



PORTFOLIO

Providing ILS software entails being close to librarians so we can understand their everyday needs, and being on top of the market so we can remain at the forefront of improvements.

PortFolio 7, our powerful ILS

A quick look reveals a multilingual solution to accommodate patrons in their most comfortable language and Web-Centricity so that very little is needed on the workstation aside from your favorite browser. The four expected modules (Catalog, Circulation, Acquisitions and Serials) are there as well as many more, such as Legal Deposit, Data Warehouse, OAI Harvester, BookMobile, etc. And of course, with an OPAC which is way more than the traditional OPAC!

A further look shows a fully customizable system with a capability for nearly unlimited amount of information fields coupled with almost unlimited indexing. And of course, a powerful Search engine with Boolean operators to go with it. Now that's potential at your service!

You expected more? How about user-friendliness, online documentation and uncomplicated report printing? What about generating your own reports? And you can enact many bulk changes throughout and every modification in real time, whatever the module. Would you like SDI (Selective Dissemination of Information)? It's a 'push' factor allowing patrons to receive any specific information from your Catalog, via their chosen method, on a given subject, when it becomes available. Now how about that!

We previously mentioned interconnectivity. Well there is of course Z39.50, Library of Congress, EDI and the like, but also SRU/SRW (Search & Retrieve via URLs and Web Services), OAI (Open Archives Initiative), OCLC (Online Computer Library Catalog), enriched data gateways and many others. And we will have RDA, FRBR and Dublin Core as soon as those norms are finalized.

Now let's move to our other modules.

The Catalog

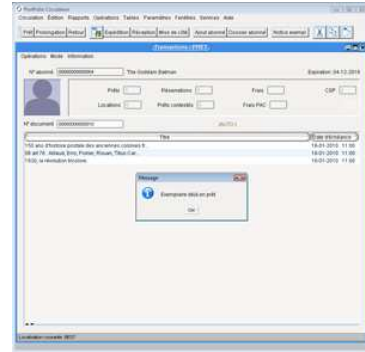
All the expected standard functions are there: templates, bibliographic, authority, copy and analytical records. But there's a more to it, like adding any other information field you want to have and making it a searchable one, like choosing any fields you require for authority record validation, like having more than 1 thesaurus for authority validation and deciding which one has priority. Also, there is the matter-of-fact record importing so you don't have to do record creation manually, if that's what you choose.

Best of all is the extremely advanced search, with single field and multiple fields (Title-Author-Subject, for instance), and with Boolean combinations and exclusions. You now have a tool that will go all the way.



Circulation

Again, you get all the functions you expect, like Patron management, Loans, Returns, Holds and Renewals. But put a little more sugar on it with extensive managed policies for fines and customized multi-level notices with automated email or phone notification. And you will like the tightly integrated interlibrary loans and temporary deposits when you have to temporarily change locations, sub-locations or document categories.



Oh yes, and what about SDI (Selective Dissemination of Information), where patrons may set up one or many search profiles and be kept abreast of results? And did we mention automated check-in and check-out stations thru RFID or barcodes? Soooo efficient!

Acquisitions

Enter Orders, Gifts, Requests and Legal Deposits. Ease of use with many default values already predefined. Set up Orders from patron and staff Request Lists or from all the Search possibilities you had in the Catalog module. There are many possibilities and your Copy records will be automatically generated.

All Orders may be regrouped before being sent to suppliers. Receptions are a breeze, driven by your pending orders, and this information may be exported to your outside financial system thru EDI or otherwise.

Or go ahead and create Invoices and Credit Notes, again working with your pre-created info. Either way, you decide if you want to work your budgets there or in your financial system. We give you the possibility of centralizing thru your main library or decentralizing to each branch or even letting each library be autonomous.

Serials

You get all the functionality as with Acquisitions, such as Searching, Importing, Orders, Gifts, Legal Deposit, Invoicing, Claims, etc. You also acquire the added capability of completely managing Subscriptions. You may define any type of periodicity, alter it as you go, add unexpected issues and/or additional elements, add them ahead of time and on the fly, and so forth. The system will automatically auto-generate future issues on check-in, according to the periodicity.

And you do have Routing lists for staff and/or for patrons, and the sought-after Binding function which allows for assemblage of all copy records as one and for all details covering physical assemblage as well.

Security

All your modules are of course secured, but you want to be able to tweak them a bit and this is where you do it. In this module, you get your say on every level, from module access to function level to mode control. You decide who accesses what and who sees what.