

	A	B	C	D
1	Category	Description	Importance	Comments
2	Patron Records and Registration	Please list data fields that display on main patron record screen and state if additional clicks are needed to navigate to different screens to view patron data.	Mandatory	
3	Financial Information and Management	Describe fine and bill payment capabilities and options for payment through staff client.	Mandatory	
4	Financial Information and Management	Provide the ability to retain item billing data in patron accounts even if item is deleted from the system.	Mandatory	
5	Holds and Notifications	Provide the ability to send email, phone or text messaging notifications to patrons. Please describe different types of notifications (such as hold notifications) that are available.	Mandatory	
6	Circulation	Describe holds pull (pick list) process as well as the process of how expired/cancelled holds appear on the patrons's "My Account" and how they are removed from the hold shelves.	Mandatory	
7	Circulation	Provide the ability to create custom hold slips and hold wrappers.	Mandatory	
8	Materials Circulation and Management	Describe any special capabilities, options or considerations available when software is integrated with automated material handling system.	Mandatory	
9	Materials Circulation and Management	Provide offline circulation capabilities if the server/internet connection is lost, including the specific functions available to staff and whether reports can be later generated to identify exceptional conditions associated with items scanned during offline mode. Please provide description of process.	Mandatory	
10	Materials Circulation and Management	Provide "bookdrop" or rapid bulk check-in to allow minimal staff involvement.	Mandatory	
11	Materials Circulation and Management	Provide the ability to support floating collections.	Mandatory	
12	General	Provide a fully functional, end point to end point, web-based client for staff. Including : Printing of receipts, customized hold slips, placing of holds, cancelling holds, displaying of available hold expiration date, use of extended field information (notes), hold history, billing history, and ability to mark items as lost or claims returned while in the patron record. As well as the ability to search for titles by keyword, ISBN, Call number and Item ID (barcode). Please specify if web-based client is compatible with Techlogic RFID desktop client solution. If above criteria are only available in desktop client, please note in response.	Very Important	
13	Patron Records and Registration	Provide the ability to search various fields while in Circulation module. Including the ability to perform keyword searches on more than two fields (EX. Simultaneous search of last name and birthdate).	Very Important	

	A	B	C	D
14	Patron Records and Registration	Provide the ability to clone new patron account. Please list which fields are automatically populated during the cloning process.	Very Important	
15	Patron Records and Registration	Provide the ability to merge duplicate patron accounts without losing relevant information. Merging should be done via the staff client and not via a report.	Very Important	

Category	Description	Importance	Comments
Training	Provide a description of all available training packages. Include what is standard and what may be extra.	Mandatory	
Training	Provide a proposed training timeline.	Mandatory	
Training	Provide a training database, data to be retrieved from current copy of our Symphony ILS, for all modules. Training database to contain at least 10,000 patron records, 10,000 random bibliographic records with items, and sufficient acquisitions and cataloging records to support training.	Mandatory	
Training	Provide customized on-site staff training for all ILS modules and functions for selected library staff in advance of going live so the District may use a train the trainer training model.	Mandatory	
Training	Provide customized on-site staff training on relevant ILS modules and functions for department representatives supporting the ILS. Including, but not limited to Finance, Communications and IT.	Mandatory	
Training	Provide recorded training (or allow live virtual trainings to be recorded) that can be posted (links are acceptable) and is compatible with our learning management system, Bridge by Learning Technologies Group.	Mandatory	
Training	Provide training manuals and quick reference guides for all ILS functions.	Mandatory	
Training	Provide training to write customized, or on the fly, reports for ILS Admin and appropriate staff using on recommended reporting tools.	Mandatory	
Training	Provide follow up on-site or virtual training six months after Go live date for Circulation, ILL, Patron Engagement and Administration in order to ensure advanced features are being used optimally.	Mandatory	
Training	Provide technical support for staff during the first month after go live.	Mandatory	
Training	Provide staff training for navigating the patron interface (Discovery Layer) as well as training on how to use new, patron facing, features in the patron's "My Account".	Mandatory	
Training	Provide a process review for Collection Management department (Acquisitions, Cataloging and Selection) six months after Go Live.	Mandatory	
Training	Provide patron facing Discovery layer quick guides and recorded videos to assist patrons with new features.	Desired	

