

## Integrated Library Systems (ILS) Checklist

- This is a guide to assist your school to make informed decisions and not intended to be comprehensive.
- Explanations of terms can be found in the Glossary.

<b>Date</b>						
<b>Name of Vendor:</b>						
<b>Name of Library System:</b>						
<b>Vendor's Profile</b>			<b>Yes</b>	<b>No</b>	<b>Comments</b>	
	Company background and experience					
	Other schools using the system					
	Website address					
	Demonstration available online					
	School or on-site demo available					
<b>Technical Specifications (Technical Architecture)</b>			<b>Yes</b>	<b>No</b>	<b>Comments</b>	
Operating system	Software compatible with school's ICT platform, e.g. Mac, Windows, Linux					
	Web based system is hosted on a reliable remote server					
	Minimum specifications for Server and Client supplied and checked					
Networking capabilities	Software operates in Area Networks including LAN, WAN and WWAN Wireless					
	Supports Structured Query Language (SQL) to aid database communication					
	OPAC can be accessed across the school network including LMS and Web					
	Software supports multiple users using different modules					
Backups	System supports Mobile Learning technology					
	Back up and restore of data is well documented and intuitive					
	Web based systems are fully maintained by vendor on remote server					
Standards	Automatic and initiated backup process					
	MARC compliant – importing, exporting and conversion of MARC data					
	Z39.50 compliant – SMS and LMS compatible					
Web module	Web module available					
	Functions from the web include WebOPAC, Homepage etc					

	Able to customise screens, e.g. colour, font, school logo etc.			
	Supports URLs and hyperlinks from bibliographic records for author, subject etc.			
	Port Forwarding/Mapping for secure offsite access of OPAC via school website			
<b>Support Services</b>		<b>Yes</b>	<b>No</b>	<b>Comments</b>
Contract	Easily understood: plain English			
	Period covered			
	Ongoing costs			
Documentation	User manual provided (online and print) – screen shots, fully indexed, easy to use			
Training	Phone and fax (free or toll)			
	Email			
	Online, on-site			
	User groups – local meetings, vendor attendance			
	Customer focused staff - (check with other schools)			
Helpdesk	Phone and fax (free or toll)			
	Email			
	Website			
	Hours, costs, response time			
	Length of support period			
	Customer focused staff - (check with other schools)			
System development	Vendor notification and implementation of new functionality as appropriate			
<b>Costs (Also listed in individual sections)</b>		<b>Yes</b>	<b>No</b>	<b>Comments</b>
Support	Contract – current and ongoing costs			
	Training – current and ongoing costs			
	Helpdesk – current and ongoing costs			
	Consortium arrangements between other users – e.g. shared catalogues, databases etc			
Hardware	Existing school hardware meets the vendor’s recommended standards			
	Library hardware is up-to-date and included in school ICT upgrades and maintenance			

	Library workstation hardware meets the vendor's recommended standards			
	Library workstation includes barcode reader/scanner with usb connection			
	Library workstation includes local or networked printer for spine labels, barcodes etc			
	Dedicated Search/OPAC workstation/s are available for student use in the Library			
Software	Existing school software meets the vendor's recommended standards			
	Library software and online access is up-to-date and included in school ICT upgrades and maintenance			
	ILS modules include cataloguing, circulation, acquisitions, periodicals, OPAC and Web			
	Itemised costs for basic system and other modules			
	Users per licence			
	Licensing for more than one installation			
Software Support	Includes or excludes upgrades			
	Data migration between old and new system			
ICT Funding	ICT budget allocation current and ongoing			
	Catalogue Record subscription service from SCIS			
	Catalogue Subject Headings and Authority File service from SCIS			
<b>Installation</b>		<b>Yes</b>	<b>No</b>	<b>Comments</b>
Hardware	Existing hardware meets the vendor's recommended standards			
	Library hardware is up-to-date and included in school ICT upgrades and maintenance			
	Library workstation hardware meets the vendor's recommended standards			
	Library workstation includes barcode reader/scanner with usb connection			
	Library workstation includes local or networked printer for spine labels, barcodes etc			
	Dedicated Search/OPAC workstation/s are available for student use in the Library			
	Processing speed required – acceptable speed of record recall			
	Compatible with barcode reader/scanner			
	Supports multiple users using different modules			
Software	Existing school software meets the vendor's recommended standards			
	Library software and online access is up-to-date and included in school ICT upgrades and maintenance			
	Runs on school's current ICT operating system, e.g. Mac, Windows, Linux			

