



# BOSSIER PARISH LIBRARIES

**RFP NUMBER: RFP-2021-BPL-ILS**

is accepting sealed proposals on an

## **INTEGRATED LIBRARY SYSTEM**

This proposal will be received by:

Heather McEntee, Director of Libraries  
Bossier Parish Libraries  
4915 Shed Rd.  
Bossier City, LA 71111

Until

**10:00 am Central Daylight Time**

**Monday, May 24, 2021**

RFP Documents listed at [www.bossierlibrary.org/rfp](http://www.bossierlibrary.org/rfp)

**Please CAREFULLY read this Request for Proposal on the following pages.**

Vendor Name:	
Address:	
Phone Number:	
Date:	

## 1. General Information

### 1.1. Overview & Purpose

This request for Proposal (RFP) is issued by the Bossier Parish Libraries (herein referred to as “BPL”) for the purpose of obtaining proposals from Proposers for a hosted Integrated Library System (ILS). BPL seeks a new ILS for the following intended outcomes.

- **Adaptability** – Any selected ILS should have the adaptability to be scalable and flexible for expanding collections and customer base. BPL database must allow for increases with patron records, collection codes, location identifiers, and bibliographic/title records.
- **Curated Collections** – Any selected ILS must include strong analytic tools. BPL will use these tools to create a strong, independent, curated collection for the community—focusing on genres, formats, and other key informational points that the community desires.
- **Discoverability** – Ability to enhance the Online Public Access Catalog (OPAC) for BPL’s Community to facilitate a better Discovery experience of library materials, both physical and online.
- **User-Friendly Design** – Provide one place to look for our users, both staff and public interface. Must be Americans with Disabilities Act (ADA) compliant. Support ease of use, intuitive design, and efficient workflow.
- **Responsiveness** – Any selected ILS should have the ability to adapt to BPL needs and to further allow BPL to make changes to adapt to patrons’ needs. Strong analytic tools are necessary; statistical information will help focus our decisions regarding purchasing, policy, and future directions.
- **Standards** – Adhere to library industry and technology standards and best practices.
- **Web-Based** – Any selected ILS must include a web-based staff client to allow for access beyond BPL walls. This will be necessary for growing the BPL’s Community Engagement department and meeting patrons where they are in the community. Staff must be able to perform circulation duties, such as library card registration and materials checkout, outside of the BPL network.

### 1.2. Background

Bossier Parish Libraries has funding to replace its current Library Management System in 2021. Bossier Parish Libraries are located in Bossier Parish, Louisiana. The parish serves approximately 127, 000 residents. BPL system comprises 7 public library branches, a history center, an administrative office building, and a community engagement department delivering library services throughout the parish.

BPL’s current system is The Library Corporation’s Library.Solution LS2 version. BPL installed TLC’s Library.Solution system in the early 2000s.

Bossier Parish Libraries work cooperatively with Bossier Parish Public Schools to issue an eCard to every public-school student. This requires a formal contract between BPL’s ILS vendor and the public school system. The winning Proposer must agree to enter into a similar contract agreement.

**1.3. Statistics and Record Counts** – Unless otherwise stated below, all statistical and record counts provided were calculated on March 30, 2021.

<b>System and Community Information</b>	
Library locations	7 public buildings 1 administrative building
Population Served	116,979 (2010 census) / 127,039 (2019 estimate, census.gov)
Patron Records/Registered Borrowers	85,204
2020 Physical Item Circulation	431,271 (2020 annual report)
2020 Digital Item Circulation (eBook, eAudio, eMagazine, etc.)	134,209
2020 Holds on Items	42,188
<b>ILS Holdings, Items, and Staff Accounts</b>	
Library Physical Title Records	243,775
Library Physical Item Records	252,865
Items Added in 2020	38,590
Items Deleted in 2020	44,670
Collection Codes	663
Authority Records	218,760
Number of Borrower Types	16: Adult (A), BPL Delivers (HBS), Branch Accounts (BRANCH), Child Only (CO), Child/Teen (C), e-Card (EAO), Educators (EDU), Green Gold (GG), Inter Library Loan (ILL), Organization (ORG), Registered Online (OBR), Staff (S), Student eCard (STUDENT), Technical Services (TS), Teen Only (TO), Temporary Patron (Temp)
Staff User Accounts	107
Notices generated in 2020, email or text	175,414

**1.4. Core Applications/Services**

At a minimum, the proposed ILS solution should contain the following core applications, or their equivalent as determined by BPL’s sole discretion.

Acquisitions with Fund Accounting and User Roles
Online Public Access Catalog
Cataloging
Circulation, including Offline Mode and Mobile Circulation
Digital Asset Management
Interlibrary Loan Management
Inventory Control and Management
Reports – Management Information System
Serials Control with Fund Accounting
Migration & Support
System Functionality

## 1.5. Compatibility

The proposed solution should interface with or work in conjunction with BPL’s existing equipment, software, and third-party solutions listed in the table below. Alternatively, the proposed ILS solution could provide equivalent functionality of the third-party solution, either as part of the ILS without the need for interfaces or integration with third-party solutions, or through a different third-party solution. Any costs for integrations or ILS components that replace a listed item below should be clearly indicated in the proposal.

<b>Equipment, Software, &amp; Standards</b>	<b>Description</b>
Star Micronics TSP100 thermal receipt printers	Charge receipt printing
Touch screen catalogs for public use	Touch screen catalogs
Ability to read 14-digit codabar patron library cards	Ability to read 14-digit codabar library cards
Ability to read 14-digit codabar item barcode labels	Ability to read 14-digit codabar item barcode labels
Ability to integrate with RFID software	Industry standard
Ability to integrate with RFID charge pads	Industry standard
Ability to integrate with RFID inventory wand	Industry standard
Microsoft Windows	Production and offline software must be compliant with Windows 10.
Anti-virus/malware software	Production and offline software must be able to work on a computer with standard/common anti-virus and malware installation
Centurion Shield software for public and PAC PCs	Restores clean image of PCs on reboot
Z39.50 Client and server	Ability to search catalogs
WorldCat	Ability to integrate with WorldCat to download MARC records
Standard Interchange Protocol (SIP) <sup>2</sup>	Used to interface with other products
Niso Circulation Interchange Protocol (NCIP)	Used to interface with Auto-graphics state wide Inter Library Loan (ILL) service
Application Programming Interface (API)s	Used to interface with other products
Transport Layer Security (TLS) or Secure Sockets Layer (SSL) Security	Secure access for patron’s accessing accounts via online ILS gateways
Active Directory integration and Single Sign-On	Staff users can use Active Directory accounts to log into ILS and access all permitted functions
MAchine Readable Cataloging (MARC) <sup>21</sup>	Cataloging standard
Dublin-Core	Cataloging standard
Resource Description and Access (RDA)	Cataloging standard
<b>Third-Party/ILS Interfaces/Integrations</b>	<b>Description</b>
Accelerated Reader (AR)/Lexile Measure	Records are updated at least quarterly and new AR/Lexile information is added
EBSCO Library Aware Newsletters	Newsletters use patron email list from ILS

EBSCO Novelist	Reader's advisory service that provides information about on-the-shelf availability and linked to catalog
hoopla by Midwest Tape	Circulating online collection
Google analytics	Code for Google Analytics
Ingram iPage	Selection & Ordering via EDI
Baker & Taylor Titlesource 360	Selection & Ordering via EDI
Midwest Tape	Selection & Ordering via EDI
Playaway/Findaway	Selection & Ordering via EDI
Thorndike (Cengage Publishing)	Selection & Ordering via EDI
Syndetics Unbound	Catalog content enrichment
Short Message Service (SMS) text service	ILS SMS text patron notices
WT Cox	Serials subscription management

## 2. Proposal

### 2.1. Submission Requirements

The Proposal shall include all requested information and documents as outlined in this Request for Proposal (RFP).

Proposals received should be completed in a format and order that is described in this RFP or the Proposal may not be accepted.

Submission of Proposals: One (1) signed original response, marked "Original" and one (1) digital copy should be submitted in PDF format. Costs incurred in the preparation and submittal of proposals are the responsibility of the Proposer and will not be reimbursed.

Additional information may be attached to clarify narrative, functionality, and/or compatibility. Please clearly identify Section and Item Number which the accompanying materials address. Please do not include marketing materials.

Submissions should be mailed to the following address, based on carrier service used by the proposer.

Physical Address for all carriers
Bossier Parish Libraries ATTN: Heather McEntee, Director of Libraries 4915 Shed Rd. Bossier City, LA 71111

### 2.2. Proposer Inquiries

All questions regarding this RFP should be submitted in writing no less than fourteen (14) days prior to the opening of proposals. Questions regarding the proposal may be addressed to both:

Heather McEntee, Director  
Bossier Parish Libraries  
4915 Shed Rd  
Bossier City, LA 71111  
Email: hmcentee@bossierlibrary.org

**and** Teresa Rice, Associate Director of Technical Services  
Bossier Parish Libraries  
4915 Shed Rd  
Bossier City, LA 71111  
Email: trice@bossierlibrary.org

All questions submitted to Bossier Parish Libraries will be reviewed. Responses will be issued as an additional document and released on the library’s website at [www.bossierlibrary.org](http://www.bossierlibrary.org). This document will be uploaded by close of business on May 17, 2021.

**2.3. Estimated Schedule of Events**

RFP Advertisement Period Begins	April 22, 2021
Deadline for Questions	May 10, 2021
Library Response to Proposer Questions	May 17, 2021
Deadline for Receipt of Proposal	May 24, 2021
Proposer Demonstration	May 25-26, 2021
Library Board of Control Review	May 27, 2021
Bid Award Announced	May 27, 2021
System Fully Operational	October 1, 2021

**2.4. Contract Term and Insurance Requirements**

The successful Proposer will be required to execute a contract with Bossier Parish Libraries. If an agreement is offered to a Proposer, the term will be for a twelve (12) month period. The Proposer will begin performance within thirty (30) days after receiving the work order or “Notice to Proceed” and have the system fully operational by October 1, 2021. The agreement may be renewed automatically for ten (10) successive one-year periods unless either party gives written notice of its intent to not renew this agreement at the same prices, terms, and conditions except that a price adjustment based on the Consumer Price Index (CPI), not to exceed five (5) percent, may be considered, at the sole discretion of BPL, in the fifth (5<sup>th</sup>) year of the agreement and each fifth year thereafter.

