



Request for Proposal

<i>Commodity:</i>	Library Management System
<i>Request for Proposal Number:</i>	P 6237
<i>Closing Date:</i>	Monday, May 2, 2011 2:00:00 p.m. Local Time
<i>Project Location:</i>	Edmonton, AB
<i>Number of Responses Required:</i>	4 (See Section 3.2 for details)

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- Vendors are solely responsible for ensuring that all pages and sections of this document are enclosed. If this document does not contain all pages and sections please contact Purchasing and Contract Services at 780-429-8199.
- Vendors should carefully read the Terms and Conditions, as they are binding on vendors once a quotation has been submitted.
- This document has been formatted by Purchasing and Contract Services and must not be altered in whole or in part. If altered, your response will be rejected.

PART 1 TERMS AND CONDITIONS

1. REQUEST FOR PROPOSAL

- 1.1** Consideration will only be given to quotations or proposals directly received by a staff member at the reception desk of Purchasing and Contract Services 3rd floor, on or before the closing date specified.
- 1.2 Commodity:** Edmonton Public Schools (EPS) requests proposals from eligible vendors (See Section 2.1) for the following Commodity: Library Management System
- 1.3 Request for Proposal Number:** Eligible vendors should cite the following Proposal Number: P6237
- 1.4 Issue Date:** This Request for Proposal is issued as of: April 1, 2011
- 1.5 Further Information and Delivery of Submissions and Notices:** Use the following Contact Address for all inquiries, requests for information, and the delivery of proposals and notices:

Contact: Sybille Hoffmann, CPPB
Procurement Agent
Purchasing and Contract Services
3rd Floor, Centre for Education
One Kingsway
Edmonton, AB T5H 4G9
Phone: (780) 429-8202
Fax: (780) 429-8216
E-mail: Sybille.Hoffmann@epsb.ca

Questions or concerns pertaining to this proposal must be e-mailed on or before, April 26, 2011 to: PCS@epsb.ca

1.6 Ownership of Documents: These Request for Proposal documents are the property of EPS, and are provided to vendors solely to allow them to prepare and submit a proposal. Reproduction or distribution in whole or in part is forbidden.

2. VENDORS

2.1 Eligibility. Vendors must be pre-qualified with Edmonton Public Schools before proposals will be accepted. Vendor Application forms may be obtained by contacting Purchasing and Contract Services at 780-429-8199 or by accessing <http://purchasing.epsb.net> on the internet.

3. PROPOSALS

3.1 Compliance. Proposals must strictly comply with the Terms and Conditions and may be rejected for any variation in the sole discretion of EPS. Proposals will not be considered unless accompanied by this Request for Proposal document plus a **signed** Acceptance of Terms and Conditions (see page 5).

3.2 Submission. One (1) original of the Proposal, two (2) duplicate hard copies and one (1) electronic copy in Microsoft Word or PDF saved to a storage device (USB key, CD) must be delivered no later than 2:00 p.m. (see Closing Date on page 1) to the Contact Address.

3.3 Late Submission. Proposals submitted late will **not** be considered and will be returned unopened, courier collect, to the Vendor.

3.4 No Electronic Submission. Proposals submitted by electronic methods (e-mail, facsimile) will not be accepted.

3.5 Reference. All Proposals must clearly identify the Proposal Number and Commodity.

3.6 Prices. Quoted prices must be Net Canadian Funds, G.S.T. excluded (applicable G.S.T. will be added to quoted prices), duty included, unless otherwise indicated, F.O.B. destination prepaid and based on delivery to the location specified by EPS (see Page 1).

3.7 Amendments and Withdrawal. An application by Vendor to alter, amend or withdraw all or part of its Proposal must be delivered to EPS at the Contact Address prior to the stipulated closing date and time. Only written addenda or corrections issued by Purchasing and Contract Services of EPS shall become a part of these Terms and Conditions.

3.8 Proposals Irrevocable. Except as provided for in section 3.7, Proposals are irrevocable and firm.

3.9 Ownership of Proposals. All Proposals submitted become the property of EPS.

4. EVALUATION OF PROPOSALS

4.1 Criteria. EPS in its sole discretion utilizes the following criteria in evaluating Proposals.

1.) Terms and Conditions 5%

-Vendors response must comply with the format outlined below

2.) Support/Service 10%

-Company/Business profile, scope and quality of services the vendor can supply
-Performance and experience on contracts with similar scope
-Feedback from references
-Customer service commitment
-Delivery/Lead Time
-Company's stability and commitment

3.) Suitability/Functionality 35%

-Compliance with EPS "System Specifications"
-Functionality of modules
-Platform suitability
-Compliance with EPS "Critical Requirements"

4.) Conversion/Pricing/Training 35%

-Conversion/migration process
-Implementation and integration
-Capacity for system expansion
-Various methods of training available: one to one, self-paced, web-based training and vendor-hosted distance training via web
-District implementation training for library staff

5.) Licensing/Value Add 15%

-Pricing Options/Flexibility
-Tiered discounts offered
-Additional capabilities/modules available, and cost of such additional capabilities
-Support Service Contracts
-Top tier educational discount pricing
-Implementation templates and guides
-Other value add as determined by vendor

4.2 Procedure. In its sole discretion, EPS may prepare a shortlist based on the stated criteria. The shortlisted vendors may be asked to prepare a presentation, supply demonstration equipment, or provide additional technical literature prior to the final selection.

5. ACCEPTANCE OF PROPOSALS

5.1 Lowest Price. The Proposal with the lowest quoted price will not necessarily be accepted.

5.1.1 Identical Bids. If two or more quotes are received having identical bids and conditions, preference will be given first to local vendors, secondly to provincial vendors and thirdly to national vendors. In the event two or more quotes received have identical bids and conditions and the vendors are from the same geographical location, the award will be made to the vendor whose bid is received the earliest in the bid process.

5.2 Discretion. EPS may in its sole discretion refuse to accept any or all Proposals, may eliminate any item from a Proposal that may be deemed undesirable or unnecessary, and may cancel purchase orders that are not filled by Vendor by the date specified. The issuance of a Request for Proposal does not constitute a commitment by EPS to award a contract or purchase any goods from Vendor.

5.3 Cost of Proposals. EPS will not pay any costs incurred by the Vendor in preparing a Proposal.

5.4 Variance by EPS. EPS may in its sole discretion award the contract on a split order, lump sum, or individual item basis, or other such combination as it sees fit.

5.5 Internal Bids. EPS may solicit Proposals from internal departments of EPS.

5.6 Binding Contract. The acceptance by EPS of a Proposal results in a binding contract between EPS and Vendor for the supply and purchase of the goods or services stipulated in the Proposal (the "Purchase Contract"). The terms and conditions of the Purchase Contract shall be as stipulated in the standard form contract of EPS, which Vendor shall execute.

6. GENERAL TERMS AND CONDITIONS

6.1 Default of Vendor. If Vendor defaults on delivery or any other term of the Purchase Contract, EPS may in its sole discretion terminate the Purchase Contract and procure the articles or services specified in the Purchase Contract from other sources, and Vendor shall indemnify and hold harmless EPS for any excess cost occasioned thereby.

6.2 Samples. Samples of items, when required must be furnished free of cost to EPS, prior to the opening of the Proposal and if not consumed in testing will, upon request, be returned at the expense of the Vendor. If samples are not requested, EPS reserves the right to view products or request demonstrations for the purpose of evaluation prior to finalizing awards.

6.3 Specifications. The use of a manufacturers name and/or a specified brand or make, in describing an item will restrict the person quoting to that specified item. Substitutions will only be accepted if it is specifically stated and the substitution must be an approved equal by EPS. EPS reserves the right in its sole discretion to determine if an item substitution is an equal to the item specified. **Proposals not meeting all specified requirements are subject to rejection.** Where applicable, the Vendor must show the brand or trade names of the items which are being quoted. If a part number and description listed in this tender do not coincide, it is the Vendor's responsibility to contact the procurement agent identified on page 1 of this document.

6.4 Delivery. Vendor shall supply and deliver the items, equipment, or services on the dates and to the location or locations stipulated.

6.5 Condition of Goods. Unless otherwise specified by EPS, all items, equipment, and materials whatsoever delivered and supplied shall be delivered fully assembled, in complete operating condition, and shall include all accessories specified by EPS.

6.6 Payment. EPS shall pay for items or services within thirty (30) days following receipt of the invoice (net 30).

6.7 Licensing. Vendors must be licensed to conduct business as required by current legislation.

6.8 Signing Authority. A Proposal must be signed by the Vendor or, if Vendor is a corporate entity, such of its employees or agents who have full authority to legally bind Vendor.

6.9 Compliance With Legislation. Vendor shall comply with all legislation applicable to the performance of the Purchase Contract, including Workplace Hazardous Material Information System (WHMIS), Transportation of Dangerous Goods (TDG), Workers' Compensation and Occupational Health and Safety legislation, and shall give all notices and obtain all licenses and/or permits required to fulfil the Purchase Contract.

6.10 Negotiate. In the event that only one bid is received, EPS reserves the right to be able to negotiate on the quoted price or no award the proposal.

