

**CITY OF BOISE  
LIBRARY  
REQUEST FOR PROPOSAL**



**Project Information  
Attachment 1  
RFP 15-178**

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ILS**

**Integrated Library System (ILS)  
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**Section 1. INTRODUCTION**

**1.1 BACKGROUND**

The LYNX! Consortium is currently comprised of eleven individual libraries representing eleven distinct communities or districts within southwest Idaho. Seven of the eleven libraries are located within the Treasure Valley and share a courier service to transport materials between these agencies. The membership includes:

- 1) Boise Public Library with a main facility and 3 branches, one off-site digital branch, and a potential new branch in 2016/17(BPL)
- 2) Ada Community Library District with a total of four branch locations (ACL)
- 3) Nampa Public Library (NPL)
- 4) Caldwell Public Library (CAL)
- 5) Meridian Library District; one main library, small branch, a bookmobile& smaller sprinter delivery service (MLD)
- 6) Garden City Library (GCL)
- 7) Eagle Public Library (EPL)
- 8) Twin Falls Public Library and a bookmobile (TFPL)
- 9) Hailey Public Library (HPL)
- 10) Emmett Public Library (EMM)
- 11) Mountain Home Public Library (MHPL)

Together these libraries service over 650,000 citizens within this region.

<http://tokcommercial.com/Portals/0/Images/StatsInfo/BoiseMSApacket.pdf>

The mission of the LYNX! Consortium is to cooperatively provide library resources and services to the patrons of all member libraries. The vision statement reads: The members of the LYNX! Consortium choose to work jointly to provide the best possible library services and resources to the patrons and staff of member libraries and the wider library community served mutually by the consortium.

Libraries of the LYNX! Consortium have experienced dynamic growth and expansion since the last RFP for an ILS system was issued in 2005/2006. Two area libraries (Emmett Public Library and Mountain Home Public Library) have joined the Consortium. Ada Library District has added a branch and service pickup locations, Boise Public Library added 3 branch libraries, a digital branch in 2014, and has plans for an additional full-service branch in the next few years. Meridian Library District replaced a very small branch with a larger branch and is exploring further expansion options and Nampa Public Library will complete building of their new facility in 2015. Twin Falls Public Library expanded their facility and added a bookmobile. Several of the other LYNX! libraries have also improved and updated their facilities. There is interest from other community libraries within this region in joining LYNX! The Consortium continues to see an increased demand for service at every location. It is imperative to select a system which will be able to grow with us in a cost effective manner as well as provide affordable buy-in costs for new members.

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LYNX! currently supports almost 400 public and staff PCs with ILS client installations, across 20 locations. Additionally consortium libraries each support a large number of public PCs and/or mobile devices for customer use. Each member library has their own customized web site incorporating, or with links to, the catalog and/or discovery layer.

**1.2 PURPOSE/OBJECTIVE**

The LYNX! Consortium Strategic Plan 2013-15, directs that “User services will be at the forefront of considerations for technology enhancements of our online catalog.” To this end, the membership recognizes that while they are currently sharing a Horizon system, the library vendor marketplace now provides a range of new products and services that are prevalent in other areas of technology. The LYNX! Consortium seeks a fully integrated database management system that will meet the needs of a growing environment and will function with complete satisfaction and provide the flexibility to incorporate significant improvements at reasonable cost as technology becomes available to enhance library service.

The ILS proposed must have the demonstrated capability of supporting multiple branch and independent libraries under separate jurisdictions, with a central computing configuration. Member libraries share a common database, with each library/agency/location maintaining different delinquency criteria, fine calculation rules, loan period rules, and hold parameters. The ILS must allow local definition for agency or location specific parameters.

The LYNX! Consortium is seeking to enhance its data and information processing services by implementing an integrated library system that facilitates library processes and is patron focused. This document requests provisions of computer equipment, software, and services required to implement this new integrated library system. As part of the evaluation process, LYNX! is asking vendors to submit information on their products which will meet the needs of our consortium as defined in this Request for Proposal (RFP).

The vendor selected under this Request for Proposal will provide, on both initial provision and ongoing basis, the delivery and support for all aspects of computer hardware, operating system and new and current functional applications needed by the LYNX! Consortium and outlined in this document.

In addition to providing all hardware and software for the new system, the selected vendor will be responsible for converting existing data, entering that data into the new system, providing system testing in accordance with testing provisions, training staff, documenting processes and procedures, as outlined in this RFP, and remaining available for support and service through the life of the contract between BPL, on behalf of the LYNX! Consortium, and the selected vendor.

**1.3 SCOPE OF THE PROJECT**

With a budget of \$500,000, the LYNX! Consortium is seeking to acquire a new or enhanced Integrated Library System to replace or improve its existing Horizon product. Library staff anticipates that the new ILS will have all the features and functions available in the modern product, including Windows-compliant graphical clients, full integration of the Internet into staff and patron services, and full compliance with the appropriate standards for library services, information technology and networks.

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LYNX! also wishes to make expanded use of features that are not widely available in the ILS market but have become commonplace online. These features include e-commerce links to permit patrons to pay all fee-bearing charges or purchases by credit or debit card and update patron records in real time; the ability to accommodate web community features that exploit relational data on patron use of the system (for example, “readers who borrowed this title also borrowed that one”) and accommodate options for patron reviews and ratings of materials. A sharply expanded self-service role for patrons is expected. Other features of great interest include the use of a variety of devices, devices for staff operations and patron searching, use of non-proprietary hardware in self-service, and the expansion of ILS functionality to embrace more integrated web-related electronic resource access and control from within the catalog.

LYNX! staff have surveyed the Integrated Library System market and believe that their vision is appropriate, but that no vendor of ILS products has completed development of the full range of features envisioned by staff. This will be taken into consideration when evaluating vendor responses.

The selected ILS must be adaptable and scalable to meet the needs of a growing membership. The future holds additional branches and/or expansion for existing member facilities as well as potential for new members.

The ILS must provide the following requirements.

- Public Access Catalog / Discovery layer options
  - System should allow patrons the option to purchase or rent materials from outside vendors (Amazon, Barnes & Noble, etc)
- Cataloging and Bibliographic control
- Authority Control
- MARC bibliographic and authority record import/export utility
- Acquisitions
- Electronic ordering and invoicing that will interface with Enterprise Resource Planning (ERP)
- Serials
- Circulation
- Offline circulation
- Mobile circulation
- Enhanced content
- Self check compatibility and support
- Automated notification and renewal, telephone and e-mail, SMS
- Report Writer/Generator
- Interlibrary Loan
- Outreach Services (Homebound Services)
- Z39.50 or SRW or most current standards to allow broadcast searching
- Federated searching
- Consortium-wide SIP2 licensing or SIP-less option
- NCIP Interface

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- Bookmobile and off-site support
- Inventory
- Collection agency interface (preference given to current vendor “Unique Management”)
- RFID compatibility and support
- XML interoperability
- A catalog interface easily customizable for multiple locations and audiences EDI (Electronic Data Interchange) transaction manager
- E-Commerce (ability for patrons to pay library fees on line) and update patron records in real time
- Multiple Saved List features/options available to the public Digital Media Management and Integration
- A minimum one-time database cleanup and authority record upgrade process is a required component of the RFP
- Interface with the parent agency’s ERP

Specific needs are addressed in the Technical and Functional Requirements sections of this document.

Preference will be given to proposals that can utilize the LYNX! Consortium’s current server hardware investment (if locally hosted).

In the event that the Library chooses to purchase equipment or extended maintenance elsewhere (if the system or parts of the system would be locally hosted), the vendor’s responsibility will be limited to assisting in the diagnosis of the problem and to restoring the system once the problem has been repaired by the LYNX! Consortium or the vendor responsible for the hardware.

**1.4 TIMELINE**

**LYNX! ILS RFP Project Timeline, ESTIMATED ONLY**

Initial subcommittee meetings and RFP activity development	<b>October – November 2014</b>
RFP Review & Input back from Teams	<b>December 04, 2014</b>
Subcommittee begin drafting of REP that reflects staff input & ILS requirements and desired enhancements for progress report to Directors for review and input at December Director meeting	<b>December 05, 2014</b>
Subcommittee Presentation to Directors	<b>Dec. 19, 2014</b>
Completed draft RFP document incorporating input from above to Directors	<b>February 13, 2015</b>
Completed draft RFP document sent for review to City of Boise: Purchasing Department Legal Department and IT Leadership	<b>February 17-March 18, 2015</b>
Directors approval of revised RFP document	<b>March 20, 2015 Director meeting</b>
City of Boise Purchasing - Final document approval	<b>Late March 2015</b>
RFP out “on the street” for bids	<b>April 2015</b>

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Deadline for vendor responses / quotes	<b>June 17, 2015</b>
Evaluation & selection process - includes calling in top vendors for Q&A and demos	<b>June – mid August 2015</b>
Recommendation to Directors	<b>By end August 2015</b>
Award and sign contract	<b>By end September 2015</b>
Begin training for migration setup if required	<b>October 2015</b>
Other migration activities & timing to be determined	<b>October 2015</b>

**Section 2. ENVIRONMENT**

**2.1 CURRENT HARDWARE CONFIGURATION**

Description of Consortium's network environment:

- The ILS servers currently reside with the City of Boise and Boise Public Library, which provide ILS hardware and software management services to the library consortium member libraries.
- TFPL and MLD each have bookmobiles. MLD currently connects to the ILS through a VPN into the local library network and telnet to backbone. BPL, GPL, CAL, MHPL, EPL, NPL, and MLD are using a time management system for their public PCs. Currently, payment for patron print and copy services is managed outside of the ILS. BPL and CAL use a Pharos PC management system MLD, NPL, TFPL and GPL use the Comprise SAM product. MHPL and EPL use the Envisionware system.
- MHPL and EPL both use Envisionware as a time management system for their public PCs. MHPL does not use the print cost recovery function; EPL does use the Envisionware print cost recovery system.
- BPL, ACL, TFPL, and EPL are using 3M Self Check units that interface with the ILS. NPL uses Demco Self Check units that interface with the ILS. MLD uses TechLogic self check system.
- Member libraries access the ILS through VPN.
- HPL accesses the ILS through Citrix. Each agency has its own local area network and file servers using a variety of operating systems from Windows 7 to Windows 8.
- Other client devices used by all agencies include receipt printers, scanners, 3M workstations, and networked printers.
- Consortium member libraries materials security is provided by a mix of RFID and traditional security systems from various vendors.

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The current LYNX! Consortium database servers are configured as follows:

Horizon Database Server  
VMWare Virtual Server  
Windows 2008 SP2  
Dual 2.67 GHz Intel Xeon Processor  
16384 MB Memory  
200 GB

Web Reporter Server  
VMWare Virtual Server  
Windows 2008 SP2  
Dual 2.67 GHz Intel Xeon Processor  
4095 MB Memory  
70 GB

SIP Server  
VMWare Virtual Server  
Windows 2008 SP2  
2.67 GHz Intel Xeon Processor  
4095 MB Memory  
50 GB

Telemessaging Server:  
Dell Server PE2900  
Windows 2003 RD  
Intel Xeon 5140 2.33 GHz  
4GB Memory  
200 GB

Information Portal Server

VMWare Virtual Server  
Windows 2008 SP2  
3 Core 2.67 GHz Intel Xeon Processor  
8192 MB Memory  
125 GB

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**2.2 SYSTEM GROWTH/STATISTICS TABLE**

**Population for the area encompassing the majority of consortium libraries is projected to rise from 580,629 in 2010 to 1,022,000 in 2040. A resulting impact is expected for consortium libraries**

<http://www.compassidaho.org/documents/prodserv/CIM2040/2040%20Official%20Impact%20Area.pdf>

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**STATISTICAL INFORMATION TOTALS FOR LYNX! MEMBER LIBRARIES:**

	<b>2004</b>	<b>Nov. 2014</b>	<b>Increase</b>	<b>PROJECTED 2024</b>	2024 projections (based on percentage increase in each category over previous 10 year period, and in consideration of est. regional pop. growth noted above , current branch expansion discussions & potential for new members
<b>CIRCULATION</b>	3,923,576	5,729,206	46%	8,364,641	
<b>PATRON RECORDS</b>	200,000	328,593	64%	538,893	
<b>HOLDINGS</b>	1,094,063	1,472,737	35%	1,988,195	
<b>AUTHORITY RECORDS</b>	700,000	801,547	15%	921,779	
<b>BIBLIOGRAPHIC RECORDS</b>	500,000	639,307	28%	818,313	
<b>SERIALS*</b>	2,236	2,845	3%	2930	
<b>ORDER RECORDS*</b>	36,790	8,108 on 11/26/2014  Estimate of : 5K – 45K at any one time (see note)	N/A	N/A  Estimate of : 5K – 45K plus at any one time (see note)	Not all libraries may utilize or fully utilize the Acquisitions module. Also, the number of order records will vary dramatically depending on the time of fiscal year & date a count is run. There is no indication of when the 2004 count was run.
<b>NUMBER</b>	200 staff	384 machines		561 projected	

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<p><b>WORKSTATIONS / ACCOUNTS</b></p>	<p>workstations (no record if these all had client installed)</p> <p>450 Total workstations</p>	<p>with client installed.</p> <p>Total of 510 user accounts</p>		<p>user accounts</p> <p>Used estimate of 10% increase over 510 user accounts in 2014 since client installations may no longer be appropriate considering proliferation of access via internet</p>	
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**Section 3. EVALUATION OF PROPOSALS**

*This section of the RFP identifies the evaluation and selection criteria, as well as the weighting factors for each criterion.*

**3.1 SELECTION PROCESS**

LYNX! Directors will make the overall determination as to which vendor offers the best mix of existing functionality and currently active product development and identify a Preferred Vendor for contract negotiation. For the purpose of providing input to the director's evaluation of the proposals for this RFP, particularly in the areas of Core Functionality, LYNX! has identified an ILS Evaluation Team. Proposers should be prepared to respond to requests by the ILS Evaluation Team Leader, on behalf of LYNX!, for additional information deemed necessary to assist in the detailed evaluation process. Proposers are advised that LYNX!, at its option, may award this proposal solely on the basis of the initial evaluation of the submitted responsive proposals or conduct interviews with the top ranked proposers at its own discretion..

LYNX! additionally reserves the right to:

- Select for contract or for negotiations a proposal other than that with lowest costs.
- Reject any and all proposals received in response to this RFP or to make no award or issue a new RFP.
- Waive or modify any information, irregularity, or inconsistency in proposals received.
- Request modification to proposals from any or all contractors during the review and negotiation.
- Request demonstrations of any respondent's system as part of the evaluation process.
- Visit installations at current customer sites.
- Interview existing customers.
- Negotiate any aspect of the proposal with any firm and negotiate with more than one firm at the same time.

**3.2 PROPOSAL EVALUATION**

The information required in response to this RFP has been determined to be essential for use by the ILS Evaluation Team in the bid evaluation and award process. Therefore, all instructions contained in this RFP shall be met in order to qualify as a responsive contractor eligible for consideration for award. Proposals which do not meet or comply with the instructions of this RFP may be considered non-conforming, deemed non-responsive and subject to disqualification at the sole discretion of the ILS Evaluation Team. The ILS Evaluation Team will review and evaluate all proposals which are fully responsive, submitted by the time required, presented in the format prescribed in this RFP in the form required, and meet all of the Basic System Requirements described in the System Specifications.