Category	Description	Importance	Comments
Administration	Provide full data migration service. Please identify any areas where data migrated will need to be modified, truncated, reformulated, or lost as it migrates to the vendor's system.	Mandatory	
Administration	Provide test environment for ILS database. Test environment should be updated upon the request of the ILS Administrator (provide any additional cost this may incur).	Mandatory	
Administration	Provide SaaS single tenant environment. System should allow read/write access for the appropriate people via SQL, comparable query language, or API. If production system does not allow full read/write access provide additional test environment that is updated on a schedule to be determined.	Mandatory	
Administration	Provide database(s) schema.	Mandatory	
Administration	Provide granular permissions for different modules. Permissions can be set per group or per user.	Mandatory	
Administration	Provide the ability to configure system pull lists (holds) based on a configurable algorithm, which allows prioritization of fill locations by various criteria. Requested item appears on only one location pull list at a time. Hold pull list must be dynamically created when run by staff.	Mandatory	
Administration	Provide regular software updates, with documentation, of resolved known bugs or newly provided features. Please indicate how often software updates are released.	Mandatory	
Administration	Describe the available options for contacting support and reporting issues. Provide the expected response times for each option. Include the process for escalating support requests. Describe the 24/7 support response for critical problems (i.e. system outages).	Mandatory	
Administration	Please specify which (if any) indexes are not updated dynamically and are updated either by batch processing or job scheduling.	Mandatory	
Administration	Provide a configurable desktop and/or web-based client. Configuration should include the ability to change font type, size and color.	Mandatory	

Administration	<p>Provided data migration should migrate at a minimum:</p> <p>Patrons: Creation date, expiration date, last activity date, birthdate, notes, current checkouts, holds, unpaid fines, paid fines, user ID (patron barcode), previous patron barcode (if any), patron PIN, borrower type (patron profile), patron status, address information, custom categories (such as Bookmobile stop, School District, grade and school), and patron My Lists in current online catalog</p> <p>Items: Creation date, historical # of checkouts, call #, owning library, home location (shelving location), current location (item status), item type, holds, price, notes and last activity date, last charge date (checkout), last discharge date (check in)</p> <p>Serials: Serial volume, internal notes, summary holds, check in history, prediction patterns, claim information and links to bibliographic and item records</p> <p>Holds: Current status of items on hold, date holds were placed, pickup location, holds queue in order by date placed and whether hold is at title level or copy specific</p>	Very important	
Administration	<p>Additionally Provided data migration should migrate at a minimum:</p> <p>Acquisitions: Funds – fund account number, fund ID, fund name, fund information. Financial information – amounts budgeted, spent, encumbered and free balance Vendors – vendor ID, vendor name, vendor address, vendor EDI address, customer number. Orders – Order ID, Orderlines, Order history. Invoices – Invoice ID, date paid, amount, fiscal cycles</p> <p>Cataloging: Bibliographic records including all fields, subfields, local subject headings, record creation and cataloged date</p> <p>Authority records Please note which fields cannot be migrated</p>		
Administration	<p>Provide the ability to create patron profiles (permissions) to limit access to specific District collections. EX: Juvenile profiles would only be allowed to check out selected collections such as picture books, easy readers, juvenile non-fiction and juvenile fiction (this is also known as a Parental Controls profile).</p>	Mandatory	

Administration	Support at least 500 SIP2 connections. Please provide in-depth list of which fields are supported including extended fields. Provide in-depth information on how SIP2 data can be protected.	Mandatory	
Administration	Provide the ability for staff to access multiple modules from a single interface.	Very important	
Administration	Provide the ability for any changes in configurations at the Admin level to be in real time. Please specify which configurations are not changed in real time.	Very important	
Administration	Provide robust, well documented API or web services.	Very important	
Administration	Provide the ability for staff to view records, such as item, bibliographic and patron side by side	Very important	
Administration	Provide ability for staff to use Boolean searching techniques such as the use of Boolean operators and special characters in the staff client.	Very important	
Administration	Provide the ability to batch change bibliographic, item and patron records within the staff client.	Very important	
Administration	Provide the ability for authorized staff to setup custom created scripts as scheduled tasks/chron jobs as needed. If District staff cannot do this specify how vendor staff will perform this function (provide any additional costs that maybe incur).	Very important	
Administration	Provide the ability for desktop staff clients to be updated automatically, without requiring additional third-party software. Client should be immediately available for use.	Very important	
Administration	Provide the ability to customize which "wizards" (functions and/or modules) are seen by specified staff/staff profiles in the staff client.	Very important	
Administration	Provide the ability to create unlimited item types, shelf locations (collections) and loan rules.	Very important	
Administration	Provide cover art and format icons in staff client search results.	Important	
Administration	Provide, pre-migration, patron data refining (patron address scrubbing) address verification and field normalizing service.	Desired	
Administration	Provide the ability to integrate with District ERP (by Tyler Technologies) financial system. Please provide in-depth description as well as an example of one other library system that currently uses the integration.	Desired	

