

# Carroll Library Partnership

## Integrated Library System

### Request for Proposal

Proposals due: Monday, 13 July 2009, 1:00 PM

Deliver to: Carroll County Public Library  
c/o Scott Reinhart, Assistant Director of Operations  
1100 Green Valley Road  
New Windsor, MD 21776

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Carroll County Public Library  
1100 Green Valley Road  
New Windsor, MD 21776  
410.386.4500 v  
410.386.4509 f

## GENERAL INFORMATION FOR BIDDERS

### 1. INSTRUCTION, FORMS AND SPECIFICATIONS

- A. As agent for the Carroll Library Partnership, the Carroll County Public Library is issuing this Request for Proposal.
- B. Each proposal must be enclosed in a sealed envelope and marked:

CARROLL COUNTY PUBLIC LIBRARY  
1100 Green Valley Road  
New Windsor, MD 21776

OPENING DATE: Monday, July 13 at 1:00 PM  
BID: Integrated Library System

- C. Proposal packets must be delivered, either by mail or otherwise, by the time and date shown in the Notice to Bidder. ALL bids received after the time and date shown in the Notice to Bidder will be returned unopened. Each packet must include five (5) copies of the bid proposal.
- D. Changes in phraseology, additions or limiting provisions, or materials or equipment not meeting the attached or noted specifications may cause the rejection of the bid.  
  
Please note that FAXED OR EMAILED COPIES WILL NOT BE ACCEPTED as bid proposals.
- E. In case of doubt as to the meaning or intent of anything shown in the specifications, inquiry should be made to the Scott Reinhart, Assistant Director of Operations, 410.386.4500 x3137 or scottr@carr.org, before the proposal is submitted. The submission of a proposal shall indicate the bidder thoroughly understands the terms of the specifications.
- F. Any bidder or bidders finding any discrepancy in or omission from the specifications, in doubt as to their meaning, or feeling that the specifications are discriminatory, shall notify the Assistant Director in writing five (5) days before the scheduled opening bids. An exception in no way obligates the Library to change the specifications. The Assistant Director will notify all bidders in writing, by the addendum duly issued, of any interpretations made of specifications or instructions.
- G. THE LIBRARY WILL ASSUME NO RESPONSIBILITY FOR ORAL INSTRUCTIONS OR SUGGESTIONS. ALL OFFICIAL CORRESPONDENCE IN REGARD TO THE SPECIFICATIONS SHOULD BE DIRECTED TO AND WILL BE ISSUED BY THE ASSISTANT DIRECTOR.
- H. After bids have been officially opened, no bid may be withdrawn for a period of forty-five (45) days, and then only by written notification delivered to the Library Assistant Director.

2. AWARD OF AGREEMENTS

- A. The Partnership will award, under the formal sealed bid process, a contract to the lowest responsible bidder who submits a responsive bid which is most advantageous to the Partnership.
- B. Discounts on Terms of Payment may be considered in determining the award at the sole discretion of the Partnership.
- C. Any other considerations for the award will be stated on the specifications and proposal.
- D. The Library will send written notice of its award to the successful bidder. Said notice shall constitute acceptance of the successful bidder's proposal.
- E. The Library will notify all unsuccessful bidders in writing after the award of the bid.
- F. The Partnership Library reserves the right to reject the bid of the apparent low bidder where the available evidence or information does not satisfy the Carroll Library Partnership that the bidder is qualified to carry out properly the terms of the contract.

3. RESERVATIONS

- A. The Partnership reserves the right to waive any informality in bidding and to reject any or all bids.
- B. The Partnership reserves the right to increase or decrease the quantities to be purchased at the prices bid. The quantity intended to be purchased; the period of time and additional amount of any such reservation shall be stated in the specifications or proposal inviting bids.
- C. The Library reserves the right to award agreements or place orders on a lump sum or individual item basis, or such combination as shall, in their judgment, be in the best interest of the Partnership.
- D. The Partnership may waive minor differences in the specification's intent, that do not materially affect the operation for which the item or items are being purchased, nor increase estimated maintenance and repair cost to the Partnership.
- E. The Partnership shall have the right to take such steps as it deems necessary, to determine the ability of the bidder to perform the work; the apparent low bidder, upon request, shall furnish all such information and data for this purpose.

4. DELIVERY

- A. Bidders shall guarantee delivery of materials in accordance with such delivery schedule as may be provided in the specifications and proposal.
- B. All items shall be delivered F.O.B. destination, and delivery costs and charges included in the bid.

5. COMPETITION

- A. To better insure fair competition and to permit determination of the lowest bidder:

The name of any manufacturer, trade name, or manufacturer or vendor catalog number mentioned in specifications is for the purpose of designating a standard of quality and type and for no other.

- B. A bidder may offer a price on only one unit, even though he may have two or more units that meet specifications. Bidders must determine for themselves which to offer. Submission by a bidder for more than one unit may be sufficient cause for rejection of that specific item.
- C. Bids that show any omission, irregularity, alteration of form, additions not called for, conditional or unconditional unresponsive bids, or bids obviously unbalanced, may be rejected.
- D. All bids must be accompanied by such descriptive literature as may be called for by the specifications or proposal.
- E. Specifications provided are based on Partnership needs and uses, estimated costs of operation and maintenance, and other significant and/or limiting factors to meet Partnership requirements and consistent with Partnership policies. Minimum specifications, and maximum specifications where included, are not established arbitrarily to limit competition or to exclude otherwise competitive bidders.

6. APPROVED EQUALS

Any request for an approved equal exception to the specifications or protest of the specifications must be fully supported with technical data, test results, or other pertinent information as evidence that the substitute offered is equal to or better than the specification requirement.

7. DISPUTES

In cases of disputes as to whether or not an item or service quoted or delivered meets specifications, the decision of the Carroll County Public Library Director, or their authorized representatives, shall be final and binding on both parties.

8. ERRORS IN EXTENSION

Where the unit price and the extension price are at variance, the unit price will prevail.

9. PAYMENT

If the Bidder proceeds properly to perform and complete the terms and conditions of the specifications and contract, the Library may, at its discretion, from time to time as deliveries are made, grant to the bidder an estimate of the amount already earned, which shall entitle the holder thereof to receive the amount due thereon, when the condition, if any, annexed to such estimate shall have been complied with.

10. INSURANCE

The successful bidder shall protect, hold free and harmless, defend and indemnify the Library or Partnership, including its officers, agents and employees, free from all liability, penalties, costs, law suits, damages, expenses, death of any person or damage to property of any kind, which injury, death or damage arises out of, or is any way connected with the performance of the work under this contract.

The bidding requirements that are stated in the detailed specifications, the proposal form, or the special provisions will have precedence over the General Information to Bidders.

Where any items or material is specified by propriety name, the trade names, and/or name of manufacturer, with or without the additional or such expressions as "or equal" or "approved equal," it is to be understood that the item or material name of the equal thereof, is intended, subject to the approval of the Library as to the equality thereof, and it is distinctly understood (1) that the Buyer is to use his own judgment in determining, from time to time whether or not any item or material proposed to be substituted is the equal of any item or material so specified; (2) that the decision of the Library on all such questions of equality shall be final and (3) that in the event of any adverse decision by the Buyer, no claim of any sort shall be made or allowed against the Owner.

#### 11. ETHICS IN GOVERNMENT

By submitting a bid in response hereto, the bidder acknowledges that it is familiar with the Carroll County Ethics Ordinance (Chapter No. 18 ETHICS, Carroll County Maryland Code of Public Local Laws and Ordinances) and certifies that it has no knowledge of any violation of that ordinance; that it has no knowledge of any conflict of interest which may be caused if it is awarded a contract under the Ethics Ordinance; and that it has not given as a gift (as that term is defined in the Carroll County Ethics Ordinance) to anyone who has or may participate in the awarding of this contract. The requirements of this paragraph should be deemed met by the bidder if a disclosure of any fact that might require disqualification hereunder has been made to the Carroll County Ethics Commission prior to submission of the bid. Contact the (Carroll) County Attorney's Office if additional information is required.