The evaluation process will determine the best system for the Consortium and will include, but not be limited to, consideration of the initial acquisition cost, continued operating costs, number and relative importance of continued operating costs, number and relative importance of specified needs which can be met, additional capabilities available, and cost of such additional capabilities. The Consortium may or may not select the system with the lowest initial purchase price. Other areas of principal evaluation include:

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- Compliance with system specifications
- System reliability
- Past performance on delivery and installation of the software version proposed
- Availability of the system software for delivery at time of proposal
- Capacity for system expansion
- Expected lifespan of the system following installation
- Availability of maintenance support
- Training and documentation proposed

### 3.3 EVALUATION CRITERIA

All proposals will be ranked and evaluated according to their responsiveness, completeness, apparent relevant expertise of the Proposer, ability to fully satisfy the technical requirements, and proposed training and other support services as outlined in this RFP. The Evaluation Team will use a scoring method that ranks each vendor for each criterion. All assignments of points shall be at the sole discretion of the ILS Evaluation Team. Functional specifications will be measured by responses to requirements using the following definitions.

#### DEFINITIONS:

##### **A Available**

Feature, function, product, or service is available as requested without modifying program code. Capabilities are demonstrable, currently installed, and proven at one or more library sites.

##### **D Development**

Feature, function, product, or service is under **active development and operating in a test environment**, has a deliverable date, and estimated cost. Please indicate the date after which the function and feature will be available in general release and operation in the system proposed to the library. Indicate cost, if applicable, either as a direct cost of the feature, function, product, or service, or because the feature, function, product, or service will require replacement of, or addition to, hardware or software originally proposed for initial installation, as an attached appendix.

##### **C Custom**

The functional capability does not currently exist. However, the vendor will make the capability available to the Library by customizing program code. If additional cost is involved, please indicate cost as an attached appendix.

##### **N Not available**

Feature, function, product, or service is not available nor in development. If the feature, function, product, or service is not available or in development, an explanation of how the specification might otherwise be met using alternative features, functions, products, or services currently available from the Vendor or a 3<sup>rd</sup> party, and any added costs, either direct or indirect.

##### **\$ Extra cost**

Feature, function, product, or service will have an additional cost; is not part of standard package.

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**3.3.1 Criteria will be weighted as in chart below.**

Aspect	Weight	Definition
<b>VENDOR QUALIFICATIONS</b>		
Corporate History/Stability	50	Vendor's financial and business position as provided in the proposal, described in interviews and evaluated by the ILS Evaluation Team.
Compliance with requirements	100	Meets requested features with code = A/\$
Implementation Plan	50	Vendor's plan for converting data and implementing the new system successfully to meet LYNX! requirements.
Prior Experience	50	Vendor's experience in projects of similar scale, scope and complexity with organization(s) incorporating independent libraries.
Vendor Support	50	Vendor's documentation, training, implementation skill and technical support infrastructure meet LYNX! requirements.
References	100	
<b>VENDOR FACTOR TOTAL</b>	<b>400</b>	
<b>CURRENTLY AVAILABLE FUNCTIONALITY:</b>		Vendor's proposed system and services are currently available to meet LYNX! functional requirements for current needs and projected growth in the following aspects:
Public Access Catalog/Discovery Layer	100	
Circulation	100	
Acquisitions	75	
Cataloging & Authority Control	75	
Serials	50	
Reports	75	
Interlibrary Loan/Outreach	50	
Additional features	25	Suitable for Lynx! Application
Installed lead time	50	
<b>FUNCTIONALITY FACTOR TOTAL</b>	<b>600</b>	

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<b>TECHNICAL REQUIREMENTS:</b>		Vendor's proposed server hardware, operating system, DBMS, network and client software / hosting options and features as demonstrated by the proposal, described in interviews and experienced during on-site visits and demos.
System Architecture	75	
System Operation	75	
System Reliability	100	Based upon references uptime
Local Control / Customization Options	75	Flexibility within system to allow for local authority in settings that is in accordance with the specifications.
Expected life-span of proposed product	50	Include proposed solution for systems with life-span, less than 5 years
Product support plan	50	Include availability of support staff.
Training & Documentation plan	50	Provide documentation sample and training plan
<b>TECHNICAL FACTOR TOTAL</b>	<b>475</b>	
<b>COST:</b>	250*	The vendor proposes to furnish the LYNX! Consortium with an ILS, for a total price that is in accordance with the specifications.
<b>Total</b>	<b>1725</b>	

\*Cost per point method will be used for evaluation (cost of buying one Rating Point)

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**Section 4. Functional Specifications**

1. The system must provide graphical user menus and user interfaces to all public service features, including OPAC and patron self-services, using editable and configurable HTML or other standard web-based features.
2. The system must be fully compliant with the current MARC, RDA, and UNICODE standards.
3. The system must be designed to be readily revised to accommodate record display using new cataloging standards as they are adopted.
4. The system must support a full set of public access help features that are configurable, editable, and context-sensitive.
5. The system must support a broad range of indexes and access points for library and electronic materials, with multiple searching, retrieval, sorting, and limiting features available to patrons and staff.
6. OPAC displays must be configurable and tailored to individual locations, collections, and material types.
7. OPAC should reflect code description from the ILS without manual entry.
8. OPAC designs must be customizable in color, design, logos, etc. so that site can be matched with Consortium Library websites
9. OPAC stations must be linked to a pre-established management profile configured by the individual service location, or by individual staff members.
10. The system must allow individual customizations to follow with subsequent updates. Updates must not cause the system to return to default settings.
11. The system must provide for alternate language interfaces including, but not limited to, Spanish. It will be possible to easily switch between another language and English.
12. The system should have an icon-based OPAC with sets of graphic or photo icons, specialized bibliographies, and custom pre-set searches designed by each library for standard topics.
13. The system must provide a wide variety of customizable features ---("My Catalog") for individual patrons.
14. The system must be ADA accessible. Vendors will provide a demonstration of the system's 508 compliance features as well as working site information.
15. The system must have the ability to display device friendly OPAC screens on a mobile computing device, such as a smartphone or tablet. All features must be available no matter what device is used with the OPAC.
16. Each library must have unlimited customizable profiles.
17. OPAC must have ease of use for touchscreen interfaces.

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18. OPAC must support current versions of standard browsers and two versions back.
- 
19. The OPAC should use responsive design to accommodate said mobile devices.
- 
20. System must collocate bibliographic records based on FRBR model.
- 
21. The system must have a digital asset management system integrated for the management and display of digital materials such as photos, audio, and video.
- 
22. The system must be able to incorporate digital material titles (such as eBooks, eAudio, and eVideo) from a variety of vendors customizable by agency or subscription directly in the OPAC without MARC records in the catalog. These materials should show current item availability and allow patrons to download and place holds on items without leaving the OPAC.
- 
23. The system must offer a rich variety of user self-service features, including the capability of allowing users to create and save search defaults. Users will also be able to select and manage notification type (email, phone, SMS, standard mail) independently. Users should also be allowed to create and save an OPAC interface.
- 
24. The system must support a broad range of character sets, must permit printing from OPAC workstations, must incorporate a “shopping cart” feature to identify items for further action, and must provide a wide variety of customizable features (“My Catalog”) for individual patrons.
- 
25. The system must provide user self-service options, through the OPAC, including the ability to review the status of their account and view custom displays of:
- 
- a. bills
- 
- b. items charged with due dates and accrued fines
- 
- c. holds requested, with availability status and their queue position
- 
- d. replies to their requests of library staff, with the ability to reply to responses or cancel a request
- 
- e. notes from library staff
- 
26. User accounts must be password protected with a PIN (personal identification number) or password.
- 
27. System must allow users to create a username and password for management of their account separate from their library card number.
- 
- a. Please describe options.
- 
28. Each library must have the option of allowing users to change their PINs/passwords.
- 
29. The system proposed must allow each library to require use of a PIN/password for certain types of requests.
- 
30. Users must be able to, at the discretion of each library and without staff intervention, renew eligible items.
- 
31. Users must be able to, at the discretion of each library and without staff intervention, delete, suspend, activate, and place holds.
-

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32. Regarding holds, system must allow for the following :
- 
- a. users must be entered into the holds queue on a first come first served basis
- 
- b. users of each agency must receive the materials held by their own agency first before the patrons of other agencies can have access to them regardless of where the hold is placed. Please describe methodology
- 
- c. users must be able to place copy specific holds
- 
- d. users must be able to indicate where holds will be picked up
- 
- e. select agencies to be hidden at the choice of the library
- 
33. If the agency selects to do so, the user should be able to pay a fee for a hold or expired hold.
- 
34. Users should be able to, at the discretion of each library and without staff intervention, complete online, library defined request forms, e.g., ILL, purchase requests, self-registration, suggestions or comments, reference requests, etc. These forms will be available through the OPAC.
- 
35. The system should be able to track user preferences and interests for the benefit of the user, including a “favorites list”, which will include, but not be limited to, authors, subjects, etc. These items will be accessible from the user’s personal online account.
- 
36. The system should allow the user the option to keep checkout history for future reference. This option must be customizable by agency.
- 
37. OPAC users should be able to select interests that they want the system to monitor for updates or developments. (For example, when new titles by a particular author are added to the library collection, the system proposed will produce an alert message within the user's secure online personal account.)
- 
38. The system should automatically transfer bibliographic information to the request form, as defined by each library for each form.
- 
39. The system should permit bi-directional communication between library users and library staff.
- 
40. The system must provide e-commerce functions, allowing users to make online payments for fines, fees, donations, etc. E-commerce features will be compatible with third party payment systems and will accept major credit cards.
- 
41. The system must be able to automatically analyze each library’s overall circulation and display lists of each library’s most popular titles, authors or subjects. This information will be updated automatically
- 
42. The OPAC must support Z39.50 (or current equivalent standard) searches of resources and databases.
- 
43. The system must support persistent links to services or web pages of each library’s choice.
- 
44. The system must allow custom webpage code such as JavaScript.
- 
45. The system must support designation of both basic and advanced searching levels, including an “all fields search”.
-

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46. The OPAC must provide, but not be limited to, keyword searches by title, author, subject, phrase, and Boolean, as well as icons linked to library-assigned search results lists. The OPAC should also include browse searching for those fields.
- 
47. All bibliographic fields must be full-text searchable; i.e., every word of the searchable fields will be indexed for keyword searching, if desired by a member library. Relevance ranking must be supported.
- 
48. The system must allow each profile to hide search results from selected locations.
- 
49. The system must enable users to limit searches by:
- a. publication year (limits retrieval to titles published in, after, or before a specified date, or within a specified date range)
  - b. language (limits retrieval to titles whose cataloging information indicates that they were published in the language specified)
  - c. item type (limits retrieval to titles belonging to a specific material type out of the list of possible material types established by each library, e.g., for videos, reference books, periodicals, etc.)
  - d. item category (limits retrieval to titles belonging to the user's choice of two specific item categories out of the list of possible categories established by each library, e.g., Fiction, Nonfiction, Mystery, Children, etc.)
  - e. format (limits retrieval to titles in a specified broader material type defined by each library e.g., one of the seven defined MARC formats)
  - f. location (limits retrieval to titles in a specified permanent shelving location within each library)
  - g. libraries (limits retrieval to items owned by a specified library within a shared catalog)
  - h. access (for staff use only) allows library staff to limit searching to items that are or are not restricted from patron access (staff catalog)
  - i. item status
- 
50. Apostrophes, quotation marks, parentheses, brackets and diacritic marks must be ignored. All other punctuation and special characters will be treated as spaces.
- 
51. Character case must be disregarded.
- 
52. Beginning a new search must require no more than one keystroke or mouse click.
- 
53. The system must allow the user to move forward and backward in a search, exploring alternative paths without having to re-execute the original search.
- 
54. The system must retain on the screen the terms or terms used as a search string until the user executes another search, to allow checking for errors in input if no matches are found to validate which terms were found in the system.
- 
55. The system must provide automatic spell checking in an intuitive manner similar to Google.
- 
56. The system must provide search suggestions based on frequent searches within the system.
- 
57. The system must provide fuzzy logic for search results.
-

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- 
58. The system must enable a user to submit one search expression that will search the full-text of each record in the database AKA “Everything” search.
- 
59. Vendor should provide browse indexes for authors, titles, subjects, and series.
- 
60. The system must enable a user to enter multiple words or phrases to be searched in one, more than one, or all fields.
- 
61. The system must enable a user to search multiple fields simultaneously for the words or phrases.
- 
62. The system must enable searching using the following Boolean operators within and across all fields.
- a. OR (either one or both terms must be in the record)
  - b. NOT (the following term must not appear in any record in which the previous term occurs)
  - c. AND (both terms must be in the same record)
- 
63. The system must allow implicit Boolean searches. That is, the system must allow users to enter keywords without Boolean connectors and must process a search as if AND connectors were used.
- 
64. The system must enable the user to page back and forth within the list of records retrieved by any search.
- 
65. Search results should allow the option for infinite scrolling (dynamically loading results as page is scrolled). When a record is selected and then the back button is hit, the list should then remember the last place in the results.
- 
66. Records for Search results must have the option to show item availability and location.
- 
67. The system must enable the administrator to maintain a list of fields which constitute an abbreviated record and a list of fields which constitute an expanded record.
- 
68. The system must display brief records for a search resulting in multiple hits.
- 
69. The system must display the expanded record if a search results in only one hit, as well as suggested spelling corrections.
- 
70. Authors, series, call numbers and subject headings must be hyperlinked in each record so the user can click on them to re-execute their search with more precision.
- 
71. The system should enable searching using the following positional operators within and across all fields.
- a. SAME (terms must be in the same field)
  - b. WITH (terms must be in the same sentence within a field)
  - c. NEAR (terms must be adjacent to one another, but in either order)
  - d. ADJ (terms must be immediately adjacent to one another, in the order that they are entered)
- 
72. The system should support common search engine search operators such as:
- a. + (plus sign) to indicate the inclusion of a word or phrase
  - b. – (minus sign) to indicate the exclusion of a word or phrase
-

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- c. " " (quotation marks) to indicate phrase searching
- 
73. The system should enable any reasonable (e.g. more than nine) number of keywords and linking operators (e.g. AND or NOT) to be used in a search.
- 
74. The OPAC should allow users to create personal bibliographies from a catalog search. The personal bibliographies should have multiple sorting options. Personal bibliographies should be saved, printed, SMS, shred with social media, or emailed to an email address.
- 
75. The system should allow the user to download, print, SMS, share with social media, email or save (in their account) search results.
- 
76. The system should enable fields declared to contain numeric values to be searched using relational operators.
- 
77. The system should enable searching using any of the following relational operations:
- a. "less than"
  - b. "greater than"
  - c. "equal to"
  - d. "less than or equal to"
  - e. "greater than or equal to"
  - f. "not equal to"
- 
78. Relational operation search functions must be intuitive to the lay person or the system will provide drop down menus for user selection.
- 
79. The system should enable searching using pattern matching:
- a. any number of characters or any number of characters up to a user specified maximum can be matched.
  - b. an exact number of characters can be matched.
- 
80. The system should enable both types of matching to be used:
- a. WILDCARD SEARCHING - within a string of characters
  - b. RIGHT TRUNCATION - at the end of a string of characters
  - c. TRUNCATION AND WILDCARD SEARCHING - together, in multiple combinations
  - d. LEFT TRUNCATION - at the beginning of a string of characters
- 
81. The system should enable the system administrator to configure the form for the search command to include specific search fields connected by Boolean operators, as well as a general purpose field used for searching fields not on the form.
- 
82. Users must be able to sort by pub date, title, author, availability, audience, and format.
-

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83. In addition to the standard OPAC, the Vendor should offer OPAC content enrichment integration features that will provide users with images and information similar to online book Vendors' sites.
- 
84. Describe available options for content enrichment. Please address compatibility with current vendors (Syndetics, Novelist)
- 
85. OPAC content for multimedia resources, including visual and audio samples, should be included when available.
- 
86. The Vendor should describe OPAC content enrichment products. List content providers and approximate count of enrichment records by type (e.g., number of book jacket images, author biographies, etc.)
- 