6.11 Insurance. Vendors must have and maintain Two Million Dollars Liability Insurance.

6.12 C.S.A., C.G.A., AND U.L.C. Vendor warrants that the commodities supplied under the Purchase Contract are fit for the intended purpose, and comply with those of the following conditions which are applicable:

- In the case of chemicals, reagents, and other like substances, the grade specified by Vendor, for example A.C.S., TECH., or L.G.
- In the case of electrical and electronic equipment or apparatus, C.S.A. approved and suitable for 110 - 125 volt, A.C., 60 cycle operation, unless otherwise requested by EPS.
- In the case of gas-fired equipment, C.G.A., U.L.C., or C.S.A. approved.
- In the case of commodities eligible for local approval, electrical, electronic, or gas fired equipment may, at the sole discretion of EPS, be considered for acceptance provided, however, that any such equipment complies with and satisfies any provincial and municipal laws and regulations governing the same. The vendor shall bear all costs incurred to obtain any such local approval.

6.13 Freedom of Information. The vendor acknowledges that EPS is subject to the *Freedom of Information and Protection of Privacy Act* (FOIP). Vendor shall abide by the requirements of FOIP in so far as applicable to its operations and the information Vendor has access to, collects, or uses as a consequence of carrying out its obligations under the contract, which include an obligation to protect the privacy of the individuals to whom information relates. Vendor shall protect the confidentiality and privacy of an individual's personal information accessible to Vendor or collected pursuant to the Purchase Contract. Vendor consents, and has obtained written consent of any individuals identified in the Purchase Contract, to the use of the information by EPS and its employees, plus individuals and organizations under contract to provide services to EPS to enable EPS to evaluate the Proposal, and to use this information for other program purposes of Edmonton Public Schools.

6.14 Safety and Security. When accessing EPS property, vendors and their representatives are to ensure the following:

- Proper identification is to be worn in a visible manner in the form of company issued tags or a visitors tag provided by the site administration.
- Personnel not displaying the required identification tags may be requested to vacate EPS property immediately.
- Upon arrival at the site, check in with the administration to review any specific requirements with regard to the *Occupational Health and Safety Code*.

7. SOCIAL ACCOUNTABILITY

7.1 By signing the Terms and Conditions your company assures Edmonton Public Schools that the products offered in this quotation, by you and your suppliers are manufactured in a socially responsible manner with regard to the protection of human rights, ethical practices (i.e. child labour, working conditions).

7.2 Vendor/Manufacturer of the product must provide evidence of good social and ethical standards through their policies and procedures or ISO certification.

8. ENVIRONMENTAL STANDARDS

8.1 Environment. Edmonton Public Schools requires vendors to act environmentally responsible when bidding products. Vendors should only recommend products that are environmentally certified.

PART 3

REQUEST FOR PROPOSAL SPECIFICATIONS

Introduction

The intent of this request for proposal is to seek qualified vendors for a centralized library, textbook, eBook, media, asset management system. The desire is to have a single vendor for the purchase of software, data conversion services, installation, training and ongoing annual technical support and maintenance of the library management solution.

The overall goal is to identify a web-based library system that is centralized, customizable and meets the ever evolving needs of the 21st century learner.

Background

Edmonton Public Schools (EPS) is one of the largest school districts in Canada, providing services to approximately 80,000 students and distributed over roughly 211 schools and educational sites. The purpose of this project is to examine the implications to upgrade the current Library Management System, Circulation/Catalog Plus (FOLLETT) which is used in over 85% of EPS libraries to a centralized library system. In addition to Circulation /Catalog Plus the district also has seven school libraries using Athena as the library system of choice and three schools using CHILDS which is a local system that uses a non-marc record system.

The current library management system has served the district for over 10 years, but it is nearing end of life, does not meet current technical requirements and is unable to meet the needs of the staff and students of EPS going forward. Beyond the functional restrictions that an aged library system presents, there are known and documented issues related to the technical environment the district is moving towards- Windows Server 2008 and Windows 7. The current LAN based client/server architecture is also considered obsolete and limits the environment that the end user must work in.

EPS has numerous school campuses distributed across Edmonton. Each school library is managed locally by school library staff, and resources are rarely shared between school sites. There are significant cost implications to managing a library system in this manner, as each school requires trained staff to manage their library collection. The district has experienced issues when school staff move from site to site, often times leaving one school without trained library staff. Barcode symbologies within EPS are codabar, code 39 and FOLLETT classic. Because many resources are the same from school to school, there is considerable duplication and inconsistency of effort in entering new titles and resources into the system. The same resources or books in one school could be found in a certain area based on how that particular school entered the resource and that same resource could be found in a different location at another school because of how or who entered the resource into the system.

With just under 211 libraries within the EPS system, the average number of titles per library is 13,500 with a range of 5000 titles in our smaller school libraries and up to 44,000 in the larger. The average number of copies per library is 21,000 with a range of 5000 to 77,000 copies between the smallest and largest libraries. The annual number of transactions per year across the system is 3,538,665. The current EPS Library system addresses the needs of 80,000 students and 5000 teaching staff/librarians.

Vendor's proposed system must support the following quantities of:

2,900,000	Bibliographic Records (titles)
4,500,000	Items (copies)
3,538,665	Annual Circulation Transactions
5,000	Concurrent Users Connections (library staff)
80,000	Concurrent Users Connections (public users)

These figures represent current database size and transaction volume. Vendor should use these figures in calculating costs to implement the system and load data files. In addition, Vendor must indicate the extent to which each of these quantities can be expanded to support future growth without additional costs.

Form of Proposal

Vendor's Proposal must be capable of being understood without reference to other documents, and must include, at a minimum, the following sections:

1. Cover Letter

A brief letter of introduction, bearing the original signature of the Vendor's authorized representative. The letter must include a statement certifying the Vendor's compliance with the RFP requirements, the name and address of the firm submitting the proposal and the name of the person(s) authorized to represent the firm during the proposed consultation process.

2. Executive Summary

Vendor's executive summary should include an understanding of the current environment and a description of how the proposed solution will help us meet our stated requirements and goals.

3. Vendor Profile

Vendors must include in this section a brief description of their corporate background, organization, staff, experience, and product line.

4. Customer References

Vendors must submit 2 references of libraries of similar size currently operating with the system proposed here. References must include library name, address, and names of contact persons.

5. Response to Critical Requirements and System Specifications Table

The vendor of the centralized library, textbook, media, and asset management system under consideration should be in a position to meet the Critical Requirements and System Specifications by the proposal due date. Vendors must provide references of districts that have implemented the proposed centralized library, textbook, media, and asset management solution meeting these requirements and have been operational for at least one full school year.

Proposers must respond to every functional, technical, and performance requirement contained in the CRITICAL REQUIREMENTS and FUNCTIONAL SPECIFICATIONS TABLE section of the RFP using the following criteria.

Y YES. Feature, function, product, or service is available as requested and is fully operational using the version proposed at one or more library sites. Feature, function, product, or service will be delivered as part of the total cost included in the Mandatory Proposal Form.

O OPTIONAL. Feature, function, product, or service is available as requested and is fully operational using the version proposed at one or more library sites. Feature, function, product, or service is not

included in the Mandatory Proposal Form, but it can be added as an option at a cost to be quoted in detailed cost attachments.

D IN DEVELOPMENT. Feature, function, product, or service is under active development and operating in a test environment.

P PLANNED. Feature, function, product, or service is planned. No development has begun.

N NO. Feature, function, product, or service is not available, in development or planned.

Comment If Needed. Respond in further detail to the functional specification outlined in the RFP. Vendors can use at their discretion, but should be used when the specification or requirement identified in the table cannot be answered in a Yes or No format.

For any specifications to which the Vendor answers D, P, or N, Vendor must describe:

- a) The feature, function, product, or service being planned or developed, indicating the date after which the function and feature will be available in general release and operation in the system proposed to the Library
- b) Whether the Library will incur any added cost for the feature, function, product, or service once it becomes available, 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.
- c) If the feature, function, product, or service is not available, in development or planned, an explanation of how the specification might otherwise be met using alternative features, functions, products, or services available from the Vendor, including availability dates for any such alternative and any added costs, either direct or indirect.

Any such exception taken to any specification must be stated immediately following the specification in question. Vendors are advised that the district is interested in receiving proposals from vendors who can offer a centralized library, textbook, media, and asset management system already in use by an installed customer base, and that proposals for systems in an Alpha or Beta phase of development will not be considered. The district reserves the right to evaluate all proposals solely on the basis of currently existing features, functions, products, or services meeting the specifications as stated.

EPS would like to test some of the perspective software from vendors for a specific time period to gain a better understanding of functionality and possible conversion times. All vendors are encouraged to provide a 90 day trail period with associated support to EPS so we can test the systems and gain a better understanding of the software. All vendors should indicate whether or not they can provide trial access to their systems and what possible supports or testing could take place during this 90 day trail.