#### 12. BID AWARD PROTEST PROCEDURES

- A. Protests of bid awards must be received by the Carroll County Public Library Director in writing by certified mail not later than seven (7) working days after all potential bidders have been notified of the contract award.

Protests must be fully supported with adequate technical data, test results, or other pertinent information to support the protest. At a minimum, this must include the name and address of the protestor; identification of the project for which the protest is being filed; a statement of the reasons for the protest; supporting exhibits, evidence or documents to substantiate the protest; and a statement of the ruling desired from the Library.

- B. The decision of the Library shall be final except in instances of:

-- Violations of federal law or regulations; and/or

-- Violations of the Library's protest procedure or the failure of the Library to review a complaint or protest.

The successful bidder covenants to save, defend, keep harmless and indemnify the Library and all of its agents and employees (collectively the "Library") from costs and attorney's fees, charge, liability or exposure, however caused, resulting from or arising out of or in any way connected with the Contractor's performance or non-performance of the terms of the Contract Documents or its obligations under the Contract. This indemnification shall continue in full force and effect

until the Contractor completes all of the work required under the Contract, except the indemnification shall continue for all claims, including latent defects or completed operations after final acceptance of the work by the Library for which the Library gives notice to the Contractor after the Library's final acceptance of the work.

14. NONDISCRIMINATION IN EMPLOYMENT  
(Contract Provisions)

During the performance of this agreement, the contractor or vendor agrees as follows:

- A. The Contractor or vendor will not discriminate against any employee or applicant for employment because of race, creed, color or national origin. The contractor or vendor will take affirmative action to ensure that applicants are employed, and that employees are treated during employment without regard to their race, creed, color, or national origin. Such action shall include, but not be limited to the following: Employment, upgrading, demotion or transfer; rates of pay or other forms of compensation; and selection for training, including apprenticeship. The contractor or vendor agrees to post in conspicuous places, available to employees and applicants for employment, notices to be provided by the owner setting forth the provisions of this nondiscrimination clause.
- B. The contractor or vendor shall, in all solicitations or advertisements for employees placed by or on behalf of the contractor or vendor, state that all qualified applicants will receive consideration for employment without regard to race, creed, color or national origin.
- C. The contractor or vendor will send to each labor union or representative of workers with which he has a collective bargaining agreement or other contract or understanding, a notice, to be provided by the owner, advising the said labor union or workers' representative of the contractor's or vendor's commitments under this section, and shall post copies of the notice in conspicuous places available to employees and applicants for employment.
- D. The contractor or vendor shall furnish, if requested by the Library, a compliance report concerning his employment practices and policies in order for the Library to ascertain compliance with the special provisions of this agreement concerning nondiscrimination in employment.
- E. In the event of the contractors or vendors noncompliance with the nondiscrimination clause of this agreement, this agreement may be cancelled, terminated, or suspended in whole or in part and the contractor or vendor may be declared ineligible for further Library work.
- F. The contractor or vendor shall include the special provisions outlined herein pertaining to nondiscrimination in employment in every subcontract or purchase order utilized by him in order to carry out the terms and conditions of this agreement so that such nondiscrimination in employment provisions shall be binding on each subcontractor or vendor.

15. Use of Contract by Other Public Libraries/Government/Education Agencies

While this request for bid is prepared on behalf of the Library, it is intended to apply for the benefit of other Maryland public libraries, government and educational institutions. Unless the bidder takes exception, the resulting awarded items will be made available to any agencies listed upon their written request. Purchase requests and funding for other agencies will be the sole responsibility of that agency.

16. Taxes

The Library is exempt from federal excise taxes and state sales and use taxes. Tax exemption certificates shall be provided to the contractor upon request. The selected bidder shall include on the face of all invoices the firm's Federal Tax Identification Number.

17. Software Escrow Agreement

The contractor will provide an Escrow Agreement or an Agency Agreement whereby the firm will make available to the Library all program source code for software in the proposal in the event of non-compliance by failure or default; firm ceases to exist or is merged with another firm; firm drops the product; or firm ceases to support the product. The vendor will maintain the escrow account at its own expense.

## INTEGRATED LIBRARY SYSTEM - REQUEST FOR PROPOSAL

### PURPOSE

This request solicits proposals to furnish the Carroll Library Partnership (CLP) with an automated integrated library system. This system will be implemented in May of 2010. Vendors are expected to provide the software and services for the furnishing, delivery, installation, and maintenance of an integrated library management system

Both a technical and cost evaluation will be performed before a contract is awarded. Further price negotiation is prohibited after proposals are submitted so vendors should submit proposals with lowest possible costs.

### CONSORTIUM OVERVIEW

The Partnership is a multi-type library consortium consisting of Carroll Community College (CCC), Carroll County Public Library (CCPL), McDaniel College (MC), Talbot County Free Library (TCFL), Chesapeake College (CC), and 5 Department of Health and Mental Hygiene libraries. Including two publicly funded community colleges, two public libraries, and one independent, privately supported college, and 5 special libraries, CLP is the only partnership of its type in Maryland.

Beginning in 1991, the partners independently installed separate stand-alone library management systems sold and maintained by the same vendor, then known as Dynix. As each library added data and functionalities and as original equipment approached the end of its projected life cycle, the institutions began to explore the feasibility of a cooperative endeavor and in 1996 agreed to establish a countywide library cooperative. Central site hardware was installed at CCPL Headquarters and CCPL patron and bibliographic data were loaded in late spring, 1997. MC records were merged into the database in August 1997, and CCC data loaded in January 1998.

In 1999, we began to offer automation services to a number of small State of Maryland Department of Health and Mental Hygiene Hospital libraries (DHMH). These five libraries have combined holdings of approximately 5,000. Our current Dynix server is partitioned into two separate systems; one serving CLP and one serving the hospital libraries. Additional system load is minimal, with combined DHMH annual circulation being under 2,000.

In 2009, Talbot County Free Library and Chesapeake College joined the consortium. Their individual databases are stored in a separate partition.

### IMPLEMENTATION SCHEDULE

To allow staff the ability to spend more valuable time with the system, any work connected with a change in software, data conversion and staff training must be completed by May 28, 2010.

Each vendor is required to provide a detailed migration/implementation schedule. This schedule must reflect a completion date no later than May 28, 2010.

The vendor will base any recommendations on providing an end result system that will perform within the acceptable limits set forth by CLP. The vendor must provide both a best-case scenario estimate of system downtime and a worst-case scenario estimate of downtime for implementation.

The implementation schedule must include, but is not limited to test of existing data for conversion, conversion of data, data migration, loading software, and training staff.

## SYSTEM CAPACITY REQUIREMENTS

The proposed system must be configured to accommodate the following four individual database sizes and transaction loads. The Vendor must describe the data formats in which data files will be accepted and include any cost to prepare or load the library's existing machine-readable records in the cost section of the response.