**4.1.1.5 Federated Searching**

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87. The Vendor must offer a federated search option that can be integrated with the ILS Vendor's OPAC to enable users to conduct simultaneous searches across both Z39.50 and non-Z39.50 targets including:
- 
- a. commercial abstract, full text and index databases
- 
- b. library catalogs
- 
- c. search engines
- 
88. The federated search option should return a unified search result for all such searches, regardless of the targets or protocols used to search or retrieve results from each source. Please describe options.
- 
89. The federated search option must:
- 
- a. speak to each source in its native language to provide superior results.
- 
- b. deliver results merged into a single interface to enable users to limit searches, sort, de-duplicate, and filter.
- 
90. The Vendor must describe its proposed federated search option including protocols supported.
- 
91. The system proposed must support a customizable "web portal" or "web site home page" interface, which provides space for library logos or other graphics, library news, hours of operation, branch addresses and hours of operation, and other important library information.
- 
92. This "web site home page design" must be available through the OPAC.
- 
93. The system proposed should enable the user to display maps or graphical shelving plans created by each library and stored as images.
- 
94. The system proposed must enable a user to select from bibliographies of predefined titles (e.g. book award winners, new books, local interest) both provided by the Vendor and locally generated.
- 
95. The system proposed must enable each library to define pre-set searches and assign appropriate icons that, when selected, display results automatically.
- 
- a. searches must be performed on "live" catalog data.
-

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- 
- b. search results must be fully integrated with the library catalog and display full item information, including location and availability.
- 
- c. search results may be exported to a file, printed on a local or system printer, saved to a thumb drive or sent to an e-mail address.
- 
- d. holds may be placed on items displayed.
- 
- e. hypertext links may be launched from items displayed.
- 
96. All circulation functions must be available on bookmobiles, other remote libraries and mobile devices.
- 
97. The full online public catalog must be accessible to the operator with a single keystroke or mouse click.
- 
98. The system must enable an authorized operator to access the complete user or item record at any time, from any online module, with a maximum of two keystrokes.
- 
99. The Vendor must describe and provide sample circulation statistics and reports that are available directly from the ILS.
- 
100. The system must track circulation statistics generated both by checkins and checkouts.
- 
101. The agency must be able to determine what happens to an item that is designated as "lost."
- 
- a. the item is suppressed so that it does not display in PAC
- 
- b. the item remains visible in the catalog with a status of "lost"
- 
102. The system must provide automated email notices.
- 
103. The system must be able to:
- 
- a. perform circulation using a mobile device.
- 
- b. perform circulation activities in case the system connection is lost, preferably automated.
- 
- c. Upload date and time stamped transactions when the system is available.
- 
104. Patron notices should be able to be printed, emailed, telephoned, or via SMS, according to the patron's preferences.
- 
105. The system must have the option to send pre-overdue notices to patrons who have opted in.
- 
106. Notices should have a link for the option to renew.
- 
107. The system should provide a dead letter queue that enables email addresses to be corrected. Once the address has been corrected, the notice should be able to be resent without generating the notice again.
- 
108. The system should interface seamlessly with an automated telephone notice system in order to deliver patron notices via the telephone.
- 
109. The telephone messaging system should enable two-way communication so that patrons can renew items, monitor items currently checked out, etc. using the telephone.
-

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- 
110. When delivering an overdue notice via the telephone messaging system, it should allow the patron to renew their items during the same phone call.
- 
111. Please describe your telephone messaging system.
- 
112. The system must allow entry of the borrower's and the item's identification/barcode using normal circulation tools such as a barcode scanner, keyboard and RFID reader.
- 
113. The system must search for and provide access to patron records by:
- a. identification number
  - b. barcode number
  - c. birth date
  - d. name
  - e. phone number
  - f. mailing and email address
  - g. items out to borrower
  - h. full or partial names
  - i. Boolean combinations of entry fields
- 
114. The system must identify invalid check digits and alert the operator visually and audibly when the barcode label is incomplete or incorrect.
- 
115. The system must alert the operator if no record exists for the patron entered, allowing for easy addition (completing only required fields on the patron record) and full checkout on first visit.
- 
116. The system must use a temporary record and permit circulation of library materials that are not yet in the bibliographic database. At check-in, the system should alert the operator that only a temporary record exists and prompt the operator to send the item to Technical Services.
- 
117. The system must determine permission to checkout or renew and determine due date automatically, by a conjunction of item type, patron type, and agency.
- 
118. The system must check each item for the following before permitting checkout:
- a. holds
  - b. charges
  - c. permission to circulate
- 
119. The system must be able to checkout multiple items after entering a single patron barcode.
-

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- 
120. If an item is presented for checkout that is already checked out to the current patron, the system must optionally renew it.
- 
121. If an item is presented for checkout that is already checked out to another patron, the system must check it in with no fines and then check it out to the current patron.
- 
122. The system must automatically switch patron records if a patron barcode is entered when an item barcode is expected.
- 
123. The system must checkout materials that have been temporarily reassigned or transferred from another branch or borrowed from another agency.
- 
124. The system must have an automatic means of authenticating patrons who belong to other libraries that have reciprocal borrowing agreements.
- 
125. The system must "time out" after an agency set interval (in seconds) to prevent items being checked out to a subsequent patron on the previous patron validation.
- 
126. The system must have an optional automatic address check at specified time intervals to maintain patron records; customized by agency.
- 
127. The system must allow each agency to determine circulation parameters according to item and patron (i.e., loan periods, fine rates, etc.).
- 
128. The system must accommodate separate circulation privileges by location.
- 
129. The system must allow an operator to adjust easily an item's assigned due date via the terminal keyboard for individual or unique conditions.
- 
130. The system must produce circulation slips, such as borrower receipts, for Circulation transactions. These receipts must be customizable at each agency. Borrower receipts must be generated for:
- 
- a. single check-in
- 
- b. group check-in
- 
- c. single checkout (due date slips)
- 
- d. group checkout (checkout receipts)
- 
- e. payments
- 
- f. refunds
- 
- g. renewals
- 
- h. Hold slips must be customizable to allow patron self-service with the ability to only show a few letters of the patron's last name in large letters in a large font along with item information and expiration date.
- 
- i. all items checked out
- 
- j. transit slips
-

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- 
131. The system should allow borrower receipts to be sent to patron by e-mail and text.
- 
132. The system must be able to interface with a self-checkout machine that allows borrowers to check out their own materials.
- 
133. If the system includes a self-checkout feature within the system itself the Vendor will explain and describe, including any additional hardware or software requirements.
- 
134. The system must have the ability to limit, with capability to override, the number of items on loan to a patron by:
- a. agency
  - b. item type
  - c. patron type
  - d. combinations thereof
- 
135. The system must allow any item to be checked out for any period of time (days, hours, or minutes).
- 
136. The system must allow and adjust loan periods for holidays and closed agency hours.
- 
137. The system must enable staff to define special loan and fine rules that can override standard circulation defaults.
- 
138. The system must allow fixed due dates and multiple fixed due dates.
- 
139. The system must allow the agency to define the grace period used in circulating overdue items, fines, notices, etc.
- 
- The system must provide a clear audible and visual signal (selectable by agency location) that the barcode or RFID labels have
140. been read and information accepted.
- 
141. Staff must be able to search the catalog during checkout or check-in, and then return to checkout or check-in without having to rescan the ID card or barcode, or interrupting checkout or check-in procedures.
- 
142. The system must check-in items using:
- a. the current date and time
  - b. yesterday's date (for book drop returns)
  - c. date and time specified by the agency
  - d. fines exempt mode
  - e. renewal mode
  - f. damaged mode
  - g. mending mode
- 
143. The system must check-in items with missing barcodes, using the catalog.
-

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- 
144. The system must alert the operator if an item belongs to another agency location, or if the item does not belong to any Consortium member.
- 
145. The system must allow the operator to print a check-in receipt for the patron.
- 
146. The system must allow agencies to choose from the following display elements at check-in: name, ID number of patron, title, due date of item, patron barcode, and fines, full access to account.
- 
147. The system must provide the option to exempt fees and fines as individual cases arise.
- 
148. The system must sever the link between the item and user at check-in; however, it must be possible for authorized staff to determine the last user to have checked out the item until the item is checked in by the next user, to allow investigation of any damage to items.
- 
- a. number of "previous" users must be a configurable parameter, and accessible by the system and agency administrators only.
- 
149. The system must alert the operator at check-in if an item is on hold, displaying the name of the patron who has requested the hold and automatically print the hold slip without operator intervention.
- 
150. The system must allow the operator to access information about the item being checked in without leaving the check-in function. The system must provide at least the following information: item barcode number, patron's name, patron's ID number, contact information, shortened title, due date of item, and the previous patron.
- 
151. The system must allow the operator to search the item being checked in (i.e., in the event of a missing barcode, etc.) without leaving the check-in function.
- 
152. The system must alert the operator when items checked in have one of the following statuses, customizable by agency:
- 
- a. on hold
- 
- b. needs full cataloging
- 
- c. lost item (found); credit to borrower optional rather than mandatory
- 
- d. missing item (found)
- 
- e. claims returned
- 
- f. item note
- 
- g. special statuses
- 
153. The system must generate a list of items tagged as "lost" after a specified period of time.
- 
154. The system must permit an operator to tag an item as "borrower claims item returned," and must keep a record of such tags.
- 
155. The system must allow an authorized operator to change the status of an item being checked in (lost, claims returned, damaged, mending, etc.) and manually change statuses at staff discretion.
-

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- 
156. An authorized operator may change the status of items to any valid status (for example, "missing" to "lost") by entry of the barcode by laser, or keyboard. The status of items with missing barcodes also may be changed using normal circulation tools.
- 
157. The system must record on the item the date on which a special status was assigned. This date may be used as a criterion for additional processing (i.e., assign all items "missing since Feb. 1" to status of "lost").
- 
158. The system must allow for an item to have more than one status (e.g. checked out and missing parts).
- 
159. The system must allow for additional agency-defined statuses without programmer intervention.
- 
160. The system must provide circulation statistics for checkouts, renewals, phone renewals, internet renewals, and in-house use for current and previous years.
- 
161. The system must provide use statistics for different time periods determined by the agency.
- 
162. Staff must be able to toggle between check-in and checkout with one keystroke.
- 
163. The system must be able to create work slips for items needing to be cataloged and items in transit.
- 
164. The system must integrate seamlessly with automated return and sorting systems.
- 
165. The system must provide the ability to record in-house use by scanning barcodes and RFID tags on materials being re-shelved.
- 
166. Exempting fines and/or fees should be a password-controlled function (optional by agency).
- 
167. The system must automatically alert the operator in the event of a patron or item block (i.e., non-circulation item, patron is barred from borrowing). Such blocks must require operator acknowledgment before checkout can proceed; optional by agency.
- 
168. The system must allow the operator to view a detail screen of the block without leaving the checkout function.
- 
169. Item and patron blocks must be agency-defined. The system should allow the operator to easily display blocks, detailing reasons for block(s). All blocks must have the option to be overridden by an authorized operator.
- 
170. The system must block patrons with overdue materials or unpaid fines with the option to override by agency.
- 
171. The system must allow payment in full or partial payment of fines and fees by agency.
- 
172. The system must allow for lost and paid reimbursements if the patron finds and returns the material within an agency-specified time period.
- 
173. The system must allow found items to be automatically reinstated to the collection and counted accordingly.
- 
174. The system must check to see if an item is being held, blocking the checkout if an item is in the hold file. The system must allow customization for hold permissions. The system must allow an authorized operator to override the block.
- 
175. Staff must be able to delete blocks using a single command.
-

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- 
176. Authorized operators must be able to designate a block as "read only;" optional by agency.
- 
177. The system must provide history for all patrons for an agency-specified period of time.
- 
178. The system must provide a history for all patron delinquencies (outstanding and resolved) for an agency-specified period of time.
- 
179. When an item status is changed to "claims returned," the system should generate notices to the owning agency and the reporting agency.
- 
180. The system must allow the operator to renew all items or an easily specified list of items. A single command should cause the system to renew materials without having to enter each item separately.
- 
181. The system must allow the patrons to renew items by phone, online, or in person.
- 
182. The system must prohibit renewal if the item has:
- a. a hold registered against it
  - b. reached the renewal limit (defined by patron type and agency)
  - c. some other agency specified restriction
- 
183. The system must automatically calculate a new due date based on agency-set parameters for renewals.
- 
184. The system must allow the agency to restrict the number of renewals that can be made by a patron in person, online or by phone according to the patron or item type.
- 
185. The system must allow the library to renew items from the check-in and checkout screens, using a renewal mode.
- 
186. Staff should be audibly and visually notified if there is a problem renewing the item. Such blocks must require operator acknowledgment before checkout can proceed.
- 
187. Each agency must be able to set a maximum fine amount and number of overdues that can be overridden.
- 
188. The system must list all overdue items on a single notice.
- 
189. The system must allow the agency to select the default overdue notification method, with the option to change for individual patrons:
- a. mail
  - b. phone
  - c. email
  - d. SMS
-

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190. The system must have the capability of suppressing the production of overdue notices on items on loan to patrons of a specified type.
- 
191. The system must produce bills automatically for all items overdue for an agency-specified time.
- 
192. The system must produce billing letters for:
- a. lost materials
  - b. damaged materials
  - c. misc.
  - d. missing parts
  - e. fines, determined by agencies
- 
193. The overdue notice must list the following for each overdue item:
- a. due date
  - b. title
  - c. author
  - d. item type
  - e. accumulated fines
  - f. date the notice was generated
  - g. barcodes
  - h. check-out date
- 
194. The system should allow the agency to specify text, no character limit, and included fields for overdue notices and allow the sorting of such notices by any field in the borrower record.
- 
195. The system must allow holds to be placed on all eligible items, including on shelf, on order or in process (if desired and authorized).
- 
196. The request record must include:
- a. request ID
  - b. type of request
  - c. status
  - d. library where placed
  - e. date placed
  - f. date modified
-

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- 
- g. operator
  - h. call number copy
  - i. user ID
  - j. item ID
  - k. pickup location
  - l. title
  - m. author
  - n. format
197. The system must allow the agency to select and the patron to specify the notification method when placing a hold:
- a. mail
  - b. phone
  - c. email
  - d. SMS
  - e. no notification
198. The system must allow an operator or PAC user to optionally specify a last acceptable date for a hold, after which time the material is no longer needed.
199. The system must allow the agency to set a threshold for the number of holds that a patron can make by patron type.
200. The system must alert the operator when materials on hold are renewed or checked in, displaying and optionally printing:
- a. name of the patron placing the hold
  - b. pickup location
  - c. patron barcode
  - d. item barcode
201. The system must verify the correct patron is checking out material at time of the loan, allowing an authorized operator to override.
202. The system must allow easy hold cancellations, making a note on the patron's record.
203. The system must allow an operator to easily (within a maximum of 2 keystrokes from the hold queue) change the pickup location for a hold at any time, including after that hold is in transit or already on the hold shelf.
204. The system must allow an operator or PAC user to view holds sorted by date placed, title, author, library, or hold expiration.
205. The system must allow an authorized operator to reset holds list.
-

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- 
206. The system must allow an authorized operator to view on-line the patron record for which a particular item is being held.
- 
207. When circulation staff fills a hold, the system must automatically display any comments related to the hold that were entered at the time the hold was placed.
- 
208. The system must prepare a "purchase alert" when the ratio of holds to the number of available copies exceeds an agency-set threshold.
- 
209. The system must produce notices alerting patrons of materials being held with an indication of where to pick up material, and by what date.
- 
210. The system must allow for the printing of hold slips to be placed in items being held, showing the patron name (customizable by agency).
- 
211. The system must allow an authorized operator to review holds for any given patron.
- 
212. The system must monitor the length of time items sit on the hold shelf. If the time exceeds the number of days defined to hold, the hold must be canceled and an appropriate note made on the patron's record.
- 
213. The hold record should show:
- 
- a. the date reserved
- 
- b. the pickup location
- 
- c. the status of the hold
- 
- d. the copy filling the hold
- 
- e. expiration date
- 
- f. date that the hold is expected to be filled (if status is not filled); customizable by agency
- 
214. The system should be able to tell staff if hold was placed on staff computer or public catalog; customizable by agency.
- 
215. The system should have the ability to transfer hold queues from one bibliographic record to another bibliographic record.
- 
216. When registering a new user, the system must supply a customizable template containing required and recommended user information fields.
- 
217. The system must allow for exporting of data from patron database in multiple formats. Vendor must give the data file structure to the library.
- 
218. The system must be able to import borrower records, with the ability to import multiple values for a single item (such as multiple addresses or phone numbers) and be able to import created patron records from offline circulation utility.
- 
219. Each of the data elements in the patron file must be variable length.
- 
220. The information entered and stored in the patron database must include, but not be limited to, the following fields:
-

