

MATERIALS BOOKING

Vendor/Product: _____

Essential:

Criteria	Yes	No	Comments
Do the functions for materials booking activities have the same "look and feel" as other technical services modules, esp. Circulation			
Are the materials booking functions integrated into existing Circulation system, allowing operator to apply basic Circ functionality on "booked" items			
Can items from existing main collection be temporarily converted into "booked" items			
Can items that are not part of the existing main collection be temporarily converted into "booked" items			
Does the system allow different (shortened) loan periods for items from regular collection when they are booked			
Does system allow different fine rates for items from regular collection when they are booked			
Is the system able to book library materials, equipment <u>and</u> facilities			
Is Materials Booking information integrated with PAC, i.e. does booked status of items display in the online catalog			
Does the system provide the ability to search by call #, barcode #, Title, author			
Can an availability calendar for items be displayed in OPAC			
Can the availability calendar be viewed by patron or item in daily, weekly, monthly, or yearly mode - by staff or end user			
Does system allow patrons to review their current/outstanding booking requests			
When the system calculates availability is it able to account for shipping times, library closed dates and other special circumstances as defined by user			
Does the system prevent double booking			
Are both staff and end users able to book specific copies or specific formats			
Are both staff & end users able to modify previously booked items (change or cancel)			
Can the system automatically apply user fees and charge different fees to specific patrons or patron types			
Can booking restrictions/availability/loan periods/fine rates & fees be controlled by user definable combinations of user types & policies relating to specific materials			
Will the system block bookings by certain # of days before going out - can the "blocking threshold" be assigned by format type, and/or shipping method, and/or patron type			
Will the system automatically assign delivery methods according to patron type or material format			
Are confirmations automatically sent via email and/or printed to be manually sent			
Can confirmations be turned off, either individually or by patron type or delivery method			
Is the print and/or email output user definable: timing of output and wording of content			

MATERIALS BOOKING

Vendor/Product: _____

Essential (cont.):

Criteria	Yes	No	Comments
Are staff able to (re)print any list or confirmation slip on demand			
Are lists printed that summarize what email notices were sent, to whom, when			
Can the system print pull lists on the day after a booking is placed and/or at other user specified times			
Does the pull list printed information include call #, barcode, title, name of patron who placed it, course name and number			
Do delivery lists print out 10 working days or more before shipping			
Can the system produce separate lists for each/all forms of delivery methods (e.g. pickup, mail, priority, fed ex, special courier)			
Does the system produce printed packing slips which include who, what, date, time			
Does the system provide the option for patrons to perform online self-booking			
Does the system produce booking stats/reports including: number of transactions, by patron types, by format/material, by shipping method; number of overdue items, not returned items, fines assessed -			
Are the booking stats/reports cumulated weekly, monthly, yearly			

Important:

Does system have the ability to print media catalogs and/or bibliographies of subject selected items			
Does the system provide the option for telephone booking			