**2.5. Response Documents and Order**

Proposer’s response should include answers to questions, completed forms, and requests for information in separate documents numbered to correspond with the document listing below. Please try to avoid any elaborate promotional materials and provide only information that is required. All supporting materials should clearly reference the RFP section to which they pertain.

- Company Narrative and Response to Questions
- Completed Functionalities Checklist Form (Attachment A)
- Completed Compatibility Checklist Form (Attachment B)
- References (Attachment C)
- Completed Cost Proposal
- Signed Proposal Form

**2.6. Evaluation Criteria**

Written proposals will be evaluated by the library staff ILS RFP committee. The committee will review the RFP responses utilizing the criteria and corresponding point system below. After review, the committee will contact one (1) or more of the Proposers, based on the criteria stated below, for an in-depth onsite or web demonstration of the proposed hosted ILS solution. The final award recommendation is at the sole discretion of Bossier Parish Libraries.

Company Capacity, Experience, & Vision	25 Possible Points
Conformity to Functionality	25 Possible Points
Conformity to Compatibility	10 Possible Points
References	10 Possible Points
Cost/Price (one time and Recurring)	25 Possible Points
On-site Demonstration	5 Possible Points
<b>Total Possible Points:</b>	<b>100 Possible Points</b>

Company Capacity, Experience & Vision .....25 Possible Points

The Proposer should submit satisfactory evidence that they possess an adequate inventory of resources; have adequate staff to perform the type, magnitude, and quality of work as specified in the RFP. Please address all questions listed below. If needed, please also provide additional supporting documents.

In addition, a successful proposal will also include a narrative about the Proposer’s organization, its product deployment and data migration methodologies, as well as its customer service and support practices. If needed, additional supporting materials can be included in separate documents that clearly indicates which Section and item to which the supporting material refers.

1. Provide a summary of the organization’s experience and qualifications, including: a brief history of the organization, ownership information, number of employees, percentage of employees assigned to product development and/or support, headquarters address, and names of key executives. Discuss the organization’s corporate outlook over the next three (3) years including market share, stability, goals, and major initiatives.
2. Have there been any changes in ownership, other than shares on a public stock exchange, in the organization in the last seven (7) years?
3. Have there been any environmental, financial, and/or social sustainability steps taken by the organization?

4. Please state the number of employees of the organization that hold a Master of Library Science (MLS) or Master of Library and Information Science (MLIS) degree.
5. Please identify staff who would be involved in implementation and migration, including a hierarchy of staff, listing supervisor(s) and technician(s). Please indicate who the library contacts should an issue arise.
6. Please provide a chart showing how many production versions of the proposed software the organization currently supports. What percentage of customers are currently running each version?
7. What other ILS products does the organization offer and/or support outside the scope of the one offered in this proposal? What percentage of customers are running that product?
8. Please provide an estimated timeline for the installation, migration, training, and go-live process. Include in your estimation what BPL staff time and resources will be needed to support the installation, migration, training, and go-live process including required roles and degree of involvement.
9. Based on previous experience, are there any potential issues that would prevent data to be migrated to your proposed solution from BPL's current ILS: The Library Corporation Library.Solution LS2. Please address each of the following using record numbers found in the above Section 1.3 Statistics and Record Counts table, plus growth:
  - a. Merging and duplication of bibliographic records
  - b. Processing and loading of Item Records: Are there any records that will not be loaded? Does this include all item records marked as discard, missing, cataloging, repair, lost, staff action (lost, missing, damaged), damaged, in storage, withdrawn. If so, which ones and why?
  - c. Processing and Loading of Bibliographic and Authority Records: Are there any bibliographic records that will not be loaded? If so, which ones and why?
  - d. Processing and Loading of Serial Records: Currently, Bossier Parish Libraries do not use a serials module with the current vendor. BPL wishes to use a serials module with the new vendor. What steps are required to identify serials records, prepare them for migration, and ensure they load into the Proposer's serials module/utility correctly?
  - e. Processing and Loading of Patron Records: Are there any records, either expired or not expired, that will not be loaded? What information contained within patron records will or will not be loaded, for example patron charge history, loan history, notes added by staff, additional address and/or phone numbers, notification types, authorized patrons, or other custom fields? If so, which ones and why?
  - f. Processing and Loading of Acquisitions Order Records: Are there any records, including past fiscal years, which will not be loaded? If so, which ones and why?
  - g. Processing and Loading of Circulation Loans Records: Are there any records that will not be loaded? If so, which ones and why?
  - h. Processing and Loading of Circulation Requests/Holds Records: Are there any records that will not be loaded? If so, which ones and why?
  - i. Processing and Loading of Circulation Fines Records: Are there any records, including past years, which will not be loaded? If so, which ones and why?
10. What does the ongoing support process following go-live include as part of the annual maintenance? Please include detailed descriptions of reporting and resolution processes as well as support staff availability, access to that staff by Library System staff, resolution timelines and guarantees, and upgrade support.
11. What does the Proposer require of the library's IT staff for migration, other than access to the library's current data/ For example, firewall rules, VPN access to network, Static Public IP addresses, Public IP address range, etc. Please provide a list.

12. Describe the data centers(s) where the hosting is performed, their location, who provides their Internet connection, and any certifications or standards followed by the facility.
13. Describe the physical security of your data center. Does your company have an information security officer?
14. What is your uptime percentage?
15. Describe your backup, retention, disaster recovery process, and average recovery time.
16. Describe how patron data is secured at the data center and in transmission.
17. Describe ownership of data stored at the data center. Will our data be stored in a proprietary format? Are we able to, at any time, acquire a snapshot of our full data?
18. Describe database structures, including any database utilized for discovery layer, if separate from the main ILS.
19. Describe the entire process for creating and processing offline transactions both at the staff client end and the remote server end.
20. Describe any proactive monitoring and maintenance of the proposed solution.
21. Describe the training that can be provided as part of this solution. Does the Proposer's organization offer on-site training both before "go-live" and ongoing during the length of use? Is there off-site training available? Is there web-based training available? Describe the options or tiers of options available and associated costs for each option.
22. Describe how the ILS is accessed for staff and patron functions. Does the solution require Virtual Private Network (VPN) or Static Internet Protocol (IP)?
23. What data speed is needed for library branches to properly perform staff and patron functions?
24. Discuss the organization's development methodology. Include the process for customer enhancement requests. What percentage of annual development is driven by customer enhancement requests?
25. Discuss any innovations that you have developed or are developing of which BPL may not be aware. For any items in development, please provide timelines for general release and estimated costs to BPL should they not be available for purchase at the time of proposal.
26. Discuss any unique aspects of the Proposer's organization or products.
27. List any criminal, civil, and disciplinary proceedings or hearings concerning business related offenses, within the past three (3) years, in which the Proposer, its principles, officers, or predecessor organization(s) were defendants' parties related to this type of work.
28. Please describe any and all pre-migration data refining or "scrubbing" services that the Proposer's organization offers including pricing and degrees or depth of service. One example: Address verification and field normalization.
29. Describe your Help Desk capacity. Discuss hours of operation, locations of call centers, and who from the customer site can be authorized to call for support.
30. Describe support services offered. This must include post installation response and resolution times, along with support hours.
31. Discuss the change control process as it relates to support, and on average how often new updates are released.
32. Describe how you anticipate responding to new technologies and future direction over the next five years.

Conformity to Functionality ..... 25 Possible Points

The Proposer should submit satisfactory evidence that they can provide functionality and information about availability for both the core applications/services and other applications. Please complete the attached Functionality Checklist (Attachment A) provided, and, if needed, provide additional supporting documents. Any additional supporting materials submitted must be included in a separate document(s) that clearly indicates which section and item to which the supporting material refers.

The Functionality Checklist form (within each function) includes separate Columns (defined below).

**Proposer’s response should include “X” in most appropriate of these four (4) columns:**

- Yes: As stated this function is met in the proposed system.
- No: As stated this function will not be provided.
- Future: As stated this function will be met in a future release dated mm/dd/yy (date must be included, or response will be considered as No “will not provide”).
- Custom: As stated this function will be met by a customization (denote if customization will be at an additional cost, and what that cost would be, beyond the standard pricing information). Additional costs for customizations should also be included on the cost proposal form.
- Additional Information: If Proposer wishes to submit additional information on any listed functionality, this information must be submitted in a separate document title “Functionality Checklist: Additional Information”. Please list additional information in chronological order, referencing the section and functionality list number. Do not submit marketing materials as additional information explanations in this section.

**Please note:** If selected answer is Future or Custom, additional information must be provided in a separate supporting document. Please list additional information in consecutive order and clearly identify section, function, and number to which information applies.

Example: If in the acquisitions function document, you need to respond to #9 and #18 you would put in your document ---

acquisition #9 yes this would be custom work but is included in maintenance cost

acquisition #18 that is coming in future release 11-1-21

**Note:** BPL is interested in learning about other applications and/or services your company may provide either as part of the ILS, or as third-party interfaces or services. Please provide additional information about other applications and services in your company’s narrative.

Conformity to Compatibility..... 10 Possible Points

The Proposer should provide information on compatibility of proposed ILS with BPL’s current library software, equipment, and third-party solutions. Please complete the Compatibility Checklist (Attachment B), and, if needed, provide additional supporting documents.

