REQUEST FOR PROPOSAL FOR AN INTEGRATED LIBRARY SYSTEM

SNO-ISLE LIBRARIES

ISSUED MAY 3, 2010

Prepared by Quipu Group, LLC
## CONTENTS

1. **Introduction & General Information** ................................................................. 5
   1.1 **Introduction** ......................................................................................... 5
   1.2 **General Information** ........................................................................... 5
   1.3 **Proposal Requirements** ....................................................................... 6
       1.3.1 **Timeline** ..................................................................................... 6
       1.3.2 **Letter of Intent** ........................................................................... 7
       1.3.3 **Questions Regarding RFP** ......................................................... 7
       1.3.4 **Bid Requirements** ...................................................................... 7
2. **Key Functionality Requirements** .................................................................. 10
   2.1 **Size of Collection & Level of Transactions** ........................................ 10
   2.2 **Floating Collection** ........................................................................... 10
   2.3 **Public Interface – Flexibility & Customization** .................................. 10
   2.4 **Reports** .............................................................................................. 11
3. **General Functionality** .................................................................................... 11
4. **Acquisitions** ................................................................................................. 12
5. **Cataloging** .................................................................................................... 13
6. **Circulation** .................................................................................................... 14
7. **Inventory Control** ........................................................................................ 17
8. **OPAC** ........................................................................................................... 17
9. **Serials** ........................................................................................................... 20
10. **Systems/IT** ................................................................................................. 20
11. **Financial processing – Auditing requirements** ........................................ 22
12. **3rd Party and Locally Developed Products** ............................................ 22
    12.1 **OverDrive** ......................................................................................... 23
12.2 3M Self-Checks ........................................................................................................................................... 23
12.3 Metrologic USB scanner ................................................................................................................................ 23
12.4 EZproxy .......................................................................................................................................................... 24
12.5 Homework Helper, Online Chat .................................................................................................................... 24
12.6 Discovery tools ................................................................................................................................................ 24
12.7 iTiva ................................................................................................................................................................ 24
12.8 Syndetics ......................................................................................................................................................... 25
12.9 Serials Solutions ............................................................................................................................................. 25
12.10 Library OnLine .............................................................................................................................................. 25
12.11 Authority control .......................................................................................................................................... 26
12.12 Automated Materials Handling Systems ..................................................................................................... 26
12.13 Evanced calendar ....................................................................................................................................... 26
12.14 Vending Kiosks .......................................................................................................................................... 27
12.15 In-house created databases ....................................................................................................................... 27
12.16 Other 3rd Party Interfaces ............................................................................................................................ 28
13 API’s and standards .......................................................................................................................................... 28
14 Issues of Concern to Sno-Isle .......................................................................................................................... 29
14.1 Call Number format ..................................................................................................................................... 29
14.2 Serial records ................................................................................................................................................ 29
15 Vendor Stability/Migration Process/Training/Support ...................................................................................... 29
15.1 Vendor’s company ........................................................................................................................................ 29
15.2 Allocation of staff ......................................................................................................................................... 30
15.3 References .................................................................................................................................................... 30
15.4 Customers, Experience and History ................................................................................................................. 30
15.5 Migration and training .................................................................................................................................. 30
15.6 Support .......................................................................................................................................................... 31

Sno-Isle Libraries RFP
Page 3 of 32
16 Sno-Isle Selection Process .................................................................................................................. 31
16.1 RFP Evaluation................................................................................................................................. 31
16.2 Demos and Vendor Visits .................................................................................................................. 31
16.3 Final Selection ................................................................................................................................... 32
# 1 INTRODUCTION & GENERAL INFORMATION

## 1.1 INTRODUCTION

Sno-Isle Libraries (“Sno-Isle”), a two-county library system with 21 library buildings and a bookmobile, seeks a new integrated library system (ILS). Sno-Isle is currently using CARLSolution from The Library Corporation. In 2008 the search for a new ILS began for our libraries. We received non-binding quotes and demos from a number of vendors. The decision process for a new ILS had to be put on hold for a variety of reasons. We are now ready to proceed with the selection and implementation of a new ILS.

From the base of the Cascades to the salt waters of north Puget Sound, the Sno-Isle Libraries provide library services to more than half a million residents of Snohomish and Island Counties, Washington. The vision statement for Sno-Isle Libraries states that the Library District will be recognized as a leading contributor to informational and educational networks and for its excellence in providing innovative, comprehensive and timely library services and materials to all the people of Snohomish and Island counties. Sno-Isle is currently implementing a 5-year strategic plan which includes goals that will enhance resources and services for every age group. Sno-Isle is interested in finding an ILS which provides customers with robust, seamless access to a variety of online resources as well as enabling the Library District to monitor and improve stewardship of library resources.

The Sno-Isle Libraries have built a strong and effective team to provide services to our constituents and we are looking for an ILS vendor which can support and enhance our efforts in continuing to implement stable, innovative and comprehensive customer services.

An electronic version of this RFP is available at: http://www.sno-isle.org/?ID=5080

## 1.2 GENERAL INFORMATION

This section contains general information about the collection, staff size and other details regarding the Sno-Isle Libraries. Please use this information when you determine hardware configuration and system pricing.

<table>
<thead>
<tr>
<th>Population served</th>
<th>663,930</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bib records</td>
<td>298,374</td>
</tr>
<tr>
<td>Items / holdings</td>
<td>1,289,608</td>
</tr>
<tr>
<td>Customer records</td>
<td>548,486 as of April 2010. We are conducting a major deletion of older records throughout 2010 so this will diminish</td>
</tr>
<tr>
<td>Annual circ (charges + renewals)</td>
<td>9,172,984</td>
</tr>
<tr>
<td>Branches / Bookmobile</td>
<td>21 buildings, 1 bookmobile</td>
</tr>
<tr>
<td>Self-check units</td>
<td>Minimum of 1 per building; 52 across system at end of 2009</td>
</tr>
</tbody>
</table>

Sno-Isle Libraries RFP  
Page 5 of 32
<table>
<thead>
<tr>
<th>Public workstations</th>
<th>500</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staff workstations</td>
<td>450</td>
</tr>
<tr>
<td>Library website</td>
<td><a href="http://www.sno-isle.org">www.sno-isle.org</a></td>
</tr>
<tr>
<td>Number of Acq Records</td>
<td>Up to 65,000 per year, usually closer to 40,000. Monthly average 4 – 5,000. We expect to carry forward up to 20,000 records</td>
</tr>
<tr>
<td>Number of Serial Records</td>
<td>58,500</td>
</tr>
</tbody>
</table>

Data from 2009

**RFP Contact information:**

Quipu Group has been contracted to provide consulting services for the ILS selection and migration process and will be responsible for communicating with vendors during this RFP process.