### Carroll County Public Library/McDaniel College/Carroll Community College Current Software – SirsiDynix Horizon 7.4.2

Bibliographic Records	434,000 titles
Items (copies, volumes)	805,000 volumes
Authority Records	967,000 records
Customer Records	118,000 records
Volumes Purchased Yearly	107,000 items
Serial Holdings	5,600 titles
Annual Circulation	2,700,000 items
Staff PCs	118

### Talbot County Free Library Current Software – SirsiDynix Horizon 7.3.4

Bibliographic Records	91,000 titles
Items (copies, volumes)	116,000 volumes
Authority Records	170,000 records
Customer Records	27,000 records
Volumes Purchased Yearly	8,300 items
Serial Holdings	220 titles
Annual Circulation	192,000 items
Staff PCs	28

### Chesapeake College Current Software – SirsiDynix Horizon 7.3.4

Bibliographic Records	52,000 titles
Items (copies, volumes)	52,000 volumes
Authority Records	122,000 records
Customer Records	15,000 records
Volumes Purchased Yearly	2825 items
Serial Holdings	116 titles
Annual Circulation	3,000 items
Staff PCs	3

### DHMH Libraries Current Software – SirsiDynix Horizon 7.3.4

Bibliographic Records	15,000 titles
Items (copies, volumes)	17,000 volumes
Authority Records	36,000 records
Customer Records	11 records
Volumes Purchased Yearly	507 items
Serial Holdings	0 titles
Annual Circulation	0 items
Staff PCs	7

Any vendor proposed software must be able to support desktop computers that are at least Pentium 4 computers with 1GB of memory running on the Windows XP, Vista, or Windows 7 platform. All are equipped with either 10/100/1000 network adapters.

#### SERVER ARCHITECTURE

The vendor must support an open Windows-based client/server architecture, which is portable and interoperable and which depends upon standards or where standards are lacking commonly accepted practices. The system is expected to redistribute data or logic from client to server. The system must be scalable to support a variety of configurations, including large LAN/WAN operations.

The system must make use of an open database structure that may be accessed using Standard Query Language (SQL) such as MS SQL Server. The database must not be compressed, it must be extensible and it may not be based on proprietary database software. CLP must have access to all tables and data within the database and will be provided with a document outlining the table structure.

CLP has the option of purchasing the hardware from the vendor, another source recommended by the vendor, or from another hardware source. For vendor supplied hardware or hardware supplied by a source recommended by the vendor, installation by a vendor Technician must include installation of all software and hardware.

#### HARDWARE/SOFTWARE MAINTENANCE

The vendor must offer full maintenance for all software and hardware provided by the vendor. System parts must be made available on-site within 4 hours. Records of each maintenance visit or preventative maintenance visit must be kept on the vendor's network for reference. Any source for the purchase of hardware recommended by the vendor must provide the same maintenance requirements stated above.

Software maintenance must include all software enhancements offered as part of the standard system to future prospective customers. Any upgrades to the software purchased by CLP must be offered to CLP free of charge or as part of the software maintenance agreement costs. This includes all core client software modules and the PAC.

The vendor must provide Help Desk support to CLP. This Help Desk must be staffed during business hours (Eastern Time Zone) and calls/emails to the help desk must be returned within 2 hours. Support must be available 24 hours a day, 7 days a week for priority problems concerning software, hardware and the operating system. The vendor must be able to perform remote software problem diagnosis.

#### WARRANTIES

The vendor must warrant that the system will operate in conformance with the proposal submitted in response to the specifications contained in this document. For one (1) year following delivery, the vendor will, upon timely notification, design, code, checkout, document and deliver promptly any amendments or alterations to the software that might be required to correct errors present at the time of system delivery and which significantly affect performance. Any hardware proposed will be warranted against defects in workmanship and materials, under normal use and service for a minimum period of four (4) years from the date of installation.

#### EVALUATION

The CLP Operations Committee will review and evaluate proposals that are submitted by the Bid Opening date and are presented in the format prescribed in this RFP. CLP reserves the right to require vendors to provide a demonstration of their software before a contract is awarded.

Evaluation scoring will be based upon the following weighted scale:

40%	Functional Requirements
20%	Price
15%	Marketplace rankings and reviews
15%	References from customers
10%	Hardware/Software platform

#### VENDOR RESPONSE

All responses must include, at a minimum, all of the information requested in the Vendor Response, the System Requirements, Required Database Features, Functional Specifications sections, and the Systems Cost page. Vendors are required to answer all questions, and to respond to all numbered statements in this document using the key provided at the end of this section.

#### COVER LETTER

This letter will include the name and address of the firm submitting the proposal and the name, address, email address, and telephone number of the person(s) authorized to represent the firm during contracting.

#### VENDOR PROFILE

A brief description of the vendor's background, organization, staff, experience, and product line must be included in this section. Vendor should demonstrate financial stability and describe any outstanding litigation.

#### SYSTEM GROWTH & CONVERSION OF DATA

Vendor should describe how the proposed software would handle future growth of the CLP, including additional workstations, volumes, customers and system features. The vendor must also include information on what they expect CLP to do to prepare the database(s) for a satisfactory transition. The physical medium and data formats in which CLP data will be accepted must also be included.

#### LICENSING ISSUES

Vendor must submit any software licensing restrictions, including maximum number of clients (PAC, staff, SIP, NSIP, Z39.50), cost of additional licenses, and licensing issues for remote access.

#### IMPLEMENTATION SCHEDULE

Vendor is to provide an implementation schedule for system installation outlining what will take place and the responsibilities of the vendor and the Partnership. Requirements for this implementation schedule are detailed on page two of this document. Vendor is required to provide all information outlined in the Implementation Schedule section of this document.

#### MAINTENANCE AND SUPPORT UPDATES

Vendor must describe their customer support policies including any free help lines, hours of operation, how customer support or help desk services are staffed and emergency service. Terms and cost of any available software maintenance agreements must be described in detail. The vendor must also state if a software maintenance agreement is not available for their product.

Information on the frequency of software upgrades must also be provided. What is the process for loading a software upgrade? Would CLP or the vendor perform upgrades? In what form does CLP receive the software (e.g. ftp or via a Web site)?

The vendor must describe their system for submitting enhancement requests. Please include details about the review process and what criteria are used for the inclusion of enhancements.

The vendor's recommendation for the purchase of new hardware must state when (days and time of day) hardware maintenance will be provided. The cost of hardware maintenance must be included on the Cost Proposal page.

#### FILE REORGANIZATION

Does the proposed system require periodic file reorganization (i.e. re-indexing and resizing)? If so, the vendor must explain this process. This explanation must include a list of any files that require periodic reorganization, the length of time the reorganization takes, and information about the availability of the system during this reorganization (e.g. can the system be accessed by PAC, staff and remote users). The vendor must also include a list of any indexes that will require periodic reorganization and indicate if the system is available to PAC, staff and remote users during the reorganization. If the system is available to users during reorganization will users experience any slowness in response time during this process? The vendor must also state if file reorganization and/or index reorganization is not required.

#### BACKUP

The vendor must outline the routines recommended for unattended, automatic system and data backup. An estimate of the length of time required for each type of backup is also required. The vendor should use CLP's database size listed in the System Capacity Requirements section. Please note that CCPL uses Symantec NetBackup for on-site and off-site disk-to-disk backups of data. We do not use tape for any backup processes.

#### SECURITY

Describe both client and server security and any known security issues, including vulnerability to denial-of-service attacks.

#### DOCUMENTATION

Describe any documentation that is included with the system and provide samples of this documentation. Vendor should also state if additional documentation is available and the cost for that documentation.

#### SUPPORT OF OTHER LANGUAGES

The vendor must list the languages their system supports. The vendor must clearly indicate on the Cost Page any additional cost for these languages.

#### BRIEF DESCRIPTION OF EACH MODULE

This section must contain a list of all modules and the functionality provided. Vendor should note any special features the modules contain. The vendor should also state whether any modules require other modules in order to function properly.

## SELF-CHECK SYSTEMS, AUTOMATED TELEPHONE RENEWAL AND BOOK SECURITY SYSTEMS

The vendor must indicate if their software is compatible with self-check out systems, automated telephone renewal list systems and book security systems, and list each compatible system. The system must also be compatible with standard thermal and line-fed receipt printers.

