

## Acquisitions Questions

1. Does your system interface with bibliographic utilities such as OCLC and RLIN; with subscription agents databases such as DataSwets and Faxon Source, with CD-ROM products to receive/download data, with institutional accounting systems?
2. Does the system provide a hot link to a URL from the OPAC if the record has information in the 856 field?
3. Does your system provide the capability of implementing Electronic Data Interchange (EDI) according to national standards (ANSI, X12), international standards (UN/EDIFACT) and related industry implementation guides? The system should be able to:
  - ▶ send and receive transactions with support for standard EDI formats
  - ▶ send electronic orders and claims, and receive acknowledgments and reports electronically
  - ▶ receive electronic order status reports from vendors
  - ▶ receive electronic invoices, including data for price, period covered, invoice number, invoice date and currency conversion data as appropriate
  - ▶ allow automatic updating of records by electronic transactions, or to have staff review transactions before posting, at processing unit discretion
  - ▶ generate error reports for failed or suspect electronic transmissions
  - ▶ send lists of desiderata to selected sites, such as vendors, publishers, other libraries
  - ▶ allow launching from an acquisitions record to external on-line resources, initiating browsers or other applications as appropriate
  - ▶ the ILS should import from and export to a commercial EDI translation package
  - ▶ all ILS systems or modules should be able to share a commercial EDI translation package
  - ▶ outside of the online ILS software, no human intervention should be required to transmit, send, receive, or otherwise handle EDI data
  - ▶ updating of the database with EDI messages should be able to occur while the system is in use
  - ▶ when it is not possible or it is undesirable to update the database with an EDI message, the message should be available for review online
  - ▶ a transaction log of all EDI transactions should be viewable online or should be printable as an off-line job
  - ▶ all EDI data should be able to be archived
4. Does your system provide for encumbrances, payment data and fund code allocations/balances to be easily converted from one fiscal year to the next, either globally or partially? What fiscal-year closeout/rollover options are provided? Can each institution act independently?

5. Does your system allow for the purging of fiscal data from previous fiscal years to be stored and accessed from a separate database? Is this functionality system wide or can a local institution act independently?
6. Does your system allow a library to load records for acquisitions actions and bibliographic records based on machine-readable records provided by suppliers and/or any independent bibliographic support utility?
7. Does your system provide direct access to a desired activity such as invoicing, without having to go through other screens or activities first?
8. Does your system allow a library staff member (not a programmer) to create customized reports on demand?
9. Does your system permit a user to specify output destinations, including?
  - ▶ workstation screen
  - ▶ local printer
  - ▶ E-mail
10. Can your system provide for storage and interactive retrieval/editing of several million orders, vendors, invoices and related records in total across all ten SUS institutions, with several fiscal years' worth of stored data and each institution having its own local data?