Melissa Stockton
Quipu Group, LLC
1780 S. Bellaire Street, Suite 232
Denver, CO 80222
Phone: (303) 233-3056, ext. 101
Fax: (877) 759-0845
Email: responses@quipugroup.com

### 1.3 PROPOSAL REQUIREMENTS

#### 1.3.1 TIMELINE

<table>
<thead>
<tr>
<th>Activity</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>RFP Released</td>
<td>May 3, 2010</td>
</tr>
<tr>
<td>Letter of Intent Due</td>
<td>May 14, 2010</td>
</tr>
<tr>
<td>Questions Submitted</td>
<td>May 21, 2010</td>
</tr>
<tr>
<td>Answers to all Questions distributed Vendors</td>
<td>May 25, 2010</td>
</tr>
<tr>
<td>Proposal Responses Due</td>
<td>June 7, 2010</td>
</tr>
<tr>
<td>Demos by Top Vendors</td>
<td>July 6 - 9, 2010</td>
</tr>
</tbody>
</table>
### 1.3.2 LETTER OF INTENT

Vendors planning to respond to this RFP and submit a proposal are requested to send a letter of intent by May 14, 2010 to the address below. Letters may be submitted via fax, email or US postal mail.

Melissa Stockton  
Quipu Group, LLC  
1780 S. Bellaire Street, Suite 232  
Denver, CO 80222  
Phone: (303) 233-3056, ext. 101  
Fax: (877) 759-0845  
Email: responses@quipugroup.com

### 1.3.3 QUESTIONS REGARDING RFP

Please submit any questions regarding the content and response to this RFP to the address below by May 21, 2010. Questions can be sent via email, fax, or US postal mail. By May 25, 2010, a list of all questions received and responses to those questions will be sent to all vendors which submit a Letter of Intent.

Melissa Stockton  
Quipu Group, LLC  
1780 S. Bellaire Street, Suite 232  
Denver, CO 80222  
Phone: (303) 233-3056, ext. 101  
Fax: (877) 759-0845  
Email: responses@quipugroup.com

### 1.3.4 BID REQUIREMENTS

Respondents should respond to every requirement listed in sections 2-15 of this RFP. We encourage the inclusion of screenshots from your system to help clarify your responses. Please indicate if your system does not include an area discussed in this RFP.

Section 2 of this RFP lists 4 items that are considered key elements for a new ILS by Sno-Isle Libraries. It is intended that this section give vendors a chance to highlight capabilities of the system which will help Sno-Isle

Sno-Isle Libraries RFP  
Page 7 of 32
Libraries in these extremely important areas. Specific questions related to each of these areas are also included in the module sections throughout the RFP.

Sections 3 – 14 include general and specific questions related to ILS modules. It is assumed that all responding vendors will have basic functionality in each of the module areas included. Specific questions are included for each module, with higher-priority items listed at the beginning. Specific items are not classified as required or desired because other functionality may override or make up for individual functions which are absent in a single system. The system will be evaluated as a whole, with very few individual items seen as a "make-or-break" requirement.

The final sections of the RFP relate to areas such as vendor stability, migration, implementation and support.

**Proposals may be submitted electronically, in MS Word or other common format, via email to responses@quipugroup.com.**

Cost quotes and payment terms should be included for all software and recommended equipment. Please use the table below to indicate the costs for the various components.

- If your system does not have a specific line item, indicate that with an N/A in the appropriate columns.
- Please feel free to add items to the cost table if you have items which do not fit into the specific categories.
- Costs for all modules and add-on functionality need to be included in the cost table.
- Prices for the initial purchase, implementation and 3 years of maintenance should be included for each item.
- Sno-Isle may be interested in purchasing hardware independently, please indicate if hardware must be purchased through your company or if other options are available.

<table>
<thead>
<tr>
<th>Description</th>
<th>Initial/Implementation</th>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Required Modules</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Circulation</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Acquisitions</td>
<td></td>
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<tr>
<td>• Serials</td>
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<tr>
<td>• OPAC</td>
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<tr>
<td>• Cataloging</td>
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<tr>
<td>• Reports</td>
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<tr>
<td>Multilingual OPAC - Please list all languages available and the price for each choice</td>
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<tr>
<td>Inventory Module</td>
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<tr>
<td>Authority Control Module</td>
<td></td>
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</tbody>
</table>

Sno-Isle Libraries RFP
Page 8 of 32
<table>
<thead>
<tr>
<th>Description</th>
<th>Initial/Implementation</th>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Authority Control Processing (if available)</td>
<td></td>
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<tr>
<td>EDI for Acquisitions</td>
<td></td>
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<tr>
<td>SIP/SIP2/NCIP</td>
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<tr>
<td>Customer API</td>
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<td>Catalog API</td>
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<tr>
<td>Materials Booking</td>
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<tr>
<td>Offline Circulation</td>
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<tr>
<td>Phone Notification Service</td>
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<tr>
<td>Enhanced Record Content (Syndetics or other service)</td>
<td></td>
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</tr>
<tr>
<td>Z39.50 client/server</td>
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<tr>
<td>eCommerce for Public</td>
<td></td>
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<tr>
<td>eCommerce for Staff</td>
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<tr>
<td>Hardware Purchase &amp; Maintenance</td>
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<tr>
<td>Hardware Installation</td>
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<tr>
<td>Data Migration Services</td>
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<tr>
<td>Database Licenses</td>
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<tr>
<td>Database Software Tools</td>
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<tr>
<td>Training</td>
<td></td>
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<tr>
<td>System Monitoring Software</td>
<td></td>
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<tr>
<td>Optional functionality/modules</td>
<td></td>
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</tbody>
</table>

Sno-Isle will not reimburse Vendors for any costs involved in the preparation and submission of responses to this RFP or in the preparation for or participation in any subsequent demonstrations and meetings. Furthermore, this RFP does not obligate Sno-Isle to accept or contract for any expressed or implied services. Sno-Isle reserves the
right to request any Vendor to clarify their proposal or to supply any additional material deemed necessary to assist in the evaluation of the ILS. All proposals and submissions shall become the property of Sno-Isle upon receipt and may be used by Sno-Isle in the selection of a vendor and may be incorporated into any final agreement between Sno-Isle and the vendor submitting same.

## 2 KEY FUNCTIONALITY REQUIREMENTS

Please review the information in this section, answering all specific questions and also providing the Libraries with a general overview of the capabilities and functionality within your system which relate to each area. The items listed in the Key Functionality area are things which differentiate Sno-Isle Libraries from other large public library systems and also provide a clue to the areas which are the most important as each system is evaluated.

### 2.1 SIZE OF COLLECTION & LEVEL OF TRANSACTIONS

Your system must have a proven record of handling libraries of this size and complexity. Sno-Isle’s record counts and transaction levels are included in the General Information section (Section 1.2). Please provide examples of at least three systems that are currently in operation which are similar in size, type and complexity to Sno-Isle Libraries.

### 2.2 FLOATING COLLECTION

Sno-Isle Libraries allow the vast majority of our items to “float” and remain at the returning branch until circulated or requested by a customer. This is an extremely important aspect of our service and does offer some unique challenges. Different aspects of the floating collection functionality are mentioned in various sections of this RFP but it is also included as a separate item under Key Functionality to not only stress the importance but to also give each vendor a chance to compile all of the different pieces within each system related to floating collections. Please indicate the different reports and functions available which would help Sno-Isle manage their floating collection. This could include inventory, collection management, reports, screen display elements and other parts of the ILS.

