Category	Description	Importance	Comments
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	
Holds and Notifications	Provide the ability for staff to adjust holds queues for titles. Include the ability to move hold request to any desired position with a minimum of clicks and without having to move a corresponding item with the holds.	Very Important	
Circulation	Provide the ability to automatically notify patrons if their hold is cancelled due to the last copy being deleted, an order being cancelled, or the hold is past its "fill by" date.	Very Important	
Materials Circulation and Management	Provide sophisticated materials search capabilities including the ability to filter results. Display results should inlcude cover art (if available) of titles.	Very Important	
Materials Circulation and Management	Provide ability to create notes or staff alerts in patron accounts. Staff alerts should appear when staff access the patron's account.	Very Important	
Materials Circulation and Management	Provide the ability to easily access item, title or patron data when in CKI mode.	Very Important	
Materials Circulation and Management	Provide the ability to manipulate item statuses (such as claims returned, lost, claims never checked out) within the patron record.	Very Important	
Materials Circulation and Management	Provide the ability to autorenew materials based on set criteria. Please provide list of criteria possible.	Very Important	
Materials Circulation and Management	Provide the ability to add temporary records (on the fly) during check out.	Very Important	
Materials Circulation and Management	Provide the ability to analyze shelf capacity in real time and route materials to a new library if shelves have reached pre-determined capacity at check in library. Please provide in-depth answer addressing how shelving capacity is managed.	Very Important	
Materials Circulation and Management	Provide the ability to track in-house usage statistics.	Very Important	
General	Provide the ability to add additional optional, new patron account fields at the District's discretion.	Very Important	
Patron Records and Registration	Provide the ability to alert staff to duplicate patron records based on defined fields. Duplicate patron checking should be across all branches and not limited to one library location.	Important	

Holds and Notifications	Provide the ability for staff to place holds on multiple titles simultaneously in the staff client.	Important	
Circulation	Provide the ability to cascade failed notification to secondary notification method.	Important	
Circulation	Provide the ability for staff to determine what notifications have been sent as well as if the notifications were received/opened.	Important	
Materials Circulation and Management	Provide the ability to customize receipts, to include check out, check in, and in transit receipts. Please provide in-depth answer addressing fields, or custom wording, that can be added or removed.	Important	
Materials Circulation and Management	Provide the ability to access the same bibliographic, item or patron record simultaneously from multiple work stations.	Important	
Materials Circulation and Management	Describe the claims returned item process. Include if staff are alerted when claims returned items are checked in.	Important	
Materials Circulation and Management	Provide audible alerts when items are either checked in or checked out.	Important	
Patron Records and Registration	Provide the ability to auto-populate fields when creating a new patron account. (EX : Address fields auto-populate as staff begin to enter the information).	Desired	
Patron Records and Registration	Provide the ability to automatically update patron profile status based on patron birthdate. (EX: Changing a Child profile to Teen and a Teen profile to Adult based on birthdate).	Desired	
Patron Records and Registration	Provide the ability to scan patron drivers licenses to import information into the system to create patron accounts.	Desired	
Financial Information and Management	Provide the ability to create item notes on specific materials.	Desired	
Circulation	Provide the ability to place a single title on hold for multiple patrons simultaneously.	Desired	
Materials Circulation and Management	Provide the ability for staff to view patron digital checkouts and holds within patron account.	Desired	
Materials Circulation and Management	Provide the ability for staff to view and manage ILL checkouts and holds.	Desired	