## REPORTS

Vendors must describe the report generator. Of special interest is what reports are standard, can the user create custom reports, how easy is it to generate custom reports, how flexible is the report system, are natural language queries used to build reports, and are reports able to be generated using SQL. Samples of standard and custom reports must be included.

The vendor must also provide copies of daily circulation statistics showing items circulated, number of holds, and number of items renewed and the amount of money collected for a day showing the total amount collected, waived, etc.

The vendor must also describe how the number of materials used "in house" is collected and reported. The vendor must also provide sample statistical reports containing information gathered in this manner. Are all reports integrated in the ILS, or is a separate report generator required.

The following reports are required as a canned report or to be provided by the vendor at delivery: turnover (broken down by Dewey/LC classification), hold alerts, and new materials. These reports must be able to be filtered by individual library systems and their individual locations.

## TRAINING

The vendor must provide a detailed plan for training CLP staff. This plan must include the following:

- A description of the training in all system functions for each of the functional modules;
- Specify what training is included with the system purchase and what training would be available at additional cost;
- Specify what training is on site and what training is off site;
- Specify the type of training (demonstration, hands-on, web-based, etc.) that will be used;
- Specify the training/experience of the vendor's staff who will be providing the training;
- Provide a general training calendar relative to system implementation and specify the number of contact hours of training that will be provided for each system component.
- Specify if any workflow analysis services are available.

## TEST/TRAINING DATABASE

Is a test database available during the migration and conversion process? This database would contain a small sample of customer, materials and other records, and all modules being purchased by CLP. The vendor must state if they can provide such a database and what if any additional costs are associated with this database. The vendor must also indicate if any additional hardware is necessary, what the hardware requirements are (memory, disk space, etc.).

## REFERENCES

Vendor must submit a reference list of at least five (5) multi-type consortiums that have a minimum database size of 300,000 titles and currently installed and operating with the proposed system. References must include library name and address, name, address, email address, and phone number of

contact person and the size of the system installed (e.g. the number of bibliographic records, the number of customer records).

#### SUBCONTRACTORS

The vendor must name any subcontractors that will be used in any way to fulfill the terms of this contract. The name of the subcontractor, address, nature of the service provided, and experience providing this service for the vendor must be stated by the vendor. In this section the vendor should list any agreements they have with other vendors (e.g. Amazon, Barnes and Noble, etc.).

#### CONFIGURATION AND COST

This section must include a complete breakdown of all costs associated with the proposed system, including software, any recommended hardware, data conversion include whether CLP would need to contract with SirsiDynix for data extraction services), installation, training and maintenance.

#### RESPONSE TO SPECIFICATIONS

The following specifications illustrate the ILS functionality and features the Library expects to acquire. These specifications can serve as a guide to the bidder in developing its proposed solution; however, the bidder should use its professional judgment and experience in proposing the most optimal and cost effectively solution for the Library.

In order to facilitate the analysis of responses, the bidder may respond to each item with the following response key in the column marked Response. If an explanation is necessary, provide the narrative in the far right, Comments, column. The key is as follows:

- A Available; feature is currently available in at least 10 installed systems.
- AD Available with Deviation; feature is currently available, but differs slightly. Vendor must explain in detail on the exceptions page.
- D In Development: feature is being developed for release. State expected date of release.
- P Planned: feature to be implemented; not yet in development. Indicate the expected date of release.
- N Not Planned: feature is not currently planned and is not expected to be added to the system.
- TP Third Party: This feature is provided through a third-party product. Indicate the vendor and the cost.

Any exceptions the vendor has to anything required or stated in this RFP must be described in full.

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Number	Requirement	Description	Response	Comment
<b>TECHONOLOGY - Hardware &amp; Software</b>				
1	ILS must run on multiple Operating System platforms	Bidder must provide list of supported operating systems for server and client		
2	ILS will run on a variety of hardware	Bidder must provide list of supported hardware platforms for server and client		
3	ILS will run on enterprise class servers based on x86 hardware	Bidder must provide minimum hardware specifications		
4	ILS will provide the ability to "undo" operations reverting any performed operation or change made			
5	ILS will maintain independent tables using active directory login as primary key for authorizing and accounting staff access to ILS functions			
6	ILS will support Disaster Recovery site with automatic fail over without data loss			
7	ILS will provide continuous access to all integrated functions and features throughout all system maintenance activities			
8	ILS will implement back end services using a widely supported relational database management system supporting SQL queries	This is to implement journaling, rollback, rep-synch, snapshots, and views for third party applications - bidder will list all supported relational database management systems		
9	ILS will provide hardware support	Bidder will list hardware platforms for which support is offered		
10	ILS will provide revision control			
11	ILS will provide change windows			
12	ILS will provide model databases			
13	ILS will support continuous access/hot standby			
14	ILS will provide supportive snapshots at regular intervals			

15	ILS will provide supportive snapshots at arbitrary intervals			
16	ILS will run concurrently on two active servers			
17	ILS will run concurrently on multiple active servers			
18	ILS will run concurrently on virtual servers			
19	ILS will implement/support a staging environment for the orderly deployment of new ILS releases			
20	ILS will support hardware & software for telephone notification system			
21	ILS will support 3rd party hardware & software for self service checkout equipment		Provide API-level access to ITG Self-Checks.	
22	ILS will support 3rd party hardware & software for label generating		Support Zebra Z4M and TLP 3844-Z label printers	
23	ILS will support 3rd party printer & session management hardware		Must support Librarica, Comprise, and Envisionware systems	
24	ILS will support mobile devices including but not limited to:		Bidder must identify the mobile devices supported	
	a) Cell Phone			
	b) PDA			
	c) Handheld Computers			
25	ILS will offer tag clouds			
26	ILS will support persistent URL or dynamic bookmarking of any search			
27	ILS will allow for the full customization of all staff user interfaces including naming conventions and layout			
28	ILS will allow for the ability to copy and paste all on-screen data			
29	ILS will allow any user interface screen to be printed			
30	ILS will provide the ability to undo any operation			

31	ILS will provide the ability to verify barcodes by location			
<b>TECHNOLOGY - Database</b>				
32	ILS must be scalable			
33	ILS will maintain independent tables using active directory login as primary key for authorizing and accounting staff access to ILS functions			
34	ILS will provide open database or schema			
35	Field lengths should be unlimited where needed		Bidder should identify the maximum field length and character type supported by (user input) fields	
36	ILS will provide detailed data migration plan			
37	ILS will support data migration from SirsiDynix Horizon			
38	ILS will provide data migration assistance			
39	ILS will provide what data will not migrate (e.g. pub patterns, customer blocks, etc.)			
40	ILS will provide migration assistance if/when we leave for a new ILS vendor			
41	ILS will provide for Library-defined description text for item availability		Bidder will identify the maximum character length and character type supported by the Item Availability field. This is to allow the list of availability options to be changed to fit common terminology	
42	ILS will provide for database integrity checking without taking the database offline			
43	ILS will provide the ability to create indexes and limits without ILS support assistance and without charge			
44	ILS will provide ability to manage login connections and terminate individual logins			

TECHNOLOGY - Standards			
45	ILS must support the following authentication standards:		
a)	Active Directory		
b)	LDAP		
46	ILS must support:		
a)	RFID tags	Bidder must identify supported RFID tags.	
b)	RADIUS		
47	ILS will limit access to information contained within ILS by Access Rights and Permissions tied to user account		
48	ILS will support the following standards:		
a)	Z39.50	Bidder must list all supported standards and protocols	
b)	NCIP		
c)	SIP2		
d)	MARC II1		
e)	HTML		
f)	ODBC		
g)	RDA		
h)	FRBR		
i)	Other		
49	ILS will support consortium standards, including but not limited to the following:	Bidder will list supported consortium standards	
a)	Marina		
b)	OCLC/Worldcat		
c)	OCLC/Firstsearch		
d)	Syndetics		
e)	Overdrive		
f)	Netlibrary		
g)	Nextreads		
50	ILS will support remote access authentication for licensed databases	Bidder will specify if this feature is integrated into the system, or is a third party product required. Specify whether EZProxy is supported.	