### 2.3 PUBLIC INTERFACE – FLEXIBILITY & CUSTOMIZATION

Sno-Isle Libraries is a customer-centered organization. The OPAC and other public interfaces are extremely important to Sno-Isle as we make our decision for a new ILS. We provide the best customer experience possible to our clients by utilizing a number of different applications from our ILS vendor, 3rd party vendors and our own application development group. Sno-Isle has an IT staff with a high level of technical expertise. A number of applications to augment the public catalog have been created by the IT staff. It is important that Sno-Isle does not lose capabilities as we move to a new ILS. Vendors will be rated on their own OPAC interface as well as how their system enables Sno-Isle Libraries to maintain the current functionality we have using 3rd party and locally developed services.

Please describe how your system is unique or special in the area of public interfaces and interoperability with 3rd party vendors and the flexibility allowed for the display of the library collection. Specific API’s and 3rd party

Sno-Isle Libraries RFP
Page 10 of 32
products are included in Sections 12 and 13 so your response in this section should be more general and include aspects of your system which differentiate you from other vendors.

2.4 REPORTS

The flexibility of the reporting module is another key area for Sno-Isle: access to a flexible report module from all staff modules is critical. Flexibility includes the ability to select specific criteria for each report as well as the ability to select the data output and format. Exporting and downloading data from reports to programs such as Excel is also important.

Although the reports available through the staff modules is an important factor, Sno-Isle Libraries feels that it is even more important to have direct access to the data in the system. The IT staff at Sno-Isle has a great deal of experience in creating applications and reports using the raw data from the ILS and need to be able to utilize these capabilities with the ILS selected. The requirement of direct database access may need to be addressed in the cost area if additional or expanded licenses are required for the underlying database structure.

Please summarize the reporting capabilities of your system and make sure you address the ability to access the data directly. Please indicate if there are any reports which should be run when the library is closed due to excessive load on the system.

3 GENERAL FUNCTIONALITY

This section includes questions regarding functionality which covers all of the modules within the ILS. Please indicate if these functions vary by module or if they are consistent system-wide. High priority items are placed at the beginning of the list.

3.1 Is there a separate client for each module? For example, if a user has permissions in both Acquisitions and Circulation, will they be required to re-enter their login information?

3.2 Can a staff member toggle from one module to another while retaining the information for the selected item? For instance, if you have a bib record open, can you click on Circulation or Acquisitions and see that record’s information appear without having to re-enter data.

3.3 What mechanisms and functionality are built into your system for handling ADA requirements for both staff and customers?

3.4 How granular are the permissions in the staff clients? For example, in Circulation, could a staff member be allowed to view and edit but not delete a customer record or to edit only some of the fields in a customer record?

3.5 Can information be copied from and pasted into your staff modules? For example, could an ISBN be copied from the catalog and pasted into a vendor’s database?
3.6 Does the library have local control of the fields displayed on forms in the staff modules such as when adding a customer record or creating an order in acquisitions? Does the library have local control of the name of the fields presented in the staff module? Can fields be removed? Added? Moved around on the screen?

3.7 Can the library control the tab flow for each form within the staff modules? Is it different for each module? Are new fields in a record added into the tab order of the form appropriately?

3.8 Can individual users customize the staff interface, such as fonts, colors, background, etc.?

3.9 Describe 2-3 operational efficiencies in your system that enable library staff to process large volumes of materials? For example, are orders printed and/or sent in a batch process or individually?

3.10 Do you provide workflow analysis services? Sno-Isle is interested in services available to review current procedures and to create new ones that take advantage of the capabilities in the new ILS.

4 ACQUISITIONS

Sno-Isle has a central department responsible for purchasing. The number of purchasing groups in our multi-branch system is extensive and we are interested in finding an ILS which helps library staff to create, maintain and utilize as many automated features as possible to handle our purchasing needs.

Below is a list of specific elements of interest to Sno-Isle Libraries, with the most important questions appearing at the top of the list. Please respond to each item below and feel free to include any general information about this module in your response.

4.1 Is there a holds-to-copy or a holds purchase alert report available? How is this report accessed? Does the report include information such as the number of items on order, number of current copies and item status?

4.2 Can orders be imported from vendor websites, automatically including our account and branch information? We do most of our business with the following vendors: Baker & Taylor, Ingram, BWI and Midwest Tapes.

4.3 Can “on order” records be displayed in the OPAC? Does the library control whether or not customers can place holds on these records? What information from the order record can be displayed in the OPAC?

4.4 Can “on-order” records be hidden from the OPAC? What are the steps required to hide an individual order?

4.5 Are reports available through the Acquisitions module or is there a separate Report module for acquisitions? Would Acquisitions staff be able to create the following reports?

- Vendors: report on outstanding orders; $$ expended or encumbered; orders placed within a specific timeframe, etc.
- Budgets: report on expenditures/encumbrances for a specific budget line or a group of lines.
- Orders: various status'; order dates, etc.

Sno-Isle Libraries RFP
Page 12 of 32
• Invoices approved – perhaps weekly, monthly

4.6 Does your system allow the creation of purchasing groups which can be assigned to each order? The purchasing group would contain information on the number of items and the branches involved in the purchase. The library would need to edit these groups and to assign them to specific orders or groups of orders.

4.7 Does your system have templates for new orders which can be configured, managed and saved by library staff? What information can be defaulted in an order or group of orders?

4.8 Please describe the process for setting up ordering and invoicing through EDI. Does the set-up require ILS vendor assistance? Are there any extra fees (ongoing and/or recurring)?

4.9 Once an invoice is approved for payment, can any adjustments be made to that invoice? What can be changed and how are those changes accomplished?

4.10 Is there a method for editing or updating groups of order records?

4.11 We are placing an order for a title we own, but the ISBN differs. Does the system allow a staff member to add the new ISBN to the existing bibliographic record?

4.12 Can acquisitions records be purged on a regular basis? What historical data is maintained?

5 CATALOGING

Cataloging is performed at a single location for all Sno-Isle Libraries. Areas of particular interest to Sno-Isle Libraries include the facilitation of high-volume processing and the ability to manipulate/customize the information which is displayed or suppressed in the OPAC. Sno-Isle currently maintains a number of separate databases with non-MARC records and would be interested in integrating some of these resources into the ILS.

Below is a list of specific elements of interest to Sno-Isle Libraries, with the most important questions appearing at the top of the list. Please respond to each item below and feel free to include any general information about this module in your response.

5.1 Can multiple items be created at once? Is there an “express conversion” feature available? Does your system have the ability to add a range of barcodes so that a group of items can be converted in one step?

5.2 Can batches of new and updated bibliographic records be loaded into your system by the Cataloging staff? Are new records handled separately from updated records which will overlay existing records?

5.3 Can macros be used in the conversion process? Is this ability built into your system or can other software such as Macro Express be used?

