



# SEO LIBRARY CONSORTIUM

## Request for Proposal Integrated Library System

Vendor questions due: March 24, 2020

Responses due: 9:00AM, April 14, 2020

[State Library of Ohio's SEO Library Consortium \(SEO\)](#), a library consortium serving 95 Library systems with 241 locations across 49 counties all over Ohio, seeks proposals from experienced and qualified firms to provide the software as a service (SaaS), services, and support required to implement a new Integrated Library System.

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## 1. Introduction

We thank you in advance for the time and effort you will put into responding to this RFP. We are pleased that your company is committed to your library customers and the communities they serve.

We hope that this RFP allows the State Library of Ohio's SEO Library Consortium to find a partner that will provide an Integrated Library System that fully supports the mission and vision of our member public libraries. We know a good ILS can provide innovative tools that help library staff members make their institutions effective platforms for their patrons to unlock their aspirations and potential.

**Offerors must include completed copies of Supplement A and Supplement S with their proposal. Offerors must follow the completion instructions contained in the supplements when preparing their responses.**

## 2. Purpose

This Request for Proposal contains the functional specifications and related information for the delivery, installation, and maintenance of an Integrated Library System (ILS, or "system") or Library Services Platform (LSP) for the State Library of Ohio and used by the members of the SEO Library Consortium, (SEO or "the consortium") as specified in Appendix A. SEO library members (or "libraries" or "members") desire a reliable, flexible, proven, and leading-edge automated library system. The system must support relevant library standards, information technology, security, and telecommunications standards. The goals of the project are to:

1. Move to a state-of-the-art ILS that will support the customer service and collection management goals of consortium members.
2. The ILS must be cost-effective and economically sustainable to maintain.
3. The ILS shall be appropriate for the unique challenges and aspirations of public libraries and public library consortia.
4. The ILS must take advantage of new and emerging technologies, library standards, and information resources integration in support of the outstanding library service offered by SEO member libraries.
5. The system's Online Public Access Catalog (OPAC or PAC) should be best-of-breed and responsively designed. Search results should be fast and accurate; a user should get an immediate response and be able to trust that those results are reliable. The OPAC will have modes of operation that are simple enough to accommodate the first-time user and the needs of the most sophisticated searcher. *Each* SEO member library should be able to define **their** content universe available in the catalog that includes all licensed, owned, shared, and free content.

### 3. Contact for Further Information

Inquiries arising from any discrepancies, omissions, or other need for clarification in this document must be submitted in writing to SEO no later than March 24, 2020.

The words "Integrated Library System RFP Inquiry" must appear on the envelope or subject line of an e-mail to the designated contact.

Send inquiries to:

**John Stewart, Director**  
**SEO Library Consortium**  
**40780 Marietta Rd.**  
**Caldwell, Ohio 43724**  
**Phone: 740-783-5705**  
**FAX: 1-800-446-4804**  
**[jstewart@library.ohio.gov](mailto:jstewart@library.ohio.gov)**

Unless authorized by the Director, no other consortium officer or employee may speak for SEO (SEO Library Consortium) regarding this solicitation until an award decision is complete. Any Proposer seeking information, clarification, or interpretations from any other consortium officer or SEO employee uses such information at Proposer's own risk; SEO is not bound by such information. Following the Proposal submittal deadline, Proposers shall continue to direct communications to only the Director or designee.

To the extent practical, SEO will attempt to answer questions it deems are both in its best interest and contribute effectiveness and fairness of the process. To the degree possible, SEO will answer questions as they are received. Responses will be sent to all Proposers. The identity of the party who asked a question will not be included in any answer. SEO reserves the right to edit the wording of questions to improve the value of the answer(s) disseminated.

Furthermore, SEO reserves the right to ignore certain types of questions. SEO shall not be held responsible for verbal changes or amendments to this RFP. All changes or amendments to this RFP shall be in the form of an addendum which shall be furnished to all parties who intend to submit an RFP response.

This RFP and all subsequent modifications to it are hereby designated as the sole reference and authority for the preparation of proposals and take precedence over any and all information related to the acquisition obtained from any source either by verbal or written communication.

## 4. Terms of Proposal

### 4.1 Proposal Validity Period

Submission of a proposal signifies the Vendor's agreement that its proposal shall be binding upon the Vendor and may be accepted by SEO at any time within 90 days after the date on which proposals are opened. The contents of the successful proposal shall be incorporated as part of the resulting contract with the successful Vendor.

### 4.2 Withdrawal of Proposals

Proposals may be withdrawn upon written or faxed request if received from Vendors prior to the stated date and time of proposal submission. Negligence, error, or oversight confers no right for withdrawal of the proposal after the time fixed for proposal submission.

### 4.3 Proposal Rejection

SEO reserves the right to reject any or all of the proposals received in response to this request. SEO also reserves the right to waive any irregularities in proposals.