Vendors must be prepared to give demonstrations of the following district and school functionality:

- Circulation (including support for off-line circulation in library, textbook, and media modules, eBooks functionality to circulate materials and process holds/reserves across the district, the ability to define independent school-level circulation policies, and support for patron data maintenance across the district)
- Searching (including advanced searches for library and textbook staff, cross-references, browsing by standard bibliographic headings, keyword searching, district-wide and school-level searching, and interfaces and functionality specifically designed to support student and teacher searching and empowerment)

- Cataloging (including support for centralized cataloging, the ability to restrict items from showing in patron searches, integrated access to K-12 MARC records, and school-level maintenance of holdings and reading program information)
- Reporting (including customizable school-level and district-level reporting and the ability to e-mail or print the information from any function in the system)
- Inventory (including the completion of independent school-level inventory processes without disruption of normal circulation activities, and support of handheld devices to support remote inventory)
- Configuration and setup features (including customizable user access levels, support for overlapping barcode ranges across the district for patrons and copies for library and textbook modules, and support for varying barcode format/lengths and symbologies within each school)

To expand upon the requirements or to differentiate or highlight certain features, Vendors are strongly encouraged to provide additional descriptive information/demo scripts/ trail sites/ on the proposed system software, hardware, services, conversion process etc. EPS is specifically interested in:

- Conversion/Migration Process
- How to deal with: duplicate barcodes, non-marc based records
- Training
- Electronic books (including e-text books and management of e-textbooks)
- Mobile access

6. Configurations and Costs

This section must include a breakdown of all costs associated with the proposal, including all software, services, server hardware, and maintenance for the first year of operation after installation. All costs associated with receiving software enhancements must be presented in the Vendor's financial response. Costs must be summarized on the mandatory proposal form provided, although vendors may attach a more detailed cost analysis.

	Initial Cost	1st Year Support	2nd Year Support	3rd Year Support
Server Software for up to: 2,900,000 bibliographic records (titles) 4,500,000 (Items/copies)	\$		\$	\$
Unlimited site license for Library Software by staff users	\$		\$	\$
Unlimited Web Client Software for use by student/public users including access outside of the district	\$		\$	\$
Server Hardware configured for System Capacity Requirements of EPS	\$		\$	\$
Peripheral Hardware (Quote only if specific components are required by your system.)	\$		\$	\$
Licensing for test or development environment (copy of production database)	\$		\$	\$
Data conversion and loading	\$		\$	\$
Training	\$		\$	\$
Any Other Charges/Fees	\$		\$	\$
Total Cost, per Year	\$		\$	\$
Grand Total, all 3 Years	\$			

Submitted by:

Signed:

Name and Title

7. Contract and License Terms

Vendor must include in this section a copy of the vendor's proposed agreement(s) for system purchase, software licensing, and ongoing support. By submitting a proposal, Vendor certifies that, if selected, vendor will execute such an agreement without further addition of costs or terms.

8. Critical Requirements and System Specifications Table

<u>Critical Requirements</u>	Y	O	D	P	N	Comment If Needed
Data conversion from current library, textbook, media, and asset automation solution						
One single district library, textbook, media, and asset management application installation that supports all schools via the district wide area network (no library, textbook, media, eBook and asset management application installations required on school-level servers or workstations, no installation of multiple applications on the district server)						
All library, textbook, media, and asset management functionality available within a standard web browser interface (no client software requirements outside of a web browser, no installs of Java Virtual Machine on client workstations)						
Does not use Windows Terminal Services or Active X controls to deliver functionality to browser						
The system supports MYSQL or ORACLE database						
System supports single sign on (SSO) through Microsoft Active Directory credentials						
Application server support for Windows Server 2008, BSD UNIX (describe and list others if applicable).						
Software as a Service (or vendor-hosted service) is provided, if required.						
Supports Microsoft Active Directory and/or Lightweight Directory Access Protocol (LDAP)						
Supports multiple browsers: Internet Explorer 8 or higher, Google Chrome, Firefox						

Z39.50 client and server functionality						
Library system is accessible from a various operating systems and devices: Windows OS, MAC OS, Tablets, iOS, Android and Blackberry operating systems.						
Support for automated interface with district student system for patron data maintenance (additions, updates, deletes and transfers)						
90 Day Trial period for the potential system software provided to Edmonton Public Schools with associated support provided at no cost by vendor						
<u>System Specifications</u>	Y	O	D	P	N	Comment If Needed
General Implementation Requirements						
Migrate the Library's present databases which include conversion of outstanding transactions and statistics from current Follett Circulation Plus/Catalog Plus, CHILDS, and Athena systems to the proposed system so that the system must be fully operational on "Day One".						
Migration must include, to the extent such files are in present use by the Library:						
bibliographic records (titles)						
items / copies						
authority records						
circulation transactions (charges, bills, holds)						
acquisitions (vendor, orders, funds)						
serials (control, checkin, chronology)						
community information records (e.g., organizations, events, newspaper indices, etc.)						
Vendor agrees that the details of the final implementation plan must be mutually determined by the Library and the Vendor.						

Vendor must include an unlimited license for web OPAC users connecting from OPAC workstations within the library, from other libraries, and from PC's in patrons, homes, offices, classrooms, etc.						
The system offers Web Services and Application Programming Interfaces (APIs) that enable the Library to develop custom interfaces to all modules. Vendor must provide training and documentation. Since the Library may not choose to take advantage of Web Services and APIs initially, these must be quoted as options.						
Vendor must license the software for perpetual use for a fixed fee without additional royalties or service fees, except for ongoing software maintenance.						
The vendor will supply data services to convert bibliographic and holdings information provided by the district to the required MARC format for the proposed system.						
The vendor will supply data services to perform custom data manipulation of the district's MARC records, with specific services to be defined based on an analysis of the district's data.						
Technology Requirements						
The system consists of a single centralized district library, textbook, media, and asset management application that is installed at one location for the district. All or some of the modules may be purchased separately.						
The system offers both a centralized and distributed district-wide solution with the same interface.						
The system is fully integrated, using a single, common database and application for all features and a common user interface across all functions (for library staff).						
All functionality of the system (all circulation, cataloging, reporting, searching, and inventory functions) can be accessed at any workstation on the district's wide area network with a standard browser (Internet Explorer 8.0 or higher, Mozilla Firefox, Google Chrome).						
System is completely web-based.						
The district can make any portion of the library, textbook, media, and asset management functionality available via the Internet for home and/or community access.						

The system does not require any library, textbook, media, and asset management client applications to be installed on the workstation.						
The system does not require use of Terminal Services on either the workstations or servers to support the delivery of any application functionality to the browser.						
System data can be stored within MYSQL Server 2008.						
Application servers can run on Windows Server 2008.						
The system does not require ActiveX controls or installation of Java Virtual Machine on the workstations.						
The system has the ability to support wireless LAN and WAN configurations that support TCP/IP.						
The system can support integration with Microsoft Active Directory						
The system can work in a proxy server environment.						
The system must permit, but must not require, distribution across multiple servers, specifically to an application server, a database server, and/or a web server.						
The system must be an open system, with no dependency on the use of specific models or models of equipment operating systems, etc., to ensure the future viability of the system.						
The system includes support for an automated interface with the district's student information system (PowerSchool).						
The automated interface with the district's student information system (PowerSchool) supports adding new patrons, deleting existing patrons, updating existing patrons, and transferring patrons from one school in the district to another. When a student is transferred, all outstanding circulation transactions and statistics history are maintained with the patron.						
The automated interface with the district's student information system (PowerSchool) can support matching on either the patron's library, the textbook barcode, the asset patron barcode, or other district-defined patron identifier field.						
System supports use of RFID identifiers.						

The system requires no local application programming in order to become operational.						
The system includes support for barcode scanners and handheld devices for use with remote/off-line functions.						
The system allows printing of information displayed in the interface from any function within the system (without requiring copy/paste operations).						
Identify the scanners that support the library system and advantages to using specific scanners over others.						
The system provides for reports in XML, Word and PDF formats. Or other formats (identify).						
The system allows automatically scheduled checkout/overdue materials and unpaid fine notices reports.						
The system provides for HTTPS support in all functions where usernames and/or passwords are transmitted.						
The system can be hosted locally or optionally the vendor.						
System supports wireless network connectivity to 802.11-equipped devices, including laptop computers, smartphones, tablets.						
Services- Training/Consulting/Documentation/Implementation						
Project management services to support district staff in implementation is available						
Vendor must list the number of training days proposed, by type of training course (e.g., staff, administrative).						
The Library must have the option of recording training sessions for future library staff training purposes.						
Vendor must provide a brief description of training courses. Include training course location option(s), e.g., at library, Web-based, video.						
Vendor must include a description of the complete documentation package available with the system.						