The Compatibility Checklist is divided into two (2) sections:

1. Compatibility Checklist – Equipment, Software, and Standards
2. Compatibility Checklist – Third-Party/ILS Interfaces and Integrations

References..... 10 Possible Points

The Proposer should submit satisfactory evidence that they possess past experience working on similar projects for other libraries by providing references who have received services from your company. Please include libraries of similar size to BPL and closest geographical location. Please use Attachment C.

References should include:

- At least three (3) current client references of public libraries which are similar in size and transaction volume as BPL. Please also include additional clients that have been deployed in the last thirty-six (36) months. Include customer name, contact name, phone number, and email address for each reference.
- At least three (3) client references who have received services from your company and whom you no longer provide service. Please include customer name, contact name, phone number, and email address for each reference.

Cost Proposal ..... 25 Possible Points

The Proposer should complete and submit the attached Cost Proposal. Table should include at minimum, implementation fee, hosted ILS subscription fee and other fees. Please use the additional rows, if needed, for other pricing details. The Total should be the Total cost of project and ongoing annual costs. Provide supporting information if appropriate. Be succinct. If there are other possible known fees, please provide pricing details, for example pricing for post-project design changes, integration with other products, or other needs described within this RFP. BPL reserves the right to select the features/options that best fits the library’s needs at implementation and to add other options later based on the prices submitted in the RFP.

- Pricing should reflect a Proposer-hosted solution for the system.
- If your system does not have a specific line item, indicate that with an N/A in the appropriate column.
- Please feel free to add items to the cost table (in the space provided) if you have items which do not fit into the specific categories.
- Costs for all modules and add-on functionality must be included in the cost table.
- Prices for the initial purchase, implementation and five (5) years of maintenance should be included for each applicable item.
- The prices submitted shall remain the same except that a price adjustment based on the Consumer Price Index (CPI), not to exceed five (5) percent, may be considered, at the sole discretion of BPL, in the fifth (5<sup>th</sup>) year and each fifth year thereafter.

Demonstration..... 5 Possible Points

The proposer should provide onsite or web demonstration of the proposed hosted ILS solution. The library requests short demonstrations targeting specific, high-priority functionality.

Proposers who score less than combined total of seventy (70) points for the first five (5) evaluation criteria above, will not be considered as a potential candidate for the on-site or web demonstration. Of those Proposers who score seventy (70) points or more for the first five (5) evaluation criteria, the three (3) highest scoring proposals will be invited to participate in the on-site or web demonstration process which is tentatively scheduled for the week of May 24, 2021. Proposer may receive as much as five (5) points during the on-site or web demonstration which will be added to the combined score for the first five (5) evaluation criteria above, and the sum of all six (6) sections will determine a Proposer’s total score.

## ATTACHMENT A - FUNCTIONALITY CHECKLIST

### 1. Functionality Checklist – Core Applications and Services

Proposer’s response should include “X” in most appropriate of these four (4) columns.

- Yes: As stated this function is met in the proposed system.
- No: As stated this function will not be provided.
- Future: As stated this function will be met in a future release dated mm/dd/yyyy (date must be included, or response will be considered as No “will not provide”).
- Custom: As stated this function will be met by a customization (denote if customization will be at an additional cost, and what that cost would be, beyond the standard pricing information).
- Additional Information (Addt’l Info): Additional Information has been included in a separate document, clearly indicating functionality section and item number.

### Acquisitions Functions

The Library expects a seamless flow of orders through the Acquisitions module, with limited staff interaction once the parameters are established.

Acquisitions Functionally		Yes	No	Future	Custom	Addt’l Info
1.	Acquisitions is fully functional, integrated subsystem or module that can manage a complex system of orders, encumbrances, funds, and expenditures in multiple library-defined accounts based on common acquisition activities including, but not limited to, selecting, ordering, receiving, claiming, invoicing, and reporting					
2.	Ability to move between acquisitions and other ILS functions without logging in to different modules or subsystems					
3.	Ability to sync all collections against the ILS database, even those hidden from OPAC display. Sync is seamless with no need for staff to show hidden collections in OPAC for sync process					
4.	Ability to choose which collections users can order from within Acquisitions module, without intervention from Proposer					
5.	Unlimited number of users					
6.	Ability to set granular permissions for users for a variety of functions: <ul style="list-style-type: none"> <li>• Create, view, edit, release orders/selection lists</li> <li>• Create, view, edit vendor records</li> <li>• Create, view, edit funds and fund allocations</li> <li>• Create, view, edit, print purchase orders</li> <li>• Create, view, edit, print reports</li> </ul>					
7.	Ability to customize permissions for individual users					

8.	Ability to share order lists with any/all users regardless of permission levels					
9.	Supports different order types, including firm orders, subscriptions, continuations, etc. Includes the following data in the acquisitions subsystem/module: <ul style="list-style-type: none"> <li>• bibliographic information</li> <li>• acquisitions type (firm, gift, blanket)</li> <li>• status information (on order, cancelled, received)</li> <li>• library/branch/copy/fund information</li> <li>• invoice information</li> <li>• vendor information</li> <li>• accounting information</li> <li>• requestor information with ability to place hold on patron's account</li> <li>• instructions to vendor</li> <li>• internal processing instructions and notes</li> </ul>					
10.	Provides at least the following access points for acquisitions records: <ul style="list-style-type: none"> <li>• purchase order number</li> <li>• title</li> <li>• author</li> <li>• Library of Congress card number</li> <li>• ISSN/ISBN</li> <li>• bib number</li> <li>• vendor</li> <li>• UPC code</li> <li>• notes field</li> </ul>					
11.	Ability to track library defined fund/budget codes					
12.	Maintains a complete audit trail for fund allocations and adjustments by user accounts					
13.	Supports multiple overlapping fiscal periods in its fund accounting structure					
14.	Supports fund account name changes from year to year					
15.	Supports two overlapping fiscal periods, where staff can order from the new year while continuing to expend out of the old					
16.	Ability to separate Acquisitions budgets, Vendors, activity and data for designated groups of libraries					
17.	Ability to delete a record for any item in a previous fiscal year					
18.	Ability to archive orders, including by fiscal year					
19.	Supports the ability to suppress on-order items and on-order bibliographic records from display in the PAC, on a system, order, or per item basis					

20.	Ability to utilize Electronic Data Interchange ordering, EDI X12 version 4010 or higher					
21.	Orders initiated by staff automatically flow through ordering, receiving and invoicing with no additional staff intervention for EDI Vendors					
22.	Orders and invoices are integrated with distributor/vendor system, with no staff intervention					
23.	Orders initiated by staff automatically flow through ordering, receiving, and invoicing with no additional staff intervention					
24.	Generates a unique Purchase Order Number for each order released					
25.	Supports the ability to generate a printable purchase order for submission to independent booksellers and other vendors that are not EDI compliant or do not have an electronic gateway for ordering					
26.	Generates a unique Item Number for each item ordered					
27.	Ability to create grid templates and/or distribution profiles for multiple branches and/or collections					
28.	Ability to create order records from imported vendor carts, via a MARC file and/or csv/xls template, with no 9XX data included					
29.	Supports vendor selection lists (either MARC file or csv/xls file) import with 9XX data included					
30.	Ability to choose distribution information released to vendor					
31.	Ability to setup multiple vendor profiles, including EDI, for each vendor, based on account numbers/profile settings provided by vendor					
32.	Ability to make customizable data entry and add free text fields to selection and purchase requests, which can be mapped to note fields in the MARC record at library's discretion					
33.	Ability to easily add additional copy or copies to unfulfilled order records					
34.	Supports full MARC upload even with errors, which doesn't stop the whole upload process for records with no errors					
35.	Ability to generate error reports for MARC file upload to show which records did not upload due to error.					
36.	Ability to distribute partially approved/received orders					
37.	Ability to change the fund after the order is released but before invoice is received and approved					
38.	Ability to make changes, or edit, an EDI invoice					
39.	Ability to unapprove an invoice					

40.	Ability to create an invoice for non-EDI orders					
41.	Selections and purchase request functions are part of the Acquisitions software					
42.	Ability to create and maintain selection and ordering lists					
43.	Ability to share lists with other users, either by choosing an individual user or group of users					
44.	Ability to create an approval workflow for selection lists/orders					
45.	Supports approval process that retains all patron requests, notes, vendor information, etc. even when the request is rejected and returned for corrections					
46.	Customer suggestions automatically flow through system, from customer into ordering process, with only staff intervention being acceptance/modification of order request					
47.	Supports automatic claims and cancelling process – generating an emailed report of items claimed or cancelled					
48.	Ability to turn off automatic claims and cancelling process - either for individual vendors or for whole module					
49.	Ability to customize and configure acquisition reports, including but not limited to: <ul style="list-style-type: none"> <li>• Invoice</li> <li>• Fund Summary</li> <li>• Fund History</li> <li>• Order History</li> <li>• Distribution Report</li> <li>• Users</li> <li>• Users Distribution Profiles</li> </ul>					
50.	Provides a reporting feature listing bibliographic/item order records that did not automatically download to the OPAC, and includes ability to email this information to designated users on a library-determined schedule					
51.	Provides an error reporting feature listing patron holds that were not placed for requested items ordered, and includes ability to email this information to designated users on a library-determined schedule					
52.	Provides a reporting feature to identify orders cancelled by vendor that have patron holds/request attached to the item, and includes ability to email this information to designated users on a library-determined schedule					

53.	Provides an error reporting feature listing MARC records that did not download/integrate with OPAC and offers ability to retry download					
54.	Library requests a step-by-step guide to placing orders					
55.	Library requests a step-by-step guide to receiving items from orders					
56.	Library requests a step-by-step guide for processing claiming materials not received					

### Catalog/OPAC Functions

The Library expects that a proposed catalog will include all aspects of library holdings, services, and programs, both internal and external to the Library. Searching should be simple, intuitive, accessible, and provide access to library user's account. Searching should also include advanced functionality useful for the trained library professional.