51	ILS will provide Open URL Resolver			
52	ILS will support integration with Blackboard course management software			
53	ILS will support integration with the Datatel student data system for importing/deleting students from database			
54	ILS will allow for the ability to index the entire MARC record (all fields, sib-fields, and indicators) and keep these up-to-date			
55	ILS will provide the ability to batch edit all records (bibs/items/customers/etc)			
<b>TECHNOLOGY - E-Commerce</b>				
56	ILS will integrate with cash registers			
57	ILS will support cash drawer to reconciliation			
58	ILS will support Unique management			
59	ILS will support E-Commerce			
60	ILS will support 3rd party point-of-sale readers			
61	ILS will support 3rd party point-of-sale printers			
62	ILS will allow credit/debit card payments from merchant banks and Paypal			
<b>NOTIFICATION &amp; COMMUNICATIONS CAPABILITIES</b>				
63	Email notifications should have the ability to configure separate email servers by individual consortium member regardless of separate database status			
64	ILS will allow automated notification and/or alerts to library customers by:			
a)	Telephone			
b)	Text Message			
c)	E-mail			
d)	System Generated Letter / US Mail			
e)	RSS Feeds			

65	Notification methods will cascade -- if email bounces, then phone, then mail, etc			
66	Notification and alert messages must be configurable by Library Staff	Bidder will specify whether this is configurable by individual consortium member regardless of separate database status.		
67	Events to trigger automated notification or alert must be Customer selectable	Bidder will specify whether this is configurable by individual consortium member regardless of separate database status.		
68	Events to trigger automated notification or alert must be selectable by Library staff	Bidder will specify whether this is configurable by individual consortium member regardless of separate database status.		
69	ILS will have the ability to email customer from an online request "form"			
70	ILS will allow customer to Opt-in to receive notifications			
71	ILS will allow customer to Opt-Out of receiving notifications			
72	ILS will allow customer to choose the type of email or text notifications they receive			
<b>TECHNOLOGY - OPAC-Related</b>				
73	The ILS online public access catalog (OPAC) must provide tiered access to end users supporting minimally configured standards-based browsers on low speed connections	Bidder must provide minimum web browser specifications		
74	The ILS online public access catalog (OPAC) must provide tiered access to end users supporting browsers configured with full featured plug-ins on high speed connections	Bidder must provide optimal web browser specifications		
75	The ILS OPAC will tolerate reasonable settings of personal firewalls	Bidder must provide list of supported personal or desktop firewalls, if applicable		
76	OPAC will use standard browser navigation tools & buttons			

77	ILS will conform to ADA requirements			
78	ILS will work with third party reader & voice recognition software and hardware			
79	ILS must provide a secure password reset system for resetting/changing customer passwords		Bidder should describe customer password change options available	
80	ILS will allow customers and Library staff to communicate via:			
	a) E-mail			
	b) IM			
	c) Chat			
	d) Text Message			
	e) RSS Feeds			
81	OPAC will use standard browser navigation tools & buttons			
82	ILS will work with third party reader & voice recognition software and hardware			
83	ILS will assist Visually Impaired customers through the use of screen reader programs		Bidder will identify all screen reader programs supported	
84	ILS will use FRBR standards to make search results more concise and on target (de-duplicate results)		Bidder will provide information regarding the accuracy of its search results	
85	ILS will support third party PAC plug-ins (e.g. ChiliFresh, LibraryThing, Syndetics)			
86	ILS will support fuzzy matches and recommend alternate searches for misspellings, and zero hits			
87	ILS will allow customers to pay fines/fees online through the PAC.			
<b>TECHNOLOGY - Report Writing</b>				
88	ILS will allow all reports to be filtered by individual consortium member regardless of separate database status.			
89	ILS will support 3rd party reporting tools		Bidder will list supported 3rd party reporting tools	

90	ILS will bring forward historical circulation, collection, finance, and customer information from SirsiDynix Horizon as part of the database conversion			
91	ILS will provide for the automatic generation and distribution of reports as scheduled and defined by the library			
92	ILS will provide more than one level of reports access so that individual branches or administrative staff may generate a subset of reports			
93	Reports should be distributed in multiple ways: email, print ready, as excel or word files, or as files which can be transmitted to external entities either on demand or on a library defined schedule			
94	ILS must provide custom report writing features as well as canned reports			
95	ILS will have the ability to create hold report comparing number of items on hold to number of request			
96	Report will include: author, title, ISBN, current items in circulation, current items on order, number of request, date of oldest request (or days since oldest request was placed)			
97	Report should be sortable by call number or order call number			
98	ILS will generate report of titles that had last item discarded in a user-specified time period.			
99	ILS will include pre-defined reports on all activities on all funds			
100	ILS will include pre-defined reports on all activities on specified funds			

101	ILS will include pre-defined reports on all activities on a single fund			
102	ILS will generate a report identifying most popular book by checkout			
103	ILS will generate a report identifying most popular item by checkout			
104	ILS will generate a report identifying twenty most popular books by checkout			
105	ILS will generate a report identifying twenty most popular items by checkout			
106	ILS will generate a report reconciling cash reports in the ILS and in the cash register			
107	ILS will tag titles to track and display usage and availability information			
108	ILS will provide report writing training, documentation and support for more than one staff member.			
109	ILS will provide an open orders report			
110	ILS will provide a report of all titles/items with a "lost and paid" status by location			
111	ILS will provide ability to store/archive statistics on deleted bibliographic and item records for several years, and will be customizable by individual consortium member regardless of separate database status.			
<b>TECHNOLOGY - Support &amp; Training</b>				
112	Vendor will provide access to open user forum			
113	Vendor will offer technical support for hardware & software utilizing online, telephone and onsite support		Bidder will list support options	
114	Vendor must provide five (5) sets of full end user documentation in print			
115	Vendor must provide full technical documentation in print			

116	Vendor must provide full online end user documentation			
117	Vendor must provide full online technical documentation			
118	Vendor must provide full online end user training			
119	Vendor must provide full online technical training			
120	Vendor must provide full in-person end user training			
121	Vendor must provide full in-person technical training			
122	ILS will provide detailed help page accessible from every page and screen within the OPAC			
123	ILS will provide detailed help context sensitive help from every page and screen of both staff and PAC functions			
<b>TECH SERVICES REQUIREMENTS - Acquisitions</b>				
124	All acquisition functions must be separated for each individual consortium member regardless of separate database status. (i.e. McDaniel cannot see CCPL funds, orders, purchase orders, etc)			
125	ILS will provide P.O. number which is automatically assigned by the System with option to enter user created P.O. number			
126	When spent event should occur options should include:			
	a) At time of approved order			
	b) At time of receipt of materials			
	c) Time of approved payment invoice			
	d) Cost and quantity information			

e)	Author, Title, ISBN or UPC or Vendor product id number, price, quantity, Publisher, Processing notes, Distribution information which would include Branch/Collection/ Fund and Default information in order line			
127	ILS will provide purchase requests that are searchable and viewable by staff only			
128	ILS will allow customer purchase requests to be grouped and placed in a "cart"			
129	ILS will allow purchase requests to be grouped by topic			
130	ILS will have the ability to create orders			
131	ILS will have the ability to print created orders			
132	ILS will have the ability to e-mail created orders			
133	ILS will, during EDI/EDIFACT import, automatically search for matching ISBN or UPC and attach items to matching record	Provide list of vendors that you currently support		
134	Prior to creating a Bibliographic and item record, ILS will perform a search for matching ISBN or UPC			
135	ILS will provide the option to reject any matching ISBN or UPC records identified			
136	ILS will have the ability to create and store default purchase order templates for frequently used visitors			
137	ILS will have the ability to create and store distribution templates			
138	ILS will have the ability to create orders with no items attached			
139	ILS will incorporate default discount from vendor record for each title automatically.			