Documentation updates for all appropriate manuals must be provided on a regular basis as additional capabilities, enhancements, or improvements are made to the system.						
Vendor must make documentation updates and release notes available for local printing or downloading via the World Wide Web.						
Vendor must include alternate methods of training, including but not limited to self-paced web-based training and vendor-hosted distance training via the web.						
The vendor agrees to accept requests reports for technical support via:						
Toll-free phone number						
Electronic mail (Internet)						
24-hour voice mail service						
Emergency assistance must be available 24 hours a day, seven days a week, at no additional cost to the library.						
The vendor logs all problems and requests reported by the district for tracking and escalation procedures.						
The district will have access to a vendor sponsored electronic discussion group and customer care website.						
User groups are available.						
The vendor provides the training and all necessary instructional materials that may be required for effective instruction and training.						
The vendor will train personnel to provide first-level support on a day-to-day basis, with expected competencies including abilities to:						

Use each functional component						
Train other staff members in daily operation and use of the system						
Handle emergencies that might arise before district support staff can assist or vendor support staff can be contacted						
Troubleshoot and solve simple problems in lieu of calling district staff or the vendor's technical support staff.						
The vendor will train district technical staff to manage and operate the system on a day-to-day basis, with expected competencies including abilities to:						
Start up and shutdown the system						
Monitor and operate the system on a day-to-day basis						
Handle emergencies with the system that might arise before the vendor support staff can be contacted						
Troubleshoot and solve simple problems with the system in lieu of calling vendor support staff						
Load software enhancements received from the vendor						
Process student information obtained from the district's student information system						
Run system and data backup operations						
Use the supplied system maintenance utilities						

Perform recommended preventive maintenance and security measures						
The vendor offers refresher-training opportunities both on-line and on-site.						
Maintenance of proposed software must be available from the Vendor on an annually renewable contract basis.						
Vendor must describe Help Desk hours and its procedure for prioritizing requests for assistance.						
Vendor must provide a software maintenance program to include all future software updates and system enhancements applicable to system modules licensed.						
Major system upgrades must be developed and released annually, so the library will receive the latest enhancements, regardless of the version of Vendor's system that the library originally installed.						
Software enhancements must be made available without further charge to all licensed libraries maintaining an annually renewable software support contract with Vendor.						
General Functional Requirements						
The following functionality is operational and in current use at multiple existing customer districts:						
School-level circulation and circulation across the district.						
Off-line circulation with handheld device or scanner for library and textbook modules.						
Inventory management for school and district-level locations.						
Remote over the web inventory with handheld device or scanner.						

Centralized cataloging of bibliographic data, authority data and holdings data.						
Integrated access to K-12 MARC record database and textbook title database						
School-level and district level cataloging of textbooks, media, and assets, bibliographic data, holdings data and reading program information.						
School-level and district-level reporting						
Customizable reports using a wizard interface that exports HTML and/or in XML formats.						
Include the ability to export Collection Statistics (Historical, Title/Copy List and Shelf List) and Current Checkouts/Fines Reports in PDF and Excel.						
Customizable reports can be edited, modified, sorted and filtered.						
Customizable reports can be pushed down to each site.						
Customizable reports can be exported/imported to the district site.						
Staff searching functions including LCCN/ISBN/ISSN, call number, control number and barcode searches for library materials.						
Student and teacher searching functions including cross-references, keyword searching, Accelerated Reader, Reading Counts reading program, Lexile and Fountas & Pinnell searching, material type and publication date limiters, lower-grade level interface and browsing of standard bibliographic headings.						
Student and teacher patron empowerment functions (including review of current outstanding transactions, maintenance of personal booklist, generation of bibliographies, renew, submit hold/reserve requests).						
Z39.50 Client and Server.						
Customizable user access levels, user logins and passwords.						

Support for holdings and patron barcodes with overlapping ranges across the district for the library and textbook modules, and varying formats/lengths and symbologies within each school.						
System provides authorized users with the ability to set, review, and modify Library parameters used for control of system operation, using drag and drop within a graphical tool.						
System provides authorized users with the ability to set, review, and modify Library parameters used for control of system operation.						
System provides options for printing on local and remote devices, with defaults specific to the individual client.						
System provides remote patron authentication via Web portal.						
The system allows for defining access levels that control the functions available to each user when they login.						
The system allows staff to modify user names and passwords.						
The system must provide security at database, workstation, and individual operator levels.						
The system must check each user's access privileges at login, and automatically disable or enable client functions (in real time) based upon the user's profile.						
The system must provide secure access control based upon unique user login, for types of record (e.g., fund, order, patron) as well as by function performed upon the record (e.g., Display, Add, Edit, Delete.) Describe.						
The system allows patrons the ability to obtain a new password if they have forgotten the password that is in their patron record.						
The system must allow batch updating of patrons by uploading a file of patron barcodes and allow up to three patron fields to be changed at a time.						
The system must allow automatic assignment of a patron barcode when a student is transferred and no district-wide student barcoding system is used.						

The system must be able to match on ISBN and LCCN when displaying reading program information.						
The system must allow the system administrator to post a message to all users.						
The system must allow multiple inventories to be conducted at the same time.						
The system must display the last backup date.						
The system must provide a server health performance report with a snapshot of the overall usage and response rates.						
Circulation Requirements						
Access to circulation functions and records are restricted to authorized persons.						
The system provides for scanning of barcode labels affixed to patron cards and library and textbook materials.						
Circulation transactions are updated online in real time.						
The system allows capture of circulation transactions offline and loading of these transactions when the system is available.						
The system supports capture of off-line or remote circulation transactions using a scanner or portable handheld device.						
The system allows for easy movement between circulation functions based on hotkeys and barcode command sheets.						
The system allows for the user to reset the display of circulation functions and clear patron information to protect patron privacy.						
The system provides access to patron records by barcode number, any portion of the patron's name (first, last, middle and nickname), grade level, homeroom and other user-defined patron fields, in the circulation functions.						

The system provides access to title/copy records in circulation function by barcode, or title keywords in the circulation functions.						
The system permits staff to allow check out of items to patrons from other schools in the district, if desired, to support interlibrary loan within the district.						
The system will be able to process the following types of checkout and check-in transactions:						
Regular checkout for patron with item in hand						
Renewal checkout for patron with item in hand (renewal by patron)						
Renewals without prior knowledge of which patrons have the items currently checked out (renew by copy barcode)						
Recording of materials used in library prior to re-shelving (in-library usage)						
Regular check-in						
The system provides staff with notification of automatic blocks in circulation for conditions including:						
Patron has requested hold of materials that are ready						
Patron has overdue materials						
Patron has outstanding fines						
Patron has expired card						
Renewal limit reached for item						

Holds limit reached						
Checkout limit reached						
Inactive or restricted patron						
Patron attends another school						
The Circulation module can support the following features:						
a. full-text search of any word within any bibliographic field						
b. circulation functions at a workstation in real time						
c. offer an interface with user self-check workstations						
d. provide a graphical backup circulation client						
e. enable operator to circulate uncataloged items on-the-fly (e.g., add a brief title, add copies)						
f. brief bibliographic records, as well as charging and lending items for interlibrary loans						
g. checkout						
h. checkin						
i. Renew all items or renew a single item						
j. Bill a user						
k. Pay a bill						
l. Display, create, edit, copy, and remove user record						

m.	Confirm user address						
n.	Renew user privilege						
o.	Send user a message						
p.	Place, edit, display, remove holds						
q.	Claims returned						
r.	Lost card processing						
s.	Modify an item's assigned due date						
t.	Mark item used and inventory item						
u.	Charge ephemeral (impermanent) items						
v.	Bookdrop checkin						
w.	Place and track items in transit (for multi-branch and multi-library systems)						
x.	Circulate items borrowed through ILL once a brief bibliographic record has been created, with local circulation loan parameters determined by a matrix of user profile, item type, and location						
y.	Lend items to ILL partner libraries by creating a user record for each library's ILL department						
aa.	full-text, Boolean searching of any field within the user address fields or customer-defined fields.						
bb.	Automatic duplicate checking of newly-created patron records using multiple fields within the patron record, including User Name, Student ID, Street, User Group ID, Phone Number, Email Address, Alternate ID.						
cc.	Provide a books by mail feature for patrons to receive materials at home.						
	The Circulation module can interface seamlessly with other modules, including Cataloging, to enable authorized circulation staff to:						
a.	Add a brief title						

b. Add copies						
c. Change item barcode						
d. Mark item missing or lost						
e. Remove title, call number/volume or copies						
The Circulation module can enable individual user record creation, as well as a patron load utility that allows user records to be imported and updated en masse, with multiple match points.						
The system permits staff to easily view if the patron is in violation of any configured library policies, the patron's outstanding transactions, the patron's school and personal demographic information, and a picture of the patron.						
The system lists each outstanding checkout for the patron in the checkout function when the patron record is accessed.						
The system allows the user to renew all items for a given patron in one step.						
The system can allow the staff to set up policies with fixed due dates.						
The system can allow the staff to see the loan periods for all patron type or circulation type combinations.						
The staff has the ability to see historical circulation statistics based on years, months, days and hours						
The system allows each school to configure the display of the locally defined patron fields in the circulation functions, if desired.						
The system can allow the staff to define patron notes that are automatically displayed in the circulation functions when the patron is identified for a transaction.						
The system has the capability of limiting patron's use of specific types of materials.						
Renewal of an item is blocked if the patron is delinquent, title has a hold registered against it, renewal limit has been reached, or item is restricted in some other way.						