5.4 Does your system allow the loading of non-MARC records? How are non-MARC records handled in the OPAC?
5.5 Does the library have local control over indexing rules? Do you allow the library to select which tags and subfields are included in each search index? Can these selections be edited and managed by library staff? What steps are required to complete a partial or complete re-index? Is there a cost involved?

5.6 How does your system interface with OCLC Connexion?

5.7 Can global changes be made to bibliographic records? What are the restrictions, if any?

5.8 Does your system allow “tagging” of materials by staff and customers? What controls and options are available for this feature?

5.9 Can a bibliographic and/or item record can be suppressed from display in the OPAC?

5.10 Have you been involved during the development of RDA (Resource Description and Access)? What are your plans for implementing the RDA standard?

5.11 Explain the process required when a library has a new source of bibliographic records to load into the system. For example, if the library starts getting ebooks from a new vendor and has access to bibliographic records created by the new vendor, what would be required to get the new records loaded into the catalog?

5.12 Can authority records be edited manually in your system? Can authority records be globally updated? Can new authority records be uploaded individually?

5.13 Can temporary or on-the-fly records be created through the Cataloging module? Through the Circulation module?

5.14 Does your system provide a spell checker in the Cataloging module?

5.15 How are bibliographic records deleted? Are these deletes tracked or reportable within your “Reports” module?

6 CIRCULATION

Sno-Isle Libraries require a robust Circulation module. The Circulation Desk is the main point of contact with our customers. We believe that the Circulation module plays a large role in the overall customer experience. Flexibility, simplicity and stability are all considered important aspects for a Circulation module.

Here is an explanation of several terms used in our current system which will be found in the questions below: Branch = a community library; Location = shelf description such as Reference or Reader; Media type = a format code, e.g., DVD, Adult fiction.

Below is a list of specific elements of interest to Sno-Isle Libraries, with the most important questions appearing at the top of the list. Please respond to each item below and feel free to include any general information about this module in your response.

6.1 What fields are used for determining the circulation practices in your system? Can circulation policies, such as loan period, quantity and fine amount be limited by item format?
6.2 Describe the router list generated by your system to move items from one library to another. Can the user sort the list by different columns such as call number, format or location? Is the list updated in real-time or is it a static report, run on regular intervals?

6.3 Does the Circulation module display the current status of all items in real time?

6.4 What methods are available for marking an item as an exception in the floating collection system? Can we indicate that all items in a specific branch or containing a specific code NOT be included in the floating collection?

6.5 Can hold limits be imposed by the format of an item? For example, can a customer be allowed to have 10 items on hold but limit the number of DVDs to 3 of the 10?

6.6 Does your system allow library staff to scan or enter a barcode that is fewer than 14 digits and have the system supply a prefix and padding to the number automatically? For example, for an item with the barcode of 39067052437815 can a staff member enter the unique portion of the barcode (52437815) and find the appropriate item?

6.7 When one or more items are deleted from a bibliographic record, can the circulation information for those deleted items be retained for reports for that bibliographic record?

6.8 Are there separate fields for the customer name (last name, first name, middle)? Are the city, state and zip code fields separate in the customer record?

6.9 Does your system offer a “Dusty Book Report” of items not circulated since a specified date? Can the report be scoped for a specific branch, location, media or format type? Can this report be sorted by call number, shelf location and media type?

6.10 What activities can be used to trigger an update in the “last activity” date associated with a customer record? Can the “last activity” date be updated when a customer uses a remote database or other external system such as a PC management application?

6.11 Does your system support text notification to mobile devices (text messages)?

6.12 Which fields of the customer record can be searched by staff in the Circulation Module?

6.13 What methods of delivery are available for sending overdue notices to customers? Emails, RSS, phone, printed postcard, etc.? Can multiple overdue items for the same patron be batched into a single notice? Is there a limit on the number of items which can be included in a single notice? What configuration options are available for overdue notices (e.g. number or timing of overdue notices)? Are there any limits to the customization options for the text, format or graphics included on notices?

6.14 Does your system automatically notify customers when a hold is ready for pickup? What notification methods are available in this area? Emails, RSS, phone, printed postcard, etc.? Can multiple hold notices for the same patron be batched into a single notice? Is there a limit on the number of items which can be included in a single notice? When are these notices produced? In “real-time”, at specific times each day, etc. Are there any limits to the customization options for these notices?
6.15 Does your system have the ability to send hold shelf reminder notices? What notification methods are available in this area? Emails, RSS, phone, printed postcard, etc.? Are there any limits to the customization options for these notices?

6.16 Does your system automatically notify customers when a hold is cancelled? What notification methods are available in this area? Emails, RSS, phone, printed postcard, etc.? Are there any limits to the customization options for these notices?

6.17 Can library staff change the pickup location for a hold? Is there any time when the pickup location cannot be changed? Can library staff change the pickup location for all items on hold for a customer in one step?

6.18 Does the system allow staff from the Circulation module to select multiple titles and place a hold on all selected titles at once for a customer?

6.19 Can library staff cancel, suspend and reactivate holds for customers in the Circulation module?

6.20 Does your system allow a staff member to move the holds attached to a specific customer barcode to new barcode for that customer?

6.21 Does your system allow a staff member to move all of the holds on one item to another item?

6.22 How are “claimed returned” items linked to the customer? Does the customer record retain the information after the item is found/returned? Sno-Isle Libraries is interested in having the ability to retain a count of the number of times a customer has “claimed returned” without having this information block the customer from checking out items. When an item that was “claimed returned” is actually returned, the link to that item should be removed from the customer record and a “claimed returned” counter be updated.

6.23 What options are available for the claims returned status? Is it flag driven to allow us to make adjustments to the system as procedures are modified?

6.24 What e-commerce capabilities are available in the Circulation module? Can library staff use credit cards to pay fines and fees? Please include pricing for e-commerce hardware required in your bid.

6.25 What types of receipts are available for customer usage (charges, renewals, payments, lost items)? Are these receipts customizable by the library? Can the receipts be customized by branch?

6.26 Is there an ability to link family member accounts? Can address information be updated once for all linked members?

6.27 Is there a method for indicating that a customer has check-out permission for another customer? Is there a method for indicating that a customer has holds pick-up permission for another customer?

6.28 Can multiple fields in the customer record be searched simultaneously?

6.29 Can customer records be copied or cloned to create a new record for someone with the same address and telephone information?

6.30 Is there an alias or nickname field available in the customer record?

Sno-Isle Libraries RFP
Page 16 of 32
6.31 Are standardized fields available in the customer record which would allow library staff to select town names and other data from a pre-populated list and allow for less manual typing by staff?

6.32 If a customer pays for a lost or missing item which is later returned, is there a feature which would notify the customer of the return and their eligibility for a refund?

6.33 Do you offer an offline circulation module?

6.34 Does your system have the capability of sending “marketing” notices to customers based on particular interests (biography, science fiction, etc.)? Does this feature provide an “opt-in” or “opt-out” ability for the customer?

7 INVENTORY CONTROL

Sno-Isle has not used an Inventory system up to this time. We are interested in an inventory control module to help manage the floating collection and to aid in identifying lost items.