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a. current patron identification number (system-generated)
b. barcode number
c. all invalid (canceled) patron identification numbers associated with the current patron identification number
d. PIN (optionally patron-defined, for security precautions; default is the last 4 digits of current phone number)
e. patron name
f. alternate name (optional)
g. primary and alternate addresses
h. primary and alternate telephone numbers (including area code)
i. TDD number
j. any restriction on borrowing
k. type of patron
l. patron statistical class
m. parent/guardian name; allow input of multiple parents or guardians
n. fees or fines owed
o. materials outstanding, broken down into category of material (books, DVDs, books on CD, etc.) and status (currently on loan, claims-returned, claims never borrowed, lost, etc.)
p. holds, active
q. holds, historic
r. last action date
s. expiration date of registration
t. date of issue (of patron record/borrowing privileges)
u. date of last update to record
v. delinquency, stop, lost/stolen card report, etc.
w. date of birth
x. driver's license number
y. agency location where patron registered
z. email address (option for multiple)
aa. locally defined categories/other

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- 
221. The system must be able to calculate the patron expiration date based on an established loan period, or assign a specific expiration date to each borrower type.
- 
222. The system must automatically notify the operator when a patron card will expire before the due date of the material being checked out.
- 
223. The system must flag a patron card automatically if the patron was Juvenile and is now Adult, based on birth date.
- 
224. The agency must control circulation policies by assigning a patron category to the patron's record.
- 
225. The system must allow an authorized operator to suspend borrower privileges.
- 
226. The system must allow card expirations to automatically default to the first or last day of the month, regardless of the day it was entered; customizable by agency.
- 
227. The agency must be able to define as many different patron type categories as they desire.
- 
228. The system must enable an authorized operator to assign and track probationary borrower profiles; customizable by agency.
- 
229. The following information must be stored in and linked to the patron's record:
- 
- a. date of registration

---

  - b. number of items overdue and checked out

---

  - c. fines and/or other charge amounts owing

---

  - d. payment

---

  - e. date of payment

---

  - f. identification of items on hold

---

  - g. default item loan period

---

  - h. dates overdue notices sent

---

  - i. identification of items checked out (with author)

---

  - j. number of times patron claims returned items

---

  - k. patron status

---

  - l. message relating to patron
- 
230. To prevent the duplication of patron records, when creating a new account, the system must crosscheck the following fields:
- 
- a. name

---

  - b. date of birth

---

  - c. driver's license number
-

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- 
231. The system must provide for coded fields to expedite the entry of patron information. Codes entered must be verified against a list of existing codes to ensure database integrity.
- 
232. It must be possible to search the patron file without exiting the checkout function.
- 
233. The system must display the borrower address or phone number on the borrower search results screen.
- 
234. Patron information must be held confidential and must only be accessed by those operators who have the appropriate passwords and codes.
- 
235. The system must allow the operator to reassign a new barcode to the patron when a patron card is lost, changing the status of the old barcode to "lost" and the status of the new barcode to "active." Patron information and items checked out to the patron from the old barcode must be linked to the new barcode.
- 
236. The system must be able to reactivate patron barcodes that were thought to be lost but then were found.
- 
237. The system must not delete patron records that have patron blocks (overdue items, fines, etc.); specified by each agency.
- 
238. The system must allow staff members to copy an existing patron record and retain certain fields (to ease the creation of patron records for different members of the same family).
- 
239. The system must have the ability to link family members.
- 
240. The system must enable patrons to designate representatives who can checkout and renew items in their names. The system must link the patron to the items checked out and to the proxy who completed the transaction.
- 
241. A list of items currently checked out with the following information (customizable by agency) must be displayed and available for print out:
- 
- a. title
- 
- b. author
- 
- c. due date
- 
- d. number of times the item has been renewed, at which agency, method (PAC, phone, staff, etc.), and when
- 
- e. length of loan period
- 
- f. Call number
- 
- g. item barcode
- 
- h. any fines associated with the item
- 
- i. owning agency
- 
- j. item type
- 
- k. location where the item was originally checked out
-

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- 
- l. date of checkout
- 
242. Patron statistical information may be obtained from a specific field or a combination of fields on the patron record.
- 
243. The system must provide a printed statistical report on the number of patrons currently registered, by patron status, type, and location (issuing agency/zip code).
- 
244. The system must maintain on-line records of the following transactions by patron:
- 
- a. total amount of unpaid fines
- 
- b. total amount of unpaid charges for lost or damaged items
- 
- c. current transactions or those items that are currently checked out to the patron
- 
- d. date of last library transaction
- 
- b. total amount of miscellaneous fees and charges
- 
245. The system must print and export notes and other lists (e.g. a list of blocks or items).
- 
246. All record fields may be updated by an authorized person.
- 
247. The system should allow for including a photograph in a patron record.
- 
248. The system should allow staff to select list of items currently checked out for display or printing sorted by:
- 
- a. due date
- 
- b. checkout date
- 
- c. other agency-defined arrangement
- 
249. The system must support an inventory of any portion of the collections by scanning items on the shelves using a portable data collection device using either barcode or RFID technology.
- 
250. The system must check for:
- 
- a. shelf list sequence
- 
- b. ownership
- 
- c. location within the agency
- 
- d. status
- 
- e. other (please describe)
- 
251. The system must update the inventory date field for each item inventoried.
- 
252. The system must identify barcoded or RFID tagged items that are not on file and create an exceptions list.
- 
253. The system must allow each library/branch/agency to set independent parameters for fines, notice production, etc. Rates may vary according to location and type of material and type of patron.
-

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- 
254. The system must support payments from patrons using credit/debit cards or third party systems (e.g. PayPal) in real time, not batched.
- 
255. The system must print receipts for fines paid showing date, time, amount, and item titles and barcodes for which money was received.
- 
256. The system must provide a way to track accounts receivable. The system must:
- a. allow staff to track payments and changes by fee type
  - b. provide payment receipts and invoices
  - c. generate statistics and management reports by fee type and agency/location.
- 
257. The system must permit a non-character limited text field for each line when accepting payment for fines or fees.
- 
258. The system must permit an authorized operator to waive or modify system assigned checkouts; optional by agency. The system must prompt for an operator ID (e.g., initials, employee number, etc.).
- 
259. The system must allow an authorized operator to access the patron's fines and payments record, itemizing the details of each block, or a group of blocks by date of payment.
- 
260. The system must maintain a record of fines or fees levied, fines or fees waived, fines or fees collected by agency.
- 
261. The system must provide data showing system-wide fines or fees collected for specified periods.
- 
262. The system must, on demand, print billing notices for patrons exceeding the threshold levels of unpaid fines or number of overdues.
- 
263. The system must, on demand, print overdue notice reminders of all materials overdue since the last printing or subsequent notice reminders.
- 
264. The system must prepare a Final Notice incorporating the replacement price and agency-defined processing fee of the item.
- 
265. If a book billed as a "lost book" is returned to the library, the system must automatically cancel the lost status and must produce a bill for outstanding overdues fines. Should the money have already been collected, credit due the patron must be prepared, minus a processing fee; customizable by agency.
- 
266. The system must create billing notices for damaged items.
- 
267. The system must reprint (or partially print) a run of bills, notices, etc., within the same day. The system must allow viewing of notice without necessarily having to print notice.
- 
268. The system must include unpaid balance for fines and bills to be included on all patron and availability notices; optional by agency.
- 
269. The system must accommodate "reminder invoices," where all current unpaid fees/fines can be combined onto one invoice.
-

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- 
270. An authorized operator may attach a fee to a patron record for any reason. A non-character limited text field may be associated with the fee.
- 
271. Overrides for other exceptions must be allowed for an authorized operator, with an audit trail provided by requiring the authorized person's user ID and password.
- 
272. The system must permit an operator to record single, partial or full payment of fines and fees received. In all cases, the system must interactively calculate the payment and provide an updated accounting to staff.
- 
273. The system must provide for a total maximum fine amount for a particular patron type. It must be possible for the fine schedule to be set so that no fines are levied for a particular item and/or a particular patron type.
- 
274. The system must allow each agency to set a grace period for each item type in the fine schedule to allow a given number of days after a due date before fines begin to accrue.
- 
275. The agency must be able to choose whether fines will be based on patron type, item type or a combination of patron/item.
- 
276. It must be possible for an operator to tag items as lost, claims returned, or claims never had at any time (agency will define status; e.g. lost, damaged, etc.).
- 
277. The system must provide a simple way to mark items lost that will guide the operator through the steps involved; i.e., marking the item lost and billing the user for the lost item should be part of one seamless process.
- 
278. The system must calculate overdue items currently linked to a patron and what overdue fines and fees would be if the borrower returned them today without affecting the patron's financial record.
- 
279. The system must date and time stamp all financial transactions.
- 
280. The system must allow authorized staff to waive or otherwise modify system assigned charges. Any and all waives and other exceptions should require an optional ID/password entry and text description area for explanation.
- 
281. The Vendor must provide a software module for use with a collection agency (such as Unique Management) for recovering lost and overdue materials. The collection agency package must offer notices and a final letter with legal correspondence. It must be possible to interactively update returns and collections to keep patron records up to date. It is desirable for the Vendor to provide the agency with a list of clients who use specific collection agencies.
- 
282. The system must store a patron's fine payment history for an agency-designated amount of time, the least of which is 90 days. This history must be printable on demand by authorized staff.
- 
283. The system must accommodate a cash register system, allowing for keyed entries for all types of transactions (fines, damages, photocopies, computer printouts, lost items, etc.), with a detailed daily transaction report printed for each cash register and a consolidated daily report by operator /workstation, agency and library-wide.
-

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- 
284. The system must provide for auditing money collection activity by operator and workstation. This auditing should include breakdowns by type of collection, including but not limited to: charges for photocopies, charges for computer printouts, sale of supplies, interlibrary loan charges, and damages to materials.
- 
285. The system should be capable of interfacing with a parent agency's ERP.
- 
286. The system must include a fully-integrated acquisitions module, which must support but not be limited to the following functions:
- a. selection lists
  - b. pre-order searching
  - c. ordering
  - d. claiming
  - e. cancellation of orders
  - f. receipt processing
  - g. payment/credit
  - h. routing
  - i. fund accounting
  - j. vendor accounting
  - k. currency control
  - l. statistics and report compilation
  - m. bibliographic record creation and editing
  - n. creation and addition of patron holds
- 
287. The acquisitions module must accommodate a variety of materials, including but not limited to:
- a. monographs
  - b. monographs in series
  - c. serials
  - d. periodicals
  - e. newspapers
  - f. annuals & cumulative indexes
  - g. loose leaf material
-

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- h. supplements
  - i. law reports and statutes
  - j. continuations (standing orders)
  - k. documents
  - l. musical scores
  - m. media
  - n. digital media
  - o. photographs
288. The system must accommodate and identify items in a variety of formats, including but not limited to:
- a. print
  - b. microfilm
  - c. microfiche
  - d. compact disc, MP3., etc.
  - e. DVDs
  - f. videotape
  - g. audiocassette
  - h. software
  - i. realia
  - j. electronic resources
  - k. video games
  - l. photographs
289. Data stored and available for display in the acquisitions files must include but not be limited to:
- a. bibliographic information in the same MARC and MARC-like formats as detailed in the Cataloging Module line 401
  - b. acquisitions type (order, gift, approval, etc.)
  - c. status information (reported, received, etc.)
  - d. library/branch/copy/fund information/secondary agency
  - e. invoice information
-

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- 
- f. vendor information
- 
- g. accounting information, i.e. price discount
- 
- h. requestor information
- 
- i. source notes
- 
- j. location (destination)
- 
- k. instructions to vendor
- 
- l. internal processing instructions
- 
- m. item information
- 
290. The system must provide for an unlimited number of funds, vendors, orders, claims and transactions, without added cost.
- 
291. The system must be able to set defaults for each session.
- 
292. Acquisitions should have the ability to link directly from the purchase order number to the actual purchase order anywhere in the module.
- 
293. The system must check all arithmetic operations and make corrections, both those performed by operators and those received by input data such as invoices.
- 
294. The system must calculate average annual costs for categories of materials by type, fund, and subject heading or call number range.
- 
295. The system must allow each library to create, change, and maintain an unlimited number of hierarchies which allows funding and non-funding categories. The system must allow an initial allocation when an account is first created.
- 
- a. The system must accommodate free-text comment fields with any change, update or transfer for hierarchies and/or accounts.
- 
296. The system must allow at any time the creation of new accounts, update an existing account, and close an existing account (if there are no encumbrances against it).
- 
297. The system must allow for any type of encumbrances.
- 
298. The system must permit a permanent or temporary freeze of funds with override capability, i.e., freezing new orders but permitting payment on outstanding orders; freezing both new orders and further payment.
- 
299. The system must enable access to invoices by vendor name, vendor invoice number, order ID, purchase order number, and title.
- 
300. The system must enable each fund to be subdivided (categorized) by up to ten levels. (Please send examples)
- 
301. The system must enable each subdivision to be used to group accounts together to report on cumulated spending in the different categories.
-

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- 
302. The system must enable allocation of funds to be tracked by material type.
- 
303. Each line item on an order must represent an encumbrance against an account, and if finalized, an expenditure from the account.
- 
304. The order must carry the dates of both encumbrance and item(s) receipt/payment activities.
- 
305. The system must allow remaining allocations to be carried over from one fiscal year to the next, if desired.
- 
306. For each fund, the system must maintain the following information, which must be available through display, without the need to generate a report:
- 
- a. the original budget allocation
- 
- b. dollar amount of orders outstanding (encumbered)
- 
- c. dollar amount of orders paid, the free balance
- 
- d. cash balance, the number of items on order
- 
- e. number received
- 
- f. number paid for
- 
- g. number of orders placed for the fund
- 
307. The system must allow multiple distribution methods, including library-defined holdings code.
- 
308. The system must be able to roll over orders from one budget cycle to the next, while allowing for a “year-end” closing of accounts.
- 
309. The system must have the ability to copy funding structure including budget amounts from one year to the next.
- 
310. The system must have the ability to mask and/or sort by descending order previous fiscal years’ budget accounts.
- 
311. The system must have the ability to transfer funds between accounts.
- 
312. The system must be able to both track and balance the transfers between budgets
- 
313. The system must incorporate a vendor file supporting an unlimited number of vendor records including at least the following information:
- 
- a. vendor account
- 
- b. vendor name
- 
- c. multiple vendor addresses (order, returns, sales representatives / customer service and remittance addresses)
- 
- d. multiple contacts information (to align with addresses above)
- 
- e. multiple e-mail address, telephone number, and fax number (to align with addresses above)
- 
- f. a listing of types of ordering methods
-

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- g. library-supplied vendor claim period indicator
  - h. vendor performance statistics
  - i. discount information by vendor
  - j. discount information by fund
  - k. comments
  - l. purchase order number
314. Records in the vendor file must allow all acquisitions data to be sorted by location.
315. Records in the vendor file must be accessible by:
- a. vendor name (complete)
  - b. vendor name (truncated)
  - c. vendor number
316. The vendor file must include performance statistics, including, but not limited to:
- a. average receipt period in days
  - b. number of claims sent
  - c. number of copies cancelled
  - d. number of copies claimed
  - e. total amount ordered
  - f. amount encumbered
  - g. amount invoiced
  - h. amount paid
  - i. total number of orders
  - j. number of copies not received
  - k. number of copies paid
  - l. average order price
  - m. average price paid
  - n. average discount
  - o. supply times
317. Vendor performance statistics must be readily available through reports.