Category	Description	Importance	Comments
Reports	Provide the ability to have at least 50 staff users with permission to run reports simultaneously.	Mandatory	
Reports	Provide a native reporting tool (preferable web-based) that has the ability to create on demand reports (Ad-hoc) which can be saved as custom reports without vendor intervention. Please list any additional software packages that can be used to create custom reports such as MicroStrategy, PowerBI or Crystal reports.	Mandatory	
Reports	Provide the ability to schedule reports to be sent to staff, via email, in a variety of formats (Excel, HTML, XML and CSV). Please provide list of which formats are available.	Very important	
Reports	Provide the ability to query all data in real time.	Very important	
Reports	Provide the ability to prevent staff from editing, saving over or deleting designated, provided reports (either custom or canned).	Very important	
Reports	Provide the ability to offer select staff/staff profiles the ability to run reports using pre-set parameters. Running of reports should not significantly degrade system performance.	Very important	
Reports	Provide the ability for all reports and/or utilities to run concurrently, without significant time delays or degrading system performance.	Very important	
Reports	Provide a standard set of report templates which can be customized by the District with no assistance from the vendor and does not require specialized 3 rd party software.	Very important	
Reports	Provide the ability to incorporate/upload external data in order to create system wide dashboards.	Desired	
Reports	Provide the ability to display data graphically.	Desired	

Category	Description	Importance	Comments
Catalog (online)	Catalog must be American with Disabilities (ADA)/website accessibility compliant and in accordance with Colorado House Bill 21-1110 Colorado Laws For Persons With Disabilities Colorado General Assembly.	Mandatory	
Mobile App	Provide the ability to integrate with the District's current mobile app provided by Solus or similar mobile app offering.	Mandatory	
Catalog (online)	Provide a native fully responsive design.	Mandatory	
Catalog (online)	Conforms with the accessibility guidelines of the Web Content Accessibility Guidelines ("WCAG") 2.1 level A and AA published by the World Wide Web Consortium ("W3C").	Very Important	
Catalog (online)	Provide the ability for patrons to manage their own account information. Please provide in-depth answer of what can be managed.	Very Important	
Catalog (online)	Provide integration with the District's 3 rd party products (EX. OverDrive, Hoopla, Kanopy). Please describe how integration is achieved.	Very Important	
Catalog (online)	Provide the ability to customize the catalog homepage.	Very Important	
Catalog (online)	Provide the ability to save patron Circulation History by opting in. Circulation history titles should remain in list even if the title or specific item the patron checked out is deleted from the system.	Very Important	
Catalog (online)	Provide the ability for patrons to easily subscribe to alerts for new materials including specific subjects, and authors broken down by format. Please provide in-depth answer	Very Important	
Catalog (online)	Provide smart searching such as a "Did you mean" feature, dynamic predictive search results and keyword or related search suggestions	Very Important	
Catalog (online)	Provide ability to sort/limit results by various methods. Such as material type, shelf location, library, reading level/lexile and language. Limits should be "sticky" and continue to be applied even after a new search is initiated. Please provide in-depth answer.	Very Important	
Mobile App	Provide the ability to select, and apply, more than one limit at a time. Limit should be "sticky" and not need to be re-selected for each search.	Very Important	