Catalog/OPAC Functions		Yes	No	Future	Custom	Add'l Info
57.	Functionality of catalog is intuitive for end users					
58.	Ability to provide outside network access to OPAC for patrons					
59.	Ability to increase the display font and support various resolutions					
60.	American with Disabilities Act (ADA) Compliant/website accessibility compliant					
61.	Customized work remains active after upgrades					
62.	eCustomer support for library's page-level customization					
63.	Ability to configure the bibliographic data that appears in the search results screen, choosing from all MARC fields and subfields, specifying field labels and determining the order of the display					
64.	Ability to customize verbiage for item availability, headings, status and other wording throughout the catalog					
65.	Ability for MACHine-Readable Cataloging (MARC) records to be discoverable by Google, linked data standard					
66.	Personalized display as per language selection of user					
67.	Language interfaces in multiple languages, but must include English, Spanish, and French					
68.	Mobile friendly and device responsive on all types of devices					
69.	Gathers statistics on the type of devices used to access the catalog					
70.	Catalog provides static URL not sessions for easy linking in library marketing and social media					

71.	Cross browser compatible (Internet Explorer (IE), Chrome, Safari, Firefox, Opera, etc.)					
72.	Display and functionality are backward compatible with older devices and older web software					
73.	Secure Socket Layer (SSL) encryption					
74.	A seamless experience for patrons using the PAC, whether using the library's PAC machines on premises or remotely using a PC or mobile device					
75.	Ability to automatically generate and display customized carousels of new and featured items, per parameters defined by library					
76.	Ability to readily display library defined searches or lists, such as new materials					
77.	Supports enriched data, such as book jacket image, contents, excerpts, etc.					
78.	Enhanced content, such as reviews, graphics, and read-a-likes, integrated with NoveList					
79.	Offers version of catalog designed for children, aged 13 and under					
80.	Ability to integrate Accelerated Reader levels, either native to ILS or integration through API					
81.	Ability to update Accelerated Reader levels in OPAC twice a year					
82.	Ability to search OPAC by Accelerated Reader levels					
83.	Integrates with Google Analytics (GA) with ability to separate internal and external traffic; or built-in usage reporting tool					
84.	Ability to work with mapping vendor to show exact location of items					
85.	Can text or email item's title and shelf location to designated phone number or email address					
86.	Patrons can rate and review titles in library catalog					
87.	Submitted user reviews option to be reviewed by authorized staff user before public display					
88.	Provides search result relevancy ranking					
89.	Functional Requirements for Bibliographic Records (FRBR)ized results (groups similar material i.e., same title with different formats)					
90.	Collapsible limiters/facets to avoid scrolling					
91.	Ability to specify that resources are featured only at specific libraries or branches					
92.	Ability to specify (filter) item locations in first results display screen					
93.	Visible location & availability on results screen					
94.	Supports novice and advanced user searching capabilities, such as keyword, proximity, full-text					

	searching, phrase searching, auto-truncation, wildcard, etc.					
95.	Smart searching and results, including (misspellings) "did you mean?", "fuzzy" search					
96.	Ability to enable (or disable) automatic suggestions as patrons type quick, keyword or phrase searches in the PAC					
97.	Support for keyword searching across all indexed fields					
98.	Ability to search and filter results by level of material, relevance, availability, and format					
99.	System provides methods to search/browse, limit or filter through search results such as (but not limited to): current location, branch location, date/date range, Material format (books, audio, etc.), Language, Call number, Shelving location/holdings, circulation status, genre, reading level, electronic resource, specific collection, recently published materials, on-order materials, series					
100.	Multi-faceted searching (author/title, year/format, title/publisher, author/subject)					
101.	System supports an optional number search which includes: call number, International standard book number (ISBN), International Standard Serial Number (ISSN), Bibliographic record, Universal Product Code (UPC), Publisher number, Library of Congress Control Number (LCCN)					
102.	If items not found in searching, offer other suggestions based primarily on search term and show link to purchase request form or ILL					
103.	Seamless integration with third party vendor information, for example hoopla, OverDrive, World Book, EBSCO					
104.	Sync digital titles in catalog alongside physical materials so searches can return comprehensive results					
105.	Provide ability to search in multiple databases simultaneously and identify sources of merged results					
106.	Ability to link library provided databases to common search terms and suggest/advertise that database to patrons who search those terms					
107.	Ability to tie into Summer Reading Online Program for summer reading program (via Read Squared)					
108.	Ability for library patrons to access their library card account through the OPAC					

109.	For non-library users, provide online form for potential users to apply for and create a temporary library card account (eCard account). Library has full control over the fields and information gathered, including the ability to suppress certain fields or options					
110.	All eCard accounts create a staff alert to verify patron information on the first visit to a physical library location					
111.	Ability for library to limit privileges to eCard accounts per library policy					
112.	Account information is secure and cannot be accessed via back button, caching, or other methods					
113.	Catalog provides personal recommendations based on previous activity					
114.	Upon login, offer access to account summary display that includes items checked out, items requested, and items ready for pickup, outstanding fines, list fines paid, etc.					
115.	Library patron can manage own account with no staff interaction, including change password, review/place/cancel holds, review check-outs, see outstanding charges, view loan history					
116.	Display detailed list of items checked out including remaining renewals, due date, barcode, title info linkable into database and call number					
117.	Ability for patrons to renew selected titles directly from the list					
118.	Users can request to renew an expired library card through form integrated in the ILS					
119.	Ability to set up, save and retrieve searches					
120.	Ability to create and manage book lists, include the ability to place a hold directly within the book list					
121.	Under user account, ability to sort by any column, including holds, items checked out, and history					
122.	Submitted user reviews with option to be reviewed by authorized library user before public display					
123.	Under user account, ability for users to easily print or export (.csv or .xls format) saved lists					
124.	Ability for patron to view loan history					
125.	Ability for patron to enable or disable loan history					
126.	Notifies patron that loan history cannot be retrieved once disabled					
127.	Under user account, ability for users to easily print or export (.csv or .xls format) saved lists					
128.	Patrons can print out list of items they currently have checked out					

129.	Ability to renew both physical and digital materials					
130.	Includes both digital checkouts and holds within the patron's account					
131.	Offers the ability for libraries to allow patrons to share bookmarks to titles through social media					
132.	Display holds filtered by whether the requested material is ready for pick-up and include title, author, format, pick-up location, automatic cancellation date, active/suspend status, status of hold, and offer ability to cancel, suspend, and reactivate the hold from the screen					
133.	Ability to suspend/pause or cancel holds in patron account					
134.	Ability to place holds on specific copies					
135.	Ability to place holds on specific volumes					
136.	Ability for patron to place a purchase request if a search result is null. Purchase request form connects back to Acquisitions module					
137.	Ability for patrons to place Interlibrary (ILL) Loan requests if a search result is null					
138.	Patrons can see how many holds exist on a record when placing a hold including the total number of available copies					
139.	Ability of users to see all their ILL requests with integration of ILL Service (Loanshark)					
140.	Ability for patron to manage notification options, including how they wish to receive (email, text, phone) and what they wish to receive (marketing, holds, overdue, courtesy, outreach)					
141.	Ability to email user notifications when newly arrived items are added to collection based on profile preference					
142.	User can choose to have materials auto-renew with notification					
143.	Allows authenticated patrons to submit changes to their account information, such as change of address, and allows library ability to limit or allow such changes. Patron account is flagged for review at patron's next visit					
144.	Ability for an authorized user to link family records of existing customers without staff intervention					
145.	Ability for linked family members manage library cards for linked members, including: <ul style="list-style-type: none"> <li>• View items currently checked out</li> <li>• View account status</li> <li>• Renew items</li> <li>• Request renewal of expired card</li> </ul>					

	<ul style="list-style-type: none"> <li>• Update contact information</li> </ul> Patron accounts are flagged for review at next visit					
146.	Ability for linked family members to update/modify notification preferences for linked members					
147.	Ability for linked family members manage holds for linked members, including: <ul style="list-style-type: none"> <li>• Placing holds</li> <li>• Suspending holds</li> <li>• Canceling holds</li> <li>• Update pick-up location for holds</li> </ul>					
148.	Ability for linked family members to pay for all or selected fines via bank card through library catalog					
149.	Ability for patrons of majority age, as defined by library, to opt out of family membership with no staff intervention					
150.	Integrated, intuitive online fine payment solution (use of credit/debit card) or ability to integrate with third party vendor					
151.	Online fine payment allows patron to pay all or select fines on account					
152.	Online fine payment allows patrons to pay all or partial amount of any fine on account					
153.	Ability for library to disallow online fine payments under a defined amount					
154.	Ability for library to charge a convenience fee/charge for online payment and have this charge calculated in sum of total fees to be paid					

### Cataloging Functions

The Library expects that the cataloging module is intuitive to staff, with an emphasis on cataloged items being discoverable to the public.

