Questions for IR Vendor – Minnesota State University, Mankato – Drafted 11/05/2015 by the Digi-Squad (Library Services Digitization Taskforce)

ITEM/FORMAT QUESTIONS

1) Are there limits on size and number of objects added?

    a. If there is a limit on the size capacity for objects, can we obtain more space?

    b. What would the cost be in obtaining more space?

    c. If we have a high number of objects in the repository, does this slow down the speed for objects to appear or be downloaded or does that depend on end-user equipment?

2) What types of formats are supported?

    a. How are video objects handled – can you add streaming videos or do you have to download videos to view them?

    b. Do you have any recommendations on format types?

    c. Do you have a process in place to handle format migration in the future?

3) Can you get thumbnail previews of photos? Are thumbnails auto-generated or do we have to create multiple sized versions?

4) Can you watermark or band an image?

5) Can you pan/zoom in on objects/specific parts of a page?

6) Can you limit access to a specific collection or even individual items based on IP range or by using EZProxy?

7) Can you embargo items and if so, what is the process for embargoing items? When items reach the end of the embargo period, what needs to be done?

8) How are multiple page objects handled and displayed (for example a yearbook or serial)?

9) How does the system deal with/handle compound objects, like a thesis (text) with separate accompanying images and/or supplemental files?

TECH SUPPORT QUESTIONS

10) Is your product a hosted service or open source or a combination?

11) What kind of tech support is provided and are there any associated costs? Is there 24/7 tech support? What is the expected turn-around time for issues or problems?

12) How is the repository backed up? What kind of protection and security does it have (LOCKSS)? Have you ever had an outage or a time when a repository could not be accessed? If there is an outage, what is the approximate wait time before it can be brought back up?

13) If your product has a hosted service, where are the servers located? How often are the servers upgraded/how often is maintenance done and will that impact our repository or not?

14) How often is the software updated? How has this been done in the past? How does it impact our version/interface? How are updates scheduled (whose timeline)?

METADATA QUESTIONS

15) What metadata schemas do you support? Can we select our metadata schemas or is it built into the product? Is the metadata compatible with Summon or other resource discovery tools?

16) Please show us the process for metadata creation.

17) How does OCR work with your system – is it built into your system? What type of OCR software do you use? Do you have any limits on OCR?

18) Can we export a tab delimited file of metadata to the Minnesota Digital Library?

19) Can we selectively map our ETDs, for example, to MARC and load in OCLC? How can you harvest metadata for local catalog record creation?

COMPATABILITY/SEARCH ENGINE QUESTIONS

20) How does your product work with ProQuest in terms of ETD creation and uploading?

21) How does your product work with ContentDM? Can we bring in objects from ContentDM or link out to objects?

22) Can you add a creative commons license or link out to a CC license? How are copyright statements created (item level or collection level or both)? Is there a copyright template or do we create our own?

23) How is the repository discovered by Google and other search engines? Is anything done to ensure search engine optimization?

24) Will the system work with various browsers/systems (Safari and Chrome specifically) or is there a preferred browser/system? How does the product display/work on mobile devices?

25) Indexing – is this instantaneous and automatic or do we have to do something? How long on average does indexing take?

26) Interface customization – who does this? Can we do some customization by ourselves and would we have support? Can we brand the site?

END USER QUESTIONS

27) How does the end user search the repository? Does it allow searching by title, author, subject, keyword, dates? Can we create our own searches or are they canned searches?

28) Are there advanced searching capabilities or browse functions?

29) Does full text searching highlight results or take you directly to the specific page/spot where the word is mentioned?

30) Can you browse serials by specific issue or date?

31) Are there citation features? Can you export to RefWorks? Can users click on a citation button to get APA, MLA, Chicago, etc. generated citations?

32) What can an end user do with an item? Can they download, save, print, etc.? Can we customize this feature (for example, make it so that patrons cannot print a master TIFF file or print a specific page range)?

BACK OFFICE QUESTIONS

33) Do you have a web based or a client based back office? If client based, are there limits on number of clients per site and how can you duplicate settings/set ups on client stations? Does each computer/station need to be manually set up or can this be done automatically?

34) How do you add new users and assign them specific rights to the back office? How customizable is this process? Can you assign rights to submit items, approve items, edit metadata, delete items, run reports, export metadata and set up collections?

35) Describe the process to create a collection:
    a. Who has the authority to create a collection and how easy is it to do?

    b. Do we have to wait for someone else to create a collection? If so, how long is this process?

36) Show us any back office features:
    a. Is there a queue for approving items – what does it look like?

    b. What kinds of editing features are available?

    c. How can you fix problems across collections? Is there a find and replace?

    d. Can you edit an item after it has gone through an approval process? For example, if you find an image has incorrect metadata months after it was submitted, how can you fix the mistake or incorrect metadata?

37) Can you provide detailed, item level statistics? What types of statistics can be generated? How long are statistics kept and how long do we have access to the statistics?

OTHER QUESTIONS

38) Can you provide us the names of a few people that we can contact that use your product?

39) What are the fees? Annual Maintenance (hosting) fees, Annual License fees, Initial start-up fees, other?

40) Are there any yearly increases to fees? If so, what is the average % increase per year?