### 4.4 Vendor's Cost to Develop Proposal

SEO is not liable for any cost incurred by any Vendor prior to the award of a contract. Costs for developing proposals in response to this request are entirely the obligation of the Vendor and shall not be chargeable to SEO.

### 4.5 Contract Documents

The selected Vendor will be required to execute a contract with SEO. This invitation to Vendors, the selected Vendor's proposal, and any subsequent proposal correspondence will become a part of the contract.

### 4.6 Format

The Vendor will provide 10 print copies of its response to this document. If the Vendor chooses to include promotional material, a single copy will suffice. Print documentation should be sent to John Stewart at the address previously mentioned. Vendors are encouraged (but not required) to provide a copy of the bid in electronic format, preferably using Microsoft Word or PDF format.

**SEO Library Consortium must receive the bid no later than 9 a.m. Eastern Time April 14, 2020.**

#### **4.7 Proposal Evaluation**

SEO and such advisors, as it may choose to call upon will review and evaluate all proposals which are submitted by the time required and are presented in the format prescribed in this RFP. SEO may or may not select the system with the lowest initial purchase price.

Proposals evaluated using the following criteria:

- Company (One Third)
- Product (One Third)
- Cost (One Third)

#### **4.8 Confidentiality and Disclosure**

SEO is an entity of the State Library of Ohio. We will not circulate vendor responses to member libraries, but the agency will prepare a registry of proposals once opened containing the names and addresses of each offeror as required for oversight. The bids are, however, a matter of public record. The submission of a bid signifies acceptance of these conditions.

#### **4.9 Indemnification**

All proposers hereby expressly agree that they will hold harmless and indemnify State Library of Ohio, SEO, its officers, agents, and employees from liability of any nature or kind connected with the RFP process.

### **5. Anticipated Timeline**

Release of Bid Document: March 3, 2020

Questions submitted by March 24, 2020

Bids due: 9:00 AM, April 14, 2020

Scripted Demonstrations (if requested): Week of May 4th, 2020

Vendor Selection: May 14, 2020

Beginning of negotiations with selected Vendor: May 19, 2020

Contract Signing: May 27, 2020

System Go-Live Date: No later than June 30, 2021

This timeline is for guidance only. SEO reserves the right to accelerate or delay elements in it as circumstances warrant.

## 6.1 About SEO

The SEO Library Consortium (SEO) is a member-driven, patron-focused consortium in Ohio. The SEO Service Center is located at 40780 Marietta Rd. Caldwell, Ohio 43724. SEO is a library support organization that helps the library staff in our consortium serve their communities. SEO service locations encompass 95 independent public libraries, 241, main libraries, branch libraries, bookmobiles, schools, special and academic, in 49 counties across Ohio.

Since 1986, SEO has provided the automated systems that allow libraries in this consortium to share their resources and protect their data. Our Integrated Library System (ILS) enables library staff members to process, loan, and manage the inventories of physical and electronic materials owned by member libraries. It also allows library patrons to place holds on physical and electronic materials held by any public library in the SEO Library Consortium.

SEO provides automated systems to library staff, including:

- Integrated Library System software;
- A content management system that contains information for Library Staff on a variety of topics related to SEO, including advisory, services, and support. It's the central repository of ILS documentation;
- Support desk software;
- Shared eContent collections via [The Ohio Digital Library](#), including ebooks, audiobooks, movies, and music;
- Enrichment services (Syndetics Unbound) that are integrated into the online catalog to provide interactive exploration;
- EBSCO Discovery Service (EDS) provides access to [Ohio Web Library](#), which is the statewide collection and resources a partnership of Ohio libraries and library organizations that work together to provide a core collection of information resources and library services that will help all Ohioans compete in the global knowledge economy.

SEO provides our Members with a variety of services, including:

- Training for all automated systems;
- Support of all automated systems;
- Workflow consulting services;
- Email services

## 6.2 Database Characteristics

|                                 |            |
|---------------------------------|------------|
| Bibliographic records           | 1,425,277  |
| Authority records               | 1,414,914  |
| Item records                    | 8,023,895  |
| Patron records                  | 854,405    |
| Annual circulation              | 15,067,714 |
| eContent titles                 | 182,410    |
| eContent items                  | 448,238    |
| ODL Annual eContent circulation | 5,591,000  |
| ODL Annual eContent holds       | 289,512    |

System sizing should anticipate a growth factor of 5% annually in all of these characteristics over the next five years.

SEO member libraries perform copy cataloging using OCLC Cat Express. Original cataloging is performed by a Technical Services committee for member libraries data. SEO obtains MARC bibliographic records from OCLC for its shared database. SEO, with the assistance of the SirsiDynix Authority Control Service, maintains Library of Congress Authority Records.