Cataloging Functions		Yes	No	Future	Custom	Add'l Info
155.	24/7 access to cataloging utility if in a cloud environment, including step-by-step instructions on how to access the utility					
156.	Ability to download and use records from OCLC WorldCat or offers a comprehensive database for MARC records, especially AV materials					
157.	Z39.50 (Smartport) capability, including ability to determine match points					
158.	Includes a Z39.50 version 3 compliant catalog without additional charge					
159.	Supports the ability to search a remote Z39.50 database from the staff client, edit the record as					

	required, and save it to the database without invoking a separate record import function					
160.	Supports the ability for authorized staff to copy existing authority records from selected Z39.50 sites directly into the system					
161.	Clean up duplicate authority records during ILS transition					
162.	Supports an import process that performs authority control on imported bibliographic records and automatically links to a remote subscription authority database if no matching heading is found in the local database					
163.	Items are discoverable on the internet, including but not limited to Bibframe functionality [linked data/semantic web]					
164.	Ability to upgrade records to be discoverable on the internet					
165.	Records can be RDA compliant					
166.	Tools are available to convert/upgrade MARC data to RDA or other future cataloguing standards					
167.	Provides the ability to suppress specific bibliographic records from showing in OPAC at the title record level					
168.	Provides the ability to suppress specific item records from showing in OPAC at the item record level					
169.	Ability to edit actual MARC records in web version of cataloging, if offered					
170.	Access and utilize MARC records from a variety of sources, such as vendors and other libraries					
171.	Ability to index any and all fields in MARC record					
172.	Supports varieties of import template capabilities, including item level information mappings					
173.	Provides cut, copy, and paste commands for MARC record editing					
174.	Ability to integrate digital content from third party vendors, the web, and the local library					
175.	Ability to define multiple loading properties, specify loading parameters for overlay, and specify match point in loading profiles					
176.	Ability to automatically create and populate item information during MARC record loading process					
177.	Batch export MARC records with or without holding information via scheduled task					
178.	Build customized spine labels					
179.	Create customized lists and reports					

180.	Supports the ability for the Library to flag certain bibliographic records to protect them from being overlaid					
181.	Supports the ability to specify certain tags to be removed automatically from bibliographic records during the imports process					
182.	Supports importing of multiple files in one import process					
183.	Supports the ability to bulk change bibliographic and item records					
184.	Supports the ability to bulk change wherever multiple items are selected					
185.	Ability to accept and display diacritics in importing records					
186.	Ability to accept and display diacritics in record creation					
187.	Provides macros or other workflow for repetitive data entry tasks					
188.	Ability to add or edit material image in OPAC					
189.	Easy access to help tool for copy catalogers					
190.	Spell check capability, including American English					
191.	Shows a preview version of the bibliographic record as it will appear in the PAC, including active URLs. Ability for side-by-side comparison.					
192.	Ability to suppress or allow the following functions at an item record level: <ul style="list-style-type: none"> <li>• Holds</li> <li>• Shows in OPAC</li> <li>• Allows circulation from owning branch only</li> </ul>					
193.	Offers a spine label manager					
194.	Provides an optional warning if the existing barcode is changed					
195.	Supports ready access to SQL query tools for the cataloger to (optionally) use in searching					
196.	Shows statistical usage details on the bibliographic and item records					
197.	Provides real time update to OPAC of cataloging changes					
198.	Works in offline mode					
199.	Ability to upgrade records to be discoverable on the Internet					
200.	Unicode and Hypertext Markup Language (HTML) compatible					
201.	Support Functional Requirements for Bibliographic Records (FRBR)					
202.	Batch, or individual, import/download of MARC records from any source to generate bibliographic and item records in the Integrated Library System					

	(ILS). The records may be from a website, File Transfer Protocol (FTP) source, or MARC records on a local drive					
203.	Full screen editing of individual MARC records with database update on save (add/delete fields, edit fields and subfields, and replace fields, subfields, item type, call number, location, notes, and status)					
204.	Ability to make global changes to MARC and item records (add/delete fields, edit fields and subfields, and replace fields, subfields, item type, call number, location, notes, and status)					
205.	Tools are available to convert / upgrade MARC data to Resource Description and Access (RDA) compliance or other future cataloguing standards					
206.	Ability to index any and all fields in MARC record 100 Access and utilize MARC records from a variety of sources, such as vendors and other libraries					
207.	Fully customizable item types, home locations, libraries, class schemes, and categories					
208.	A step-by-step guide to creating original records. Show all editing windows available					
209.	Use formatted coding templates to reduce errors in fixed-field coding					
210.	Provide customizable duplicate detection (call numbers, Online Computer Library Center (OCLC) numbers, ISBNs, item numbers, unique bibliographic identifiers)					
211.	Merge bibliographic records and combine their holding/item records					
212.	Items are discoverable on the internet, including but not limited to BibFrame functionality [linked data/semantic web]					
213.	Provide a step-by step guide to the discard process for a batch of materials as well as individual items. Include items that have fees attached from previous checkouts and titles that have holds					
214.	Ability to delete items from database while retaining title information on patron's charge record					
215.	Ability to retrieve deleted records through title, ISBN, author or barcode					
216.	Verify the headings in any record					
217.	Merge authority records and adjust their linked headings					
218.	Manage links between authority and bibliographic records					

219.	Ability to create, edit, merge, and delete headings					
220.	Ongoing update of authority headings according to the Library of Congress (LC)					
221.	Globally update authority headings records by any MARC field					
222.	Provide as a one-time service for application of authority control, RDA standards, and FRBR access points to bibliographic database of all MARC records at the time of implementation. The result of this authority control process would be the change of each applicable heading in each MARC record to a current form of entry, and production for each such heading of a corresponding MARC authority record for inclusion in the database of the Integrated Library System; the RDA conversion of all bibliographic records, and the updating and addition of access points in bibliographic records to prepare for a FRBR display in the ILS					
223.	Authority control update services would be provided as periodic services for updates of Authority Records, RDA standards, and FRBR access points in bibliographic and authority database. The result of this update process would be replacement of Authority Records with newer versions of those records, and the update by the ILS of headings in associated MARC records to a current form of entry, and the update of records to meet current RDA and FRBR standards.					

## CIRCULATION FUNCTIONS

The Library expects a complete self-service automated model for registration and circulation. Digital and physical materials are to be fully integrated in the proposed system.

Circulation Functions		Yes	No	Future	Custom	Add'l Info
224.	Supports ability to assign unique usernames to individual staff members					
225.	Ability to assign permission levels to individual users allowing or disallowing access to features and functions of circulation					
226.	Ability to customize wording and graphics for circulation staff alerts					
227.	Digital product usage managed and tracked through circulation, including checkouts and renewals					
228.	Digital product usage recorded as patron activity					
229.	Allows the Library to set all loan period calculations, loan limits and thresholds at the branch level, if needed					

230.	Options for library to determine borrowing privileges based on borrower type, location, or material type					
231.	Option for staff or patron to activate or de-activate saving loan history in patron account					
232.	Support floating collections, including defined thresholds by location					
233.	Supports an unlimited number of item types					
234.	Ability to search any data point in the patron's record, including notes fields					
235.	Provides an offline function to charge and discharge materials on a circulation workstation or on a portable device and to load these transactions into the on-line circulation system at a later time					
236.	Mobile circulation can be used inside and outside the library building					
237.	Provide a mobile circulation platform available for use with a desktop PC, Android device, or iOS device					
238.	Mobile circulation provides 100% functionality offered by desktop circulation utility					
239.	Ability to turn RFID on and off with mobile circulation					
240.	Mobile worklists for Android and iOS devices					
241.	Mobile worklists provide real time updates					
242.	Ability to customize layout of receipts for check-out and arrived holds					
243.	Ability to advertise programs and services, including custom graphics, on the patron's printed receipt					
244.	Ability to provide receipts at staff workstations, self-checkout, and self-check-in					
245.	Supports printing of multiple receipts for all transactions, receipt to include any transaction notes when applicable					
246.	Ability to provide receipts via multiple options, including email, print, and text					
247.	Supports the ability to print multiple receipts of patron loan history by check out date, title, or author					
248.	Supports missing part check-in functionality					
249.	Supports check-in grace period to be determined by library system					
250.	Supports "bookdrop" or rapid bulk check-in to allow minimal staff involvement					
251.	Retains the following check-in information: date, timestamp, title, location, and user. Displays check-in information on check-in screen					

252.	Ability for staff, per user permissions, to override check-in or check-out date					
253.	Supports multiple notice types: friendly reminders, overdue, holds information, etc.					
254.	Supports the ability to specify which e-mail reminders, such as almost overdue/auto-renew, patron record expiration, hold cancellations, arrived hold and inactive patron, that patrons receive					
255.	Notification for holds, overdues and courtesy notices, includes all of telephone, email, and text					
256.	Option to cascade failed notices to secondary method of communication					
257.	Supports the ability to generate one notification (print, e-mail and/or text notices) for linked patron groups					
258.	Ability to customize wording and graphics for letters, emails, and text messages the system produces for patron notifications of overdues, holds, lost materials, and other system messages with no interaction with the ILS vendor					
259.	Ability to determine placement of address and salutation blocks of system-generated letters on common mailing envelopes, mailers, etc.					
260.	Ability to adjust/nudge placement of address/salutation blocks to match envelop windows, if necessary, with no intervention of ILS vendor					
261.	Supports the ability to retain and print a log of all notices sent to patron. Log should include date, timestamp, notice type, notice format, and contact information					
262.	Supports an unlimited number of patron types without vendor intervention					
263.	All fields searchable in customer record, including but not limited to: barcode, last name, first name, registered library, address, phone, e-mail, library defined fields, expiration date, registration date, last activity date, zip code, notes, blocks, birthday					
264.	Displays a patron's last activity date					
265.	Displays a patron's online activity date. Example: Last time patron accessed an item in a digital collection					
266.	Ability at the staff member level to view or edit each field in a patron record					
267.	Allows default values to be set when creating new patron records					

268.	Allows the Library to define fields as required, such as address, birth date, password					
269.	Ability to set default masking of numbers such as phone and birthdate					
270.	Supports loading patron photos from a Webcam, a digital camera, device camera, or an existing file and displays photo on the patron's record and check-out screen					
271.	Accommodates multiple patron addresses in the patron record					
272.	Accommodates at least two phone numbers in the patron record					
273.	Patron records need to support a notes field that allows an unlimited number of characters					
274.	Patron records support more than one notes field					
275.	Allow default values to be set differently by age, group, or borrower type					
276.	Supports the ability to integrate with a Driver License scanner to import information into the system					
277.	Ability to access the complete patron record from check-out screen					
278.	Ability of library to define patron membership term (expiration of patron record)					
279.	Ability for time lapse (example 24 hours), as defined by library), to control and update the patron profile between borrower types					
280.	Ability to allow a data point to automatically control and update the customer profile as defined by the library system. For example, allowing birth date to change a youth borrower type to a teen borrower type					
281.	Ability to choose the safeguard fields against duplicate accounts such as first name/last name/birthdate and provides a staff alert when suspected duplicate record found					
282.	Ability for staff, with correct permission level, to merge duplicate patron records					
283.	Ability when merging patron records to choose which field takes priority					
284.	Ability to force the deletion of patron records with administration approval					
285.	Ability to force a batch delete of patron records, with administration approval, that meet certain criteria. Example: long expired patron accounts					
286.	Ability to prevent deletion of patron records based on the following criteria: amount of money owed, items out, items on hold					