Mobile App	Ability to send Push Notifications for Holds, Overdues, and Manual messages.	Very Important	
Mobile App	Ability to see the numbers of holds for an Item before placing item on hold.	Very Important	
Catalog (online)	Provide format rollup, FRBR. A single search result for a title with multiple formats. Placing a hold on a specific format should be done easily with one click.	Very Important	
Catalog (online)	Provide the ability for patrons to manage items currently waiting for pickup. Including the ability to cancel an item, change the pickup location or suspend the item (even if on the holds shelf) to later be unsususpended at a specified date. Would also include the ability to limit time period for hold suspensions.	Very Important	
Catalog (online)	Provide the ability for patrons to create relationships (linked accounts) without staff invention. Please provide in-depth answer on what types of relationships can be created, how they can be created, and what information can be managed within the accounts	Important	
Catalog (online)	Provide personal recommendations based on previous activity (as Netflix does).	Important	
Catalog (online)	Provide the ability for staff and patrons to create and share lists.	Important	
Catalog (online)	Provide the ability for patrons to place volume level holds. Must be able to restrict by item type.	Important	
Catalog (online)	Provide "while you wait" suggestions to guide patrons to materials the District has available that are similar to the title just placed on hold.	Important	
Catalog (online)	Provide links to professional reviews within the browse or detailed search results.	Important	
Mobile App	Provide the ability for patrons to check materials out via RFID on their cell phone or device.	Important	
Mobile App	Provide the ability to view, if opted in, Circulation history.	Important	
Mobile App	Provide the ability to create and view "My Lists". My list should be the same as any My Lists created in the online Catalog.	Important	
Mobile App	Provide the ability to create a dynamic book carousel.	Important	

Mobile App	Provide the ability for patrons to renew their library card without staff intervention.	Important	
Mobile App	Provide the ability to perform a catalog search using a device's camera and an item's UPC/ISBN.	Important	
Catalog (online)	Provide the ability for staff to locally customize the contents and display of menu, search, and result screens. Please describe the level and method of customization.	Important	
Catalog (online)	Ability for patron to view ILL requests and purchase requests in their "My Account."	Important	
Catalog (online)	Provide the ability for patrons to create usernames for login purposes.	Desired	
Catalog (online)	Provide the ability to communicate via "My Account" (ie post messages) from library staff to patron.	Desired	
Catalog (online)	Provide the ability to access list of items previously placed on hold.	Desired	
Catalog (online)	Provide the ability for items to be discovered on the Internet, including, but not limited to, Bibframe functionality.	Desired	
Catalog (online)	Provide the ability to integrate library program data into the catalog. Including displaying programs that are available or displaying what programs patrons have registered for.	Desired	
Catalog (online)	Provide the ability to create curated booklists. With an option to schedule lists to display and expire.	Desired	
Catalog (online)	Provides robust cross referencing or subject searching option. Ex - a keyword search on "figure skating" would display "see also ice skating" in addition to results on figure skating.	Desired	
Catalog (online)	Provide the ability to toggle to MARC record display from the item record view.	Desired	
Mobile App	Provide the ability to link to the District's online payment system.	Desired	
Mobile App and Catalog (online)	Provide the ability to share books etc to social media or text.	Desired	
Mobile App	Provide the ability to add complex hours (two shifts) for the libraries schedule.	Desired	

Mobile App	Provide the ability to integrate with an events - booking room system.	Desired	
Catalog (online)	Provide a native reservation system. The reservation system should allow patrons to reserve specific items in advance. The library would be able, per type of item, allow the patron to reserve items, either by hour or day, ahead of time. The number of hours and/or days the item may be checked out would be determined by the library. The library should also be able to determine how far in advance a patron may reserve items (i.e. they can only reserve an item 1 month in advance). Reservation should either be automatically approved or manually approved as determined by type of equipment being reserved.	Desired	

Category	Description	Importance	Comments
Patron Engagement	Provide the ability to promote programs, services, and other opportunities to patrons based on various criteria. Please provide an in-depth answer what's available.	Very Important	
Patron Engagement	Provide a fully functional WYSIWYG feature to create and edit multiple html-based email templates.	Very Important	
Patron Engagement	Provide the ability for patrons to subscribe and unsubscribe to specific types of notifications.	Very Important	
Patron Engagement	Provide the ability to set up multiple, automated email campaigns. Please provide an in-depth answer about the types available like patron data/touch points.	Very Important	
Patron Engagement	Provide the ability to report on email deliveries, opens, and clicks on specific links within emails.	Very Important	
Patron Engagement	Provide the ability to create and automatically build static and dynamic email lists, based on patron behavior, demographics, and other criteria.	Very Important	
Patron Engagement	Provide account management for patrons like an interactive dashboard (to make selections, set up notifications, etc.).	Very Important	
Patron Engagement	Provide the ability to use patrons' selected interests for personalized, targeted communication (like genres, authors, type of programs, etc.).	Very Important	
Patron Engagement	Provide the ability for two-way interaction with patrons. Please provide an in-depth answer of what is available.	Important	
Patron Engagement	Provide permissions for staff use of community engagement tools like email marketing/notifications (i.e., selected staff can create an email, however it must be approved before being sent).	Important	
Patron Engagement	Provide the ability to integrate patron usage data from third-party vendors. Please provide a list of which vendors can be integrated.	Desired	

