**Library Conformance Checklist Worksheet**

|  |  |  |
| --- | --- | --- |
| **Group** | **Recommendation** | **Reference** |
| **A** | Library designates individuals to be responsible for configuring Discovery Service, link resolver, proxy, and other discovery-related tools for subscribed content from Content Providers. Designated point persons should work or coordinate with each other. | 3.4.1.1 (1) |
| Workshop Notes: |
| **C** | Library enables linking, ranking, and authentication options available in the Discovery Service Tool for subscribed content from Content Providers, and seeks clarification if needed. | 3.4.1.1 (2) |
| Workshop Notes: |
| **D** | Library documents configuration decisions and the reasons behind these decisions. | 3.4.1.1 (3) |
| Workshop Notes: |
| **F** | Library regularly evaluates and updates its configurations of Discovery Service configurations. | 3.4.1.1 (4) |
| Workshop Notes: |
| **E** | Library plans for system upgrades and seeks assistance from vendors if needed. | 3.4.1.2 (1) |
| Workshop Notes: |
| **D** | Library plans and documents for discovery tool changes and seeks assistance from vendors if needed. | 3.4.1.2 (2) |
| Workshop Notes: |
| **C** | Library selects the correct database collections available in the Discovery Service tool for subscribed content from Content Provider and seeks clarification from the Discovery Service Provider and Content Provider when needed. | 3.4.1.3 |
| Workshop Notes: |

|  |  |  |
| --- | --- | --- |
| **H** | Library works with the Discovery Service Provider to learn exactly what, if any, adjustments can be made to result ranking, boosting, and weighting, and seeks clarification if needed. | 3.4.1.4 |
| Workshop Notes: |
| **C** | Library selects the correct holdings packages available in link resolver for the subscribed content from Content Providers and seeks clarification from the link resolver provider and Content Provider when needed. | 3.4.1.5 (1) |
| Workshop Notes: |
| **F** | Library regularly evaluates and updates its configurations of library link resolver configurations. | 3.4.1.5 (2) |
| Workshop Notes: |
| **C** | Library configures the proxy server for discovery services and link resolvers, and seeks clarification if needed. | 3.4.1.6 |
| Workshop Notes: |
| **H** | Library works with vendors to create detailed agreements on what support the provider offers during and after implementation. | 3.4.2.1 |
| Workshop Notes: |
| **F** | Library regularly checks and evaluates [ODI Conformance Statements](https://www.niso.org/standards-committees/odi/completed-statements) from Content Providers and Discovery Service Providers and [publisher-provided configuration guides for libraries](https://www.niso.org/standards-committees/odi/configuring-content-providers). | 3.4.2.2 (1) |
| Workshop Notes: |
| **H** | Library [advocates increasing ODI conformance for Content Providers](https://www.niso.org/standards-committees/odi/library-talking-points) and Discovery Service Providers. | 3.4.2.2 (2) |
| Workshop Notes: |
| **H** | Library uses the vendor-provided tools to report missing, incomplete, or incorrect database collections, first to the Discovery Service Provider, and next to the Content Provider. | 3.4.2.3 |
| Workshop Notes: |

|  |  |  |
| --- | --- | --- |
| **G** | Library develops and executes a staff training program for one or more staff members on managing the Discovery Service, link resolver, proxy, and other discovery-related tools. | 3.4.3.1 (1) |
| Workshop Notes: |
| **G** | Library provides regular training sessions to patrons and staff on how to use Discovery Service tool. | 3.4.3.1 (2)  |
| Workshop Notes: |
| **E** | Library staff read official documentation, announcements, and updates, and make relevant adjustments in configurations. | 3.4.3.1 (3) |
| Workshop Notes: |
| **B** | Library staff join the online communities (listservs and forums) for the Discovery Service Providers, engage in dialogue, offer ideas and suggestions, and share innovative approaches created or implemented. | 3.4.3.1 (4)  |
| Workshop Notes: |
| **C** | Library staff on licensing, electronic resources, systems and front service regularly meet to discuss configuring Discovery Service, link resolver, proxy server, and other discovery-related tools for subscribed content. | 3.4.3.2 |
| Workshop Notes: |