Below is a list of specific elements of interest to Sno-Isle Libraries, with the most important questions appearing at the top of the list. Please respond to each item below and feel free to include any general information about this module in your response.

7.1 Does your system have an inventory control module? Can the Library inventory an individual collection, a branch/location combination as well as the entire collection?

7.2 How can your inventory control module help Sno-Isle manage their floating collection?

7.3 What reports are available following an inventory?

7.4 What types of hand-held barcode scanning devices would you recommend for completing a physical inventory? Please include specifications and pricing for each device recommended.

8 OPAC

Sno-Isle Libraries currently offer users a choice between AquaBrowser and the traditional CARLweb interface from the CARL.Solutions system as the main customer search portals. The catalog search box on the home page defaults to the CARLweb interface, not so much because of its search capabilities, but because it offers the popular personal list feature where a customer can place a hold on more than one item at a time. We also offer the AquaBrowser interface since it offers faceted searching and has relevancy ranked results, but the user must enter their card number each time one hold is placed. Our goal is to have one interface that offers the best of both these systems’ features.
Here is an explanation of several terms used in our current system which will be found in the questions below: Branch = a community library; Location = shelf description such as Reference or Reader; Media type = a format code, e.g., DVD, Adult fiction.

Below is a list of specific elements of interest to Sno-Isle Libraries, with the most important questions appearing at the top of the list. Please respond to each item below and feel free to include any general information about this module in your response.

8.1 Does the OPAC allow for the creation and management of personal lists? What types of personal lists are available? Are these lists maintained until deleted by the user? What method(s) do you offer to inform customers of privacy/confidentiality issues that could arise by retaining their personal lists?

8.2 Does the OPAC allow customers to suspend and reactivate holds? Can a customer request a hold be placed in the future (on a specific date)?

8.3 Can a customer log into their account at any time while searching the catalog? Can they perform searches and place holds and be able to toggle back to their account information without needing to log in again? Does their login time out or must they physically logout? What information is displayed in the OPAC to indicate that a user is logged in?

8.4 Do you offer a single OPAC which provides basic and advanced searching as well as enhanced content display such as that provided by 3rd party products like Syndetics, Novelist or LibraryThing and capabilities such as customer ratings and customer added reviews?

8.5 Does your system allow customers to select multiple titles and place a hold on all selected titles at once? Is there any system limit on the number of holds a single customer can place?

8.6 Can the user limit a search by branch and availability? With the floating collection, can your system limit the display to items which are currently available at a single branch (meaning items on the shelf or in the building)?

8.7 When and where is information about a hold queue displayed in the OPAC? Are the number of copies and number of current holds displayed? Can the library customize the message?

8.8 Does the OPAC provide a default pickup location as defined in the customer’s account record when a user is placing a hold? Can the user select a different location, if desired?

8.9 To what degree can the field labels and bibliographic information display in the OPAC be manipulated? For example, can library staff change the field descriptor in the display record from “Web site” to “website”, or suppress a certain field in certain format types? Can field names and display constants in the OPAC be matched to the type of record displaying? For example, if a set of locally created records describing websites or programs were loaded, would the display in the OPAC differ for these records so that appropriate field names were displayed and the “place a hold” button hidden or customized?

8.10 Can customers pay for fines and fees for lost, missing and damaged items through the OPAC with a credit card?
8.11 Does your OPAC provide faceted searching to allow users to narrow their results? What kinds of facets are available? Can the library customize the facets made available and where they display in the OPAC?

8.12 Does your system support catalog access for mobile devices? Is all OPAC functionality available through the mobile interface? Is the mobile interface designed specifically for mobile or small screen or is it just accessible by alternate devices?

8.13 Does the OPAC provide a “reading history” option? Can the library or the customer disable this feature for a specific customer? Can individual customers opt-in and opt-out of this feature? Is opt-in or opt-out the default for your system? Can that default be changed?

8.14 Does your system maintain information on holds not picked up? Can this information be provided to the user?

8.15 Does your OPAC have an online customer registration function which allows users to apply for and/or get a library card online? Can the capabilities of the online card be limited by the library?

8.16 Does the OPAC allow customers to update information in their customer record? Can the library specify which fields can be updated through the OPAC?

8.17 Can customers pay for fines and fees for lost, missing and damaged items in your system through a 3M self-check machine?

8.18 Can the customer e-commerce functionality link to any fee-for-printing systems?

8.19 Are there persistent links (permalinks) to specific items in the catalog?

8.20 Does your system allow a customer to enter only the unique part of their barcode and automatically add a standard prefix and padding? For example, could a customer with the barcode 29067055567826, enter only the 555567826 portion of the barcode and be recognized on a 3M self-check machine?

**Broader OPAC Questions**

8.21 Does your OPAC offer ADA friendly displays and functions such as adjustable font sizes and voice prompts? Please describe.

8.22 How does your system handle customer authentication for access to remote databases and resources via the OPAC?

8.23 What type of widgets can be added to the OPAC? The library would be interested in adding widgets such as Meebo Me to connect with the reference desk.

8.24 Can the help available in the OPAC be customized by the library?

8.25 Can your OPAC be used to search non-MARC databases? Can these databases be searched at the same time the catalog is searched? Do results from multiple databases display in one comprehensive list for the user? If your OPAC offers faceted search results, are these records included in the facets?
9 SERIALS

We want both staff and public modules to reflect comprehensive information about our subscriptions. The catalog and circ displays should show summary holdings for each subscription.

Below is a list of specific elements of interest to Sno-Isle Libraries, with the most important questions appearing at the top of the list. Please respond to each item below and feel free to include any general information about this module in your response.

9.1 Our library allows customers to place holds on and check out individual issues. How does your system accommodate this? Will statistics capture one circ each time an individual issue is checked out?

9.2 Provide a screen shot showing the screen for receiving issues.

9.3 On check-in, if we notice the volume or issue number is incorrect, how do we update that information within the system, and can we update this information for all subscriptions or one at a time?

9.4 Can library staff check in multiple copies of a single title on one screen?

9.5 What triggers the system to alert staff that an issue has not been received? What type of alert and/or report is provided to staff?

9.6 What vendors can your system interface with for electronic claims?

9.7 Can library staff edit claim intervals and frequencies?

9.8 Does your system provide the ability to print routing slips when an issue is checked-in? How many routing slips can be configured? We want the routing slip to include: Title, issue designation, list individuals with their branches and blank line for each individual to add date received/date forwarded.

9.9 Can the library enter or edit a summary holdings statement?

9.10 Can library staff edit bibliographic records through the Serials module?

9.11 What tools does your system provide to enable us to manage our periodical collections, including annual purging of back issues and maintenance of accurate bibliographic records?

10 SYSTEMS/IT

Sno-Isle Libraries is only interested in an ILS which is housed locally. The move to a new ILS will mean many changes for the staff in the IT group. The CARL.Solution system runs on Tandem hardware and Sno-Isle has a great deal of expertise in this hardware environment. Staff will be retrained to deploy and maintain the servers and other hardware for the selected ILS.
Below is a list of specific elements of interest to Sno-Isle Libraries, with the most important questions appearing at the top of the list. Please respond to each item below and feel free to include any general information about this module in your response.