Circulation features provide audible and visual signals to indicate:						
Acceptance of the patron card						
Acceptance of the item identification number						
Any condition that must be reviewed for the transaction to complete						
Only one entry of patron identification will be required per batch of items to be checked out to that patron at that time.						
The system may be set up to allow limited access to the circulation features, so aides or student helpers can circulate items.						
The system allows for all loan policies and circulation parameters/configuration to be defined on a school-by-school basis.						
The system will accommodate a ceiling due date to signal all checkout transactions are due by a specified date at the end of the school year.						
The system will accommodate an unlimited number of patron types/categories and material types/categories for defining loan policies.						
The system enables sites to globally delete or excuse fines or refunds at their sites.						
Include one general note per fine in the Add/Edit Fine screen, supporting the need to track additional information associated with a fine.						
It is possible for the system to determine loan periods from the material and patron category.						
It is possible for authorized staff to override loan periods and specify special due dates.						

The ability to override blocks can be username/password controlled.						
The system has the ability to limit the number of items on loan to a patron by patron category, with capability of override.						
Variations in amount of fines assessed daily, grace periods, and maximum fine amount for overdues, for various materials and patron types, are accommodated.						
The system allows each school to maintain a calendar that identifies closed days.						
The system alerts the user that an item not previously checked-in is being checked-out or checked-in.						
The system alerts the user that an item previously marked as lost is being checked-out.						
The system is capable of accommodating the circulation of a variety of material types including serials, pamphlets, documents, maps, kits, and audio-visual materials.						
The system accommodates the circulation of partially cataloged or uncataloged materials (checkout of temporary items).						
The system permits staff to easily determine the current circulation status of any item (whether any particular title is currently in circulation and when it is, or was, due back, if the item is marked as lost) from directly within the circulation functions.						
The system will allow the staff to specify a timeframe after which the status of an overdue book will be changed to a lost status.						
The item record contains current patron and due date (if checked out), the last patron and due date, and circulation statistics.						
The system permits staff to mark an item as lost – independent of whether or not the item is currently checked out, and independent of any inventory process.						
The system permits staff to automatically charge a patron for a lost item based on the copy price or a user-defined fine amount.						

Capability of accepting full or partial payment of fines against any specified items is provided.						
The system allows the placement of holds on any copy of a title or on a specific copy, with ability to modify the priority of the hold queue.						
The system allows staff to review a list of items being held for patrons, for whom they are being held and the expiration date for the hold.						
The system allows staff to review a list of outstanding hold requests where items are not yet available to fulfill the hold request.						
The system allows staff to review a list of outstanding hold requests where items are available to fulfill the hold request, and indicate that the material has been placed on the hold shelf.						
The system allows holds/reserves to be placed for materials from other schools, if desired, to support interlibrary loans within the district.						
The system allows one hold/reserve to be placed on multiple copies of the same library title for a specific timeframe.						
The system allows automated routing of materials and the ability to view request status of interlibrary loans within the district.						
Hold requests submitted by patrons for materials in another library can be reviewed and approved by the library media specialist of the patron before the hold request is provided to the library that has the material requested.						
The system has the ability to define the following hold parameters by patron type: default hold priority, number of days before a ready hold is expired, and number of days before an expired hold is deleted.						
The system is able to place a hold on the first copy that becomes available within the library.						
The system will cancel holds automatically based on a configurable number of days after the material becomes available and will delete the holds based on a configurable number of days after the expiration date.						
The system will automatically alert the user each day regarding hold requests that need to reviewed or acted upon.						

The system allows the user to print a receipt when a fine is paid.						
The system is capable of allowing authorized staff to waive or pay fines.						
The system has the option to require a note when a fine is waived.						
The system can interface with third party payment systems via an XML file for the third party to import. The fine information is passed back and forth between the system and the third party program.						
The system provides reporting on patrons' fine history including how much was assessed, paid, and waived even if the titles or copies no are no longer in the system.						
The system supports retention of historical records on title use, and also limits display of individual patron use information to protect the privacy of patrons.						
The system will allow a reserve or hold to be placed for a specific copy for a future date.						
The system will retain fines and history after deleting copy information.						
Patron files shall accommodate:						
Patron barcode						
Patron school						
Patron name						
Patron addresses and telephone numbers (2)						
Patron email addresses (2)						
Date of birth						
Gender						
Patron picture						

Patron status (Active, Inactive, Restricted)						
Patron access level (rights to functionality)						
Indication of Patron's Acceptable Use Policy on file						
Patron's homeroom						
Patron's grade level						
Patron username and password (for access to patron empowerment)						
Patron Type (for loan policies)						
Fines Owed						
Materials Outstanding						
Pending and Ready Hold Requests						
Pending and Ready Reserve Requests						
Card Expiration Date						
Graduation Date						
Patron usage statistics						
5 Locally Defined Patron Fields						
Unlimited Locally Defined Notes						
It is possible to import patron records using standard comma-delimited files at the individual school level.						
It is possible to import patron records using a CSV file from student information systems and transform it to an XML file to be loaded into the library system.						
Possible to import patron pictures						
Include the ability to extract data specific to copies, copy transactions and patrons in XML format						

The patron import function reports errors and warnings and allows direct access to the editing function for records with warnings.						
Patron ID cards and patron barcode labels may be printed with or without the eye-readable barcode number for increased patron privacy.						
The system is able to purge an entire group of patrons, but should retain for later deletion individual patron records with outstanding obligations against them.						
District level users of the system can push a common calendar down to all sites in the district.						
District level users of the system can push loan periods to all sites in the district to achieve consistency.						
The system allows library staff to display patrons, identified by name and picture, by a homeroom for easier checkout of materials.						
Inventory Requirements						
The system is capable of supporting an inventory of the library without impacting the ability to circulate items.						
The system can process barcode scans for inventory by the following methods: scanning directly into the inventory interface, from a text file containing a list of barcodes, or from a hand-held device used to scan barcodes remotely at the shelves.						
The system can automatically identify items in circulation (existing checkouts) as accounted for during an inventory.						
The system can automatically checkin items (existing checkouts), using normal checkin processing, when they are scanned during an inventory.						
The system can produce a listing of all items not accounted for during the inventory.						
The system can produce a listing of all items marked as lost during the inventory.						

The user can review the displayed list of unaccounted for items and can indicate, directly in the system from the list, that the item has been found, or the item should be marked as lost.						
The user can review the displayed list of items marked as lost and can indicate, directly in the system from the list, that the item has been found (can be accounted for), or the item should be deleted.						
The system can allow parameters set up for the shelf checking and can check order based on:						
Call Number						
Call number/Author						
Call Number/Author/Title						
The staff can choose to be alerted if Dewey differences are greater than:						
100						
50						
10						
1						
The system must have the ability to delete all the copies marked "lost" on or before date field.						
The system must allow the staff to count only part of the collection based on a call number range.						

Searching Requirements						
Support for English and French searching interfaces.						
Search interface is available in different themes designed for different levels such as Elementary, Junior High School and High School students.						
OPAC keyword searching must be available for every word in every bibliographic record, if desired by the Library. Relevance ranking must be supported. Indexes must be available for searching, including Author, Title, Subject, Series and Periodical Title indices.						
The system must have an icon-based OPAC for children with sets of photo icons, specialized bibliographies such as Suggested Summer Reading, custom pre-set searches designed by the library for standard topics such as science projects or crafts, and preconfigured searches of interest to children developed by library professionals.						
Vendor should provide content management capabilities including:						
The ability to manage book clubs and calendars						
The student search interface uses Web 2.0 technology to achieve an interactive and compelling web application experience.						
Search and discovery should have the ability to integrate with community sites (e.g. Facebook, Twitter, etc.)						
The OPAC must track an individual user's preferences and interests, organized into a list of "favorites" including, but not limited to authors and subjects. These "favorites" must be included in a user's personal online account.						
The system must provide user self-service options, or User Services, through the OPAC, including the ability for users to review the status of their accounts and to view custom displays of:						
Bills						
Items charged, with due dates and accrued fines						
Holds requested, with availability status						

Replies to their requests of library staff, with ability to reply to the reply, or cancel request						
Notes from library staff						
OPAC supports Web-based materials bookings/ item reservations. Describe your support for material booking by public users.						
The OPAC module can automatically analyze the Library's overall circulation and display to lists of the Library's most popular titles, authors, or subjects. The OPAC module must update this information automatically.						
OPAC content includes the following categories:						
a. book jacket / cover art images						
b. reviews						
c. author biographies						
d. table of contents						
e. excerpts or chapters						
f. summaries						
g. lists of best sellers from popular serials						
OPAC content enhancement / enrichment updates must be provided by the Vendor. Library staff shall have no responsibility for maintaining the currency of enrichment categories. Bestsellers lists must be updated by Vendor on a regular schedule.						
The display of bibliographic headings in browse functions will contain SEE and SEE ALSO references to guide patrons to other materials.						
The display of bibliographic headings in browse functions will identify the number of titles with each heading.						
The system provides for search of materials by LCCN, ISBN, ISSN, control number, call number, barcode number and user-defined copy-level categories.						