287.	Ability to force deletion of patron records with money owed during batch delete process, as approved by library administration					
288.	Ability to block a patron's account for a certain time and then automatically unblock					
289.	Offers an option for patron self-registration via online form whereby patrons are granted immediate, temporary, and limited privileges as determined by the Library					
290.	All self-registered patron accounts are automatically marked for address verification pending first library visit					
291.	Ability to customize the look of the self-registration form to the library's branding and color scheme					
292.	Ability to choose which fields and field options display on the self-registration form. Example: limiting which branches that a patron can choose during the self-registration process					
293.	Ability to batch add a set of new patron records from an .csv or .xls file. Example: Adding new public-school students to the library patron database					
294.	Patron can manage own account, including renew items, make payments, and cancel or freeze holds, with no staff intervention or additional data entry					
295.	System creates a staff alert to verify changes to membership information a patron updates in OPAC: name, address, phone number. Alert shows when patron visits library, and staff member accesses the patron account					
296.	System creates a staff alert to verify patron information when patron renews library account through OPAC. Alert shows when patron visits library, and staff member accesses the patron account					
297.	System creates a staff alert to verify updated linked patron information. For example, a parent updates information for a linked dependent child. Alert shows when linked patron visits library, and staff member accesses the patron account					
298.	Supports automatic renewal of items and notification to patrons of renewal status for physical items					
299.	Patron record includes field for option to receive publicity from library					
300.	Allows each Library to determine the method for sending each individual notice, including each					

	separate overdue notice (for example, 1st overdue by e-mail, 2nd by print, etc.)					
301.	Preserves individual patron account, notification, and borrowing activity when merging patron records					
302.	Ability to copy details from one membership registration to another. Example: Parent to dependent child					
303.	Supports linking associated patrons (family links)					
304.	Ability for library staff to see current and historical linked family circulation permissions for each patron					
305.	Connected memberships, with ability to choose relationships, can see items checked out, holds, and charges, and can renew items, make payments, and cancel or freeze holds					
306.	Supports multiple responsible party family links for dependent accounts					
307.	Supports the ability to designate up to three members of the associated patron's group who can pick up held items for other members of the group					
308.	Supports associated (linked) patron blocking for check-out and renewal based on policy					
309.	Item status does not change until hold is trapped					
310.	Ability to link back to the hold from any of the following record screen views: bibliographic, item, or patron					
311.	Supports mobile picklist for staff for Android and iOS devices					
312.	Allows staff to sort and print selected pick list of holds rather than all holds					
313.	Allows default holds fulfillment preference to local library					
314.	Ability for patron and staff to cancel holds					
315.	Ability for patron and staff to suspend or freeze holds from patron or staff at any point before or during check-in of item					
316.	Ability for patron and staff to change pickup location					
317.	Supports the ability to place requests for a single title for multiple patrons in one operation, without placing multiple individual requests					
318.	Supports the ability to place requests for any copy of a title (title level hold), a specific item (item level), or the first available copy of an item in a serial or multi-part set (such as the first available copy of season 1 of a TV series)					

319.	Allows for grouping multiple requests so that when any one is filled, the others in the group are cancelled. (For example, to get the first available copy of any of several Shakespeare plays)					
320.	Supports the ability for staff to transfer hold requests from one title to another					
321.	Generates a notice to the patron when an item is on hold shelf					
322.	Generates a notice if a request is cancelled/cannot be filled					
323.	Option to automatically notify patrons with holds when last copy is deleted					
324.	Option to automatically notify designated staff members when last copy is deleted and holds are attached					
325.	Automatically remove cancelled hold from another branch's message list					
326.	Automatic prompt to cancel or keep hold if checked out by another patron					
327.	Allows for complete control by library system of charge types. Includes the ability to hide or show system default charge types or create custom charge types					
328.	Allows for manually adding a charge to a patron record and include a note					
329.	Option to determine fines and fees by collection					
330.	Ability to define replacement cost of item by applying a flat rate or percentage of item cost to the listed cost in MARC record					
331.	Ability to calculate a patron's savings based on the patron's current check-out list, using the price based on the item price in the MARC Record					
332.	Ability to calculate a patron's savings based on the patron's yearly check-out list, using the price based on the item price in the MARC Record					
333.	Ability to print either/both the patron's current and yearly savings on the patron's check-out receipt, including customized text by the library					
334.	Allows the Library to block the patron for a threshold amount that is the total of actual fines					
335.	Ability for staff to reprint a paid receipt					
336.	Keeps all fine and fee transactions in a patron account history for library set length of time					
337.	Supports the ability to retain item title data in the patron financial history (charges/payments) even if the item is deleted or the barcode number is changed					

## ILL MANAGEMENT FUNCTIONS

The Library expects a system that fully integrates with Auto-Graphics ShareIt software for ILL (Inter Library Loan) functions but will also have basic ILL functionality if Auto-Graphics ShareIt software is not available.

ILL Functions		Yes	No	Future	Custom	Add'l Info
338.	Supports NCIP or otherwise integrates with the State of Louisiana ILL ILS vendor for seamless communication between Library ILS and State ILS					
339.	Integrated interlibrary loan functionality when requesting items: <ul style="list-style-type: none"> <li>• MARC records translate from AutoGraphics ShareIT to ILS</li> <li>• Allows AutoGraphics ShareIT to access patron data from ILS to lookup users</li> </ul>					
340.	Integrated interlibrary loan functionality for circulating items: <ul style="list-style-type: none"> <li>• Be able to check out/check in/look up item/renew item</li> <li>• Automatically delete ILL records once items are returned</li> <li>• Allow patrons to return ILL items to any branch, and have the record deleted upon return</li> <li>• Ability to edit NCIP records within ILS while maintaining NCIP status/not causing an error</li> </ul>					
341.	Interlibrary loan information is recorded in patrons account and title information is kept even after item is deleted from database					
342.	Ability for interface to interoperate with AutoGraphics ShareIT software on staff side					
343.	Ability for interface to interoperate with AutoGraphics ShareIt software on public side					
344.	Support for authentication of library users in ILS user database					
345.	Ability to send ILL overdue and ILL item ready for pickup notifications by email and text message					
346.	Ability for staff to get a report, for a specific time period, of all current ILL checkouts, as well as those that have been deleted, or have hold/overdue/lost status					
347.	Ability for staff to add and edit records for ILL items in ILS in order to allow item barcode to be used to check item out to patron					
348.	Ability for staff to delete records used for ILL items in ILS once they are no longer needed					
349.	Ability for ILL staff to place a hold, for items in current ILS, to be used for an ILL account					
350.	Ability to have unique item type used only for ILL item (NCIP)					

351.	Ability to have unique item type for ILL be shadowed within catalog, to prevent patrons from placing holds on ILL items on loan from another library system, but should be visible in ILS					
352.	Ability, based on permission level, to have only ILL staff place a hold on a current ILL item that is checked out to a patron					
353.	Interfaces: <ul style="list-style-type: none"> <li>• Interoperates with OCLC</li> <li>• Interoperates with other ILS</li> </ul>					

## INVENTORY FUNCTIONS

The Library expects a way to perform inventory will be provided as an integral part of the ILS system. The inventory method should be intuitive for staff to use.

Inventory Functions		Yes	No	Future	Custom	Add'l Info
354.	Ability to intuitively use the inventory function					
355.	Ability to perform inventory for all branches, one branch, or specific sections/collections as needed					
356.	Ability to perform inventory over 1 day or multiple days as needed					
357.	Ability to perform inventory at specific branch / location as needed					
358.	Ability to modify parameters for inventory as needed					
359.	Ability to quickly see results of items inventoried, items missing, items not checked in, items in mis-shelved (wrong collection or branch) within library					
360.	Ability to quickly and intuitively act on any discrepancies found while doing inventory. For example, mark many items missing					
361.	Ability to use mobile device to assist in the inventory that performs all or almost all functions as regular inventory					
362.	Ability to upload a file of scanned items to inventory system for inventory processing					
363.	Step by step instructions provided with screen shots for entire inventory process					
364.	Wireless inventory scanners will work with all parts of the inventory software					
365.	Allows the Library to do the following with the inventory utility and device: <ul style="list-style-type: none"> <li>• Download call number ranges of the Library's collection for easy shelf comparison</li> <li>• Scan barcodes on shelves or view list of items on shelves</li> <li>• Work in offline mode</li> </ul>					

	<ul style="list-style-type: none"> <li>• Use the utility as a collection weeding tool</li> <li>• Run reports to identify missing, exceptions, or out of place items</li> </ul>					
366.	Ability to use inventory utility on notepad or similar device					

## REPORTS FUNCTIONS

The Library expects that the reporting module can integrate ILS data for comprehensive Library reporting, with little interaction from the ILS company.

