Help and Error Messages							
11.4.1	Product has help available from all screens	D						
11.4.2	Product has context specific help messages	D						
11.4.3	Product allows library users to access help messages without exiting the search process.	D						

Number	Technical Requirements		Portal patron interface		Portal staff interface		Cataloging staff interface	
			YES	NO	YES	NO	YES	NO
11.4.4	Product allows authorized agency staff at the statewide/global level to add or customize help messages.	O						
11.4.5	Product allows authorized library staff at the local library level to add or customize help messages.	O						
11.4.6	Product provides for language appropriate help messages if non-English language user interfaces are supported.	D						
11.4.7	Product provides library users with specific explanations of any errors that occur	D						
11.4.8	Product provides for customization of error messages by agency staff at the statewide/global level.	O						
11.4.9	Product uses local library parameters to control introductory help text displayed to library users.	O						
12.0 FEDERATED SEARCH PORTAL								
12.1 Portal Overall Functionality								
12.1.1	Product interface remains stable in both appearance and operation regardless of changes to the selection of available resources.	D					N/A	N/A
12.1.2	Product interface includes a "My Portal" or "My Library" profile that allows authorized library patrons to customize available resources and features.	O					N/A	N/A
12.1.3	Product can maintain and access library user profile information to deliver personalized content so that library users can customize the interface tailored to the library user's access privileges.	O					N/A	N/A
12.1.4	Profile personalization can take place at the individual user level	O					N/A	N/A
12.1.5	Profile personalization can take place at the user category level	O					N/A	N/A
12.2 Available Resources								
12.2.1	Product provides federated search access to union catalog bibliographic product as proposed in section 5.0 above	M					N/A	N/A
12.2.2	Product provides federated search access to Z39.50 compliant bibliographic library catalogs	M					N/A	N/A
12.2.3	Product provides federated search access to full-text databases in the current BadgerLink statewide subscription	M					N/A	N/A
12.2.4	Product provides federated search access to Web-accessible non-Z39.50 compliant bibliographic library catalogs	D					N/A	N/A
12.2.5	Product provides federated search access to digitized image resources	D					N/A	N/A
12.2.6	Product provides federated search access to SQL database resources	O					N/A	N/A
12.2.7	Product provides federated search access to HTML resources	O					N/A	N/A
12.2.8	Product provides federated search access to XML resources	O					N/A	N/A

Number	Technical Requirements		Portal patron interface		Portal staff interface		Cataloging staff interface	
			YES	NO	YES	NO	YES	NO
12.2.9	Product provides federated search access to Commercial resources such as Amazon.com	<input type="radio"/>					N/A	N/A
12.2.10	Product provides federated search access to Commercial search engines such as Google, Yahoo, etc.	<input type="radio"/>					N/A	N/A
12.2.11	Product provides federated search access to open URL resolvers	<input type="radio"/>					N/A	N/A
12.2.12	Product provides federated search access to proprietary databases.	<input type="radio"/>					N/A	N/A
12.2.13	Product provides federated search access to Resources formatted in Dublin Core record structure	<input type="radio"/>					N/A	N/A
12.2.14	Product provides federated search access to resources formatted in GILS record structure	<input type="radio"/>					N/A	N/A
12.2.15	Product provides federated search access to resources formatted in EAD (Encoded Archival Description) record structure.	<input type="radio"/>					N/A	N/A
12.2.16	Product provides federated search access to resources formatted in CIMI record structure.	<input type="radio"/>					N/A	N/A
12.2.17	Product provides federated search access to resources formatted in Word or PDF record structure.	<input type="radio"/>					N/A	N/A
12.2.18	Product provides federated search access to resources formatted in other record structures.	<input type="radio"/>					N/A	N/A
12.2.19	Product can provide access to chat services	<input type="radio"/>					N/A	N/A
12.2.20	Product can provide access to email services	<input type="radio"/>					N/A	N/A
12.2.21	Product can provide access to shared calendars	<input type="radio"/>					N/A	N/A
12.2.22	Product can provide access to web meetings	<input type="radio"/>					N/A	N/A
12.2.23	Product supports simultaneous searching for any user-defined selection of available databases and resources.	<input type="radio"/>					N/A	N/A
12.2.24	Product carries actual or implied system limitations on the number of targets or resources within those targets that can be configured or that can be accessed in a single search.	<input type="radio"/>					N/A	N/A
12.2.25	Product carries actual or implied system limitations on the number of simultaneous active retrieval sessions that can be open at any one time.	<input type="radio"/>					N/A	N/A
12.2.26	Product includes support for links to external information pages such as a library "home" page or privacy statement.	<input type="radio"/>					N/A	N/A
12.2.27	Product provides a summary of search results for all databases included in the search.	<input type="radio"/>					N/A	N/A
12.2.28	Results are displayed for each database as they are retrieved.	<input type="radio"/>					N/A	N/A
12.2.29	Product indicates the session status separately for each selected target database.	<input type="radio"/>					N/A	N/A
12.2.30	If a target is not responding, the search of that target times out after a set period of time.	<input type="radio"/>					N/A	N/A
12.3	Portal Management							

