



Australian Government

Department of Education, Employment and Workplace Relations

CULINM503A Use and monitor advanced functions of integrated library management systems

Release: 1

CULINM503A Use and monitor advanced functions of integrated library management systems

Modification History

Release	Comments
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 use advanced functions of, and evaluate the functionality of, integrated library management systems (ILMS). The unit requires the analysis of interrelated functions of an ILMS, as well as the evaluation of systems and services.

Application of the Unit

This unit applies to library technicians working in functional areas of libraries and people seeking work as library technicians.

Individuals would work autonomously, within established policies and procedures. In some contexts, work may involve supervisory or team leader roles.

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
<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

1. Extend expertise in the use of ILMS	1.1 Maintain currency of knowledge of the basic functions and interrelation of different modules of an integrated library management system 1.2 Research the enhanced functions of online catalogues, including web interfaces and applications 1.3 Provide information to customers regarding online catalogue and circulation systems
2. Use advanced features of the ILMS to assist customers	2.1 Use advanced search features of online catalogues to locate information resources for customers 2.2 Use advanced circulation system functionality to resolve complex borrower problems and complaints 2.3 Provide information to customers regarding range of services that may incur costs 2.4 Process financial transactions and provide customers with information about pre-paid service transactions 2.5 Refer complex customer transactions to relevant personnel
3. Use advanced ILMS functions for collection management	3.1 Order and receive library resources using the automated acquisitions systems and procedures 3.2 Create records using automated cataloguing systems and procedures 3.3 Create reports and statistical data with different modules
4. Evaluate functionality of ILMS	4.1 Evaluate functions of an existing ILMS in relation to customer and organisational needs 4.2 Source information about current industry trends in relation to ILMS, including potential new systems, upgrades or add-ons 4.3 Consult with relevant personnel and make appropriate recommendations regarding improvements to ILMS

Required Skills and Knowledge

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

Required skills

- analytical skills to evaluate ILMS functions
- communication skills to:
 - consult with relevant personnel
 - provide effective customer service
- initiative and enterprise skills to identify the potential of systems and upgrades to improve customer service and workplace procedures
- learning skills to maintain currency of ILMS knowledge
- numeracy skills to:
 - calculate charges for services
 - handle cash transactions
 - process credit card or electronic funds transfer (EFT) transactions
- research skills to source information about existing systems and the need for potential new systems, upgrades or add-ons
- self-management skills to:
 - follow workplace procedures
 - prioritise work tasks and meet deadlines
- technology skills to use integrated library management systems and functions.

Required knowledge

- basic operation of automated library management systems, including interrelation between cataloguing, circulation, online catalogue and acquisitions modules
- basic and advanced features of automated library management systems, including customer self-service systems and associated technologies
- relevant workplace policies and procedures in relation to lending and interlibrary loans
- procedures for document delivery modules
- procedures for handling money and security
- best practice customer service policies and procedures
- impact of relevant legislation on provision of library and information services.

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.

Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • use basic and advanced features of an ILMS • conduct basic and advanced online catalogue searches • provide information to customers in a courteous and helpful manner • source information regarding current industry trends in relation to ILMS • evaluate functionality of an ILMS and make recommendations regarding new systems, upgrades and add-ons.
Context of and specific resources for assessment	Assessment must ensure: • use of current industry systems and equipment • interaction with others to reflect the customer service skills in this unit • access to relevant organisational policies and procedures manuals.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third-party workplace reports of on-the-job performance • direct observation or verified evidence of the candidate using basic and advanced features of an ILMS • verbal or written questioning to assess knowledge of basic and advanced features of ILMS • review of recommendations regarding new systems, upgrades and add-ons. 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 users, etc.).

Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBCUS501B Manage quality customer service.
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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.

