



**Australian Government**

**Department of Education, Employment and Workplace Relations**

# **CULINM402A Use integrated library management systems**

**Release: 1**

## CULINM402A Use integrated library management systems

### Modification History

| Release   | Comments                                                                                                                         |
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| Release 1 | This unit of competency first released with <i>CUL11 Library, Information and Cultural Services Training Package version 1.0</i> |

### Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to meet customer needs using integrated library management systems (ILMS). The unit requires the application of a basic understanding of the interrelated functions of an ILMS to use online catalogues, process loan transactions, and provide circulation and lending services to customers.

### Application of the Unit

This unit applies to individuals working in frontline information services roles in libraries. Work is undertaken under supervision, within established policies and procedures.

### Licensing/Regulatory Information

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

### Pre-Requisites

Not applicable.

### Employability Skills Information

This unit contains employability skills.

## Elements and Performance Criteria Pre-Content

| Element                                                                  | Performance Criteria                                                                                                                                                                                                                                                                                                    |
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| <i>Elements describe the essential outcomes of a unit of competency.</i> | <i>Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.</i> |

## Elements and Performance Criteria

|                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
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| 1. Create records in the ILMS                                      | <p>1.1 Develop an understanding of the <b>basic functions</b> of an ILMS, including the <b>interrelation of different modules</b></p> <p>1.2 Register new borrowers on to the <b>automated circulation system</b> according to organisational and system guidelines</p> <p>1.3 Process an acquisition by creating a record in the acquisition module</p> <p>1.4 Generate an interlibrary loan request by creating a request through the ILMS</p>                                                                                                                                                                                                                                                                                                                                                                                                           |
| 2. Provide customer support in relation to circulation and lending | <p>2.1 Provide current and accurate information to customers in relation to <b>circulation and lending policies and procedures</b>, including <b>self-service systems</b></p> <p>2.2 Process loan and return transactions according to organisational policies and procedures, including <b>security procedures</b></p> <p>2.3 Follow <b>safe work practices</b> when performing circulation and lending services</p> <p>2.4 Manage competing demands for services according to customer service standards</p> <p>2.5 Resolve <b>customer enquiries</b> and <b>complaints</b> within scope of own job role.</p> <p>2.6 Refer complex customer queries and complaints to relevant personnel</p> <p>2.7 Provide information on the range of services which may incur costs, including pre-paid services</p> <p>2.8 Process <b>financial transactions</b></p> |
| 3. Use online catalogues to assist customers                       | <p>3.1 Use <b>basic search features</b> of online catalogues to provide current and accurate information to customers</p> <p>3.2 Use online catalogues to assist customers in locating information resources in library collections</p> <p>3.3 Explain classification numbers and shelving location symbols or prefixes displayed on online catalogues to customers</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| 4. Maintain knowledge of ILMS trends and emerging technologies     | <p>4.1 Source information about current industry trends and emerging technologies in relation to ILMS</p> <p>4.2 Provide information to colleagues in relation to <b>add-on library automation software and hardware</b></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |



## Required Skills and Knowledge

*This section describes the skills and knowledge required for this unit.*

### Required skills

- communication skills to:
  - provide effective customer service
  - refer complex customer enquiries to others
  - share information with colleagues
- learning skills to maintain knowledge of trends and emerging technologies impacting on the ILMS
- numeracy skills to:
  - handle cash transactions
  - process credit card and electronic funds transfer (EFT) transactions
  - calculate charges for pre-paid services
- planning and organising skills to:
  - perform ILMS tasks in a logical sequence
  - research background information about ILMS
- problem-solving skills to:
  - deal with competing demands
  - handle customer enquiries and complaints
- self-management skills to:
  - follow workplace procedures
  - prioritise work tasks and meet deadlines
- technology skills to:
  - use loan processing and other circulation systems
  - search online catalogues.