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- 
318. The system must provide a formatted screen with appropriate prompts for entry of vendor file data.
- 
319. The system must be capable of printing the entire contents of the vendor file, including multiple vendor addresses.
- 
320. The system must provide an unlimited number of selection lists.
- 
321. The system must provide a searchable selection lists feature whereby titles the library intends to order will be kept on the system.
- 
322. The system must allow moving and merging items between selection lists.
- 
323. The system must be able to suppress selections lists from all modules except Acquisitions.
- 
324. The system must be able to give a dollar total for any selection lists.
- 
325. Each selection list must include but not be limited to the following fields:
- a. bibliographic information (e.g. author, title, publisher, publication date, physical characteristics, standard and/or publisher numbers
  - b. price
  - c. review citations/source notes
  - d. requesting library
  - e. number of copies to be purchased for each library
  - f. notes
  - g. item loan types
  - h. collection codes
  - i. person entering selection
  - j. vendor
- 
326. The system must allow the purging of items on the selection lists by individual, batch, or automatic mode.
- 
327. The system must allow the purging of an item from the selection list once the item has been ordered, if desired.
- 
328. The system must allow checking for duplicate records from all selection lists.
- 
329. The system must allow for linking initial purchase requests and subsequent holds to items contained in a selection file or create a new item on a selection list.
- a. Patron information for holds should be searchable by both patron name and card number and other patron information.
- 
330. The system must accommodate but not be limited to the following order types:
- a. firm order
-

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- 
- b. prepayment
- 
- c. gift
- 
- d. exchange
- 
- e. membership
- 
- f. on approval
- 
- g. blanket order
- 
- h. standing order
- 
- i. subscription
- 
- j. continuation
- 
- k. deposit account
- 
- l. U.S. government document
- 
- m. library specified type (unlimited)
- 
331. The system must allow for a variety of order templates. Please provide a list of templates available.
- 
332. The system must have the ability to add custom templates
- 
333. The system must support electronic submission of orders.
- 
334. The system must link order records to the corresponding bibliographic record.
- 
335. Order records must have one keystroke access to the authority file.
- 
336. The system must be able to place initial and subsequent holds against items on order or in process.
- 
337. Patron information for holds should be searchable by both patron name and card number and other patron information.
- 
338. The system must use status information to signal for a variety of activities, such as produce purchase order, delete order, produce open order report, etc.
- 
339. Upon completion of an order, the system must update the bibliographic database and display the order in the holdings record. Please send an example of how it will display.
- 
340. The system must be capable of printing purchase orders in a variety of printing formats and printers.
- 
341. The system must support the selection and loading of bibliographic records from a bibliographic utility database for titles to be ordered.
- 
342. The order record must be accessible online through at least the following access points:
-

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a. order number
b. purchase order number
c. author
d. title
e. author/title keyword
f. variant title
g. subtitle
h. series title
i. title keyword
j. LC card number
k. ISSN/ISBN
l. bibliographic utility assigned number
m. person requesting order
n. fund number
o. subject code
p. call number
q. vendor
r. format
s. location
t. date of purchase
u. date of creation
v. order method by Vendor
w. limit by status or date
343. The system must permit:
a. receiving and paying of items ordered from funds appropriated for the current fiscal year, or previous fiscal years, for payment at any time during the acquisitions process
b. receipt without payment
c. payment in advance

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- 
- d. partial receipt of the total number of volumes or copies
- 
344. The system must support production of purchase orders containing a combination of orders to one vendor.
- 
345. The system must be able to easily handle reorders from another vendor including reorder direct.
- 
- a. The system must also be able to easily handle reorder from the same vendor with a different purchase order number, quantity &/or account(s).
- 
346. The system must allow order line items to contain any number of copies, each funded separately, including:
- 
- a. fund splits against a single copy
- 
- b. separate distribution of each copy to different branches
- 
- c. separate distribution of each copy to different locations within each library
- 
347. Status information for each order must include:
- 
- a. status
- 
- b. date status was set
- 
- c. a free text message for further description
- 
348. Please provide samples of each order status available.
- 
349. The system must be capable of handling receipt of items with invoices, items without invoices, and invoices without items.
- 
350. When the receipt of an item is recorded, the system must automatically update the display associated with the copy of the acquisitions record in the bibliographic file. Please provide examples of the each order status.
- 
351. When a purchase order is closed out and the final invoice has been received, the acquisitions record must be transferred to pertinent history files.
- 
352. The system must be capable of accepting new bibliographic information about a title at any time after order placement.
- 
353. The system must support but not be limited to the following order types:
- 
- a. unit orders
- 
- b. subscription orders
- 
- c. approval orders
- 
- d. gifts
- 
354. The system must prevent assignment of duplicate order numbers, whether entered manually or assigned automatically.
- 
355. The system must support orders for multi-volume sets with multiple copies of each volume.
- 
356. The system must be able to enter a beginning and ending range for the multi-volume set, and have the system automatically create the order for each volume, and each corresponding copy within this range.
-

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- 
357. The system must be able to order subsequent copies of existing titles.
- 
358. The system must provide automatic conversion of any currency using library modifiable tables.
- 
359. The system must be able to override the currency table at the time of order.
- 
360. The system must compute automatic discounts based on library modifiable tables.
- 
361. The system must compute quantity discounts automatically.
- 
362. The system must compute monetary discounts automatically.
- 
363. The system must allow different and separate discount tables to be associated with each vendor.
- 
364. The system should be able to mark orders for processing at some future time.
- 
365. The system must be able to sort orders by vendor before printing.
- 
366. The system must accept credits, refunds, and partial order payments.
- 
367. The system must be able to retrieve an order containing multiple volumes and mark each volume as having been received with a single command, if desired.
- 
368. The system must be able to retrieve an order containing multiple copies and mark each copy as having been received with a single command, if desired.
- 
369. When an item is received, the system must be able to:
- a. mark the item as received
  - b. enter an invoice number
  - c. update the unit price
  - d. add the handling fee
  - e. add a barcode
- 
370. The system must be able to receive a list of all line items for which an invoice number has been recorded.
- 
371. The system should be able to interface with parent agency's ERP.
- 
372. The system must be able to handle default item price of 00.00 within an invoice and allow for the prorating of shipping/handling charges against that item.
- 
373. Invoice vouchers must combine expenditures from the same accounting unit into a single amount.
- 
374. The system must have the ability to mask and/or sort by descending order previous fiscal years' invoices and orders.
- 
375. The system should provide electronic approval for invoice payments.
- 
376. The system must support electronic submission of claims, or claims in the form of letters to the vendor.
-

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- 
377. The system must be able to produce claim notices electronically or manually based on operator specified criteria such as length of time order has been outstanding.
- 
378. The system must include the order number in claim notices.
- 
379. The system must be able to claim invoices at a specific period of time after receipt of an order.
- 
380. The system must be able to send as many claim notices as desired, with each one having text of the operator's choosing.
- 
381. The system must be able to purge records for out-of-print, never-published, or cancelled titles globally by date, vendor, invoice number, or location for which initially ordered.
- 
382. The system must accommodate one bibliographic record with items attached by each owning library.
- 
383. The system must share the ability to create and view bibliographic records so that there is no duplication.
- 
384. State what method is used for the interchange (both importing and exporting), for example, X12, EDI, etc.
- 
385. Discuss the integration with other modules, including Acquisitions, Serials and the Public Catalog. For example, work slip notes, comments, etc. input in Acquisitions can be viewed when in the Cataloging module.
- 
386. The Cataloging module must be Windows-based.
- 
387. Commands must be executed via pull-down menus or command buttons (short-cut keys).
- a. pull-down menus
  - b. command buttons (short-cut keys)
  - c. programmable function keys when inputting/changing both bibliographic and holdings records
- 
388. The system must provide full-screen MARC editing by mouse or keyboard. Describe or provide a sample screen.
- 
389. Cut, Copy and Paste commands must be available for MARC record editing and holdings.
- 
390. The system must be capable of merging bibliographic records, re-attaching all existing item records and hold queues from the old bib to the new bib, with the option to reattach without changing fields in the holdings record.
- 
391. The vendor must be able to convert any existing machine-readable database into the proper formats for the proposed system.
- 
392. The system must accommodate all MARC formats (i.e., books, serials, AV, films etc.).
- 
393. The system must also allow multiple records to be edited at one time, with the ability to copy information from one record to the other.
- 
394. The windows in the cataloging module must be movable and resizable. It must be possible to have two records open simultaneously visible and editable at the same time. Please provide a screen shot.
- 
395. Procedures for additions, modifications, and deletions online must be logical and easy to learn.
- 
396. The system must fully support the UNICODE standard for multi-lingual cataloging.
-

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- 
397. The system must properly sort and sequence international characters in the list based on the index chosen.
- 
398. Any record to be edited must have full display, but only the portion of the field to be modified will need to be re-input.
- 
399. Describe editing capabilities in both bibliographic and holdings records.
- 
400. A code must be validated against a list of similar codes.
- 
- The system must allow a staff member to search remote and local databases in a variety of advanced electronic data
401. interchanges (EDI, X12, Z39) for MARC records, and then send those records directly to Cataloging, to be modified and then saved directly to the database.
- 
402. The database must be able to store a varied number of variable-length single- and multiple-value fields.
- 
403. The system must be capable of creating, displaying and maintaining a bibliographic database with full USMARC records and utilizing appropriate data from those files in each subsystem.
- 
404. The system must be capable of creating and maintaining a bibliographic database with full European UNIMARC records and utilizing appropriate data from those files in each subsystem.
- 
405. The system must include a spell-check feature that can be turned on or off, tag by tag.
- 
406. The system must combine and overlay records from bibliographic utilities, and must also include the option to not overlay duplicate bibliographic records, using library-defined match points.
- 
407. The user should be able to specify whether imported records will convert to the USMARC or MARC 21 format.
- 
408. The system must be capable of selecting a batch of authority or bibliographic records for export or printing, based on a search for records that contain or match specified data.
- 
409. The system must be able to import authority records online from outside bibliographic sources.
- 
410. The system must produce, on demand, a listing of authority files.
- 
411. The system must be able to batch or single print labels customized by library, label, and various printer types.
- 
412. The system must enable authorized staff members to view the status or creation information for authority and bibliographic records. Staff must be able to view:
- 
- a. the record's creation date and time.
- 
- b. the name of the operator who created or updated the record.
- 
- c. the record's most recent update date and time.
- 
- d. the record's current cataloging status.
- 
- e. the date and time of the record's previous status change.
-

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413. The system must accommodate copy records, as distinct from item records. Copy records represent multiple sets of a title that has several item records attached to it. The copy record is then attached to the title's bibliographic record. (For example, you might have four sets of the World Book encyclopedia with 26 volumes in each set. Instead of displaying an item record for every volume in each set, you can create a copy record for each set and attach it to the bibliographic record for World Book.) Please provide examples.
- 
414. The system proposed must accommodate and allow access by a variety of classification schemes, including LC, Dewey, SuDoc, free-text (in-house schemes), etc.
- 
415. The system proposed must enable various barcode readers attached to stations to be used to input data, such as item labels, into bibliographic records.
- 
416. The system proposed must retain duplicate records entered into it in a review file.
- 
417. The system proposed should perform data validation at the workstation as data is input and stored, including URL (MARC 856) verification.
- 
418. The system proposed must allow users at staff workstations to search for and display items in either the public catalog or the staff catalog or in both catalogs simultaneously.
- 
419. The system proposed must be capable of incorporating changes in the MARC authority format or new national standards formats as they are developed.
- 
420. The system must provide bibliographic work forms in MARC format.
- 
421. The system must be capable of incorporating changes in the MARC format or new national standards as they are developed and must guarantee that the system will be readily modified to accommodate changes.
- 
422. The system must provide a non-MARC bibliographic work form-a simplified interface that allows staff members unfamiliar with MARC to catalog bibliographic records. This non-MARC bibliographic work form can also be used to catalog items not supported by MARC, such as Arabic records. The data should be stored in MARC-like format, allowing it to be stored, retrieved, indexed, and searched using the same processes as full MARC records.
- 
423. The system must not delete bibliographic records with items attached with the status of "checked out" and must inform the operator before deleting an item with a patron hold. When deleting a record with a patron hold, the system must provide the following:
- 
- a. the option to transfer hold to a different bibliographic record or item
- 
- b. notice to patron upon deletion of bibliographic record that the hold has been cancelled
- 
424. The system must have the ability to place a hold from the bibliographic record in the cataloging session.
- 
425. Each library must be able to add fields to work form templates.
- 
426. The system must display labels for each field or subfield when information is entered. Help screens should be available.
-

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427. The system must provide on-screen entry aids that provide the following:
- 
- a. tag description for the tag currently being edited

---

  - b. fixed field values via code list

---

  - c. coded lists of valid tags and subfields
- 
428. The system must accommodate library-defined MARC tags.
- 
429. The system must monitor the MARC data displayed in the MARC record and display incorrect or improper values. Please provide examples.
- 
430. The system must be able to generate default 008 tags.
- 
431. The system must be able to easily map and label which fields will appear in the PAC. Mapping and labels must be customizable by agency.
- 
432. The system must be able to search and link authorized fields to the authority file.
- 
433. When merging bibliographic records with requests on each record, the hold queues must be able to be merged together automatically according to date of request.
- 
434. The system must handle brief records for items not fully cataloged, as well as materials for which full catalog records are not created and to which only identifiers are assigned for purposes of circulation control. This format shall be defined by each library.
- 
435. The system will allow the operator to reassign their library's holdings with any status to another bib record without tying all items on a purchase order together.
- 
436. Item records should be easily accessible from the parent bibliographic record with one keystroke.
- 
437. The system must have the ability for item records to be created manually.
- 
438. When manually creating item records, the bibliographic information from the bibliographic record must be copied to defined fields selected by each library to the item record.
- 
439. When each library adds additional copies to the collection, the following fields are assumed to be the same and must be copied from that library's holding:
- 
- a. collection

---

  - b. call number

---

  - c. agency

---

  - d. item type

---

  - e. publication date
-

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440. Any field that is copied into a new item record must be able to be edited at any time.

---

441. The item record must contain, but must not be limited to, the following fields:

---

a. author

---

b. title

---

c. collection

---

d. call number

---

e. copy/volumes

---

f. item type

---

g. item statistical class

---

h. owning and lending agencies

---

i. price

---

j. publication date

---

k. added/modified

---

l. use count (current and total)

---

m. date last used

---

n. hold status

---

o. patron ID number in hold queue

---

p. circulation statistics

---

q. number of times renewed

---

r. in-library use statistics

---

s. barcode

---

442. The item record must be customizable by each library.

---

443. Authorized user must be able to search and retrieve items by any field in the item record as defined by the library.

---

444. Cataloging must be able to attach an item barcode prefix in its item barcode lookup command, so that users need only enter the significant digits in a search.

---

445. The system must be able to prevent specified bibliographic records from appearing in public access search indexes.

---

446. Each library must be able to define which bibliographic records to suppress from public display or access that only library staff can view.