10.1 Is non-proprietary access available to the database? We would be interested in using tools such as Crystal Reports to pull data. Does the license included in the quote allow for an SQL or Oracle call against any portion of the database? Please provide a Table Map of your system with your response.

10.2 What system administration and database administration training is available? What format of training is available, online, on-site, etc.? What type and format of training materials are provided? Does your company provide operating system training or is it outsourced?

10.3 Does your system offer the ability for live replication to a second system which can act as a “hot swappable,” redundant server. Sno-Isle has the ability to replicate their system and provide full system access from a second location in case of critical system failure. One of the larger branches has enough bandwidth to support the redundant server connectivity. Can your system make use of this redundant server?

10.4 Please document the proven system availability record for your system, preferably using information from customers of similar size.

10.5 Please document how backups are completed on your system and if there is any downtime required for backup activities. How often are backups recommended? Can your system backup to a SAN or do backups require disk, tape or other media? How much space would be required for backup storage? Does your backup mechanism support a de-duplication of data?

10.6 What types of system maintenance activities are required for your system? Do any of the regular maintenance activities require the system to be down? How much staff time is required for these activities? What skills will staff need to have to complete these activities?

10.7 What staff skills are required and/or recommended to support and maintain the server? What types of activities are recommended in the areas of database, system and hardware maintenance?

10.8 How and how often are upgrades distributed? How are ILS system upgrades coordinated with operating system upgrades? Who is responsible for operating system upgrades? What types of technical assistance are available from your company to implement upgrades of your ILS software and updates of the server software?

10.9 Describe your disaster recovery support in the areas of hardware, software and data. What is the estimated recovery time if the system had to be restored from a backup?

10.10 What hardware and software are used for the server? Does the library have a choice to purchase server hardware and software from your company or from another vendor?

10.11 What software is required for the client modules? What are the minimum specifications for a staff workstation? What are the minimum specifications for an OPAC workstation?

10.12 What operating system and programming languages are used by your system? What versions of these applications are employed?

Sno-Isle Libraries RFP
Page 21 of 32
10.13 What monitoring software is available and/or recommended for alerting system staff to IT problems related to the ILS and to the server?

10.14 How is hardware installation handled? If hardware is purchased from a separate vendor, does that hardware need to be shipped to your company or can it be sent directly to the library?

10.15 What costs are involved in support and consulting services for the library’s IT personnel?

10.16 Sno-Isle assigns a Windows domain logon for every member of the staff. Can this logon be utilized with your system to provide staff with a single-login? If so, can the source of the login be determined by user or by workstation?

11 FINANCIAL PROCESSING – AUDITING REQUIREMENTS

Sno-Isle has a number of auditing and state requirements regarding the handling of monies. Sno-Isle does not charge fines but does charge customers for lost and damaged items. Currently, a separate payment system is set up using the Library OnLine software to manage customer payments for printing. Sno-Isle requires a system which can provide an audit record for each transaction completed for a lost or damaged item.

11.1 Can your system provide an audit record for charges and payments related to lost and damaged items, including at least the following information: customer name, item information, dollar amount, date/time of payment, staff member login and branch?

11.2 Does your system allow a staff member to print two receipts for each financial transaction? Currently, one receipt is given to the customer and a second receipt is sent to the Accounting Department which uses the receipts to reconcile a weekly report of monies accepted.

11.3 Can charge and payment information be accessed through a staff module, allowing an individual staff member to view and download the information?

11.4 Does your system provide for integrated credit card processing? What additional equipment is required to accept monies?

12 3RD PARTY AND LOCALLY DEVELOPED PRODUCTS

Sno-Isle Libraries utilizes a large number of 3rd party and locally developed applications. Sno-Isle expects to replace some products currently utilized with features found in the new ILS or new 3rd party vendor relationships. Although Sno-Isle is willing to make some changes in these areas, some items cannot be replaced at this time, such as the 3M Self-Check machines.

Below is a list of products and how each of them interact with the current ILS. Please respond to each specific question and also include any other information which helps to describe how your system would interact with these products and services. If your system offers an alternative to these 3rd party products, please describe.

Sno-Isle Libraries RFP
Page 22 of 32
12.1 OVERDRIVE

Sno-Isle purchases OverDrive content, loads MARC records from OverDrive into the catalog and displays those records in the OPAC.

Questions

12.1.1 Does the system allow the display elements in the OPAC to be different for online content than it is for other library materials? For example, can the Place a Hold function be suppressed and a link to the products’ website displayed for bibliographic records coming from OverDrive?

12.1.2 Does your system provide real-time authentication for customers accessing content through OverDrive?

12.1.3 If a card is lost and a new card number assigned to a customer, can the holds already in OverDrive for that customer be retained? Is the new card number updated in OverDrive?

12.2 3M SELF-CHECKS

Sno-Isle has 52 3M self-check stations in use. They are an integral part of the circulation function and represent a very high level of financial investment. These machines will not be replaced and Sno-Isle is interested in finding an ILS which interacts well with the units and allows for the most customer-interaction possible with the self-check units.

Questions

12.2.1 Describe the messaging options and customizations available for display in the 3M self checks (such as why an item from the Reference collection does not check out).

12.2.2 What is the methodology used by your system to communicate with these devices?

12.2.3 How are the statistics tracked for self-check usage? Can the library gather statistics by individual self-check machine as well as for all of the self-checks in a specific branch? Can the library get a combined statistical report of the total number of circulations, including the self-check activity and the regular Circulation module activity for a single building? How would this be accomplished with your system?

12.2.4 Does your system allow for the use of the self-return functionality available with the 3M system?

12.3 METROLOGIC USB SCANNER

Sno-Isle Libraries utilize a Metrologic USB Scanner at each circulation desk and in workrooms.

Questions

12.3.1 Is your system compatible with this type of scanner?
12.4 EZPROXY

Sno-Isle Libraries currently uses EZProxy for database authentication. This is a tool which could be replaced with another product of its kind or with an integrated solution from a new ILS. Subscription databases include Gale, EBSCO, ProQuest, OverDrive, 360 Search (Serials Solutions), Learning Express, Tumblebooks, and BrainFuse, among others.

Questions

12.4.1 We would like to offer a single sign-on experience for our customers. Does your system offer an integrated user authentication methodology?

12.5 HOMEWORK HELPER, ONLINE CHAT

These are some products employed by Sno-Isle Libraries which are not directly related to the ILS but do utilize several pieces of the system. Homework Helper (Brain Fuse) is at: http://www.sno-isle.org/?ID=1856 and Online Chat is at http://www.sno-isle.org/?ID=1174.

Questions

12.5.1 Will the user authentication system proposed interface with these products?

12.5.2 Can we have a permanent link (permalink) to a bibliographic record in the catalog which describes and points to these services?

12.6 DISCOVERY TOOLS

Sno-Isle Libraries currently uses AquaBrowser as one of two main OPAC interfaces. We do not require the use of AquaBrowser specifically but do want a product which will search the library catalog as well as the subscription and locally-produced databases now available and offer many of the similar next generation catalog features. If the OPAC interface for your ILS has similar functionality to other discovery tools, please describe its features in this section.