Number	Technical Requirements		Portal patron interface		Portal staff interface		Cataloging staff interface	
			YES	NO	YES	NO	YES	NO
12.3.1	Administrative interface provides for maintaining information about target servers	M					N/A	N/A
12.3.2	Administrative interface provides for maintaining information about databases or collections	M					N/A	N/A
12.3.3	Administrative interface provides for maintaining information about database authorization or passwords	M					N/A	N/A
12.3.4	Administrative interface provides for maintaining information about user information and rights	M					N/A	N/A
12.3.5	Product allows for customized portal views for different groups	O					N/A	N/A
12.3.6	Product allows agency staff to configure the set of resources and portal functionality displayed to authenticated library users based on information about the library user's home library, class or category.						N/A	N/A
12.3.6.1	Functionality exists at the <i>statewide/global</i> level	O					N/A	N/A
12.3.6.2	Functionality exists at the <i>regional or group</i> level	O					N/A	N/A
12.3.6.3	Functionality exists at the <i>local library</i> level	D					N/A	N/A
12.3.7	Product provides for default or "out of the box" settings for local installation or implementation.	D					N/A	N/A
12.3.8	Product allows for the ability to limit access to certain licensed databases to "in-library workstations".	O					N/A	N/A
12.3.9	Product allows for the ability to limit access to certain licensed databases based on library patron credentials, barcodes, or logins.	O					N/A	N/A
12.3.10	Product maintains basic descriptive metadata and configuration information for core target databases	O					N/A	N/A
12.3.11	Product can authenticate access to licensed databases from authorized IP ranges	D					N/A	N/A
12.3.12	Product can authenticate access to licensed databases based on library barcodes	O					N/A	N/A
12.3.13	Product provides a method of entering descriptive information designed to help library users understand the content of the database.	D					N/A	N/A
12.3.14	Library users can link directly to the target from the portal to perform searches in the target's native interface.	D					N/A	N/A
12.3.15	Product allows the local library to include targets available locally through the library, but not available for statewide access.	D					N/A	N/A
12.3.16	Product allows agency staff to organize resources into logical groupings by type of patron (researcher, health professional, etc.)	D					N/A	N/A
12.3.17	Product allows agency staff to organize resources into logical groupings by subject	D					N/A	N/A
12.3.18	Product allows agency staff to organize resources into logical groupings by material type	D					N/A	N/A