The system supports reading program searches where the search can be narrowed by reading level, point value, title, subject and author. Reading program point values and reading levels are included in search results and can be sorted.						
The system supports Lexile searches where the search can be narrowed by Lexile measure and/or code (i.e. BR, AD, etc.). Lexile measures are included in search results and can be sorted.						
The system can support Fountas & Pinnell searches where the search can be narrowed by guided reading measure and/or code . Fountas & Pinnell measures are included in search results and can be sorted.						
Provincial, national or literary award-winning titles in the collection can be searched by using a drop-down award list. This can be enabled or disabled and allow for editing (by library staff).						
Keyword searches support internal or imbedded truncation (wildcards), e.g., one entry can retrieve ‘woman’ and ‘women’, or ‘organization’ and ‘organizations’ and phrase searching.						
Word searches that list results by the root word, whether entered in plural or singular form						
The system enables a user to enter multiple words or phrases to be searched in one, more than one, or all fields.						
The system allows the user to limit searches based on material type and/or publication date (before, after or during a specific year).						
The system allows global updating of titles by material type based on the date range the title was added or updated.						
The system allows the ability to select and remove most default catalog stop words						
The system accommodates Boolean searches using terms in AND, OR, and NOT relationships.						
The system allows the patron to search for items within their school library, across all schools in the district, or in selected groups of libraries defined by staff.						

The system is able to search on the MARC 856 tags which will link to pre-approved Internet web sites and other applications.						
Variations in punctuation, capitalization, use of diacritics, and spacing does not impede searching.						
The system will list the number of hits retrieved from a search request and will provide navigation controls to move between the hits.						
The system allows the user to display a list of search results associated with a selected heading from the browse functions.						
The list of search results will identify the search term used to produce the list.						
The system allows the patron to sort the search results by relevance, title, author, call number, publication year, material type, and status.						
The list of search results will contain the following information for each title: title, author, call number, publication date, material type and number of copies owned and available.						
The list of search results for searches including materials outside of the patron's library will identify titles that are available off-site, and the number of copies available off-site.						
Authorized users can create multiple resource lists and share the lists with other users.						
The system allows global updates to Resource Lists.						
Authorized users can email lists of library resources to others.						
The system can display reading level, interest level, point value and quiz number in the bibliographic record display for reading program titles.						
The system can display bibliographic records from search functions in a MARC format for staff use.						
The system displays the following holding information for each bibliographic record in the search functions: call number, barcode, circulation status, description and sublocation.						

The system displays the following holding information for each bibliographic record in the search functions for titles held by other libraries: call number, barcode, circulation status, description and school location.						
The system will display a “Did you mean” helper if a basic keyword search returned no hits showing up to 5 suggestions based on data cataloged in the collection.						
The system allows the user to search for other items by the same authors, subjects, series directly from within the bibliographic record display.						
The system allows the user to search for other items with SEE ALSO cross-references for authors, subjects and series directly from within the bibliographic record display.						
It is possible to print any information from the searching interface including individual titles, the search results or the user-maintained list of items of interest.						
The system allows the patron to build and edit a list of items of interest and produce a bibliography that can be printed or saved to a file.						
Include the ability to limit bibliography reports by publication year						
The system allows bibliographies with or without annotations to be printed by the patron.						
The system will automatically build an editable MLA-style citation for any item in the catalog as well as for web sites and media. The citation can be printed, emailed, or pasted into another application.						
The system allows ebooks to be searched and displayed.						
The system provides patron empowerment functions to permit authorized patrons to view and print their own checkouts, fines and holds information, to renew their own items, and to place holds and reserves on any materials within the district.						
The OPAC must track an individual user's preferences and interests, organized into a list of "favorites" including, but not limited to authors and subjects. These "favorites" must be included in a user's personal online account.						
The system allows staff to set a limit on the number of holds a patron may place.						

The system has an icon-based search function with sets of icons and searches of interest to K-12 patrons and these searches will not require the purchase of additional of additional software.						
The system has an icon-based search function that displays larger text, simpler icons appeal to elementary-level students or emerging readers.						
Library staff may define custom icons and searches for the icon-based search functions.						
Library staff may design custom pre-set searches to retrieve the best results for standard topics such as science projects, crafts, or specific holidays.						
The system must have the ability to search for brief records by a call number range.						
The system allows users to search databases, media and library collections at the same time in an integrated search with one hit list returned.						
The system allows teachers or staff to setup, name, and save multiple bibliographic lists and make them public for selected users.						
The system allows the user to see search statistics for any of the terms used in basic search: Keyword, Title, and Author.						
Library staff can customize stop words to achieve more efficient searching.						
The system supports searching for 13 digit ISBN numbers.						
Patron Networking						
The system allows users to create item reviews based on a rating system.						
The system allows library staff to approve the patron reviews before posting to the OPAC.						
Solution should suggest items of highest interest when searching as well as best sellers, recommended reading and related items of interest.						

Solution should allow individual users to create a personal account						
Personal user accounts should manage favorites as well as current circulation activities (i.e. holds, checked-out, fines)						
Interface should provide not only “Did you Mean” response but a list of suspected targets as well.						
The system allows patrons to upload digital content to a review such as an audio or video file if given the appropriate permission.						
The system allows the administrator to centrally configure which IP addresses are allowed or denied access to their digital content						
Vendor must provide URLs (web addresses) for similar customers using the proposed OPAC product.						
The OPAC module must automatically analyze the Library’s overall circulation and display to lists of the Library’s most popular titles, authors, or subjects. The OPAC module must update this information automatically.						
The system must support MARC 856 fields in bibliographic records, so that OPAC users may click on the hyperlink (either actual URL or Library-substituted public note in subfield z of the MARC 856 field) to launch a linked resource, such as a website, digital image or audio file.						
The system allows library staff to report on various aspects of reviews that have been added by patrons.						
The system must use a single OPAC user login to present all resources and gateways to local or databases that an individual is authorized to access. The OPAC must require that a user login to access the library’s catalog, at the Library’s discretion. The OPAC module must also support generic or anonymous access to the Library’s catalog.						
The system allows patrons to recommend titles to other patrons. These recommendations can be monitored to determine whether they are being made appropriately by requiring recommendations be approved before they are displayed in the recipient’s information.						

The OPAC must track an individual user's preferences and interests, organized into a list of "favorites" including, but not limited to authors and subjects. These "favorites" must be included in a user's personal online account.						
The system allows patrons to request for more copies of an existing title, or new titles to be added to the collection.						
Cataloging Requirements						
All schools in the district may share a system-wide bibliographic file.						
The system can support a central cataloging model where district catalogers can maintain title and holdings information for each school from a single login.						
The system allows the cataloging of library materials at the district level without assigning a barcode, adding a copy, or assigning it to a site.						
The system allows the district to view and create copy categories specifically for their use.						
The system can support spine label printing for items cataloged at the district level without assigned barcodes.						
The system can support a school-level cataloging model where each school has rights to maintain title and holdings information.						
The system can allow site staff to assign site-specific subject headings to a title record that only that site can search in order to support local learning initiatives.						
The system allows the cataloging user to locate MARC records by searching a vendor-supplied database over 10 million print and audio-visual records from directly within cataloging functions.						
When performing a recon against a vendor-supplied database of MARC records, the user can view records that were not updated .						
When performing a recon against a vendor-supplied database of MARC records, the user must be able to choose to recon only brief library records or all library records.						
The system must be able to do a recon on a selected number of records in the database.						

When editing a MARC record, the user must be able to add, edit and delete tags and subfields.						
The vendor-supplied MARC database can be searched with the following search strategies: title, author, ISBN (with 10 and 13 digits), ISSN and LCCN.						
The system includes initial access to the vendor-supplied MARC database for print materials at no additional cost and access in subsequent years as part of the normal ongoing support costs.						
The Bibliographic Control/Cataloging module provide Cataloging wizards that streamline the process of:						
a. Adding a brief title record						
b. Editing existing titles						
c. Duplicating an existing title						
d. Removing title, call number/volume or copies						
e. Creating and editing call number/volume records						
f. Adding or editing copies (includes global edits)						
g. Offering authority control options (display, add, duplicate, edit, remove)						
h. Bound-with processing is straightforward						
i. Providing access to a cataloging review file						
j. Transferring title, call number or copies						
k. Linking order line holdings to titles						
l. Capturing and editing records from Z39.50 sources using a Z39.50 copy cataloging client						
When creating a title, authorized staff must be able to pre-set values within the cataloging wizard, including but not limited to:						

a.	the automatic addition of a 006 field					
b.	hiding the record display from the Web OPAC (from public user searches)					
c.	item type (to prevent repetitive data entry)					
d.	item price					
e.	statistical categories					
f.	record format (e.g., MARC, Dublin Core, Map, etc.)					
g.	auto-generate temporary call numbers					
h.	whether to add a copy automatically when adding a call number/volume record					
i.	whether to auto-generate an item ID when adding a copy/item					
j.	ability to validate authority headings (if authority control is used by Library)					
k.	printing spine labels					
	In the transferring title, call number/volume, and/or copies process, authorized staff must be able to:					
a.	transfer all copies to an existing call number					
b.	transfer only selected copies					
c.	transfer all volumes					
d.	transfer only selected volumes					
e.	remove a title automatically after staff elect to transfer the last copy or volume to a new title					
f.	search and display bibliographic information without exiting the transfer process					