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447. The system must allow each library to define which fields are displayed at each level of record display. For example:
- 
- a. minimum: author, title, call number, publication date. Please provide screen shots.
- 
- b. brief: location, call number, main entry, title-subtitle, imprint, series, edition, holdings, circulation status. Please provide screen shots.
- 
- c. full: Brief augmented with notes, tracings, and other information normally found on a catalog card. Please provide screen shots.
- 
- d. full MARC: including all tags, indicators, subfield codes, fixed field elements, etc. Please provide screen shots.
- 
448. The system must support the search indexes for each record type also.
- 
449. The system must allow a list of holdings to be displayed. The operator may then add or modify items.
- 
450. The user must be allowed to batch-create item records by specifying a starting and ending barcode number.
- 
451. Item records must allow for single and multi-value fields.
- 
452. The system must be able to display/edit serials Summary of Holdings within the Cataloging module.
- 
453. The system must be able to identify last copy for a library, library system and database as a whole.
- 
- a. Describe this process.
- 
454. The system must allow batch item deletes.
- 
455. Authority files must permit appropriate "see" and "see also" cross-references.
- 
- Examples:
- 
- a. see references (aeroplanes to airplanes)
- 
- b. narrower terms (automobiles to sports cars)
- 
- c. broader terms (automobiles to motor vehicles)
- 
- d. related terms (airplanes to flying machines)
- 
- Authority-controlled fields must take the text entered and pass it automatically as a search to the authority file. The system
- 
456. must then present a display of entries from which the operator may select the appropriate insert. Authorized operators may, on the spot, create new authority records if no existing records are discovered.
- 
457. Searching for authorities can also be done by authority record number, author browse, and author keyword.
- 
458. Authorities must update in real time.
- 
459. The system must maintain only one file for each designated authority controlled field, regardless of the number of agencies sharing the database.
-

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- 
460. Authority records must be accessible from bibliographic records with one keystroke.
- 
461. The system must provide the ability to make global changes to authority records.
- 
462. Users must be able to define local fields that should not be overlaid during the bibliographic import process.
- 
463. The system must provide support for LC/MeSH headings.
- 
464. The system must accommodate multi-use authority records (for example, a Mark Twain authority record that functions as both an Author Authority and Subject Authority record).
- 
465. The system must support conditional authority headings, meaning that the system supports the ability to enter text in an authority controlled tag that can either be controlled as an authority record or merely kept as uncontrolled text.
- 
466. Information held in local subfields in authority records must be preserved and not be modified in any way by the system
- 
467. The system proposed must be able to match LC or other national standard authority records against the local file.
- 
468. The system must enable online, manual maintenance of all fields in individual authority records.
- 
469. The system must enable an authorized operator to perform global edits and updates to authority records which will automatically change every occurrence of the modified heading in the bibliographic database.
- 
470. The system must enable global edits to be performed in a "test only" mode for review purposes before the changes actually occur in the bibliographic record.
- 
471. Authority record display must include:
- a. date created
  - b. date modified
  - c. authorization level
  - d. format
  - e. source
  - f. fixed fields
  - g. extended information
  - h. index
- 
472. The system must control the receipt of journals, series and supplements, using the database common to all other modules, so no information is duplicated.
- 
473. For serials and continuations, the system must store in a single record data pertaining to:
- a. beginning date of subscription
-

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- 
- b. source
  - c. frequency or publication pattern
  - d. subscription price
  - e. fund
  - f. shelving location
  - g. preservation information (binding, micro, digitization)
  - h. date of payment
  - i. holdings
  - j. routing information
  - k. note field
  - l. active or non-active
474. For serial subscriptions, the serials control module must include the following capabilities:
- a. ordering
  - b. check-in / receiving with barcode information
  - c. claiming
  - d. routing
  - e. bindery preparation
  - f. report generation
  - g. summary holdings by title
  - h. prediction
  - i. fund accounting
  - j. union listing
475. The system must have the ability to accommodate all types of serials, including but not limited to:
- a. periodicals
  - b. continuations
  - c. law reports
  - d. newspapers
  - e. annuals
-

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- f. governmental
  - g. memoirs
  - h. proceedings
  - i. transactions
  - j. indexes
  - k. supplements
  - l. loose-leaf material
  - m. digital formats
476. Each serials control (check-in) record must be able to:
- a. be associated with a title in the catalog
  - b. designate whether or not to enter copy specific information into the catalog at check-in
  - c. establish the number of latest issues to display in the PAC, with an authorized operator able to override this designation at check-in
477. The system must provide the ability to search for serial records by:
- a. keyword search of every indexed bibliographic field
  - b. title
  - c. variant title
  - d. call number
  - e. ISSN
  - f. publisher
  - g. vendor
  - h. fund or budget number
  - i. purchase order number
  - j. location
  - k. system assigned number
  - l. corporate author/title
  - m. conference title
  - n. Superintendent of Documents number
-

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- 
- o. linked title
  - p. subject
  - q. language
  - r. bibliographic utility assigned number
- 
478. The system must detect and alert operator about duplicates between firm orders and subscription orders for monographs in series.
- 
479. Each library in the consortium must be able to maintain its own serials control record. The serials control record must be able to:
- a. designate whether or not to enter copy specific information into the catalog at check-in
  - b. establish the number of latest issues to display in the PAC
- 
480. Records must contain current issue status separate from other holdings, binding records, and routing instructions.
- 
481. The system must have the capability to show and print gaps in holdings (i.e. list of missing issues).
- 
482. The system must provide for records to note unwanted titles, withdrawn titles, cancelled titles, and other negative acquisition decisions.
- 
483. The system must provide an area within each record for special instructions, such as retention, special routing or handling, special check-in procedures, etc.
- 
484. The system must include a staff note field in all copy records.
- 
485. The system must support the reverse chronological display of serials issues, to aid in quick location of the most recently acquired issues.
- 
486. For those titles which follow a predictable pattern of publication, the system must base check-in procedures on the prediction of the expected chronology and enumeration of the next expected issue.
- 
487. The system must support the check-in of multiple copies of an issue on a single check-in screen even when these copies are accommodated in separate copy records.
- 
488. For titles with a predictable pattern of enumeration and chronology:
- a. the system must allow the check-in of issues earlier or later than the next expected issue which must be possible by using a minimum number of keystrokes.
  - b. the operator must not be required to key any data onto the check-in screen, except to indicate when the number of copies received is more or less than the number of copies expected by the system.
  - c. the system must allow the check-in of issues earlier or later than the next expected issue and this must be accomplished by the operator keying adjustments to the expected issue information displayed.
-

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- 
- d. the system must accept change of pattern of enumeration or chronology.
- 
- e. the system must be able to archive old check-in information and automatically create a new check-in screen.
- 
- f. the system must be able to accept a change of terminology in either enumeration or chronology (i.e. November to Fall).
- 
489. For titles which do not have a predictable pattern of enumeration or chronology, the system must function so as to require minimal keying of data by the operator.
- 
490. The system must be capable of locating a title for check-in by scanning SISAC issue identification printed on serials, as well as by operator keying.
- 
491. The system must provide support for the input of item specific control numbers in barcode form from labels affixed to items during checkin processing.
- 
492. The system must be able to print call number labels and routing slips at the check-in station as soon as an issue is checked in.
- 
493. The system must accommodate default prefixes and suffixes on labels; for example, you can create a prefix such as "location" to appear before the location line on the labels.
- 
494. Printing of labels and slips must be adjustable by an operator so that a group of products may be output at the end of a check-in session, or that the capability can be suppressed altogether.
- 
495. The system must have the ability to detect an attempt to check-in an issue which is in excess of the library's identified requirements.
- 
496. The system must be able to automatically identify issues of a serial that are overdue (i.e. that have not been checked in).
- 
497. Recognition of overdue issues must be available regardless of whether or not the title is received on a paid subscription, and might include the following situations:
- 
- a. failure to receive any issues against a new order within a library specified period after the date of expected first receipt recorded when the order was placed.
- 
- b. failure to receive the next issue within the expected time frame automatically determined by calculations based on publication frequency data and a library specified "grace" period.
- 
- c. in a title with a predictable pattern of publication, receipt of an issue later than the expected next issue.
- 
- d. in a title with a predictable pattern of enumeration, receipt of an issue later in the numeric sequence than the next expected issue.
- 
- e. for titles which the library receives in multiple copies, receipt of fewer than the required number of copies within a library specified time period after check-in of the first copy.
- 
- f. for items which do not have predictable patterns of frequency of enumeration, identification of items for which there has been no check-in activity within a library specified period.
-

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498. The system must be able to display the check-in record with a minimal number of keystrokes.
- 
499. The system must record automatically the date an issue is received.
- 
500. The system must retain the receiving dates for at least the 105 most recent issues.
- 
501. The system must accommodate a copy check-in note of unlimited length.
- 
502. The system must allow serials to be checked in at multiple locations.
- 
503. The system should check-in serials by scanning the ISSN.
- 
504. The system must be able to maintain routing records and produce routing slips.
- 
505. The recipient file must accommodate recipients' names and locations.
- 
506. The system must accommodate both standard and customized routing lists.
- 
507. The system must be able to provide a display or printout of all individuals receiving specific titles.
- 
508. The system must be able to output printed routing lists at the check-in operator's terminal and be available individually or in operator-defined batches.
- 
509. The system must allow you to create multiple prediction patterns for every serial record (i.e. for supplements). Describe how the system supports predictive check-in of all publication patterns with any predictable regularity and provides the enumeration (volume, issue, etc.) and chronology (year, month, day, etc.) of the next expected issue or the check-in of serials with more than two levels of enumeration (e.g. v.2, no.3, iss.7).
- 
510. Prediction patterns must not be mandatory; the system must be able to create a serial record without creating a prediction pattern for that serial.
- 
511. Predictions may be created in any of the following ways:
- a. manually or from a template
  - b. duplicated from another title's setup
  - c. duplicated from another library's title
- 
512. The system must provide for all types of frequencies, and must allow for easy adjustment if frequency changes.
- 
513. The system must provide for up to seven hierarchical levels of serials holding enumeration.
- 
514. The system must be able to display the enumeration and chronology of the next expected issue of a title recorded in the system.
- 
515. The system must accommodate free text enumeration for enumeration that is not predictable.
- 
516. The system must accommodate agency specific enumeration, chronology and holdings summary.
-

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- 
517. For each copy, the system must be capable of automatically summarizing individual holdings into a consolidated statement of holding.
- 
518. Summary holdings and holdings data for current issues as well as issue status must be automatically updated throughout the integrated system when records are added or withdrawn in serials. Describe how summary holdings are updated when issues are added or withdrawn.
- 
519. The automatic summarization capability must be available for each copy.
- 
520. In the system, summaries of holdings must be displayed separately for each copy, one after the other, in a single bibliographic display. Each material format is by definition a separate serial and, therefore, a separate copy.
- 
521. The system must include a staff-only note field in the Summary of Holdings.
- 
522. The system must include a Public Note field of unlimited length in the Summary of Holdings.
- 
523. The system must provide for the following:
- a. forced claiming
  - b. automatically generate claim notice at intervals specified in printed and machine-readable format
  - c. add a claim to the claim list for a title by filling in a screen work form
  - d. send as many claims as desired for a missing issue or copy
  - e. specify the text of each claim
  - f. determine claim action dates by expected receipt dates combined with an operator-specified claim interval
  - g. change the claim interval for each title at any time
  - h. identify issues requiring second and third claims according to library determined time lags that may be defined for various item types
  - i. identify items for which three claims have been issued without a response being recorded, and make them available for staff review to determine further action
- 
524. Manual intervention must override system-generated flags, if authorized.
- 
525. The time lag for second and third claims must be defined on the vendor record.
- 
526. The claim cycle must be capable of being overridden for specific items.
- 
527. The system must provide for resetting the expected date or marking a particular issue as unavailable or not published.
- 
528. The system must be able to delete claims from the claim cycle.
- 
529. The staff must be able to review claims before production.
- 
530. The system must allow claims to be transmitted to vendors via EDI.
-

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- 
531. The system must accommodate a Claim-To Address for vendors; only claims are sent to that address.
- 
532. The system must let you specify a date and recover/review all the claims that were sent on that date.
- 
533. The system must be able to indicate when an item is ready to be considered for binding.
- 
534. The system must support a variety of approaches for determining binding readiness, including:
- a. upon receipt of the first issue in "next" volume
  - b. at regular intervals specified by the library
  - c. receipt of index and/or title page
  - d. predictable receipt of binder furnished by publisher
- 
535. The system must provide the library with the option to delay flagging for binding readiness until any outstanding issues have been received or removed from the missing issues file.
- 
536. The system must provide access to lists of items identified as ready for binding for staff review for production.
- 
537. It must be possible to select subsets of this file for review based on a variety of selection criteria including:
- a. name of bindery
  - b. range of dates during which items were flagged as ready for binding
  - c. location
- 
538. The system must offer interface to third-party binding software application (e.g. ABLE Web).
- 
539. The system must have the ability to run on demand and under operator-defined frequency
- 
540. The system must give authorized staff complete flexibility in formatting reports, including form factor.
- 
541. The reports module must be fully integrated with all other system modules, and provide a comprehensive suite of library-customizable report templates.
- 
542. The system must enable an authorized operator to select specific times for reports to run.
- 
- On any database reports involving materials, the operator can select items for inclusion based on any combination of
543. bibliographic and item information (using full Boolean word and phrase searching).
- 
544. The module must enable an authorized operator to specify the starting date-and-time and ending date-and-time that the report is to cover on reports involving historical data.
- 
545. The fully integrated module must use the same user interface as other modules. It must:
- a. provide lists, counts, and statistical reports for each available module
  - b. provide row, column, and grand totals in applicable reports
-

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- 
- c. provide reports for all record types within the system
  - d. track statistical and management information by counting various staff processes to measure productivity, identify items which are likely candidates for weeding, or track fund status for budgeting
  - e. perform housekeeping tasks by changing the status of groups of users, or removing users or items in batches when necessary
  - f. allow authorized operator(s) to select, customize, name, save and schedule reports on a regular periodic time (e.g. daily, quarterly)
  - g. allow staff to display on screen, e-mail, export to database manager applications, and/or print finished reports
  - h. employ an easy, point-and-click interface that is menu driven for report criteria selection
- 
546. The system must enable sorting of output both on screen and thru export functions by any information.
- 
547. The system must give authorized staff complete flexibility in formatting.
- 
548. The system must be able to run on a variety of printer options and on both network and non-network printers.
- 
549. The system must enable an authorized operator to produce a count of all records edited by a specific operator.
- 
550. System must report usage by date range using any field in the item record.
- 
551. The system must support noting items 'used' in-house for statistical reporting.
- 
552. The system must be able to display status (e.g. on hold, in transit) item information.
- 
553. The system must support the creation of a shelflist from inventory data.
- 
554. The system must be able to sort an inventory list by any field.
- 
555. The system must support the use of portable inventory scanners reading barcodes or RFID tags with vendor's software able to be loaded to the Library's portable scanners.
- 
556. The system must enable an authorized operator to produce:
- a. a count or list of all titles and/or copies owned
  - b. a shelflist of all items in a collection or call number range
  - c. a count or list of all items not used since a specified date.
- 
557. The system must have audit trail reporting capability.
- 
558. The system must have capability for a daily record of financial transactions including fines and fees levied, fines and fees waived, fines and fees collected by agency, fees/materials collected by collection agency.
- 
559. The system must be capable of supporting cash drawers and credit card processing at each individually designated check-out station. It must be capable of reporting financial transactions by individual staff login. It must also provide a cash box total by workstation for the purposes of balancing with a money drawer.
-

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- 
560. The system must have the ability to export report information for financial records in ASCII format to transfer information to external accounting systems.
- 
561. The system should have the ability to interface with parent agency's ERP.
- 
562. The system must enable an authorized operator to generate a list of the checkouts to all users in any user category.
- 
563. The system must enable an authorized operator to generate a list of inactive borrowers based, for example, on the following criteria:
- a. card expiration date
  - b. last activity date
  - c. total checkouts
- 
564. The system must enable an authorized operator to generate a statistical report counting checkout, check-in, and/or renew circulation transactions broken down by or cross referenced between any two of the following (showing row, column, and grand totals):
- a. user numeric field
  - b. call number groupings
  - c. two item categories
  - d. item home location
  - e. item agency
  - f. item type
  - g. time of transaction
  - h. two user categories
  - i. user department
  - j. user agency
  - k. user profile
  - l. workstation
  - m. workstation agency
  - n. user zip code
- 
565. The system must enable an authorized operator to generate a list of items with more than an operator specified number of circulations, sorted by frequency.
-