140	ILS will allow default vendor discount to be changed or updated through EDI import			
141	Printed purchase orders will print discounted costs for each title			
142	Printed purchase orders will print total discount at end of order			
143	ILS must be able to edit and cancel order lines from purchase orders			
144	ILS must be able to copy order lines from one purchase order to another.			
145	ILS must be able to create blank purchase order.			
146	ILS will allow for batch/individual importing of OCLC records at point of ordering			
147	ILS will allow for batch/individual ordering			
<b>TECH SERVICES REQUIREMENTS - Receiving and invoicing</b>				
148	ILS must be able to receive title in full and/or partial receipt.			
149	ILS must be able to undo the receipt of titles			
150	ILS will allow default vendor discount to be changed or updated manually			
151	ILS will print OCLC number on purchase order.			
152	ILS will provide a system-generated ID number on each invoice			
153	ILS will provide a description space for each budget used when an order is split between multiple budgets			This must include miscellaneous/non-title invoices
154	ILS will provide an electronic invoicing feature			Provide list of vendors that you currently support
155	ILS will provide a description or note field for each individual budget entry in a non-title invoice/statement			

TECH SERVICES REQUIREMENTS - Fund Management			
156	ILS will include pre-defined reports on all activities on all funds		
157	ILS will include pre-defined reports on all activities on specified funds		
158	ILS will include pre-defined reports on all activities on a single fund		
159	Fund account should have the following fields:		
a)	Description		
b)	Category of materials		
c)	Fund code abbreviation		
d)	Sub-account number		
e)	Fiscal year		
f)	Allocation		
g)	Encumbrances		
h)	Expenditures		
i)	Name(s) of selectors		
j)	Status		
160	ILS will allow accounts to be searched by many fields including but not limited to:	Bidder will list all fields by which accounts can be searched	
a)	Description		
b)	Fund code		
c)	Fiscal year		
d)	Status		
e)	Selectors		
161	ILS will allow fund amounts to be transferred between accounts and automatically calculated		
162	ILS will append a date and time stamp to all fund transfers		
163	ILS will force administrator to enter text in a note field when issuing a fund transfer		
164	ILS will be able to delete closed funding accounts		

165	ILS will allow generic distribution lists not tied to specific funds, but applied across multiple funds			
166	ILS will be able to manage funding accounts as follows:			
a)	Create			
b)	Delete			
c)	Edit			
d)	Re-Name			
e)	Manually expend funds			
167	ILS will be able to have more than one fiscal year open simultaneously			
168	ILS will be able to clone or roll over part of a funding hierarchy from one fiscal year to another			
169	ILS will be able to roll over a designated fund from one fiscal year to another			
170	ILS will be able to roll over multiple designated funds from one fiscal year to another			
171	ILS Acquisitions module must issue an alert to the appropriate administrator when funds balance reaches specified level for each fund			
172	ILS Acquisitions module must allow administrator to establish alerting level for fund balances for each fund			
173	ILS will be able to track expenditure at each level			
174	ILS will display the vendor number on a printed purchase order			
175	ILS will provide the ability to change the vendor on an existing purchase order			
176	ILS will provide the ability to create an item record at the point of purchase order approval.		The ability to override this setting must be provided	

TECH SERVICES REQUIREMENTS - Vendors			
177	ILS will list and store Vendor information		
178	ILS will import existing vendor file from SirsiDynix Horizon		
179	ILS will be able to create a vendor		
180	ILS will be able to edit a vendor		
181	ILS will be able to delete a vendor		
182	ILS will be able to create a vendor record by copying an existing vendor record		
183	ILS will be able to batch vendors for global deletion		
184	ILS will maintain vendor file with ability to tag selected vendors as primary or first choice		
185	ILS will be able to track information on vendors, including but not limited to:		
	a) Timeliness of order fulfillment		
	b) Cancellations		
	c) Expenditures		
	d) Discounts		
186	ILS will maintain vendor file with a status column comprised of one of the following options:		
	a) Open		
	b) Suspended		
	c) Closed		
187	ILS will track date and time of all changes to vendor status		
188	ILS will provide the ability to automatically delete closed vendor accounts when not attached to open purchase order		
189	ILS will provide ability to automatically delete closed vendor accounts when not attached to closed purchase orders less than three (3) years old		

190	Vendor records should contain the following fields:			
a)	Vendor Code			
b)	Vendor Name			
c)	Vendor Description			
d)	Notes			
e)	Customer Account Number			
f)	Vendor Contact Information			
g)	Vendor Address			
h)	Vendor Phone			
i)	Vendor Fax			
j)	Vendor E-mail			
k)	Customer Service			
l)	Cancellations			
m)	Payment			
n)	Shipping Address			
o)	Standard Discount			
p)	EDI Flag			
q)	EAN			
r)	SAN			
s)	Tax ID Number			
t)	Date of Last Order			
u)	Status of Current Order			
191	ILS will be able to batch update vendor record information			
192	ILS will provide the ability to place requests in acquisitions			
<b>TECH SERVICES REQUIREMENTS - Serials</b>				
193	All Serials functions must be separated for each individual consortium member regardless of separate database status. (i.e. McDaniel cannot see CCPL funds, etc)			
194	ILS will allow members who are sharing a database to share serial bibliographic records.			

195	ILS will provide the ability to establish automated reminders to order next editions of circulation items through notification / alerting system			
196	ILS serials module must accommodate batch loading of serials publication patterns from vendors, such as EBSCO			
197	ILS Serials module must allow for editing of pub pattern to accommodate irregular subscriptions			
198	ILS Serials and Acquisitions modules must allow for multiple automatic claims with vendor			
199	ILS Serials and Acquisitions modules must allow for scheduling multiple automatic claims with vendor	Provide list of vendors that you currently support		
200	ILS will update copy history and summary of holdings when deleting or checking in serials			
201	ILS will provide templates for serials publication patterns and for serials check-in records			
202	ILS will provide a fully-featured binding module that automatically identifies issues ready to be bound according to customizable parameters, marks records as bound/in-process/etc, and creates binding slips according to bindery's specifications in print and electronic format			
203	ILS will integrate pertinent acquisitions data into serials records	Example: price, subscription, and vendor data must be available in the serials records		
204	ILS will retain multiple years of price field data for subscriptions			
205	ILS must provide a claiming function that is able to interact with vendor systems	Provide list of vendors you currently support		

TECH SERVICES REQUIREMENTS - Cataloging			
206	ILS will be able to print Call Number Labels on demand or in batch		
207	ILS will provide full cut, copy, and paste capabilities (e.g., MARC fields must be modifiable without retyping the entire line or data field)		
208	ILS must have MACRO language for programming repetitive functions		
209	ILS will have the capability to program function keys		
210	ILS will offer MARC record display options		
211	ILS will support the ALA/MARC character set fonts		
212	ILS will support all characters and diacritics in the ALA character set		
213	ILS will use FRBR standards to make search results more concise and on target	Bidder will provide information regarding the accuracy of its search results	
214	ILS will have the ability to create different import sources for MARC records from multiple vendors by individual consortium member regardless of separate database status.		
215	ILS will generate report of titles which had last item discarded in a user-specified time period		
216	ILS must have cataloging functionality supporting creation and validation of full MARC 21 fields for all formats, including locally defined MARC fields.		
217	ILS must have cataloging functionality supporting creation and validation of new field formats, defined as needed		
218	Display screens will include MARC text screen and full-record screen for updating/changing records		