The Bibliographic Control/Cataloging module must support MARC format error checking, including:						
a. error checking (tags, indicators, and subfields) for all formats						
b. an error message displays when incorrect values are entered						
c. prompts for correct data						
d. automatically verifies and validates structure of each type of record maintained by the proposed system						
e. performing the following error checks:						
-Entry of valid tags						
-Proper format as defined for each field (e.g., field length, character type, and numeric range checks.						
-Valid entries in controlled fields (from authority lists or files)						
-Presence of mandatory data elements.						
f. supplies default data element identifiers (tags, indicators, subfield codes, etc.)						
Vendor must provide basic authority processing service that consists of at least the following:						
a. Bibliographic Heading Update						
b. Authority Record Provision						
c. Bibliographic Record Cleanup						
d. Bibliographic Database Analysis						
e. Reporting of data cleanup						

The system allows the cataloging user to duplicate existing records as a template for adding similar titles.						
The system allows the cataloging user to copy catalog and may or may not be restricted from original cataloging.						
The system allows the cataloging user to add a record to the catalog and add multiple copies of a title at the same time.						
The system allows the cataloging user to add a record from the vendor-supplied database directly into the district's collection without use of any separate export or import functions.						
The system allows the import of MARC bibliographic records at the district level and at the individual school level.						
The system allows the merging of import of MARC bibliographic records while retaining site-specific tags, if desired.						
The system allows the export of MARC bibliographic records at the district level and at the individual school level.						
The system allows the export of MARC bibliographic records by category.						
The system allows the import of MARC authority records at the district level.						
The MARC bibliographic import function has matching logic based on title, author, material type, ISBN/LCCN/ISSN and publication date, and copy barcode, to minimize duplicate records in the system.						
The MARC bibliographic import function has additional "relaxed" matching logic based on title, author, material type, and publication date to reduce the number of duplicate records in the system.						
The MARC bibliographic import function at the district level allows the import of holdings information for multiple schools in a single MARC file.						
The MARC bibliographic import function allows the user to choose to replace or skip matching records.						

The MARC import functions reports errors and warnings and allows direct access to the editing function for records with warnings.						
The MARC bibliographic import function has logic to ensure that existing records will not be replaced by matching records which have an inferior quality (fewer access points and MARC content).						
The system provides for MARC templates containing required and recommended tags/subfields for several different types of material.						
The system supports entry and maintenance of cataloging information via a full MARC editor with support for adding, editing and deleting individual tags and subfields.						
The system provides for detailed online help on most MARC tags and subfields including examples.						
The system supports entry and maintenance of cataloging information via an easy editor with forms and prompts that do not require detailed knowledge of MARC tags and subfields.						
The easy editor allows the user to catalog the following information: title, LCCN, ISBN, ISSN, material type, author, publication information, physical description information, series, interest level, notes, subjects, electronic resources, reading program quiz and level information, alternate titles, co-authors, illustrators, editors, etc.						
The system allows the cataloger to maintain individual holdings records that capture information for each specific item/copy in the collection.						
The copy/item information that can be maintained includes: call number, acquisition date, barcode, copy price, circulation type, user-defined copy categories, copy notes, up to 3 description/enumeration fields, copy number, sublocation, vendor and funding source.						
The system will allow scanning of the ISBN barcode of an item to speed database searches and increase accuracy while cataloging.						
The system supports the ability to remove subject headings by type (LC, Sears, etc.) as records are added to the system.						
The system enables a bibliographic record or holdings/item record to be retrieved and modified at any time, once it has been entered.						

The system enables a partial record to be entered if complete information is not yet available.						
The system allows designated materials to not display in patron searches.						
The system allows item/copy records to be duplicated to allow for easy adding of new copies.						
The system accommodates:						
Personal, corporate and meeting name headings in a name authority file						
Title, uniform title, and series entries in a title authority file						
Topical and geographical subject headings in a subject authority file						
The system records the source of each authorized heading or entry.						
The system is able to match LC or other national standard authority records against the local file.						
The system stores authority records in conformance with the MARC formats for authority records.						
The system automatically links each authorized heading to each occurrence of the heading in the bibliographic database.						
System's authority function generates SEE and SEE ALSO references from authority records to direct searchers to other headings as follows:						
See references (aeroplanes to airplanes)						
Narrower terms (automobiles to sports cars)						
Broader terms (automobiles to motor vehicles)						

Related terms (airplanes to flying machines)						
The system enables an authorized user to browse through the list of terms maintained for authority control.						
The system provides an easy editor that that will enable library staff to create local authority records, without detailed knowledge the MARC authority format.						
The system enables an authorized operator to maintain authority lists by adding new terms, removing terms. The system imposes no limit on the number of SEE and SEE ALSO headings that may be added to an authority record.						
The system automatically creates see- and see-also references from the authority record, and must automatically link these references to matching headings in the searching interface.						
Library staff may define and assign copy-level categories (user-defined copy fields) to organize items in standard topics such as science projects, crafts, or specific holidays.						
Library staff may assign copy-level categories by scanning items individually, or by assigning the category to groups of items from a selected list, from barcodes scanned into a text file or the handheld device.						
Library staff may automatically remove titles with no copies from the collection, and limit the process to preserve catalog records for electronic resources, eBooks, and titles still in processing (added within a specified number of days).						
The district can control which sites have access to a specific eBook title by deleting the association to the title for that site.						
The system allows the capability to read eBooks online, checkout online, or download.						
The system allows for the library staff to have the ability to search by call number.						
Library staff are allowed to configure the basic search options that are available and the order in which they will appear.						
When doing a keyword search, the keywords should be highlighted when found through the basic search.						

The library staff have the ability to show full or brief information on title details.						
The system can recognize the primary English and French leading articles:						
English: a, an, d', de, the, ye						
French (France): l', la, le, un, les, une						
The system has the ability to acknowledge or ignore leading articles in title search terms.						
The system has the ability to find titles with duplicate standard numbers and titles without standard numbers.						
When removing titles without copies, the system is able to preview the titles before they are deleted.						
When importing copies, the system is able to assign the next available barcode number to a copy.						
Upon import, circulation type, categories, sublocation, vendor and funding source must be able to be assigned.						
When exporting library titles, users have the ability to delete titles/copies after export. Copies that are currently checked out will not be deleted.						
Upon exporting library bibliographic records, users can include all records, full records only or brief records only. Plus have the option of copy information to appear or not to appear in the export file.						
Users have the ability to preview the effects of an import on their collection before performing the actual import of a record.						
When enhancing a tag in the MARC record, the system allows users to type in the tag number or use a scroll bar to choose the desired tag.						

Users are able to update subject, author and series headings globally.						
Users must have the ability to globally delete tags (including 526, 856, or 9xx). Plus have the ability to remove all tags or only those that have data that matches specific subfield information.						
Users have the ability to globally update a copies category, call number prefix, circulation type, description, funding source, sub location and vendor.						
The system allows the district cataloger to have access to Update Copies to perform individual delete, batch delete, individual update, batch update, and global update.						
Users have the ability to delete every copy scanned.						
Users can update/assign a particular circulation type, category, sublocation or copy status to every copy scanned.						
Users must be able to see copy status from cataloging, as well as from circulation.						
The system allows library staff to upload digital content to an existing MARC record or add the content as a new MARC record.						
Library staff can customize material type icons and utilize sub types for easy identification of materials.						
Reporting Requirements						
This section outlines reporting requirements that are in addition to those printing and list requirements outlined in other functional sections. Note that the application should allow printing of information displayed in the interface from any function within the system (without copy/paste operations). Many lists displayed within the searching, cataloging and circulation functions must be printed to serve reporting needs. The additional reporting outlined in this section is used primarily to support collection development and maintenance, to monitor and promote library usage and to communicate with users regarding outstanding transactions.						