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- 
566. The system must enable an authorized operator to generate a list of materials declared missing, optionally selected by item type, and item collection, among others.
- 
567. The system must tabulate counts of overdues and projected overdues by the following (showing row, column, and grand totals):
- a. user numeric field
  - b. call number groupings
  - c. two item categories
  - d. item home location
  - e. item agency
  - f. item type
  - g. two user categories
  - h. user department
  - i. user agency
  - j. user profile
  - k. user zip code
- 
568. The system must enable authorized staff to generate a report showing the cumulative total of checkouts by each patron.
- 
569. The system must enable an authorized operator to generate a list of materials that have holds on all or specific items based on at least the following criteria:
- a. expiration date
  - b. placed date
  - c. notified date
  - d. material type
  - e. owning library
- 
570. The system must generate a report of requests based on the following criteria:
- a. requests by borrower location
  - b. number of requests by location
  - c. ratio of number of requests divided by number of copies owned by borrower location
  - d. collection
  - e. author
-

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- 
571. The system must generate a report of requests of items with no available copies by owning library.
- 
572. The system must have the capability to print mailing labels.
- 
573. The system must enable an authorized operator to generate at least, but not limited to, the following lists:
- a. new registration list
  - b. user list by borrower type
  - c. card expiration list
  - d. inactive borrower
- 
574. The system must enable an authorized operator to generate a list of outstanding charges of all users in any category and by agency and specified dates.
- 
575. The system must enable an authorized operator to generate a list of users who have just received final notices or who have had final notices (but have not yet returned materials).
- 
576. The system must enable an authorized operator to select users for inclusion in the report based on various patron information including, but not limited to, the following:
- a. registration date
  - b. registration expiration date
  - c. zip code
  - d. user categories
- 
577. The system must enable an authorized operator to output any of, but not limited to the following:
- a. user's name
  - b. addresses
  - c. borrower type
  - d. list of charges
  - e. list of holds
- 
578. The system must enable an authorized operator to generate a list of materials declared missing, optionally selected by item type, and item collection, among others.
- 
579. The system must enable an authorized operator to generate a list of materials on loan to other agencies, optionally selected by the following:
- a. date loaned
  - b. date due back
-

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- 
- c. item type
  - d. item collection
- 
580. The system must enable an authorized operator to generate a list of current holds, by agency and branch, optionally selected by the following:
- 
- a. item type
  - b. user type
  - c. date placed on hold
  - d. available or not
  - e. items with more than a specified number of holds (chart demand)
- 
581. The system must enable an authorized operator to generate lists and counts of overdue and projected overdue items by various fields.
- 
582. The system must have the ability to treat multi-volumes the same as monographs, with regard to placing holds, renewals and display within the catalog and other modules.
- 
583. The system must be able to produce a statistical report of the number of patrons and the types of automated dial-in telephone transactions completed.
- 
584. The system must be able to produce a statistical report of the number of patrons and the types of automated online transactions completed.
- 
585. The system must be able to produce a statistical report of the number of automatic dial-out calls, providing a summary of the activity during a specified period of time, such as calls attempted vs. calls completed.
- 
586. The system must be able to perform collection analysis – (e.g. what percentage of collection is checked out, used by agency and by date range and collection code).
- 
587. The system must have the capability to create, view and print a report listing circulation from one to another agency (for open access purposes).
- 
588. The system must produce outputs in individual, batch, or automatic mode, including but not limited to:
- 
- a. new or received purchase orders
  - b. claim letters
  - c. cancellation notices
  - d. list of cancellations
  - e. selection lists
-

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- 
- f. routing notices
  - g. list of items in a processing area beyond library specified time
  - h. new title reports
  - i. hold availability notices
  - j. list of invoices not cleared
  - k. vendor lists
  - l. vendor performance reports by category of material
  - m. open order reports
  - n. fund status reports
  - o. checks and other payment vouchers
  - p. debit or credit memos
589. The system must enable an authorized operator to print acquisitions notices on demand in batch, at regular intervals or at some specified time.
590. The system must enable an authorized operator to generate and print:
- a. notices for the purpose of ordering items from Vendors
  - b. notices for items not received
  - c. notices that invoices have not been received
  - d. notices that orders have been cancelled
591. The system must enable an authorized operator to list and count orders based on at least the following criteria:
- a. date sent
  - b. order type
  - c. account
  - d. vendor
592. The system must enable an authorized operator to list and count items received based on at least the following criteria:
- a. date received
  - b. order type
  - c. account
  - d. vendor
-

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593. The system must enable an authorized operator to list and count invoices based on at least the following criteria:

---

- a. order type
  - b. account
  - c. vendor
- 

594. The system must enable an authorized operator to list and count claims based on at least the following criteria:

---

- a. order type
  - b. claim date
  - c. account
  - d. vendor
- 

595. The system must enable an authorized operator to list and count orders cancelled based on at least the following criteria:

---

- a. order type
  - b. cancellation date
  - c. account
  - d. vendor
  - e. library definable cancellation reason,  
e.g., out of print; not yet published; out of stock
- 

596. The system must enable an authorized operator to select for output:

---

- a. all purchase orders
  - b. all orders for a particular payment type
  - c. all orders for a particular fund
  - d. all orders for a particular order type
  - e. all orders for a particular order status
  - f. all orders for a particular location
  - g. all orders by vendor and title ordered
- 

597. The system must enable an authorized operator to produce reports summarizing fund accounts status based on selection of such criteria as encumbered/received balances by fund account number, etc., such as:

---

- a. an item/fund account list and totals encumbered but not yet invoiced
  - b. ordering throughput by workstation and individual ID number
-

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- 
- c. a list of invoices paid and dollar amounts paid to date
  - d. a list of invoices and dollar amounts outstanding to date
- 
598. The system must maintain cumulative status information providing a history of each order.
- 
599. The system must enable an authorized operator to produce statistical reports counting items added, tabulated by at least the following:
- a. call number groupings
  - b. two item categories
  - c. item home location
  - d. item library
  - e. item type
- 
600. The system must enable an authorized operator to produce lists and counts of items added over a specified time period.
- a. Please describe process
- 
601. The system must enable an authorized operator to produce lists and counts of items deleted over a specified time period.
- a. Please describe process
- 
602. The system must enable an authorized operator to further qualify any report by at least the following:
- a. call number range
  - b. location
  - c. material type
- 
603. The system must enable an authorized operator to produce a list of all citations with authority file violations, with or without the full record for proofing.
- 
604. The system must enable an authorized operator to produce lists and counts of issues:
- a. checked in
  - b. routed
  - c. claimed
  - d. to be claimed
- 
605. The system must enable an authorized operator to produce lists and counts based on fields in serials control record (active & inactive formats, frequency, binding, etc).
- 
606. The system must enable an authorized operator to produce reports of all routing lists, with the operator able to select either all lists or selected lists by various criteria.
-

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- 
607. The system must enable an authorized operator to produce lists of subscriptions due for renewal within a variable, library-specified time frame.
- 
608. The system must enable an authorized operator to produce union lists to view or print.
- 
609. The system must enable an authorized operator to produce a variety of statistical reports, including but not restricted to:
- 
- a. number of titles
- 
- b. number of volumes, reels, sheets, etc.
- 
- c. number of copies
- 
- d. number of issues checked in by period
- 
- e. number of issues checked in operator or workstation ID
- 
- f. number of claims issued by type, supplier, etc.
- 
- g. number of titles purchased
- 
- h. number of titles received on deposit
- 
- i. number of titles received by gift or exchange
- 
- j. number of titles without current subscriptions
- 
- k. total number of titles on subscription
- 
- l. any of the above limited by time period
- 
610. System should be scalable and configurable by authorized user with capability of suppression and agency control. For example, system should allow but not require staff to review patron's ILL requests before transmission.
- 
611. System should automate borrowing and lending activity among libraries.
- 
612. System should manage all activity on one database.
- 
613. System should interface with many library automation systems.
- 
614. System should link to the local circulation and patron databases. For example, to check for blocks and number of active requests then allow or suppress request based on status.
- 
615. System should interface with OCLC, commercial document suppliers and external messaging utilities via the ISO/ILL 10161 protocol or SMTP standard Internet e-mail protocols.
- 
616. System should produce on demand a complete list of incoming requests.
- 
617. Use of the system should eliminate any need for an ILL paper trail but allow for back-up printing.
- 
618. System should keep a broad range of statistics and generate a broad range of reports. An example would be those statistics concerning fulfillment of lending and borrowing transactions.
-

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- 
619. System should provide tools to assist the staff to determine the best and/or least expensive provider for the request based upon lending partner's profiles.
- 
620. Library should be able to track status of their loans through the system.
- 
621. Patrons should be able to submit ILL requests via any system that supports the ISO/ILL standard (e.g. Internet, e-mail) with System verifying a user's identity via RPA or similar method.
- 
622. System should search local library catalogs first. Then, if item is not found, turn to OCLC for holdings.
- 
623. Patrons should be able to track the status of their request(s) through the system.
- 
624. System should automatically notify patrons of the receipt of their requested information sending such notifications by mail, e-mail, or telephone.
- 
625. System should interface with acquisitions module to provide option for patron to submit purchase request upon submitting an ILL request.
- 
626. The system must incorporate circulation activities specific to outreach/homebound services for each participating library either as part of the Circulation module or as a separate module. Describe how outreach/homebound features will work for multiple independent libraries using your system.
- 
627. The system must maintain an unlimited length borrower log for each participating library to prevent duplication of materials selected for borrowers. The log must be printable from the system and also allow for exporting of the data in multiple formats.
- 
628. The system must allow staff to record notes for outreach/homebound services borrowers. Multiple free text, customizable fields must be available for matters such as Home Library, Comments, Equipment Preference, Format Preference, Reader's Profile, Certification, etc.
- 
- a. The system should provide a check box to show the borrowers has granted permission to keep and share the log with appropriate parties.
- 
629. The system must allow for each participating library to define a set of service routes for their institution and to assign its' borrowers to a specific route within that set of routes
- 
- a. The system must also provide the option for a designated individual (such as a Reader's Advisor) from each participating library to be assigned to each of the libraries' routes.
- 
- b. The system must allow authorized individuals to assign, edit, and modify the routes for their institution
-

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**4.2 TECHNICAL SPECIFICATIONS**

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630. The ILS must have the demonstrated capability of supporting multiple branches or independent libraries under separate jurisdictions, with a central computing configuration. Member libraries share a common database, with each library maintaining different delinquency criteria, fine calculation rules, loan period rules, and hold parameters.
- 
631. If system is to be hosted by the Consortium, the ILS must utilize the Consortium's current server hardware investment. The vendor may additionally propose a vendor hosted solution.
- a. The vendor must propose, as an option, utilizing the consortium's existing server hardware including costs associated with upgrading hardware/software of the pre-existing platform if deemed necessary and reasons for doing so.
- 
- b. The vendor may additionally propose other equipment as a second option, which will enable us to compare and evaluate costs and other considerations. This may include the option of the vendor hosting the system.
- 
- c. If hosted by the vendor, the system must be reliable and stable on current with current locations' network bandwidth. The vendor must provide service level agreement uptime.
- 
632. The ILS should be native to a Structured Query Language database with the ability to support the creation of custom queries.
- 
633. The ILS must run on an Ethernet network using the TCP/IP protocol in LAN/WAN hardwired and wireless environments that are to be provided by our multi-site library consortium.
- 
634. The ILS must exceed the current system capacity requirements.
- 
635. Expansion of the system to support double the number of current simultaneous users, workstations, and data will be through the modular addition of disk storage, memory, and processing units, and/or by adding servers if this is deemed preferable, without necessarily replacing the proposed server hardware.
- 
636. The ILS must be adaptable and scalable to meet the needs of a growing consortium of libraries.
- 
637. The ILS must incorporate error detection and correction techniques for the file system, database, and communication links.
- 
638. Any time the ILS is initialized:
- a. the integrity of the entire file system must be checked.
- 
- b. any errors found in the file system must be automatically corrected and a message generated for the system administrator.
-

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- 
639. If an error is encountered in the database while the system is in operation the system must:
- 
- a. record the circumstances for later analysis and

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  - b. inform the operator that the operation could not be completed due to an internal error.

---

  - c. "not "go down" and the operator must be able to continue with another command
- 
640. All data in the database must be able to be backed up dynamically
- 
- a. Please describe the methods currently available.
- 
641. All library data must be recoverable in the case of a hardware/software failure.
- 
642. System transactions must be date and time stamped so as to allow the system to reconstruct activity for any period.
- 
643. The system must provide staff with API integration for use in outside systems.
- 
644. The ILS must be an open system, with no dependency on the use of a specific models or models of equipment, operating systems, etc., to ensure the future viability of the system.
- 
645. The ILS must allow all data in the database to be retrievable by library staff.
- 
- If hosted by the consortium, the ILS must be fully contained within the consortium and capable of
646. being operated by library staff with no dependency on Vendor services for its routine operation.
- 
647. The Vendor must license the software for perpetual use for a fixed fee without additional royalties or service fees, except for ongoing software maintenance.
- 
648. The ILS must comply fully with Z39.50 Version 3 or other current standard on both the client and server sides.
- 
- a. Discuss any current development of SRW and how it may replace Z39.50.
- 
649. The ILS must include ENTERPRISE SIP licensing.
- 
- a. Discuss any current development of SIP-less options.

---

  - b. The SIP system must be compatible with existing self check and PC management systems that integrate with the current system.
- 
650. The ILS must fully support Unicode in all modules.
- 
651. The ILS should support right-to-left orientation, in order to correctly display and edit text from languages such as Arabic and Hebrew.
- 
652. The ILS should provide an Upgrade wizard which simplifies the server software upgrade procedures.
-

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- 
653. The upgrade wizard should make server software upgrades self-installable, without the need for Vendor intervention.
- 
654. If vendor is required for an upgrade they must be able to schedule overnight or morning hours Mountain Time in order for completion prior to library open hours.
- 
655. The system must allow customizable default preferences for searching to be set by location or group that extends to all modules.
- 
656. The system must be updated in real time and shared among all modules and agencies to maintain the currency of all records and statistics; batch updates are not acceptable.
- 
657. Describe your system's architecture, specifically addressing the issues of scalability and network compatibility.
- 
658. The ILS must run on a network of any size and/or topology.
- a. Please describe networking compatibility of your system.
- 
659. The initial login to the system must set all privileges for all staff and public modules; i.e., the client must not require a separate or repeated login to access different modules, functions, or subsystems during a single user session.
- 
660. Staff members must have customizable user profiles.
- 
661. The ILS should allow a staff interface throughout the system that is fully customizable, including the ability for library staff to change displays, windows, and labels.
- 
662. The ILS must support multiple networked printers.
- 
663. The ILS must have the option of using the Windows print manager for all printing functions.
- 
664. The ILS should enable the operator to print the current record in its entirety. (Use of PC print screen keys, which print only a single screen at a time regardless of record length, is not acceptable.)
- 
665. The ILS must accept 14 digit Codabar barcodes with check digit and unique identifiers as well as EAN.
- 
666. The ILS must accept input from devices such as barcode readers, RFID readers, and magnetic stripe readers attached to a workstation.
- 
667. The ILS must be compatible with mobile devices running common Operating Systems.
-

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668. The ILS must allow staff and patron clients to operate successfully on workstations running any version of the Windows Operating system currently supported by Microsoft. Preference will be given to vendors that are platform independent.