Questions

12.6.1 Does your system interface with AquaBrowser in real-time for both cataloging data and customer account information? If not, what alternative do you recommend?

12.6.2 What 3rd party search interfaces (such as AquaBrowser, Endeca, EBSCO Discovery Service, etc.) are currently in place among your client base?

12.7 ITIVA

Sno-Isle Libraries employ an iTiva phone notification system. Although we require that a phone notification service be part of a new ILS implementation, the system does not have to be iTiva.
Questions

12.7.1 Does your system interface with the iTiva phone notification system? If not, what alternative phone notification system do you recommend?

12.8 SYNDETICS

Sno-Isle Libraries uses data from Syndetics to populate the catalog with images, reviews and summary information. We would like to continue using data from Syndetics in the new ILS.

Questions

12.8.1 How does your system interact with Syndetics? Data loads, on-the-fly inclusion, etc.
12.8.2 Is there any limit to the content provided by Syndetics in your OPAC?
12.8.3 Would Sno-Isle contract with Syndetics directly or through your company?
12.8.4 Can your system provide access to the Syndetics feature called “If you liked reading...” which gives readers suggestions for further reading? Are there any additional costs involved in implementing this feature?

12.9 SERIALS SOLUTIONS

Sno-Isle Libraries is currently reviewing their relationship and use of Serials Solutions for access to database content. We are interested in retaining the type of access provided by Serials Solutions and integrating this type of information into our public interfaces but are open to different products and services.

Questions

12.9.1 Does your system allow for the incorporation of data from Serials Solutions? Please describe.
12.9.2 With AquaBrowser we currently have access to all data available from Serials Solutions through the catalog interface. Can your OPAC offer similar access or would you recommend a 3rd party discovery layer product for this type of interaction?

12.10 LIBRARY ONLINE

Library OnLine, from Active Network in San Diego, is the PC reservation and print management solution currently in place for Sno-Isle Libraries. We would be interested in changing the products in this area only if a different vendor’s products could be more closely integrated with the selected ILS. Currently a flat file is produced from the ILS which is uploaded to the Library OnLine system and utilized for authenticating customers for PC and printing services.

Questions

12.10.1 Can your system provide Sno-Isle Libraries with a real-time authentication interface for Library OnLine which includes information about the age of the customer? Note: Due to age restrictions on internet access,
Library OnLine accounts are flagged for customers under a certain age. The customer record in the ILS does contain a field for date of birth.

12.10.2 Can your system interface with the Library OnLine system in order to provide a single payment account for the customer? This would allow a user to add monies to their account which could be used to pay for lost/damaged items or printing services.

12.10.3 Can your system update the “last use” or “last activity” information on a customer record when the Library OnLine account is utilized?

12.10.4 Does your system integrate with any other printing and computer reservation software? Please describe and include information on options and pricing.

12.11 AUTHORITY CONTROL

Sno-Isle Libraries regularly sends records out to LTI for authority control and may do some additional processing during the migration.

Questions

12.11.1 Does your system allow for records to be exported and sent to LTI or another vendor for authority processing? Can the resulting authority records and updated bibliographic records be re-loaded into the system?

12.11.2 Can both new and updated authority records be loaded through the cataloging staff client?

12.12 AUTOMATED MATERIALS HANDLING SYSTEMS

Sno-Isle does not currently employ any automated materials handling systems but is interested in this area for the future. Our interest ranges from automated self-return stations to larger automated return and sorting systems.

Questions

12.12.1 Does your system integrate with any automated materials handling systems?

12.12.2 Do you recommend any specific vendor for better integration with your system?

12.13 EVANCED CALENDAR

The Evanced Calendar is another product which is not directly related to the ILS at this time. Sno-Isle would only be interested in replacing this product if a new ILS had the same robust functionality.

Questions

12.13.1 Do you offer any integration capabilities into the Evanced Calendar product?

12.13.2 Does your system include a module for event and program listings?
12.14 VENDING KIOSKS

Sno-Isle Libraries do not currently utilize any form of vending kiosk, however, we may be interested in installing something in the future such as disc (DVD) vending machines.

Questions

12.14.1 Does your system interface with any vending kiosk systems?
12.14.2 What costs are involved in implementing this functionality?

12.15 IN-HOUSE CREATED DATABASES

Sno-Isle has created a number of applications which are used to display and manipulate catalog data and expose it through their website. Currently, static lists are created using the bibliographic ID numbers in the current system. Sno-Isle Libraries would like to make these lists dynamic through the use of direct SQL queries or the use of APIs. Other options may also be available with other ILS products.

Below is a list of products. Please indicate how the information could be retrieved and displayed through your system (API, direct SQL, module feature, etc.).

12.15.1 Magazine Search (http://www.sno-isle.org/?ID=3258)

The current Magazine Search allows users to search for journal titles by keyword, title and topic area. Descriptions of the title are displayed with holdings and access information for online titles.

12.15.2 Recently Added (http://www.sno-isle.org/?ID=1172)

This product provides a list of titles which have recently been received and those on order. Users can browse the list by type and can view a full record and place a hold on the title.


Sno-Isle Libraries provides a variety of booklists for customers. The adult book list is further divided by topic or subject.

12.15.4 Blogs, newsletters and social networking

Sno-Isle maintains blogs via Blogger, newsletters using Topica and participates in social networking tools such as Facebook, Twitter and Flickr. Although these items are not directly associated with the ILS, they are included in the overall library website and utilize links into materials in the catalog.

12.15.5 Web Site Search

Sno-Isle Libraries currently utilize a custom database created by AquaBrowser that performs a SQL query to pull Web sites from an in-house database of external Web sites. AquaBrowser imports the information into their database and consolidates the Web sites into the search results.

Sno-Isle Libraries RFP
Page 27 of 32
12.15.6 **Research Tools** ([http://www.sno-isle.org/?ID=1246](http://www.sno-isle.org/?ID=1246))

This is another product employed by Sno-Isle Libraries which delivers results from different databases in one result set. The results are from a collection of subscription databases, articles, eBooks, Internet Web Sites, Search Tools, and Directories. The items are selected, monitored, and organized by library staff. The main thing required from the ILS for this product is the ability to perform a dynamic query from search terms submitted through a search box. The ILS would need to accept the search, return results in a standard fashion and then allow the creation of links directly into each record.

### 12.16 OTHER 3RD PARTY INTERFACES

12.16.1 Please describe any other 3rd party interfaces you believe would be of interest to Sno-Isle.

### 13 API’S AND STANDARDS

13.1 Do you have an API available for searching the catalog?

- What language and/or protocols are used for accessing your API?
- What bibliographic and item elements can be used to request data from the catalog?
- What bibliographic and item elements are available to be retrieved and in what format?
- Could we use the API to retrieve a list of all of the DVDs?
- Could we use the API to retrieve a list of all the recently cataloged items?