	Compatible with school's SMS and LMS			
	ILS modules include cataloguing, circulation, acquisitions, periodicals, OPAC and Web			
	Other software required e.g. Windows, Web browser			
	Dedicated Search/OPAC workstation/s are set to access Library Home and or OPAC in Library			
	Library has a dedicated page as part of LMS and/or school website which includes OPAC access			
<b>Access control (Security)</b>		<b>Yes</b>	<b>No</b>	<b>Comments</b>
User identity	Levels of security prevent unauthorised access or misuse of the system			
Passwords	Password access for various user groups, e.g. staff, students, librarians			
	Password access for administration modules, e.g. cataloguing, circulation,			
	Logoff (Exit) password for OPAC			
	Required to change password regularly			
Offsite access	Port Forwarding/Mapping for secure offsite access of OPAC via school website			
<b>Usability</b>		<b>Yes</b>	<b>No</b>	<b>Comments</b>
Prompts	Prompts for missing data for required fields			
Clipboard	Allows copying and pasting across the system			
Usability	Graphical User Interface (GUI) screens are friendly and intuitive			
	Easy to use, intuitive screens, prompts, icons and navigation aids			
	Able to move between different screens and functions intuitively			
	Allows multiple windows to be open simultaneously and easily accessed			
	Provides pre-programmed function keys			
<b>Modules</b>				
<b>OPAC (Online Public Access Catalogue) (WebOPAC)</b>		<b>Yes</b>	<b>No</b>	<b>Comments</b>
Searching	Clear and intuitive			
	Help screens – interactive, easy to find and searchable			
	Reservations option available through the OPAC			
	Borrower can view overdues, loans, reserves etc.			

	Borrower interaction including borrower profile, book reviews and lists of favourites			
	Searching across all fields e.g. Keyword, Author, Title, Subject Heading			
	Boolean (i.e. using AND, OR, NOT to link and exclude terms)			
	Truncated searches – able to shorten the search term			
	Basic and advanced searches			
	Effective alternative spelling facility – misspellings retrieves useful results – list of preferred terms available			
	Punctuation sensitivity – correct punctuation should not be required			
	Case sensitivity – upper and lower cases should be interchangeable			
	Interactive map linked to location and classification			
Displays	Search results with visual prompts depicting format, location and availability information			
	Records in full and brief formats			
	Records with visual prompts including book covers, location maps and availability information			
	Number of copies of a resource			
	Status of resources: e.g. on order, on loan			
	Date due for borrowed resources			
	The number of records found and availability of items (i.e. if item is borrowed)			
	Results can be ranked by relevance e.g. author, title, year, classification, format etc			
	Hyperlinks to Authority fields e.g. Authors Names, Subject Headings, Series, Classification			
	Hyperlinks to website urls			
	Hyperlinks open in new window			
	Access to catalogued full text multimedia resources, Word documents, images, pdfs etc.			
	Icons identify material type in results list, e.g. websites			
	Book cover images included as part of Catalogue record			
Usability	Web page option for library news etc			
	Graphical User Interface (GUI) screens are friendly and intuitive			
	Choice of search interface e.g. Junior, Senior, Teacher			
	Search and display screens intuitive and easy to navigate			
	Context-dependent help i.e. Help information relates to where you are in the database			