Reports Functions		Yes	No	Future	Custom	Add'l Info
367.	Ability to have unlimited staff users					
368.	Ability to assign granular permissions to users					
369.	Ability to import and export data, in industry standard formats, such as CSV, XLSX, XML, PDF					
370.	Reports and data visualizations incorporate ILS and non-ILS data					
371.	Incorporates external data from program attendance: <ul style="list-style-type: none"> <li>• Incorporates external data from demographics</li> <li>• Incorporates external data from web analytics</li> <li>• Incorporates external data from people counter</li> <li>• Incorporates external data from GPS information for library users and items, including geocoding</li> <li>• Incorporates external data from other library systems</li> <li>• Incorporates external data from surveys</li> <li>• Incorporates external data from Third party services, including email service providers</li> </ul>					
372.	Ability to report on and access any data available for reporting, including both ILS data and imported, external data					
373.	Makes 100% of the database schema available online to Library staff for purposes of developing custom reports and SQL scripts. If not 100%, please describe extent					
374.	Offers a wizard reporting software native to utility that allows for report customization on any/every data field by library, without vendor interaction					
375.	Ability to display data graphically					
376.	Ability for authorized users to create custom reports intuitively					
377.	Ability for library administration to disable "SAVE" function to prevent staff users from overwriting master reports. Offer SAVE AS functionality instead					

378.	Ability for library administration to restore a master report if accidentally saved over, without vender intervention					
379.	Offers a standard set of report templates which include both graphical and numerical visualizations of data, and can be customized by library with no interaction from Proposer					
380.	Ability to schedule reports and send to multiple users via email					
381.	Ability to schedule reports on hourly, daily, or monthly schedules					
382.	Ability to schedule reports to run with pre-selected parameters as chosen by library					
383.	Reports and visualizations include geographic mapping of users based on several criteria					
384.	Ability to produce activity and transaction reports based on workstation per day, including choice time period					
385.	Daily updates of holds pull list					
386.	Reports having the ability to provide evidence as collection analysis and evaluation functionality (like Edelweiss)					
387.	Integrates with Edelweiss					
388.	<ul style="list-style-type: none"> <li>• Provides library usage analysis reports</li> <li>• Provides reports for which library materials are used and in which locations</li> <li>• Provides recommendations for purchase, including title subject, author, DDC range, and genre</li> <li>• Provides recommendations for purchase based on hold levels</li> <li>• Provides recommendations for location balancing for floating collections</li> </ul>					
389.	Predictive analysis provides recommendations regarding what to add, remove/eliminate/cancel or change					
390.	<p>Ability to identify and report on patron activity. For example:</p> <ul style="list-style-type: none"> <li>• Report on how categories or demographics of patrons are using library resources</li> <li>• Track visitor and patron activity across multiple interactions</li> <li>• Report on what patrons' link to or download</li> </ul>					
391.	Ability to identify patrons within a certain group, like adult, juvenile, teen, staff					
392.	Ability to produce reports on demographics					
393.	<p>Provide reports on patron searches:</p> <ul style="list-style-type: none"> <li>• What search terms/subjects patrons search</li> </ul>					

	<ul style="list-style-type: none"> <li>• Where searchers come from, including other sites and item carousels</li> <li>• When/time of day searching occurs</li> <li>• How patron search (advanced, keyword, uses facets)</li> <li>• What patrons find or don't find in a search</li> <li>• Top search history</li> <li>• Which category/demographic of patrons are searching</li> </ul>					
394.	Ability to identify positive engagements					
395.	Ability to identify negative engagements such as inactivity or expired cards					
396.	Ability to produce searching reports, including cross-references between data sets					
397.	Statistics on electronic resources specific to branch patron's use					
398.	Ability to track website visits and form-fills and based on complex behaviors					

## DAY ONE REPORTS FUNCTIONS

In addition to the above functionality for the reports function below is a list of reports that are considered essential and should be in place from day one. These reports are required; however, if there is a similar function that does this instead of running a report then please note this.

For example: We currently must run a daily money report to calculate the funds received the previous working day, including all monetary transactions (cash, check, card) for all charge types (lost book, copies, etc.). If you have a similar function, without running a report, that is used in order to see which items need to be pulled from each location to fulfill a hold, please explain.

All reports, or similar function, should have the ability to have the parameters of the report modified, as needed depending on the type of report and results needed, to include / exclude branches, patrons, item types, shelf locations, dates (hourly, daily, weekly, monthly, yearly, previous years), orders, funds, current statuses, fees, expiration dates, cataloged dates, on order, etc.

All reports should also be able to be scheduled or run manually as needed

Day One Reports Functions		Yes	No	Future	Custom	Add'l Info
399.	A report, or similar function, to expire available holds that have been on the available hold shelf for specified number of days					
400.	A report, or similar function, that lists holds to reroute and/or remove from hold shelf due to patron modifying or canceling hold					
401.	A report, or similar function, that alerts staff to pull items that need to be trapped for holds					
402.	A report, or similar function, that alerts staff to pull items that were on order, and just received, that have holds on them					

403.	A report, or similar function, that alerts staff that a bibliographic record has item holds and all items are lost/missing/damaged status					
404.	A report, or similar function, that removes holds from the system that have never been filled, were cancelled, or otherwise still tied to patron record					
405.	A report, or similar function to give stats on where the holds were placed: OPAC, ILS, Mobile circ, Mobile App, etc.					
406.	A report, or similar function, that shows the total number of holds that were placed, filled, canceled either daily, weekly, monthly, yearly					
407.	A report, or similar function, that can list all items with holds for the entire system					
408.	A report, or similar function, that will allow entire record set or smaller subsets to be exported out to 3rd party to send via ftp in order to provide updated information on catalog items availability					
409.	A report, or similar function, that will generate notices for items that are overdue, and these notices sent either via phone call, text message, or email					
410.	A report, or similar function, that will generate a courtesy notices to alert patrons of upcoming due dates, and these notices sent either via, phone call, text message, or email					
411.	A report, or similar function, that will generate notices for patrons that have bills and these notices sent either via, phone call, text message, or email					
412.	A report, or similar function, that will generate notices for items that have available holds and these notices sent either via, phone call, text message, or email					
413.	A report, or similar function, that will generate notices for patrons' privileges that are soon to expire, and these notices sent either via, phone call, text message, or email					
414.	A report, or similar function, that will generate a list of all patrons, or subset of patrons, in the system					
415.	A report, or similar function, that will generate a list of newly added patrons to the system					
416.	A report, or similar function, that will change a group of patron status from ok, delinquent, blocked, barred based on certain settings					
417.	A report, or similar function, that will list patrons with charges					
418.	A report, or similar function, that will automatically move patron items to lost or lost					

	assumed and bill the patron for items still checked out after a specified number of days past the original due date					
419.	A report, or similar function, that will allow individual or batch removal of expired patrons					
420.	A report, or similar function, that will allow removal of patron charge history if desired					
421.	A report, or similar function, that lists patron records missing essential information in patron record					
422.	A report, or similar function, that lists patrons with notes in their account, including the note					
423.	A report, or similar function, detailing charges paid, which patron paid, which staff member assisted, and which branch received payment					
424.	A report, or similar function, should move items in the location of missing, lost, lost assumed, etc... to the location of discard					
425.	A report, or similar function, should remove items completely from the system that are in the discard location					
426.	A report, or similar function, should show all items in transit either to a branch or from a branch					
427.	A report, or similar function, should show the status of all items for entire system or by branch or within a branch for a shelf location					
428.	A report, or similar function, should show all items checked out by location, item type, and patron type					
429.	A report, or similar function, should automatically renew items checked out based on certain criteria					
430.	A report, or similar function, should notify patrons of items that were auto renewed, and these notices sent either via text message or email					
431.	A report, or similar function, should alert staff to items that have been on order for 6 months or more and still haven't been received					
432.	A report, or similar function, should allow staff to see all aspects of a fund or all funds for this fiscal year or previous years					
433.	A report, or similar function, should allow staff to see all aspects for a vendor or all vendors for this fiscal year or previous years					
434.	A report, or similar function, should allow staff to see all aspects for invoices for this fiscal year or previous years					
435.	A report, or similar function, should allow staff to see all aspects for orders for this fiscal year or previous years					

436.	A report, or similar function, should allow staff to process serials					
437.	A report, or similar function, should allow staff to import records into ILS for cataloging, acquisitions, serials, or other modules as needed					
438.	A report, or similar function, should allow staff to view what requests have been submitted by patrons requesting information or requesting an item be purchased					
439.	A report, or similar function, should allow staff to view what ILL have been submitted either by staff or patrons, if ShareIt does not handle this					
440.	A report, or similar function, should allow staff to see what serials have or have not been received for this fiscal year or previous fiscal years					
441.	A report, or similar function, should allow staff to see what is in locations like missing, discard, lost, repair, cataloging, etc.					
442.	A report, or similar function, should allow staff to see what items were marked as “in house use” or “mark item used” for items used within the library and this list should be able to be daily, weekly, monthly, yearly					
443.	A report, or similar function, should allow staff to view all items added to catalog, removed from catalog, or edited daily, weekly, monthly, yearly					
444.	A report, or similar function, should allow staff to see, and count, all registered borrowers					
445.	A report, or similar function, should allow staff to see, and count, all items in the collection					
446.	A report, or similar function, should allow staff to see, and count, all circulation					
447.	A report, or similar function, should allow staff to see, and count, all items added					
448.	A report, or similar function, should allow staff to see, and count, all items removed					
449.	A report, or similar function, should allow staff to see, and count, all bills paid					
450.	A report, or similar function, should allow staff to see, count, and remove paid bills for a certain period					
451.	A report, or similar function, should allow staff to see, and count all items that were renewed					
452.	A report, or similar function, should allow staff to look at transactions on particular patron, item, or staff member either live (things that were done today) or a history (things that were prior to today)					

## SERIALS FUNCTIONS

The Library expects a seamless tracking solution for the serial's module, with limited staff interaction once the parameters are established.