Basic functions may include:	• automated acquisitions systems • automated cataloguing systems • automated circulation and lending services systems • automated interlibrary loans systems • automated serials systems • online public access catalogues (OPACs).
Interrelation of different modules may include:	• bibliographic records in OPAC linked to cataloguing database or module • bibliographic records linked to home library service • interlibrary loans history linked to patron record in circulation • loan status linked from circulation module to OPAC display • missing status linked from item record in circulation or cataloguing module to OPAC display • on order or in process status linked from acquisitions module to OPAC display • serials records and check-in history display in OPAC • use of modules to establish operating procedures and conditions throughout the ILMS, such as: • administration • management • parameters.
Integrated library management system may include:	• acquisitions • administration and management, including: • bookings • customising system parameters • cataloguing • circulation • digital resource management • home library service • interlibrary loans • OPAC • patron records and files • report writer function • reserve room

	• serials.
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Enhanced functions may include:	• access to electronic databases • ‘ask a librarian’ services • authentication for remote sign-on • federated search engines • links to enhanced content, such as: • publisher reviews • table of contents • links to the services of other library websites • links to other websites or services, such as free email • live chat sessions • resource linking from reference databases to full text resources • current and emerging web applications, such as social networking • web-based search engine linking with organisation's intranet.
Information may relate to:	• classification numbers • interlibrary loans and document delivery services and systems • self-service systems, including: • online renewals and reservations • self-check machines • shelving location symbols or prefixes as displayed in online catalogues • statement of holdings.
Advanced search features may include:	• any combination of basic search features • exact phrases or proximity searching • limiting search by factors, such as: • collection • date range • geographical location • language • location • material type • number of records to be displayed • search by: • barcode • call number • International Standard Book Number (ISBN) • International Standard Serial Number (ISSN) • search by unique identifying numbers, such as: • accession number • order number • system record number

	• search across multiple databases using federated search engine • use of Boolean operators in search terms.
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Advanced circulation system functionality may include:	• financial management for payment of fees and other charges • generation of reports, including overdue items and fines from circulation database • reports of loan history by item or borrower • sending report and notices via email or SMS to customers • statistical and other data reports, including: • holdings data • loan statistics • shelf lists • web interfaces and other applications.
Services may include:	• consumables, such as: • library bags • USBs • faxing • internet or computer usage • laminating • pre-paid services cards • printing or photocopying • membership for special categories, such as general public using academic library.
Costs may relate to:	• fines for overdue items • hire, such as: • equipment • facilities • room • replacement of lost library cards • replacement of missing or damaged items.
Financial transactions may relate to:	• booking or hiring rooms or facilities • faxing • handling cash payments • interlibrary loan or document delivery • internet or computer use charges • overdue fines • payments, such as: • council rates • Australia Post invoices • utility bills • photocopying or printing charges • prepaid services cards purchased through auto teller machines • processing credit card or EFT transactions • purchase of consumables, such as:

	• overhead transparency sheets • data storage devices, such as USBs • replacement costs for lost or damaged items • reservation charges for items on loan • sale of library bags or printed publications • those performed by another section or department, such as the administration section in schools.
Automated acquisitions systems and procedures may include:	• electronic data interchange (EDI) invoicing • electronic methods for despatching orders, such as: • email • EDI • financial/budget control in acquisitions database • functions performed in acquisitions module, such as: • ordering and invoicing • supplier files • interrelation with online catalogue, such as on order status display in OPAC • link to bibliographic records in cataloguing and OPAC databases.
Automated cataloguing systems and procedures may include:	• links to acquisitions, circulation and online catalogue modules • overview of copy and original cataloguing • searching and downloading bibliographic records from external databases • shared cataloguing networks.
Modules may relate to:	• home library service • interlibrary loans • learning systems • serials check-in.
New systems, upgrades or add-ons may include:	• automated security systems • barcode readers • card laminators • card printers • content enrichment technologies, including: • images • links from catalogue and OPAC records to table of contents • notes • profiles • reviews • current and emerging web technologies • federated search engines • fully automated loans, returns and shelving systems • implementing additional modules or upgrades to existing systems

	• label printers • links to full text content from cataloguing database or OPAC • mobile barcode terminals • receipt printers • radio frequency identification (RFID) technology • scanners • seamless interaction with external databases • systems that use open source applications • upgrading functionality of modules • upgrading versions of modules.
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Unit Sector(s)

Knowledge management - Information management