Number	Technical Requirements		Portal patron interface		Portal staff interface		Cataloging staff interface	
			YES	NO	YES	NO	YES	NO
12.4	Portal Reports and Statistics							
12.4.1	The following portal reports of Statewide Summary & Individual participant data are available at the statewide/global level							N/A N/A
12.4.1.1	Search history that can be viewed and saved at the local library level	D						N/A N/A
12.4.1.2	Total number of Portal search sessions	D						N/A N/A
12.4.1.3	Length of Portal search sessions	D						N/A N/A
12.4.1.4	Total number of searches of each specific resource	D						N/A N/A
12.4.1.5	Number of searches of each specific resource by date or date range	D						N/A N/A
12.4.1.6	Frequency of terms entered	D						N/A N/A
12.4.1.7	Frequency of terms entered by library code login	D						N/A N/A
12.4.2	The following portal catalog reports of Statewide Summary & Individual participant data are available for web display and/or download at the regional level for all member libraries belonging to that group.							N/A N/A
12.4.2.1	Search history that can be viewed and saved at the local library level	O						N/A N/A
12.4.2.2	Total number of Portal search sessions	O						N/A N/A
12.4.2.3	Length of Portal search sessions	O						N/A N/A
12.4.2.4	Total number of searches of each specific resource	O						N/A N/A
12.4.2.5	Number of searches of each specific resource by date or date range	O						N/A N/A
12.4.2.6	Frequency of terms entered	O						N/A N/A
12.4.2.7	Frequency of terms entered by library code login	O						N/A N/A
12.4.3 REVISED	The following virtual catalog portal reports of Statewide Summary & Individual participant data are available for web display and/or download at the local library level for each participating library -- (Typo. Revised wording to change "virtual catalog" to "portal")							N/A N/A
12.4.3.1	Search history that can be viewed and saved at the local library level	O						N/A N/A
12.4.3.2	Total number of Portal search sessions	O						N/A N/A
12.4.3.3	Length of Portal search sessions	O						N/A N/A
12.4.3.4	Total number of searches of each specific resource	O						N/A N/A
12.4.3.5	Number of searches of each specific resource by date or date range	O						N/A N/A
12.4.3.6	Frequency of terms entered	O						N/A N/A
12.4.3.7	Frequency of terms entered by library code login	O						N/A N/A
12.5	Portal System Performance (See Word file)							
13.0	CATALOGING MODULE							
13.1	Cataloging Overall Functionality							
13.1.1	Product allows library staff to create new bibliographic records by starting with a blank MARC work form or template.	M	N/A	N/A	N/A	N/A		

Number	Technical Requirements		Portal patron interface		Portal staff interface		Cataloging staff interface	
			YES	NO	YES	NO	YES	NO
13.1.2	Product allows library staff to create new bibliographic records by using an existing bibliographic record as the basis for a new record.	M	N/A	N/A	N/A	N/A		
13.1.3	Product allows the library staff to create and edit fixed field data (leader, 008, etc.) in the work form or template.	M	N/A	N/A	N/A	N/A		
13.1.4	Product allows library staff to create and edit indicator values in the work form or template	M	N/A	N/A	N/A	N/A		
13.1.5	Product uses different work forms or templates for different types of media types (e.g. books, serials, computer files, etc.).	O	N/A	N/A	N/A	N/A		
13.1.6	Product allows library staff to create and edit fixed field data (leader, 008, etc.) using a separate window with help messages and English language cues.	D	N/A	N/A	N/A	N/A		
13.1.7	Product allows library staff to create default text or common data for repeated addition of common text on cataloging work forms or templates.	D	N/A	N/A	N/A	N/A		
13.1.8	Product links access fields to an authority file so that headings can be validated and library staff alerted if the heading is not in the authority file.	O	N/A	N/A	N/A	N/A		
13.1.9	Product employs keystroke shortcuts.	D	N/A	N/A	N/A	N/A		
13.1.10	Product allows library staff to see the entire cataloging record in a single screen or with scroll arrows.	D	N/A	N/A	N/A	N/A		
13.1.11	Product allows library staff to format and create spine labels based on bibliographic records created.	O	N/A	N/A	N/A	N/A		
13.1.12	Product has a spell checker function for verifying spelling prior to saving the bibliographic record into the database.	D	N/A	N/A	N/A	N/A		
13.1.13	Product allows library staff to edit or add to the spell checker dictionary for terms used frequently at the local library.	O	N/A	N/A	N/A	N/A		
13.1.14	Product allows library staff to configure the spell checker feature to check or to skip specific fields in the cataloging record.	O	N/A	N/A	N/A	N/A		
13.2	Printing, Saving, Exporting MARC Records							
13.2.1	Product allows library staff to print a single bibliographic record.	M	N/A	N/A	N/A	N/A		
13.2.2	Product allows printing of the set of all records for a given search (e.g. all records that contain a specific holding library).	D	N/A	N/A	N/A	N/A		
13.2.3	Product allows library staff to save a catalog record to a local file at any point in the creation of the cataloging record.	M	N/A	N/A	N/A	N/A		
13.2.4	Product allows library staff to export a single bibliographic record.	M	N/A	N/A	N/A	N/A		
13.2.5	Product allows library staff to export multiple MARC bibliographic records as a group into a single file.	M	N/A	N/A	N/A	N/A		
13.2.6	Product allows library staff to export bibliographic records to a local hard drive or desktop.	D	N/A	N/A	N/A	N/A		
13.2.7	Product allows library staff to export bibliographic records to a TCP/IP port on a local automated system.	O	N/A	N/A	N/A	N/A		