219	ILS will be able to create themed collections			
220	The cataloging module must be able to support:			
a)	Adding a title record, call number, volume number, number of copies	Bidder will identify the maximum character length and character type supported by the title record field		
b)	Editing an existing titles, call number, volume number, number of copies			
c)	Duplicating an existing title, call number, volume number, number of copies			
d)	Deleting an existing title, call number, volume number, number of copies			
e)	Transfer an existing title, call number, volume number, number of copies			
f)	Offer authority control options (e.g., display, add, duplicate, edit, remove)	Bidder will list all authority control options available		
g)	When duplicating a title, the ILS must allow staff to pre-set values within the cataloging module, including but not limited to:	Bidder will describe the range of pre-set values available		
h)	The automatic addition of a 006 field			
i)	Hiding the record display from the Web OPAC (from public user searches)			
j)	Item type (to prevent repetitive data entry)			
k)	Item price			
l)	Statistical categories			
m)	Record format (e.g. MARC, Map, sound recording, etc.)			
n)	Whether to add a copy automatically when adding a call number/volume record			
o)	Ability to validate authority headings			
221	ILS will automatically index database as new records are added			

222	ILS must provide for entry and indexing of libraries own call number system			
223	ILS must provide for entry and indexing of libraries own analytics			
224	ILS must be able to merge records and transfer items from one record to another while retaining original order information (from Acquisitions module)			
225	ILS will have capability to overlay bibliographic records and retain fields specified by user upon import and configurable by individual consortium member regardless of separate database status.			
226	ILS will have capability to move a hold queue from one record to another			
227	Match points must be delineated to prevent unintentional data overlay problems - use of system control number, OCLC number or LCCN but NOT ISBN. Also allow customer specified match points.			
228	ILS must provide Open URL resolver			
229	ILS must have the capability to catalog internet websites			
230	ILS will have a link verifier to check for dead internet links			
231	Record display must allow bibliographic and item records in online catalog to show multi-volumes			
232	ILS must permit bibliographic records to be deleted from database, but retain history of relevant information in customer records and acquisitions records			

233	If a record cannot be deleted, ILS will send a message to appropriate staff identifying the reason through notification / alerting system			
234	ILS will support of ISBN 13 and ISBN 10			
235	ILS Cataloging module must have help screens specific to, but not limited to:		Bidder will identify all fields for which help is provided within the ILS	
	a) Fields			
	b) Tags			
	c) Subfields			
236	ILS will allow collections to have instantaneous updating without requiring batching			
237	ILS will have a single record per title which links to format options			
238	ILS will be able to place a reserve on a specific volume or a volume set			
239	ILS will display item's last activity date			
240	ILS Serials, Acquisitions and Cataloging modules must allow for rapid barcode conversion		E.g., After entering first barcode & number of copies, barcodes should self populate till # of copies satisfied	
241	ILS must be able to generate list of all editions of a work using XISBN FRBR standards			
242	ILS must be able to import and save records resulting from Z39.50 search capability			
243	Field lengths should be unlimited		Bidder should identify the maximum field length and character type supported by (user input) fields	
244	ILS Cataloging module must issue an alert when an improper field, subfield and/or delineator are used.		Bidder will identify the ILS' alerting capabilities	
245	ILS will use icons to help indicate formats and functions available in the public and staff interfaces			

246	ILS cataloging module must have authority control capability conforming to the MARC21 format for authorities.			
247	ILS cataloging module must have global instantaneous subject authority control. Must have ability to change subjects, authors, and names globally			
248	ILS cataloging module should provide the capability of automatically matching headings in bibliographic records with authority records for the purpose of establishing a dynamic link or relationship between the two			
249	ILS cataloging module must have subject thesauri and subject headings supported by the system including LCSH, LC children's, form/genre terms, Spanish language			
250	ILS cataloging module must automatically generate appropriate see and see also references, broader, narrower and related terms and dynamically updated in the OPAC		Scope notes which explain the headings use should also display in OPAC	
251	ILS cataloging module must have the ability to download authority records directly from OCLC or LC and overlay appropriate existing records			
252	ILS will provide access to all data in the bib record while using any technical services function			
253	ILS will provide global and batch editing of all bibliographic/holdings records			
254	ILS will provide a batch delete process which produces a list of deleted materials			
255	ILS will provide color coding for incomplete or incorrect bib records			

256	ILS will allow internal notes to carry through entire processing process			
257	ILS will allow for duplicate order checking			
258	ILS will check authority records and other titles/call numbers linked to that authority	A separate search should not be required		
259	ILS will display OCLC number on printed work slips			
260	ILS will provide work slip note space for at least 512 characters			
261	ILS will provide the ability to print a separate customizable work slip by location	The ability to not print/generate work slips must also be provided		
262	ILS will provide the ability to change item status within the cataloging module without switching to the circulation module			
<b>CIRCULATION</b>				
263	ILS will allow truncation command when entering search criteria			
264	ILS will provide for searching customer records in list format			
265	ILS must not have a limit on the number of status designations			
266	ILS will support document delivery			
267	ILS will allow customers and staff to:			
a)	Create hold requests on single item			
b)	Create hold requests on multiple items			
c)	Create hold requests on multivolume items			
d)	Create hold requests on items on order			
e)	Create hold on item regardless of edition			
f)	Create hold on item regardless of media			
g)	Create blanket holds on title regardless of edition			

h)	Create blanket holds on title regardless of media			
i)	Suspend or cancel hold request			
j)	Change pickup location			
268	ILS will allow Library staff to move a customer to the top of the hold queue on an item			
269	ILS will efficiently produce search results desired and display them in a ranking of relevance with option to re-order by library-defined fields.			
270	ILS will be able to link family accounts (mother, father, son, daughter, other)			
271	ILS will provide adaptable wording for Graphical User Interface (GUI) features (e.g., buttons) that can be altered by the library			
272	ILS will highlight expiration dates on screen			
273	ILS will be able to show circulation statistics for particular item			
274	ILS will be able to show circulation statistics for a group of items			
275	ILS will allow staff to reset a customer password			
276	ILS must be able to automatically delete holds on multiple editions once hold is satisfied			
277	ILS will identify items to customer that cannot be renewed when trying to renew			
278	ILS will display renewal counts of materials			
279	ILS must provide customer with information to resolve issues in real time to proceed with transaction (e.g., by paying fines or confirming email address)	Transaction to include checking out items, renewing library card account		

280	ILS will display fines to date to customers			
281	ILS will allow all the fines from associated records to be displayed, calculated, and paid on one screen			
282	ILS will accept customer bill and fine payment as well as various for sale items			
283	ILS must allow multiple in-branch payment and donation options, including but not limited to:	Bidder will identify all in-branch payment and donation collection options supported		
a)	Credit Cards			
b)	Debit Cards			
c)	Cash			
d)	Check			
e)	PayPal			
284	ILS must support multiple online payment and donation options, including but not limited to:	Bidder will identify all online payment and donation collection options supported		
a)	Credit Cards			
b)	Debit Cards			
c)	PayPal			
285	ILS will be able to print duplicate receipts			
286	ILS will provide adjustable reason codes for canceling or waiving a customer fee or fine			
287	ILS will be able to generate a hold flag	Hold flag will print and placed in the book that satisfies the hold		
288	ILS must show detailed information on a single screen about a checked-in/out item	Bidder will identify all information that can be provided on screen regarding item		
289	ILS must show detailed information on a single screen about a checked-in item			
290	ILS must retain historical notes including refunds, warnings	Bidder will identify the time period historical notes are maintained		
291	ILS will accommodate the check in of:			
a)	Newspapers			
b)	Serials			