---

669. The ILS should deliver client upgrades automatically

---

670. The ILS must allow remote client and administrative access to the database and all server(s).

---

The ILS must employ a single, menu-driven modern graphical user interface, with “point and click” functionality and user-optional keyboard shortcuts such as copy/paste must be included which supports all staff operations.

---

672. The ILS must allow the Library staff to change most parameters, e.g. circulation, statistical categories, passwords, etc., without Vendor consultation, programmer intervention or additional programming fees.

---

673. Please describe the security features available in all modules of the proposed system. LYNX! expects this to include security of each module and specific functions within each module.

---

674. The ILS must accommodate multiple levels of security:

---

a. network level

---

b. database level

---

c. application level

---

d. record level

---

e. field level

---

f. user level (staff ID)

---

675. The ILS must support an encrypted form of remote client access.

---

676. A list of supported patches and OS updates must be maintained and distributed.

---

677. The default state for all unused network services must be disabled.

---

678. Vendor must offer 24/7 hardware and software support via telephone.

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a. Note: Phone support is separate from email and web so Vendor can't combine options to equal 24/7 support.

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679. The vendor must offer 24/7 hardware and software support via email, and the World Wide Web.

---

680. Vendor must agree to actively assist library in resolving interoperability issues with 3rd party products promoted by the ILS vendor

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- 
681. Provide detail on the various support and maintenance options that are available and provide costs for each.
- 
- a. Identify the recommended option and level of support for this project.
- 
- b. If a third party provides any services, please identify that service, Vendor, and cost.
- 
682. The vendor must identify all data not able to be migrated from the existing server(s).
- 
683. The vendor must indicate any limitations or qualifications to the format in which records must be received by the Vendor in order to be migrated.
- 
684. Migration must include, to the extent such files are in present use by the Consortium:
- 
- a. bibliographic records (titles)
- 
- b. items / copies
- 
- c. authority records
- 
- d. circulation transactions (charges, bills, holds)
- 
- e. acquisitions (Vendor, orders, funds)
- 
- f. serials (control, check-in, chronology)
- 
- g. community information records
- 
- h. statistics
- 
685. Data Conversion Services must include both bibliographic and patron record deduping.
- 
686. The vendor must migrate the Consortium's current database to the proposed system so that the system is fully operational when placed in production.
- 
687. Vendor will provide post migration cleanup assistance.
- 
688. The vendor must provide on-site training to enable full use and administration of complete system.
- 
689. The vendor should also provide the option for remote training for users at the consortium libraries.
- 
690. The vendor must provide a description of the training and the training schedule recommended for this project.
- 
- a. Include an outline of the training sessions.
- 
- b. Specify the number of training hours provided.
- 
691. The vendor must provide a cost sheet and calendar of training opportunities for additional training requests.
- 
692. Training must be scheduled to coordinate with the availability and use of the system.
-

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- 
693. Training must include on-site assistance for go-live activities.
- 
694. Access by the trainees to the trainer via phone and e-mail must be provided for a period no less than 90 days after the training and 30 days after go-live.
- 
695. Describe the support provided during system software upgrades.
- 
696. The vendor must include a description of the complete documentation package available with the system.
- 
- a. Include the format and how it is accessed.
- 
- b. Describe how the documentation can be searched.
- 
697. The ILS must include an online help system to be used by all levels of library staff and must be easily understandable.
- 
698. Please provide information on how library staff may access user documentation and help systems during the evaluation period.
- 
699. Documentation updates for all appropriate manuals must be provided on a regular basis as additional capabilities, enhancements or improvements are made to the system.
- 
700. The vendor must make documentation updates and release notes available for local printing or downloading via the Internet.
- 
701. The system administrator must be able to configure different data entry fields as "mandatory," requiring the user to place information in that field (such as in patron records, POs, etc.).
- 
702. Describe any programs, reports, or utilities that must be run on a regular basis to keep the system running efficiently.
-

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**Section 5. Performance, Testing, and Acceptance**

**5.1 PERFORMANCE AND TESTING REQUIREMENTS**

LYNX! will require the successful completion of rigorous and well documented testing processes prior to accepting system equipment, software, or services.

**5.1.1 Performance Guarantees**

The System shall be capable of providing user services, storing data, processing transactions, and meeting response time requirements as identified in this RFP. The response time requirements are based on the projected figures in Column Projected 2024 of the SYSTEM GROWTH/STATISTICS TABLE found in Section 2.2 and are outlined in the Response Time Table below.

**5.1.2 RESPONSE TIME TABLE**

<b>Type of Transaction</b>	<b>Normal Load Average Response in Seconds</b>	<b>Peak Load Average Response in Seconds</b>
Checkout	<b>1</b>	<b>2</b>
Renewal	<b>2</b>	<b>3</b>
Check-in	<b>1</b>	<b>2</b>
Fines processing	<b>1</b>	<b>3</b>
Bib file query/update	<b>2</b>	<b>3</b>
Holding file query/update	<b>2</b>	<b>3</b>
Patron file query/update	<b>2</b>	<b>3</b>
Holds placed	<b>1</b>	<b>2</b>
<b>Searches:</b>		
Keyword	<b>1</b>	<b>2</b>
Keyword Boolean (Title, Subject, etc.)	<b>3</b>	<b>5</b>
Numeric (LCCN, ISBN, etc.)	<b>1</b>	<b>2</b>
Authority searches (Author, Subject, etc.)	<b>2</b>	<b>3</b>
Acquisitions Ordering	<b>3</b>	<b>5</b>
Serials Check-in	<b>3</b>	<b>5</b>

**5.1.3 Availability Requirements and Maintenance**

The system must operate at an availability level of 99.5 percent, as measured on a calendar and clock basis.

<b>Item</b>
Maintenance from the vendor must be available 24/7, including service desk support and dispatching of field technicians within four hours of notification (hardware sale only).
All downtime shall be measured by rounding to the 1/10th of an hour. At the conclusion of each downtime period, the downtime value resulting from each occurrence will be computed to arrive at the total amount of downtime.

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**5.1.4 Testing, Acceptance, and Remedies**

In order to ensure that LYNX! has received the value and functionality specified in this RFP, LYNX! will conduct, with the vendor’s assistance and support, a series of tests over a period of months, to verify that all modules of the system function as agreed. Further, LYNX! retains the right to repeat tests to ensure that the ongoing operation of the system meets specified parameters. The actual scheduling and sequence of tests will be included in final contract Implementation Plan.

**5.2 SOFTWARE FUNCTIONALITY TEST**

The purpose of the Software Functionality Test is to verify that the required functional capabilities of the Software have been delivered.

**5.2.1 Functionality Test Procedure**

**5.2.1.1 Timing and Sequence of the Test:**

<b>Item</b>
Testing will coincide with the implementation of the various modules and shall occur during or immediately after the training session for the module on a training database that contains a set variety of consortium data for bibliographic, holdings, and patron records.
Training and testing will not occur until after the Hardware Functionality Test has been passed and sufficient software and data have been loaded to permit training and the test to be effectively performed.
Verification of the attached functional checklists will occur during the training sessions.
LYNX! shall have an additional 30 days to test additional functions related to the module(s) on which training was received.

**5.2.1.2 Testing Methods:**

<b>Item</b>
Prior to training, LYNX! shall designate one or more persons participating in the training session who are authorized to indicate acceptance of the functional checklists attached.
During training, LYNX! shall initial the functional checklist for features observed and operational.
Functions that do not operate properly shall be noted and reported in writing to vendor.
LYNX! shall have 30 days from the completion of training for a module to verify other functions that vendor documentation indicates the software will perform and submit any exceptions in writing.
Vendor shall clarify and resolve all reported problems within 30 days of receipt of report. Within seven days of receipt of notice of resolution from vendor, LYNX! shall retest the function and confirm that the function has or has not been resolved.

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**5.2.2 Software Functional Checklist:**

The following features are part of software module testing, and each will be tested or conducted during the test.

General Features (All modules)	Notice Production (Circulation)
Searching and Display Capabilities (All modules)	Holds (Circulation)
Data Entry and Editing (All modules)	Recalls (Circulation)
Bibliographic/item File and Maintenance	Patron File (Circulation)
Bibliographic Interface Software	Portable Back-up Units
Authority Control	Report Writer
Inventory (Circulation)	Acquisitions
Checkout (Circulation)	Serials
Renewal (Circulation)	Electronic Databases
Circulation/Management Reports (Circulation)	Network Operations
Check-in (Circulation)	Z39.50 Server
Fines and Fees (Circulation)	Inter-Library Loan

**5.2.3 Software Functionality Acceptance**

The Software Functionality Test for a given function will be successfully completed and LYNX! Obligated to pay invoices when:

<b>Item</b>
Each function of the appropriate functional checklist is operational
Each problem properly reported in the 30-day additional test period has been resolved.

**5.2.4 Software Functionality Test Remedies**

In the event that the software module tests do not fall within the guaranteed parameters, and vendor has not responded with a formulated plan for problem resolution within 24 hours of notification of the end of the test period, LYNX! may at its option:

<b>Item</b>
Grant vendor further time to resolve the problem, <i>or</i>
Set up a conference call within two working days with LYNX! Project Manager vendor's Customer Services, <i>and</i> —
If the problem is still not resolved three days from the conference call begin accruing maintenance credits of 1/30 of the monthly charge for each day the problem is not resolved, <i>or</i>
If resolution is not underway after 5 business days from the call LYNX! may require a visit from vendor to directly address the problem, at the vendor's expense, <i>or</i>
Accept the solution as is and upon negotiating satisfactory terms pay the appropriate invoices.
These remedies shall be non-exclusive remedies in the event vendor is unable to pass any Module Functionality Test within 90 days of commencing the test, and LYNX! may have additional remedies under law.

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**5.3 RESPONSE TIME TEST**

The purpose of the Response Time Test is to verify that the System is capable of meeting the performance standards as defined in the Agreement at user workstations under full load conditions.

**5.3.1 Response Time Testing Procedures**

<b>Item</b>
A Response Time Test may be requested by LYNX! anytime within five years of the completion of the implementation as a means of verifying the performance standards established in this RFP.

**5.3.1.1 Testing Methods:**

<b>Item</b>
The Response Time Test will be performed with workstations allocated by function (circulation, patron query, etc.) in the mix of workstations and process in normal library use, or as mutually agreed upon at the time of the test.
System load defines the number of transactions being processed during a given time period. Average response time under Normal and Peak Loads will vary as shown in Response Time Table.
Normal Load is defined as the load on the System when processing transactions up to the level specified in Response Time Table. The Normal Load is computed by dividing the annual transactions by the number of operational hours.
Peak Load is defined as the load on the System when processing transactions at rates above Normal Load up to the level shown in Response Time Table-Peak Load.
The test may be performed for normal and/or peak load conditions. The transaction load on the system may be achieved by actual library activities or scripting transactions at a rate to simulate either load level.
LYNX! will provide operators and people acting as data recorders. The operators shall perform the workstation functions and tally the number of transactions completed. The recorders will clock and record the response times for each transaction at selected workstations.
Each test shall last for at least 30 minutes. No test shall be deemed valid unless a minimum of 50 timings were performed at the selected workstations for each type of transaction.
Both vendor and LYNX! may provide inspectors to verify the accuracy of the activities of the operators and the recorders.
Prior to the commencement of the test, vendor shall provide, with the assistance of LYNX! personnel, such training as shall be necessary for the operators and the recorders to perform the activities herein described.
Response time shall be the interval of time between the moment when the operator at a workstation completes the input of a command or data by pushing the "return" key or by completing a label scan, as applicable, and the completion of meaningful response from the workstation indicating either the result of the transaction or the readiness of the system to accept further data or the next transaction.
All records and logs made during the test shall be available for inspection by representatives of vendor and LYNX! during and after the test.
Transactions with multiple steps shall include timings for each step. The average response time is computed by summing the response times for all steps for a given type of transaction and dividing the total by the number of timings.

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**5.3.1.2 The Response Time Test shall be successful if:**

<b>Item</b>
The stated transaction throughput is achieved, <i>and</i>
All transactions complete successfully, e.g., no hung sessions, <i>and</i>
The normal and peak response time averages for each function do not exceed those stated in Response Time Table, for the appropriate load levels.
Vendor shall bear its own expenses for the performance of a warranty Response Time Test if the test is unsuccessful. In the event a Response Time Test is requested and the test passes, LYNX! shall pay vendor's expenses.

**5.3.2 Response Time Test Acceptance**

The Response Time Test will be successfully completed and LYNX! obligated to pay invoices when:

<b>Item</b>
Response time is within the parameters of Normal Load and Peak Load as shown in Response Time Table.

**5.3.3 Response Time Remedies**

In the event that the response times do not fall within the guaranteed parameters, and vendor does not respond with a plan for resolution within 24 hours of notification of the end of the test period, LYNX! may at its option:

<b>Item</b>
Grant further time to resolve the problem, <i>or</i>
Set up a conference call within two working days to discuss a remedy for the problem, <i>and</i>
If the problem is still not resolved three days from the conference call LYNX! will begin accruing maintenance credits of 1/30 of the monthly charge for each day the problem is not resolved, <i>or</i>
If the issue is not being resolved after one week from the call, LYNX! may require a visit from vendor to directly address the problem, at the vendor's expense, <i>or</i>
Accept the solution as is and upon negotiating satisfactory terms pay the appropriate invoices.
These remedies shall be non-exclusive remedies in the event the system is unable to pass any Response Time Test within 90 days of commencing the test, and LYNX! may have additional remedies under law.

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**5.4 HARDWARE FUNCTIONALITY TEST**

The Hardware Functionality Test will be performed by the vendor’s installer immediately after successful installation of the required equipment for the migration of the LYNX! data from the Horizon system to the proposed system and begin on-site training.

**5.4.1 Hardware Functional Test Procedures**

The following tests will be included for equipment supplied by the vendor then installed:

<b>Item</b>
Central Processing Unit(s) diagnostic test.
Memory unit(s) diagnostic test.
Disk storage/controller unit(s) diagnostic test, including the writing of a disk file, the reading of a disk file, and the erasure of a disk file.
Magnetic tape drive units(s) diagnostic test, including the writing of a file to tape, the reading of a file from tape, and the erasure of a tape file.
Workstation unit(s) diagnostic test.
Printer unit(s) diagnostic test.
Telecommunications unit(s) diagnostic test.
Power loss/failure test.

**5.4.2 Hardware Acceptance and Remedies**

The Equipment will be accepted when all of the above tests are successfully completed. In the event the system is unable to pass the Test within five (5) days of first initiating the test, and the vendor has not responded with a plan for resolution within a specified time of notification of the end of the test period, LYNX! may at its option:

<b>Item</b>
Grant the vendor further time to resolve the problem, <i>or</i>
Set up a conference call within two working days to discuss a remedy for the problem, <i>and</i>
If the issue problem is still not resolved three days from the conference call, then the non-functioning equipment will be replaced.

**Section 6. VENDOR INFORMATION**

Include the following information for the vendor: name, address, telephone number, FAX number, and e-mail address of the person(s) who will be representing the vendor.

**6.1 VENDOR REFERENCES**

Proposer will be required to supply a comprehensive listing of your customer base for the proposed system. Also, supply seven (7) customer references that are consortia with different governing entities comparable to the LYNX! Consortium (e.g. 7 city libraries and 2 district libraries). At least four (4) of these references should be public library consortia.

Including the following information for each of the seven references:

- 6.1.1. Library staff member contact name, address, city, state, zip, title and phone number. This person should be an active user of the system and/or involved with the implementation.

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6.1.2. Library Information Systems staff member contact name, address, city, state, zip, title and phone number. This person should have been involved in the installation and support of the system.

6.1.3. Collection size, annual circulation, number of agencies/branches

6.1.4. Applications/modules installed

6.1.5. Date each application/module was activated and the version number

6.1.6. Hardware configuration

6.1.7. How long the system has been installed at this site

6.1.8. Is the customer reference configuration comparable in size to the proposed ILS