Serials Functions		Yes	No	Future	Custom	Addt'l Info
453.	Ability to automatically send claimed missing issues to serials management vendor, as per configured parameters, with no staff intervention					
454.	Report of missing issues automatically generated					
455.	Ability to report missing issues					
456.	Ability to create frequency of serials templates					
457.	Ability to utilize frequency information from vendor to automatically create check-in boxes					
458.	Display of serials holdings data in other modules (ex. Issues in Catalog)					
459.	Accommodate and link title variations					
460.	Accommodate and link multiple formats of the same title (print, fiche, electronic)					
461.	Hyperlink to e-version of journal					
462.	Flexible, customizable display of call number and location					
463.	Share Proposer records with acquisitions module					
464.	Share fund records with acquisitions module					
465.	Support automatic or mediated claims and cancellations in email or print formats <ul style="list-style-type: none"> <li>• Manually, via email</li> <li>• Manually, via printouts</li> </ul>					
466.	Ability to utilize frequency information from vendor to automatically create check-in boxes					

## MIGRATION AND SUPPORT

Professional and available support is required once the system is live and functional. Data record counts can be found in Section 1.3 Statistics and Record Counts.

Migration and Support		Yes	No	Future	Custom	Addt'l Info
467.	Work flow analysis is available and conducted before migration of data and before system parameters are established					
468.	Easy and complete migration of Patron, Item Data and bibliographic data from The Library Corporation Library.Solution 4.2					
469.	Data migration plan, with chronological timeline, provided to library by Proposer					
470.	Data migrated in a secure fashion, using industry standard encryption					
471.	Availability of tools to convert/upgrade MARC data for increased discoverability, including					

	BibFrame, Linked Data, or another future cataloguing schema					
472.	Documentation is accessible for all ILS and catalog functions					
473.	Keyword accessible help pages with step-by-step instructions					
474.	Training, whether onsite or online, is provided for all functionality, including system administration and configuration					
475.	Staff authorization is role based and can be customized					
476.	Proactive alerts are provided regarding system and software issues					
477.	Known issues are published with up-to-date notes					
478.	Regular updates on open tickets are provided to ticket creator					
479.	Ability for multiple people (role based) to create help tickets					
480.	Ability for multiple people (role based) to view all help tickets past and current					
481.	Clear escalation process is provided for unresolved issues					
482.	Included password recovery feature through email					
483.	On-going separate test environment for ILS is provided to try and test settings and configuration, as well as training. Test environment should include admin settings utility, catalog utility, and circulation utility, at a minimum					
484.	System allows staff to change their own password with option to require override password					

## SYSTEM FUNCTIONS

The Library requires the ability to apply customizations to the system for both branding and security purposes.

System Functions		Yes	No	Future	Custom	Add'l Info
485.	MS SQL database environment with complete open access					
486.	Offers SQL training to customer to write custom reports					
487.	Ability to distinctly brand and customize options for staff and public interfaces					
488.	Development cycle that is responsive to known issues and enhancements					
489.	Notice of software update or System Maintenance via email provide a minimum of 48 hours in advance					

490.	Software as a Service (SaaS) Facility has a secure back up power supply					
491.	SaaS Facility has a fire suppression system					
492.	SaaS Facility has fully secure access and provides onsite security personnel					
493.	SaaS server is configured for 99.9% availability, including detailed plan of how Proposer handles unexpected downtime and restoring access					
494.	SaaS server is monitored by Proposer for disk space, memory usage, Central Processing Unit (CPU) utilization and process status					
495.	All the data held in the ILS should be encrypted. This includes “data at rest” and “Data in motion”. All backups should be encrypted					
496.	Provide access to detail disaster recovery before go live date					
497.	Proposer takes legal and financial responsibility for breaches of security of sensitive data, i.e., library patron data					
498.	Automatic regular backups					
499.	Software regularly updated and upgraded with minimal impact on service					
500.	Security measures are included to minimize chance of fraudulent activity or access					
501.	Customer information and backups remain in the United States					
502.	ILS Client compatible with Microsoft Windows 10					
503.	Backups daily, weekly					
504.	System backup performed by Proposer					
505.	Ability to create logs such as audit, event, transaction					
506.	Ability to search and view logs such as audit, event, transaction					
507.	Ability to roll back server in the event of system or human error					
508.	SaaS Solution automates regular administration tasks such as but not limited to: <ul style="list-style-type: none"> <li>• Backups</li> <li>• Daily updates of holds pull list</li> <li>• Daily blocking of delinquent accounts</li> <li>• Daily notice creation</li> </ul>					
509.	Granular security that can be applied to each user account					
510.	Ability to customize the staff interface					
511.	Ability to customize the public interface					
512.	Ability to maintain customizations with upgrades					
513.	Ability to add and integrate Application Program Interface (APIs), which are RESTful compliant					

514.	Documentation for API integration and usage examples					
515.	Ability to create individual logins for each staff user with multi-level permissions for functionality and data viewing in each utility/module of the ILS offered by the Provider					
516.	Allows staff to access multiple modules of the system through a single interface					
517.	Use natural language to describe functions (e.g., check-in, check out, etc.) or the ability to edit					
518.	Uses standard Windows copy/cut/paste keyboard commands					
519.	If awarded Request for Proposal (RFP) must supply a Holiday closure schedule					
520.	Ability to add and subtract locations without additional cost					
521.	SaaS Solution provides Method for automating regular administration tasks such as but not limited to: <ul style="list-style-type: none"> <li>• Daily email notice bounced flags patron record</li> <li>• Suppress email notices once a notice bounce flag has been set</li> </ul>					
522.	Authentication of staff accounts using Active Directory for a Single Sign-on Environment, at no additional charge					
523.	Ability to make mass changes to staff user accounts					
524.	Ability to force password resets or force password changes to one, a group, or all user accounts					
525.	The ability to integrate Geographic Information System for address verification					
526.	24 X 7 Support					
527.	Ability to add and subtract SIP and/or NCIP licenses without additional cost					
528.	SaaS must allow for location-based software access or not as required (i.e., white-listing)					
529.	System provides a responsive public interface offering full searching and patron self-service options					
530.	HTML 5					
531.	Radio Frequency Identification (RFID) compatible					
532.	Offline mode available for check-in, check-out functions when connection to database is down/unavailable					
533.	SSH Certificate for site and PAC					
534.	Agrees to sign a contract with Bossier Parish Libraries and Bossier Parish School Board to protect student privacy for student and teacher eCard accounts					

## ATTACHMENT B – COMPATIBILITY CHECKLIST

### 1. Compatibility Checklist – Equipment, Software, and Standards

Please indicate compliance with each by checking either a YES or NO answer. A ‘YES’ answer indicates 100% compliance with the entire statement. Explain all ‘NO’ answers in the deviation section.

To provide additional information about any of the items listed please include in separate document that clearly indicates item number and item name to which the supporting material refers.

	Equipment, Software, and Standards	Yes	No	Deviation
1.	Star Micronics TSP100 Thermal Receipt Printers			
2.	Touch screen catalogs for public use			
3.	Ability to read 14-digit Codabar Library Cards			
4.	Ability to read 14-digit Codabar Item Barcode labels			
5.	Microsoft Windows, latest version			
6.	Centurion Shield software for public and PAC PCs			
7.	z39.50 Client and Server			
8.	Session Initiation Protocol (SIP)2			
9.	Niso Interchange Protocol (NCIP)			
10.	Application Programming Interface (API)s			
11.	Peripheral Component Interconnect (PCI) compliance for all financial transactions			
12.	MAchine Readable Cataloging (MARC)21 / National Information Standards Organization (NISO) standard			
13.	Dublin-C / NISO Standard			
14.	Resource Description and Access (RDA) / NISO standard			

### 2. Compatibility Checklist – Third Party / ILS Interfaces and Integrations

	Third Party/ILS Interfaces and Integrations	Yes	No	Deviation
15.	Integrated Accelerated Reader (AR)/Lexile Measure			
16.	EBSCO Library Aware Newsletters			
17.	EBSCO Novelist			
18.	hoopla by Midwest Tape eContent service			
19.	Ingram iPage			
20.	Baker & Taylor Titlesource 360			
21.	Midwest Tape			
22.	Syndetics Solutions			
23.	Short Message Service (SMS) text service			

**ATTACHMENT C – REFERENCES**

**Current Clients**

A successful proposal will include at least three (3) current business references who have received services from your company using this form. Please include libraries of similar size to BPL and closest geographical location, if applicable. References must include library name and address as well as the name, email address, and phone number of the contact person. The library is especially interested in public libraries in Louisiana operating your system as proposed.

Name of Public Library	Contract Start Date
Client Contact Name	Title
Client Email Address	Client Phone Number

Name of Public Library	Contract Start Date
Client Contact Name	Title
Client Email Address	Client Phone Number

Name of Public Library	Contract Start Date
Client Contact Name	Title
Client Email Address	Client Phone Number

Name of Public Library	Contract Start Date
Client Contact Name	Title
Client Email Address	Client Phone Number

Name of Public Library	Contract Start Date
Client Contact Name	Title
Client Email Address	Client Phone Number

Name of Public Library	Contract Start Date
Client Contact Name	Title
Client Email Address	Client Phone Number

**Past Clients**

Please include at least three (3) past business references who have received services from your company and with whom you no longer provide service. Please include libraries of similar size to BPL and closest geographical location, if applicable. References must include library name and address as well as the name, email address, and phone number of the contact person. The library is especially interested in public libraries in Louisiana who were operating your system as proposed.

Name of Public Library	Contract Start Date
Client Contact Name	Title
Client Email Address	Client Phone Number

Name of Public Library	Contract Start Date
Client Contact Name	Title
Client Email Address	Client Phone Number

Name of Public Library	Contract Start Date
Client Contact Name	Title
Client Email Address	Client Phone Number

Name of Public Library	Contract Start Date
Client Contact Name	Title
Client Email Address	Client Phone Number

Name of Public Library	Contract Start Date
Client Contact Name	Title
Client Email Address	Client Phone Number

Name of Public Library	Contract Start Date
Client Contact Name	Title
Client Email Address	Client Phone Number