### Required knowledge

- basic functions of ILMS
- interrelation of different modules in the ILMS
- interrelation between different functions of an automated library management system, including cataloguing, circulation and acquisitions modules
- basic features of online catalogues
- basic features of automated circulation systems, including self-charging systems and associated technologies
- organisational policies and procedures in relation to:
  - lending
  - interlibrary loans
  - security
  - financial transactions
  - customer service
  - processing loans and returns
  - circulation services

- safe work practices relating to using an ILMS.

## Evidence Guide

*The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.*

|                                                                                                     |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
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| <b>Overview of assessment</b>                                                                       |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>Critical aspects for assessment and evidence required to demonstrate competency in this unit</b> | <p>Evidence of the ability to:</p> <ul style="list-style-type: none"> <li>• use ILMS to: <ul style="list-style-type: none"> <li>• process loans and returns within required time constraints according to procedures</li> <li>• conduct basic online catalogue searches</li> <li>• assist customers to find information using ILMS functions</li> <li>• create records in the acquisitions module</li> <li>• generate interlibrary loans</li> </ul> </li> <li>• maintain knowledge of trends and emerging technologies affecting ILMS.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>Context of and specific resources for assessment</b>                                             | <p>Assessment must ensure:</p> <ul style="list-style-type: none"> <li>• use of an ILMS for loan processing and catalogue use, acquisitions and interlibrary loans</li> <li>• interaction with others to reflect the customer service skills in this unit</li> <li>• access to relevant policy and procedures manuals and loan processing systems.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>Method of assessment</b>                                                                         | <p>A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit:</p> <ul style="list-style-type: none"> <li>• direct questioning combined with review of portfolios of evidence and third-party workplace reports of on-the-job performance</li> <li>• direct observation of the candidate processing loan transactions, answering customer enquiries, conducting catalogue searches, and creating a record in the acquisitions and interlibrary loans modules</li> <li>• verbal or written questioning to assess knowledge of basic features of ILMS and associated security procedures.</li> </ul> <p>Assessment methods should closely reflect workplace demands and the needs of particular client groups (consider the requirements of different age groups, clients with English as a second language, clients with disabilities, remote library</p> |

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|                                            | users, etc.).                                                                                                                                                                                                                      |
| <b>Guidance information for assessment</b> | <p>Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example:</p> <ul style="list-style-type: none"><li>• CUECOR03B Provide quality service to customers.</li></ul> |

## Range Statement

*The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.*

|                                                                       |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
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| <b>Basic functions</b> may include:                                   | <ul style="list-style-type: none"> <li>• automated acquisitions systems</li> <li>• automated cataloguing systems</li> <li>• automated circulation/lending services systems</li> <li>• automated interlibrary loans systems</li> <li>• automated serials systems</li> <li>• online public access catalogues (OPACs).</li> </ul>                                                                                                                                                                                                                                                                             |
| <b>Interrelation of different modules</b> may include:                | <ul style="list-style-type: none"> <li>• bibliographic records in online catalogue linked to cataloguing database or module</li> <li>• interlibrary loans history linked to patron record in circulation</li> <li>• loan status linked from circulation module to online catalogue display</li> <li>• missing status linked from item record in circulation or cataloguing module to online catalogue display</li> <li>• on order or in process status linked from acquisitions module to online catalogue display</li> <li>• serials records and check-in history display in online catalogue.</li> </ul> |
| <b>Automated circulation systems</b> may include:                     | <ul style="list-style-type: none"> <li>• borrower registration or patron records</li> <li>• generation of overdue notices and fines</li> <li>• loan of information resources</li> <li>• records of loan history by item and borrower</li> <li>• renewals</li> <li>• reservation of items on loan</li> <li>• return of information resources.</li> </ul>                                                                                                                                                                                                                                                    |
| <b>Circulation and lending policies and procedures</b> may relate to: | <ul style="list-style-type: none"> <li>• charges for library services</li> <li>• damaged or missing items</li> <li>• disputes about returns</li> <li>• loan periods and their provisions</li> <li>• not-for-loan items</li> <li>• number and type of items that can be borrowed</li> <li>• overdue items and fines or replacement costs</li> <li>• restrictions on access to library services or materials</li> <li>• withdrawal of borrowing rights.</li> </ul>                                                                                                                                           |