13.2 Does your catalog support the Z39.50 protocol? If so, what version of the standard is currently supported?

13.3 Do you have a Customer API? Does the API allow the following?

- Placing, updating, deleting holds, changing customer holds
- Updating customer records (editing address, name, phone, email, etc.)
- Retrieving catalog details on an item (marc info elements)
- Get item status (where it is in the system, how many, etc.)
- Get customer status (what they have on hold, blocks)
- Create customer account (to allow us to generate active card number)
- Adding, editing, deleting items on a personal list (if the ILS supports this)

13.4 Does your system support SIP2 and NCIP for authenticating against customer records? Are the servers accessible by 3rd party applications?

13.5 Please name all of the protocols supported, including EDI/X.12, FTP, SMTP, HTTP, SOAP and others, as appropriate.

13.6 Please provide any documentation available on currently accessible APIs.
14 ISSUES OF CONCERN TO SNO-ISLE

There are two areas which need special attention during the migration and implementation process. Sno-Isle would like each vendor to describe how they would handle these issues when moving data from the current CARL.Solutions system to a new ILS.

14.1 CALL NUMBER FORMAT

Many of the reporting issues currently faced by Sno-Isle are due to the format of some of the call numbers in the system. Many call numbers include a designation for material type at the beginning of the call number. For example, a “J” for juvenile is included at the beginning of the call number field for all juvenile items. The problem is that all of the items are interfiled on the shelves so when a report is created and sorted by call number, the items next to each other on the shelves are not shown in the same order on the report because J398.001 does not display next to 398.001 in a sorted list. This affects a large number of reports and lists generated from the ILS data.

14.1.1 Does your system have a “bucket” or other mechanism for storing and displaying these other characters? Would you be able to move the appropriate letters currently in the call number field to a different location during migration? Sno-Isle Libraries can provide a complete list and definition of all of the initial characters in the call numbers which would need to be moved.

14.1.2 Please indicate how you would propose to deal with this special call number issue prior to, during or following a migration of the Sno-Isle data.

14.2 SERIAL RECORDS

Sno-Isle allows customers to place holds on and borrow individual issues of serials. In order to provide this service through the CARL.Solutions system, a temporary brief bibliographic record is created for each issue. Circulation statistics are counted for each issue.

We want each of the staff and the public modules to reflect comprehensive information about our subscriptions – a bibliographic record, summary holdings, and information about individual issues including their status relative to the checkout process. When the issues are discarded the catalog must reflect this.

14.2.1 Please describe how your system displays information about subscriptions and issues, both from the staff’s interest in maintaining accurate records and the public’s interest in knowing our holdings to the issue level.

14.2.2 Please discuss how the temporary bib records we currently have for individual issues would be migrated to your system and new methodologies to be implemented for ongoing circulation of serial issues.

15 VENDOR STABILITY/MIGRATION PROCESS/TRAINING/SUPPORT

15.1 VENDOR’S COMPANY

Name

Sno-Isle Libraries RFP
15.2 ALLOCATION OF STAFF

Please use these categories as guidelines and represent your company’s staffing in the most appropriate ways.

- Research and Development
- Customer Service/Support
- Sales
- Administration
- Implementation
- Training

15.3 REFERENCES

Please provide 3-5 references which can accurately reflect the system performance and company support. References should include similar installations in the areas of size and transaction levels.

15.4 CUSTOMERS, EXPERIENCE AND HISTORY

15.4.1 How many customers are currently running production versions of your ILS? What sizes and kinds of libraries make up your customer base?

15.4.2 How many years has your company worked in the ILS marketplace?

15.4.3 Is your company currently for sale or involved in any transactions to expand or to be acquired by another organization? If so, please explain.

15.4.4 Has your company been involved in a merger, acquisition, or reorganization in the last five years? If so, please describe.

15.5 MIGRATION AND TRAINING

15.5.1 Please provide an implementation and training schedule which would allow Sno-Isle libraries to go live with your system in February 2011.

15.5.2 Does your company provide on-site training for the system? Do you offer off-site or web-based training? Please describe what options are available and the costs involved with each option.

15.5.3 Does your company provide any assistance with OPAC design and implementation?
15.6 SUPPORT

The vendor must guarantee support for current releases of all databases and operating systems for the first twelve months after the release. The library would require an ongoing annual contract for support and maintenance.

15.6.1 Describe your customer support structure, hours and resources for hardware support, operating system support and application/data support.

15.6.2 What are the hours and days of your live telephone support?

15.6.3 What technical assistance is available from your company for maintaining the ILS and server software? Do you provide consulting support for operating system and ILS software upgrades?

15.6.4 Please describe the make-up and governance of the ILS user group.

15.6.5 Please describe the mechanism for reporting and resolving issues with the system.

16 SNO-ISLE SELECTION PROCESS

16.1 RFP EVALUATION

RFP responses are due on June 7, 2010. Sno-Isle will evaluate the responses received and select 2 or 3 vendors to bring in for final demonstrations and high-level functionality discussions. All responding vendors will be contacted by June 25, 2010.

The Sno-Isle ILS Selection Task Force will evaluate the RFP responses, manage the vendor demonstrations and meetings, solicit input from staff and draft a recommendation for the Library Director. The 10-person Task Force is made up of the Library Director, Managers and Directors from Technical Services, Information Technology, Circulation Services, and Content Access, Acquisitions and Collections Management. The Task Force also includes a district manager and 2 experienced community library staff members.

16.2 DEMOS AND VENDOR VISITS

The 2 or 3 vendors selected from the RFP evaluation process will be asked to visit Sno-Isle Libraries in person for 2 days. Each vendor will be asked to provide a 2-hour demonstration of the OPAC and Circulation modules for any Sno-Isle staff member who wishes to attend. All demonstrations will be scheduled on a single day between July 6 – 9, 2010.

The second day of the vendor visit, also between July 6 – 9, 2010 will include a face-to-face meeting with Sno-Isle’s ILS Selection Task Force. During this meeting, the ILS Task Force will be asking specific questions related to the RFP response and system functionality. The group will be asking the vendors to describe specific capabilities as well as to show how some functionality works. The questions will relate to all modules described in the RFP responses as well as vendor stability, development planning and support. We hope that given this advanced warning, each selected vendor would make available appropriate personnel for the demonstration and meeting days.

Sno-Isle Libraries RFP
Page 31 of 32
Sno-Isle Libraries will try to schedule the demonstrations and meetings in a manner that will be the least time-consuming for each vendor. There will be no more than one day between the demonstration and meeting with the Task Force members.

16.3 FINAL SELECTION

Sno-Isle will make its selection of a vendor during the month of July, 2010 and will be ready to begin negotiations with the selected vendor in August, 2010. Sno-Isle wishes to have a signed contract no later than September 17, 2010. In the event that Sno-Isle is not able to successfully negotiate a timely agreement with the initial vendor selected, it may select another responding vendor and negotiate for an agreement. The final selection will be based upon Sno-Isle’s evaluation of the proposals submitted and the acceptability of the terms and conditions of a negotiated agreement with the vendor. Sno-Isle reserves the right to reject any and all proposals submitted.