	Search options include field-based and text-string options			
	Flexible search options include relevance ranking			
	Author's Name, Series and Subject Headings are hyperlinked to create lists of same			
	Downloading of search results			
	Catalogued multimedia and internet resources can be linked to and viewed			
	Personal list creation, borrower profile and review options			
	Online reserve, review and feedback options			
	Results and online resources can be accessed quickly without the use of multiple logins.			
	Web and other online resources open in new window			
<b>Cataloguing (Data Entry)</b>		<b>Yes</b>	<b>No</b>	<b>Comments</b>
	Cataloguing process includes both manual and rapid entry options			
MARC fields	Imported catalogue records (Copy Cataloguing) include all of the following fields:			
	Name (author, illustrator, editor, joint author etc.)			
	– individual names have separate authority records, i.e. one name, one line			
	Title			
	Variant (Other) title			
	Subject headings – Add additional Subject Headings from SCIS			
	Physical description			
	Edition			
	GMD (General Material Designation), e.g. book, videorecording, website, etc.			
	Publishing information (place of publication, publisher, date of publication)			
	Series – ability to enter more than one series, plus series number			
	Notes – field length adequate to include all necessary information			
	ISBN, ISSN – ability to scan into field			
	URL field for cataloguing websites – ability to enter more than one url			
- Local fields	Most commonly edited fields - check for ease of access, editing and saving:			
	Call/Classification code, i.e. Dewey number, shelf location etc:			
	-Classification code imports in preset Non Fiction format e.g. 513.2 not 513.2 ALD			

	-Classification code imports in preset Fiction format e.g. ALD not F ALD			
	Keywords – ability to automatically generate and enter manually			
	-Keyword searches are able to be configured to search certain fields			
	Location e.g. Library, Library Office, Staff Room, Teacher Resource Room			
	Age level – ability to suppress in OPAC student view			
	Barcode/Accession number – ability to be generated automatically or scanned in.			
	Date of purchase			
	Price, Purchase (Actual cost paid) - ability to maintain accurate budget.			
	Price, Overdue/Replacement (Actual cost for replacement) – ability to adjust cost			
	Supplier (Source) e.g. Donation, Duffy Book, Supplier's name			
	Status e.g. New Book, In Library, Lost, Missing, Withdrawn			
	Media e.g. Book, CD, DVD Website, Poster, Board Game			
	Resource Type/Format e.g. Fiction, Non Fiction, Reference, Picture Book, Website			
	Websites – ability to untick stocktaking option for Websites			
Import MARC files	Z39.50 standard allows for direct and transparent transfer of catalogue record data			
	Schools Catalogue Information Service (SCIS) data transfer			
	SchoolsCat data transfer			
	Other cataloguing service data transfer			
	NB: Imports bibliographic records with no loss of content including Notes when available			
	Authority files maintained globally e.g. Authors' Names, Series and Subject Headings			
Exporting records	Easily exported from the system			
	Data not locked to prevent data migration			
	Cost of data migration between old and new system			
	Data is fully MARC compliant and not system dependent			
	Able to convert non-MARC to MARC			
Usability	Cataloguing module is easy to find and open			
	Graphical User Interface (GUI) screens are friendly and intuitive			
	Cataloguing fields visible and intuitive to edit and save			
	Support for non-Roman scripts and Macron for Maori words			

	Ability to edit all imported data			
	Ability to edit all Catalogue fields for direct cataloguing			
	Ability to generate and print own barcodes and spine labels			
	Ability to display records in MARC format			
<b>Circulation (Issues and returns)</b>		<b>Yes</b>	<b>No</b>	<b>Comments</b>
Borrower files	Borrower type (Student, staff, etc.)			
	Borrower's names			
	Borrower barcode			
	Gender			
	Level			
	Class			
	Date of birth			
	Address			
	Parent / Guardian details			
	E-mail			
	Telephone			
<ul style="list-style-type: none"> <li>• Displays details of transactions on the screen when issuing, returning and stocktaking</li> <li>• Importing and exporting – student files can be exported from other student management systems and imported into the integrated library system</li> <li>• Ability to edit all imported data</li> <li>• Allows photo ID to be added</li> <li>• Creates short records allowing full registration later</li> <li>• Messages can be attached to a borrower's record</li> <li>• Tracks the last patron to borrow an item</li> <li>• Overdue notices by individual, class and year</li> <li>• Able to email overdues</li> <li>• Details of borrower history, by date, current loans, overdues are available</li> <li>• Globally changes year, groups and classes</li> </ul>				
Loan periods	Set individually and globally for year, groups and classes			