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| <b><i>Self-service systems</i></b><br>may include:     | <ul style="list-style-type: none"> <li>• online renewals and reservations</li> <li>• self-check machines.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b><i>Security procedures</i></b><br>may include:      | <ul style="list-style-type: none"> <li>• data protection privacy</li> <li>• high demand items held in open or closed reserve</li> <li>• inspection of customers' bags</li> <li>• location of resources in secure locations, such as behind front desk</li> <li>• location of shelving with resources in full view of staff</li> <li>• no bags or backpacks allowed in library, particularly school libraries</li> <li>• sensitising or desensitising magnetic security devices, such as magnetic strips or labels</li> <li>• using protective devices, covers or dummy cases</li> <li>• using security gates or systems</li> <li>• video monitoring.</li> </ul> |
| <b><i>Safe work practices</i></b><br>may include:      | <ul style="list-style-type: none"> <li>• ergonomic furniture or equipment</li> <li>• ergonomic workstations and customer service areas</li> <li>• exercise</li> <li>• recommended safe manual handling of information resources</li> <li>• recommended safe practices for lifting, bending and stretching</li> <li>• rest breaks</li> <li>• use of mechanical aids, such as: <ul style="list-style-type: none"> <li>• lifting devices</li> <li>• trolleys.</li> </ul> </li> </ul>                                                                                                                                                                               |
| <b><i>Customer enquiries</i></b><br>may be:            | <ul style="list-style-type: none"> <li>• by email</li> <li>• by fax</li> <li>• by phone</li> <li>• face-to-face</li> <li>• from library website</li> <li>• in writing.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b><i>Complaints</i></b> may relate to:                | <ul style="list-style-type: none"> <li>• damaged or lost items</li> <li>• disputed returns</li> <li>• loans</li> <li>• overdue items or fines</li> <li>• reservations.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b><i>Financial transactions</i></b><br>may relate to: | <ul style="list-style-type: none"> <li>• booking or hire fee for rooms and facilities</li> <li>• interlibrary loan or document delivery charges</li> <li>• internet or computer use</li> <li>• overdue fines</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                         |

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|                                                                     | <ul style="list-style-type: none"> <li>• payment of: <ul style="list-style-type: none"> <li>• Australia Post invoices</li> <li>• council rates</li> <li>• utility bills</li> </ul> </li> <li>• photocopying or printing charges</li> <li>• prepaid services cards purchased through auto teller machines</li> <li>• purchase of consumables, such as: <ul style="list-style-type: none"> <li>• data storage devices (e.g. USBs)</li> <li>• overhead transparency sheets</li> </ul> </li> <li>• replacement costs for lost or damaged items</li> <li>• reservation charges for items on loan</li> <li>• sale of library bags and printed publications.</li> </ul>                                                                                                                                                                        |
| <b>Basic search features</b> may include:                           | <ul style="list-style-type: none"> <li>• author</li> <li>• combined search</li> <li>• keyword</li> <li>• phrase</li> <li>• quick search</li> <li>• subject</li> <li>• title.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>Add-on library automation software and hardware</b> may include: | <ul style="list-style-type: none"> <li>• automated security systems</li> <li>• barcode readers</li> <li>• card printers</li> <li>• card laminators</li> <li>• content enrichment technologies, including: <ul style="list-style-type: none"> <li>• images</li> <li>• links from catalogue/OPAC records to table of contents</li> <li>• notes</li> <li>• profiles</li> <li>• reviews</li> </ul> </li> <li>• current and emerging web technologies</li> <li>• federated search engines</li> <li>• fully automated loans, returns and shelving systems</li> <li>• label printers</li> <li>• links to full text content from OPAC</li> <li>• mobile barcode terminals</li> <li>• other add-on software and hardware</li> <li>• receipt printers</li> <li>• radio frequency identification (RFID) technology</li> <li>• scanners.</li> </ul> |

## **Unit Sector(s)**

Knowledge management - Information management