292	ILS will support receipt printing for check-in, check-out, fine/bill payment, and for sale items			
293	ILS will have the ability to add/remove location restrictions when searching			
294	ILS will have the ability to transfer financial data to and from the ILS to a Bursar's office			
295	ILS will have a damaged check-in function with the ability to invoice for damages with out having to place the item in lost status to generate a bill			
296	ILS will provide an offline circulation program with the ability to also register new customers			
297	ILS will provide the ability to recall the last customer record regardless of how that record was retrieved			
298	ILS will provide the ability to batch override transactions in addition to per item override			
299	ILS will provide the ability to store digital signatures and photos, as well as provide the ability to import these from a Bursar's office			
300	ILS will allow the number of items allowed per person on the hold shelf.		If customer is limited to 5 items on the shelf, and a 6 <sup>th</sup> item is checked in, the item is given to the next person in the queue and the original customer retains place in the queue.	
301	ILS will support ILL functions with OCLC and SirsiDynix URSA products to automatically import bibs into the ILS			
302	ILS will provide the ability to customize invoices/billing/overdue/ILL notices by individual consortium member regardless of separate database status.			

303	ILS will provide the ability for the customization of the number of requests per customer by individual consortium member regardless of separate database status.			
304	ILS will provide the ability for the customization of the number of requests from a particular library by individual consortium member regardless of separate database status.			
305	ILS will provide the ability to recall items in circulation			
306	ILS will provide the ability to apply fines according to holding library rules			
307	ILS will provide the ability to choose which mailing address to use based on date			
308	ILS will provide the ability to easily customize notices			
309	ILS will provide the ability to retain customer details on lost items in the item detail record			
310	The ILS will provide an inventory module that will properly sort LC and Dewey call numbers including Cutter numbers			
311	ILS will provide a sent to Bursar function		This function will allow the removal of current charges from payable account, but will retain record of fine details in customer record	
312	ILS will provide the ability to enter a date for book drop check-in or provide a button to select the previous business day			
313	ILS will support floating collections by individual consortium member regardless of separate database status.		If a consortium member does not participate in the floating collection process they will not be able to assume ownership of other library's items. Items returned to these locations will be marked as 'In transit' for return to owning library	

314	ILS will provide for the ability to see specific consortium member customers or all customers			
315	ILS will allow recalls to be configurable by individual consortium member regardless of separate database status.			
a)	ILS will provide ability to guarantee a minimum loan period before a recall can be requested			
<b>OPAC</b>				
316	ILS will be able to rank search results in order of relevancy			
317	ILS will be able to search information repositories beyond the catalog, including but not limited to:	Other databases, events calendars, designated websites, and other information repositories that it can search		
a)	External Databases	For example: <a href="http://community.carr.org">http://community.carr.org</a>		
b)	Designated Websites			
318	OPAC will provide secure login to customer accounts			
319	ILS will support integrated chat software	List supported reference chat software		
320	ILS will support RSS feeds			
321	ILS will provide wish list/ shopping cart features for prospective holds			
322	ILS will provide remote customer authentication for 3rd party databases	Bidder must identify all 3rd Party databases supported		
323	ILS will support single sign in for OPAC and Databases			
324	ILS will allow customer to select notification options			
a)	Telephone			
b)	Text Message			
c)	E-mail			
e)	Other Portable Devices			
f)	Pop-Up Window			
g)	System Generated Letter / US Mail			
h)	Any cascading combination			

325	ILS will allow customers to print account information			
326	ILS will allow customers to recover account user ID			
327	ILS will allow customers to recover account password			
328	ILS will allow customers to reset account password			
329	ILS will support end user printing and downloads			
330	ILS will support emailing of end user search results	By customer to customer		
331	ILS will allow customer to retain and view search and circulation history	Bidder will the time period of circulation history maintained		
332	ILS will allow customer to renew checked materials online by location			
333	ILS will allow customer to renew library card holder account online			
334	View place in on-hold queue			
335	ILS will allow customers to establish and manipulate lists of titles of interest			
336	ILS will allow customers to place batch reserves			
337	ILS will allow customers to manage their library account through:			
	a) In-Branch PCs			
	b) Online (via Web browsers)			
	c) Portable devices			
338	ILS will allow customers to view information regarding their account:			
	a) Currently checked out items			
	b) Fines	Bidder will list all customer account information available to customers		
	c) Fine Details			
	d) Requested Titles			

339	e) Reading History f) Saved Searches			
	ILS will provide multiple search features, including but not limited to:			
	a) Filters			
	b) Limits			
	c) Item format (e.g., DVD, Book, etc.)			
340	ILS will be able to search individual Locations and Branches			
341	ILS will integrate digital content			
342	ILS will be able to search serials			
343	ILS will be able to search local collections			
344	ILS will provide federated searches			
345	ILS will provide faceted browsing			
346	ILS will offer shelf list view			
347	ILS search results will display most popular books by checkout			
348	ILS will display list of books of interest along with search results			
349	ILS will offer 'people who read this also read' lists for titles called up in search			
350	ILS will develop an end user profile based on searches, holds, and checkouts			
351	ILS will be able to limit search by:		Bidder will list all search limiting criteria	
	a) Media			
	b) Availability			
	c) Location			
	d) Language			
	e) All indexed date fields			
	f) Resource			
	g) Database			
	h) Collection code			
	i) Special Collection			
	j) Call Number Field			





374	ILS must display "See" referenced in scoped/limited OPAC			
375	ILS will provide the ability to automatically display notes on collections that are not available to a customer			
376	ILS will provide the ability to browse the collection by individual consortium location regardless of separate database status.			
377	ILS will provide the ability to see all DVDs, CDs, special collections, etc without having to enter a search term			
<b>Course Reserves</b>				
378	ILS will provide the ability to circulate reserve items seamlessly from the same terminal/login as regularly circulating items.			
379	ILS will provide the ability to batch process the placing of items on and off reserve.		Bidder will list support options	
380	ILS will provide the ability to temporarily convert items from original collection to reserves.			
381	ILS will provide the ability to place professor owned copies on reserve.			
382	ILS will provide the ability to track number of checkouts for each course an item is placed on reserve.			
383	ILS will provide the ability to print a letter to the course's faculty member at the end of the term listing each item and the number of times that it circulated while on for that one semester.			
384	ILS will provide the ability to create a reserve item with an active URL without any cataloging experience.			

385	ILS will provide the ability to post an electronic document, such as a PDF, in the reserves module.			
386	ILS will provide the ability to search only reserve items in the OPAC.			
387	ILS will provide the ability to scope reserve items by location in the OPAC.			
388	ILS will provide the ability for the system to automatically shorten the due time of reserve items to 15 minutes before the library closes.			
389	ILS will provide the ability to have several different reserve loan times (2 hours, 4 hours, 1 day, 1 week)			
390	ILS will provide the ability to permanently place items on reserve, or ability to have courses with varying end-dates.			
391	ILS will provide the ability to track number of checkouts for each course an item is placed on reserve, including separating reserve circulation counts from regular circulation counts			
392	ILS will provide the ability to keyword search all fields of the reserve record in the OPAC			
393	ILS will provide the ability to create and manage pull lists through the staff mode of the ILS			
394	ILS will provide the ability to set reserves inactive and still retain information			
395	ILS will allow integration with Blackboard software			