Patron Engagement	Provide the ability to send SMS and/or MMS/RCS messages to patrons for promotional purposes.	Desired	
Patron Engagement	Provide the ability to host an integrated program calendar. Please provide a list of which calendar services and features are available.	Desired	
Patron Engagement	Provide accessibility options for patrons such as for account management, email marketing, website landing pages, etc.	Desired	
Patron Engagement	Provide the ability to auto-translate patron communication such as email marketing and notifications.	Desired	

Category	Description	Importance	Comments
ILL	Provide the ability to integrate with our current ILL/resource sharing products: ILLiad (Atlas) and WorldCat (OCLC). Please explain how that integration would be achieved.	Very Important	
ILL	Provide the ability to fully integrate with Prospector (Colorado Alliance of Research Libraries). Please explain how that integration would be achieved.	Very Important	
ILL	Provide the ability for patrons to view their current ILLs and ILL requests, which may be through Illiad or Prospector, in their online catalog account (My Account). Please provide in-depth answer.	Very Important	
ILL	Provide the ability to fully integrate interlibrary loan functionality for circulating items. To include the ability for staff to view ILLs currently waiting to be filled, ILLs currently checked out and the ability for staff to use the ILS to check out and check in ILLs within the staff client. Please provide in-depth answer.	Very Important	
ILL	Provide the ability to automatically send various ILL notifications. Please provide list of notification types and methods.	Important	
ILL	Provide patrons the ability to access WorldCat and Prospector from the online catalog if they cannot locate item(s) in the online catalog.	Important	
ILL	Provide the ability to integrate purchase requests with the ILS acquisitions module. Please describe process from initial request, ordering, hold placing and how the patron is kept informed of the process.	Important	
ILL	Provide the ability for staff to import non-Prospector ILL records into the staff client.	Desired	

Category	Description	Importance	Comments
Collection Analysis	Provide the ability to analyze collection. Analysis to include number of checkouts, customized date range, circulation status, number of copies, number of holds, collection codes, call number, subject area, genre, copyright date, creation date, and Dewey range, and any combination of these.	Mandatory	
Collection Analysis	Provide the ability to gather usage information for purchasing decisions. To include purchase alerts and titles with no usable copies.	Mandatory	
Funds/Vendors/Budgets	Provide the ability to immediately identify and search for items/orders that have not been fully received.	Mandatory	
Funds/Vendors/Budgets	Provide the ability to easily view and create fund reports to include allocation, encumbrances, expenditures, and available balances in raw and percentage numbers.	Mandatory	
Funds/Vendors/Budgets	Provide the ability to create multiple accounts under a single vendor.	Mandatory	
Ordering	Describe all steps of order process from bringing in titles to sending order to vendor.	Mandatory	
Ordering	Provide the ability to create variety of ordering match points. To include OCLC number, ISBN, ISSN, and title/author to identify duplicate records in the system.	Mandatory	
Ordering	Provide the ability to use EDI for all appropriate Acquisitions functions. To include ordering, receiving, confirmations and invoicing.	Mandatory	
Receiving/Invoices	Provide the ability to search by multiple match points within the Acquisitions module. Please provide what match points are available.	Mandatory	
Serials	Provide the ability to easily manage various publication patterns including unique and non-traditional publication patterns.	Mandatory	
Serials	Provide the ability to display received issues by ascending or descending chronology, by ascending or descending enumeration.	Mandatory	
Serials	Provide the ability in the Serials module to allow staff to choose whether or not to automatically import items into the catalog.	Mandatory	
Serials	Provide serials claim tracking function.	Mandatory	
Steering	Provide ability to add internal notes to bib record and items.	Mandatory	
Collection Analysis	Provide a variety of alerts when discarding item. To include alerting staff if item has any hold, including suspended.	Very Important	