Number	Technical Requirements		Portal patron interface		Portal staff interface		Cataloging staff interface	
			YES	NO	YES	NO	YES	NO
13.2.8	Product allows library staff to export bibliographic records to a designated place on the vendor's server for later retrieval or download.	O	N/A	N/A	N/A	N/A		
13.2.9	Product allows library staff to set an export preference as a default, and to change the setting for the default or for a single session.	O	N/A	N/A	N/A	N/A		
13.2.10	Product employs a timeout mechanism that confirms the connection when exporting of large files rather than interrupt the export.	O	N/A	N/A	N/A	N/A		
13.2.11	Product controls the file name, file extension name and/or the path used for exporting records.	O	N/A	N/A	N/A	N/A		
13.2.12	Product allows library staff to specify a file name and path name for exporting records.	D	N/A	N/A	N/A	N/A		
13.2.13	Product exports all files from a single institution or login to a single export file.	O	N/A	N/A	N/A	N/A		
13.2.14	Product allows multiple staff users from a single institution or login to maintain their own export files.	D	N/A	N/A	N/A	N/A		
13.3	Cataloging Reports and Statistics							
13.3.1	The following cataloging reports of Statewide Summary & Individual participant data are available at the statewide/global level		N/A	N/A	N/A	N/A		
13.3.1.1	Total number of new bibliographic records created/added to the union catalog	D	N/A	N/A	N/A	N/A		
13.3.1.2	Number of new bibliographic records created/submitted to the union catalog, broken out by library.	D	N/A	N/A	N/A	N/A		
13.3.1.3	Number of bibliographic records used for copy cataloging, and not added to the union catalog.	D	N/A	N/A	N/A	N/A		
13.3.1.4	Number of bibliographic records used for copy cataloging, and not added to the union catalog, broken out by library	D	N/A	N/A	N/A	N/A		
13.3.2	The following cataloging reports of Statewide Summary & Individual participant data are available for web display and/or download at the regional level for all member libraries belonging to that group.		N/A	N/A	N/A	N/A		
13.3.2.1	Total number of new bibliographic records created/added to the union catalog	O	N/A	N/A	N/A	N/A		
13.3.2.2	Number of new bibliographic records created/submitted to the union catalog, broken out by library.	O	N/A	N/A	N/A	N/A		
13.3.2.3	Number of bibliographic records used for copy cataloging, and not added to the union catalog.	O	N/A	N/A	N/A	N/A		
13.3.2.4	Number of bibliographic records used for copy cataloging, and not added to the union catalog, broken out by library	O	N/A	N/A	N/A	N/A		
13.3.3	The following cataloging reports of Statewide Summary & Individual participant data are available for web display and/or download at the local library level for each participating library.		N/A	N/A	N/A	N/A		
13.3.3.1	Total number of new bibliographic records created/added to the union catalog	O	N/A	N/A	N/A	N/A		
13.3.3.2	Number of new bibliographic records created/submitted to the union catalog, broken out by library.	O	N/A	N/A	N/A	N/A		

Number	Technical Requirements		Portal patron interface		Portal <i>staff</i> interface		Cataloging <i>staff</i> interface	
			YES	NO	YES	NO	YES	NO
13.3.3.3	Number of bibliographic records used for copy cataloging, and not added to the union catalog.	○	N/A	N/A	N/A	N/A		
13.3.3.4	Number of bibliographic records used for copy cataloging, and not added to the union catalog, broken out by library	○	N/A	N/A	N/A	N/A		
13.4	Cataloging System Performance (See Word file)							