	Set individually and globally for types of resources for year, groups and classes			
	Renewals/extensions – bulk renewals			
Loan limits	Set individually and globally for year, groups and classes			
	Enables selected borrower groups to access specific resource categories			
	Block loans			
	Loan bans			
Reservations	Alerts library staff when a reserved item is returned and issued			
	<ul style="list-style-type: none"> <li>• Authorised staff override circulation defaults, e.g. loan limits, loan periods etc.</li> <li>• Includes a recall facility</li> <li>• Authorised staff can identify the borrowers of all copies of all resources via the OPAC</li> </ul>			
Usability	Circulation module is easy to find and open			
	Graphical User Interface (GUI) screens are friendly and intuitive			
	Circulation options are intuitive to edit and save			
<b>Reports</b>		<b>Yes</b>	<b>No</b>	<b>Comments</b>
Report Options	Offers both prepackage and custom options.			
	Ability to generate reports easily and efficiently			
	Ability to be previewed and / or printed			
	Display options e.g. Bar chart, Pie chart, Line chart			
	Ability to save online			
<b>Circulation</b>				
Resources	Number of times resources have been borrowed, by individuals, groups, classes etc.			
	Resources most and least used			
	How often individual and groups of resources have been used			
	Number of times resources have been used, including a non-circulation count			
	Resources currently issued to a borrower			
	Number of items issued and returned by day, week, month and year			
	Generates a list of unfilled reservations			
	Number of reserves placed across the collection and on individual items			

	Issues by resource category, e.g. fiction, non-fiction, teacher resources			
	Top authors issued in a given period			
	Top titles issued in a given period			
Borrowers	Lists who has borrowed a resource			
	Borrower history			
	Resources and resource categories borrowed by class, year, group etc.			
	Names of borrowers by class, year, group etc.			
	Borrower cards			
	Overdues by group, class and individual			
	Which resources are currently on loan?			
Notices	Generates reservation notices			
	Generates recall notices			
	Text Messaging option for overdues etc			
<b>Cataloguing</b>				
Resources	Lists resources catalogued between a range of dates			
	Lists items by location, classification, status and resource type			
	Number of resources by location, call number			
	Value of resources by location and accession date			
	Number of resources by GMD e.g. book, videorecording, website, etc.			
	Number of resources accessioned between a range of dates			
	Resources with duplicate barcodes			
	Collection in shelf list order			
	Resources purchased by supplier			
Authority lists	Produces authority lists, e.g. subject, author			
	Lists authority records which do not have resources attached (subject, author etc.)			
	Generates a list of subject headings, including 'see' and 'see also' references			
	Lists resources attached to subject authority records			
<b>Inquiry</b>				
Searches	Identifies borrower searches, including search term and type of search			

<b>Stocktaking</b>				
	By location			
	A section at a time			
	While the collection is circulating			
	Ability to withdraw and retrieve records before they are purged			
	Ability to finalise stocktake at different times for different resources, sections, locations			
Resources	Lists resources which have been scanned by call number and location			
	Current stock by location, call numbers, value and copies			
	Retains withdrawn / missing resources until the end of audit cycle			
<b>Printing</b>		<b>Yes</b>	<b>No</b>	<b>Comments</b>
	Provides data to screen and printer			
	Prints reports to screen and / or printer and / or file			
	Prints Help screens			
	Retains report parameters for print options			