Funds/Vendors/Budgets	Provide the ability to create flexible fund structures.	Very Important	
Ordering	Provide the ability to detect duplicate purchase orders and provide alerts when a new order is created.	Very Important	
Ordering	Provide staff the ability to edit, modify or delete orders after the order is placed.	Very Important	
Ordering	Provide the ability to easily identify orders that have not been successfully submitted.	Very Important	
Receiving/Invoices	Provide staff the ability to modify invoices as needed, including edit or delete.	Very Important	
Receiving/Invoices	Provide the ability to map multiple charges from the invoices to appropriate individual funds (processing, shipping, MARC records, etc).	Very Important	
Steering	Provide the ability for item branch location to automatically change to reflect current branch location as items move to fill holds.	Very Important	
Funds/Vendors/Budgets	Provide audit trail of fund allocations and adjustments.	Important	
Funds/Vendors/Budgets	Provide the ability to create on-demand and year-end vendor reports. To include outstanding orders, amount expended or encumbered, orders placed within a specific time frame, fill rates, etc. Provide the ability to calculate discounts based on funds, vendor accounts, etc. (while still encumbering at a discount).	Important	
Funds/Vendors/Budgets	Provide the ability to easily roll over funds, vendors, and all other related functions to new fiscal year. Please provide in-depth information.	Important	
Ordering	Provide the ability to integrate with PPLD's ERP (by Tyler Technologies) Financial system. Please provide in-depth information and example of one other library system that currently uses the integration .	Important	
Receiving/Invoices	Provide the ability to electronically receive partial shipments, including partial receipts on the same order line on the same day.	Important	
Receiving/Invoices	Please provide in-depth description of manual order receiving.	Important	
Serials	Provide the ability to create various reports based on circulation in a specified period by magazine title. To include titles that have zero circulations.	Important	
Serials	Provide predictions based on title, as opposed to individual subscriptions (or ability to copy predictions).	Important	

Funds/Vendors/Budgets	Provide the ability to create customized fund dashboard for collection areas and sub-areas.	Desired	
Funds/Vendors/Budgets	Provide the ability to create spending reports. To include Dewey range, for example "How much did we spend in the 940s vs. 810s on fund ABC?"	Desired	
Receiving/Invoices	Provide the ability to move seamlessly between fiscal years for acquisitions processes.	Desired	
Serials	Provide the ability to automatically update remaining predictions after deleting or modifying an expected issue.	Desired	
Serials	Provide the ability to automatically designate the latest issue of a periodical as non-circulating, and change the designation to "circulating" when the next issue is received.	Desired	
Serials	System identifies, through a report or some other function, unreceived issues of specific periodicals, including by type or by title, for example: only juvenile or only adult magazines, or excluding newspapers.	Desired	
Receiving/Invoices	Provide the ability to import both retail and discount prices from vendor to include the ability to calculate discounts based on funds, vendor accounts, etc. (while still encumbering at discount).	Desired	
Steering	Provide the ability to toggle between user logins within the same session, without having to have two separate instances open.	Desired	

Category	Description	Importance	Comments
Cataloging	Provide full UNICODE support to handle and display all languages.	Mandatory	
Cataloging	Provide the ability to shadow/hide/suppress records and/or items from public view.	Mandatory	
Cataloging	Provide the maximum number of characters that can be used in each bibliographic field and in call numbers.	Mandatory	
Cataloging	Provide native full-featured MARC editor functions integrated into ILS (undo, cut/copy/paste, macros, optional spellcheck).	Very Important	
Cataloging	Ability (with appropriate permissions) to move holds individually or as a group from one record to another without having to move a corresponding item with the holds.	Very Important	
Cataloging	Provide the ability to accommodate and be compliant with various cataloging standards (AACR2, RDA) including future updates and changes.	Very Important	
Cataloging	Provide the ability to copy an existing bibliographic record to create a new one.	Very Important	
Cataloging	Provide the ability to search by call number and to shelf-list (browse call number).	Very Important	
Cataloging	Provide the ability to prevent the deletion of bibliographic records which have item(s), on-order, or holdings records attached or have outstanding holds.	Very Important	
Cataloging	Provide the ability to create and edit all authority record types.	Very Important	
Cataloging	Provide the ability of system to highlight invalid authorized headings in the bibliographic record.	Very Important	
Cataloging	Provide the ability for staff to have access to the following information relating to item records: owning library, item ID, call number, copy number, item type codes, volume, shelf location, status, price, record creation date, last checkout date, due date, last check-in date, last activity date, item notes and total number of checkouts.	Very Important	
Cataloging	Provide the ability to automatically create item records when loading bibliographic records.	Very Important	
Cataloging	Provide the ability to undo changes to bibliographic records.	Important	