The system provides district wide reporting and school-level reporting.						
The system has the ability to display and print for a given patron the current outstanding transactions (checkouts, fines, holds).						
The system supplies fines reports indicating all outstanding fines with the following information: the date the fine was created, and the type of fine assessed, fine amount, the patron name and the first two user-defined patron fields, the title, barcode and call number of any associated material.						
The system supplies checkout and overdues reports indicating all outstanding checkouts and/or overdues with the following information: the due date, an estimated fine amount indicating the overdue fine that would be charged on checkin, the patron name and the first two user-defined patron fields, the title, barcode, price and call number of any associated material.						
Checkout/overdue and fine reporting can be configured to report on various limiting parameters:						
Only checkouts currently overdue						
Only checkouts overdue within a range of number of days						
Only checkouts due within a specific date range						
Only checkouts/overdues for selected patron types						
Include patrons from other schools who have checkouts/overdues or fines for materials from the library user						
Include patrons from the library who have checkouts/overdues or fines for materials in other libraries in the district						
Only checkouts/overdues for selected material types						

Only patrons with a selected name or range of patron names						
Only patrons with a select user-defined patron field or range of user-defined patron fields (for example, homeroom teacher)						
User can print multiple overdue notices per page (2 or 4)						
Checkout/overdue and fine reporting can be sorted by patron name or any of the user-defined patron fields (for example, by homeroom teacher).						
The system allows the hiding of title on checkout/overdue and fine reporting to protect patron privacy.						
The system allows the display of patron phone-number on checkout/overdue and fine reporting to protect patron privacy.						
The system provides for communicating checkout/overdue/fine reports in both a list format (for internal distribution) and a notice format (for distribution to patrons).						
The system provides for editing of the text on the checkout/overdue notice.						
The system allows the user to define and save parameters for checkout/overdue/fine reporting once and then re-use the parameters whenever the report needs to be produced.						
The system has the ability to print a list of overdue items by call number.						
The system can produce a usage report showing the following information grouped by each Dewey range (000-999, including each 100's, 10's and 1 level) and/or call number prefix:						
Number of circulations today						
Number of circulations this month						

Number of circulations this year						
Number of total circulations						
Number of copies in the collection						
Number of copies with cataloged publication date						
Average age of materials (based on publication date)						
Number of copies with cataloged price information						
Value of materials (based on actual and estimated copy price)						
Number of copies in the collection						
The system provides the usage report identified above at the district level – listing the same information for each school in the district.						
The system allows limiting the usage report identified above to only items with combinations of the following parameters:						
Copies with selected Dewey ranges or call number prefixes						
Copies which have circulated today or within a specific date range						
Copies which have more or less than a specified number of circulations						

The system allows drill-down from the usage report identified above to the following usage information on each specific copy in the collection:						
Number of circulations today						
Number of circulations this month						
Number of circulations this year						
Number of circulations last year						
Number of total circulations						
The system provides a report of the top circulating schools in the district sorted by Total Circulation and Average Circulations/Patron.						
The system provides a report of the top circulating homerooms or grades whose patrons have the highest/lowest circulation statistics sorted by Total Circulation and Average Circulations/Patron.						
The system provides a report of the titles that have the highest/lowest circulation statistics showing title, author, call number, and number of circulations.						
The Circulation module must allow both the renewal of a single item and the renewal of all items charged to a user. Staff and user self-renewal (for selected item(s), and via the web OPAC) must be available.						
The Circulation Module must allow holds to be placed:						
a. by staff						
b. by public users within the library						
c. by remote users via the web OPAC						
d. at the title or copy level						

e. over a range of materials to fulfill a “blanket hold” request (e.g., any novel by...)						
f. only by authorized users and only on ‘holdable’ materials as determined by local library circulation policies.						
A count of items currently checked out						
A count of items currently overdue						
A count of items currently marked as lost						
A count of ready hold requests (item is available to fulfill the hold)						
A count of pending hold requests (item is not available to fulfill the hold)						
A count of expired hold requests						
A count of unpaid fines and the total amount associated with these fines						
A count of all titles and copies in the collection						
Number of circulations today, this month and this year (broken down regular checkouts, in-library usage, and renewals)						
A count of renewals today and this year performed by patrons using patron empowerment features						
A count of hold requests today and this year performed by patrons using patron empowerment features						
A count of items circulated to patrons of other schools (interlibrary loans within the district) today, this month and this year						
A count of hold requests by patrons of other schools (interlibrary loan requests within the district) today, this month and this year						

A count of total holds placed today, this month and this year						
A count of all patrons in the school (broken down by patron status)						
Vendor must describe the Circulation module's standalone, graphical offline circulation feature.						
The Circulation module's standalone, graphical PC-based alternative allows circulation to continue in the event the system cannot be used due to system failure, communications failure, downtime required for maintenance, etc.						
The offline circulation feature must provide:						
a. a feature to alert staff when circulating items to blocked users						
b. support for item charge and discharge						
c. renewals						
d. new user registration						
The system provides a shelf list report sorted by call number, author and title for all copies or a specified range of copies (specified by Dewey number or call number prefix).						
The system provides printing of patron and copy barcode labels, and spine labels (either in groups or individually).						
The system can produce a summary-level usage report showing the following information grouped by each defined patron type, patron status, or user-defined patron field (with up to two levels of sorting by these fields):						
Number of patrons						
Number of circulations today						
Number of circulations this month						

Number of circulations this year						
Number of total circulations						
The system provides the usage report identified above at the district level – listing the same information for each school in the district.						
The system allows the user to drill-down from the summary-level usage report above to same usage statistics at the individual patron level.						
The system has the ability to run call number reports by:						
Copies with call number prefixes						
Copies with different call numbers (for the same title)						
Copies without any call numbers						
The system provides title and copy list that allows you to limit by:						
A range of titles						
One or all circulation types						
One or all categories						
The date a copy was added to the collection						
The date a title was added to the collection						
The date a title was updated						
The system has the ability to run a report that allows the staff to identify bibliographic headings that do not have corresponding authority 1xx headings.						
The system is able to run a report that shows collections for library materials for a specific time frame and can be organized by call number prefix or Dewey. The report can also be limited to a specific call number range.						

The system is able to run a report that shows patron circulations for library materials or textbooks. The report must be able to run for a specific time frame and can be sorted by Patron Status, Patron Type, and all user defined fields.						
The system is able to run a hold statistic report that has the ability to select by Title or Call Number and can limit by more than, equal to, or less than a certain number of holds for the year.						
When printing patron barcodes, the staff must be able to select by patron name or any user defined field and limit the range.						
The system can print patron ID cards by Name, user defined field, or a list of barcodes.						
The system can run a patron name list report that will create a patron list by name, user defined field or uploaded file.						
The library staff can print spine/pocket labels and barcode labels based on items in a user defined list, by date added, or by a list of barcodes.						
The system has ability to generate and print unused copy barcode labels.						
In a holds report, the system allows staff to customize the holds view to limit by date and/or holds status.						
Include the ability to save report settings and define “favorite” reports for easy access						
Include the ability to exclude inactive patrons from reports along with “Select All” and “Clear All” functions options						
Include the ability to print barcode, spine labels report by timestamp						
Include the ability to print multiple copies of the same barcode on the used/unused barcode label reports						
Include the ability to include phone and email contact information in all views that contain patron information						

Enriched content can be provided to enhanced content in the search interface including display of book covers, table of contents, book reviews, summaries or tables of contents for titles.						
Reports						
The Reports module must be fully-integrated with all other system modules, and provide a comprehensive suite of library-customizable report templates.						
The Reports module must enable an authorized operator to schedule production of report output at a specified date and time and on a regular periodic basis, such as daily, weekly, monthly, and at pre-specified times.						
The Reports module must enable an authorized operator to view completed reports on screen or to e-mail or print the report, at the operator's convenience.						
On any database reports involving materials, such as new accessions lists, shelf lists, high/low circulation lists, and bibliographies, the operator can select items for inclusion based on any combination of bibliographic information (using full Boolean word and phrase searching) and on any combination of control information, for example collection, current status, number of circulations, number of holds, classification, and accessions date.						
The Reports 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.						
The fully-integrated Reports module must use the same user interface as other modules. The Reports module must:						
a. provide lists, counts, and statistical reports for each purchased module						
b. provide row, column, and grand totals in applicable reports						
c. provide reports for all record types within the proposed system						
d. track statistical and management information by counting various staff processes to measure productivity, identifying items which are likely candidates for weeding, or tracking fund information 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						
g. allow staff to display and/or e-mail finished reports						
h. employ an easy, point-and-click interface with dropdown menus for report criteria selection						
As an option, the system could offer two levels of report generation possibilities:						
a. the fully-integrated ILS Reporting module for task management, would be administered by system administrators and others to produce major system reports, schedule reports to run automatically, manipulate and change data when required, and facilitate import and export of data files. In addition, the Reporting module must be able to work at the Application Programming Interface level to facilitate creation of interfaces to external campus systems, create custom applications, etc. as an option.						
b. an optional “executive desktop reporting system” that will allow management to make informed, data-driven decisions by providing a unique, customized view of an individual library’s operation as well as consortia-wide activities and operations.						
This optional executive desktop reporting system must provide the following:						
a. Password protected access to individual member library data only – and optionally, access to some or all statistics of the consortia						
b. Management-level data for in-depth analysis of the library system(s), its collections and users						
c. Presentation output that is "Board Ready" for effectively communicating information and analysis to library boards, administrations, and other library supporters						

d. Deep circulation analysis to uncover trends and assist in collection development						
Reporting system can enable library management to:						
a. Activate automated alerts - "Notify me if ... "						
b. Access graphical presentations that change dynamically as data refreshes						
c. Conduct natural language queries - "When was the highest circulation month in the past ...?"						
d. Create calculations on the fly, while analyzing data						
e. Go behind the numbers with "drill down" data mining for comparative and referential analysis						
f. Conduct sophisticated "what if" analyses using online analytical processing (OLAP) tools						
g. Print, download and email data and graphs in a variety of formats (for example, Microsoft Excel™ and PowerPoint™)						
h. Drag and drop data elements to instantly refine results						