Cataloging	Provide the ability to use various navigation options such as keyboard shortcuts (standard and custom), tabbing, mousing, drag and drop within the bibliographic record.	Important	
Cataloging	Provide the ability to create bibliographic record templates.	Important	
Cataloging	Provide the ability to search Z39.50 datasets for MARC records.	Important	
Cataloging	Provide the ability to click on or within a MARC tag (fixed or variable) and display the associated tag, indicator and subfield values.	Important	
Cataloging	Provide the ability of the system to automatically flag MARC format errors and MARC tag errors.	Important	
Cataloging	Provide the ability to protect certain fields during bibliographic overlay.	Important	
Cataloging	Provide the ability to automatically update bibliographic records when a linked authority record is modified.	Important	
Cataloging	Provide the ability to use macros in bibliographic records and item holdings.	Desired	
Cataloging	Provide the ability to place copy-level holds on all items on a record as a batch instead of individually.	Desired	
Cataloging	Provide a fully functional web-based cataloging interface.	Desired	
Cataloging	Provide the ability to index all fields in a bibliographic record so as to be searchable in the staff client.	Desired	
Cataloging	Provide the ability to automatically track bibliographic record deletions in the staff client and remove the corresponding holdings from OCLC.	Desired	
Cataloging	Provide the ability for catalogers to save records in a draft state for later editing.	Desired	
Cataloging	Provide the ability to preview an import to see what records will be created, which records will be overlaid, and which records are duplicates.	Desired	
Cataloging	Provide the ability to click on, or within, a MARC tag (fixed or variable) and link directly to the corresponding information at LOC's MARC 21 Bibliographic Data site.	Desired	

Cataloging	Provide the ability to click & drag or cut & paste fields from one record to another in a side-by-side display.	Desired	
Cataloging	Provide the ability to import authority records in real time from a variety of external record sources, including Z39.50 targets, on a record-by-record basis and in batch mode.	Desired	
Cataloging	Provide the ability to copy an existing item record to create a new one.	Desired	

Category	Description	Importance	Comments
Currently in Symphony	Provide automated student data load: Data to be extracted from files automatically sent from local school districts. Uploaded records should automatically create new student records or update student account, excluding the PIN, if currently in the system. Additionally, new student records will populate specified custom fields (School District, School and Grade), if the student file does not contain a PIN one is automatically generated for them based on DDMM of the birthdate. The data load allows the specification of the home library, expiration date and last activity date when the student record is initially created	Mandatory	
Currently in Symphony	Provide a random sample inventory report. Report should list a pre-specified number of items located at each library. Report should randomly select items listed at that library including items that are checked out or set to lost or missing	Mandatory	
Currently in Symphony	Provide a custom fund balance report to be run on demand by Finance staff. Report uses a pre-specified data format in order for staff to directly upload paid invoice data from the ILS into the District's financial system ERP.	Mandatory	
Currently in Symphony	Provide the ability, without contacting Support, to batch change due dates and/or on shelf hold expiration dates.	Very Important	
Currently in Symphony	Provide the ability to automatically send selected patron hold, overdue and billing notification data to UMS. Data will be in defined format in order to be ingested by UMS phone notification system	Very Important	
Currently in Symphony	Provide the ability to display in the patron "My Account" the total amount patrons have saved by checking out physical items. Item amount is to be a cumulative total and not affected if the item is removed from the collection	Desired	
Not currently available	Provide the ability for patrons to subscribe to a favorite author automatic hold system. Patrons should be placed automatically on hold for selected favorite authors. Order of holds being placed should be randomized so as not to favor specific patrons. Patrons should also be able to specify format of title.	Desired	
Not currently available	Provide the ability for legal guardians to select physical titles they do not wish minors under their guardianship to check out. Legal guardians should be able access a list of titles the District owns, search by title, select titles and enter library card number of minor.	Desired	