## 6.3 User Characteristics

|                               |         |
|-------------------------------|---------|
| Number of libraries           | 95      |
| Physical service locations    | 241     |
| Registered staff workstations | 900+    |
| Dedicated OPAC stations       | 850+    |
| Staff users                   | 3200    |
| Consortium service population | 883,588 |

## 6.4 Third-Party Product Integration Characteristics

SEO expects the prospective ILS vendor to provide the foundation to support the continued use of third-party products and vendors via the SIP2 protocol, customized API, Webservices, or automated exports. SEO expects that the vendor will provide configuration assistance that will enable SEO libraries to offer these services on day one of their go-live.

SEO libraries use the following third-party circulation products that integrate with the ILS.

| Type            | Manufacturer | Protocol | Number of units |
|-----------------|--------------|----------|-----------------|
| Self-Check Unit | 3M           | SIP2     | 2               |
| Self-Check Unit | Open Source  | SIP2     | 2               |

| Type            | Manufacturer                     | Protocol         | Number of units |
|-----------------|----------------------------------|------------------|-----------------|
| Self-Check Unit | BayScan                          | SIP2             | 2               |
| Self-Check Unit | EnvisionWare                     | SIP2             | 22              |
| Mobile App      | BC Mobile, SirsiDynix            | Web Services     | 24              |
| Mobile App      | Capira, Capira Technologies, LLC | Web Services     | 1               |
| Collection HQ   | Bridgeall Libraries Ltd          | Automated output | 2               |

SEO Libraries use the following third-party products that use SIP2 (63 total ports) to perform patron authentication.

| Type                  | Manufacturer | Number of Libraries  |
|-----------------------|--------------|----------------------|
| PC Reservation        | EnvisionWare | 12 shared interfaces |
| Cassie PC Reservation | Librarica    | 2 shared interfaces  |
| 24 Hour Library       | Envisionware | 2, LLP, LBR          |
| Tele messaging        | SirsiDynix   | 1                    |
| Envisionware Payment  | Envisionware | 1, TCO               |

SEO Libraries use the following eContent providers. These providers use SIP2 to authenticate patrons.

- OverDrive
- Kanopy
- RB Digital
- LYNDA
- Creative Bug
- Gale Virtual Reference Library
- Freegal Music
- HOOPLA
- TumbleBooks
- Comics Plus
- Axis360
- Zinio
- Flipster

SEO libraries use the following providers for patron self-service circulation and materials booking:

- Library Elf (JANDI)
- Plymouth Rocket (KitKeeper)

SEO libraries use the following event calendar providers:

- Plymouth Rocket (EventKeeper)
- Evanced
- LibraryInsight

The SEO OPAC integrates data from the following enriched content providers and readers' advisory platforms:

- ProQuest Syndetics Unbound
- EBSCO Discovery Service

When and if third party integration problems are encountered, SEO will expect the ILS Vendor to communicate with any third-party product provider and assist SEO to obtain a successful resolution to the problem(s). SEO requires the prospective Vendor to maintain productive working relationships with all the companies that provide SEO and its members with these critical services. Vendors should indicate whether they have a current or planned relationship with these third-party companies.

### ***6.5 Telecommunications Characteristics***

SEO libraries have business-class broadband provided to the majority by The [Ohio Public Library Information Network \(OPLIN\)](#). There are some branch locations that subscribe to local business class broadband.

- The SEO Service Center has an Ethernet fiber connection configured for 100mbps download and 100mbps upload speed.
- SEO maintains rack space in the OPLIN core network at the [SOCC](#) and utilizes this space to host the consortium Forcepoint VPN appliance. Connectivity for this appliance is 1000mbps.
- All Main Library locations have 50mbps to 1000mbps business class broadband.
- Branch locations can vary but we should have no location under 10mbps.

The SEO Service Center uses a Forcepoint 1401 Next Generation Firewall/VPN appliance at its colocation. All library sites are whitelisted and provided with a single advertised address to connect to the current Symphony system. When connecting to the advertised address, connections are redirected via a VPN to our vendor-hosted solution. SEO maintains vendor support coverage on all consortium equipment.

OPLIN manages DNS for SEO and its member libraries.

### ***6.6 Current ILS and Functional Modules in Use***

SEO's current ILS is SirsiDynix Symphony 3.6.1 which is hosted in the vendors SaaS environment.

SEO uses the following modules:

- Cataloging & Technical Services
- Authority Control
- Acquisitions: Two libraries use the Symphony Acquisitions module. In the future, more libraries plan to use this module. SEO uses a de-centralized model for materials acquisition.
- Circulation: SEO libraries have independent circulation policies and fine rules. The patron database is shared among libraries. SEO libraries allow reciprocal borrowing of their materials. The Circulation system also supports interlibrary loan among member libraries.
- [Enterprise Online Public Access Catalog \(OPAC\)](#) search and discovery tool that helps patrons find what they need through a single search box. Accurate search results even when typos, misspellings, diacritics, prefixes, and suffixes are involved. In addition, community features and library-owned resources.
- [BLUEcloud Mobile](#) lets our users access their library anytime, anywhere. Physical and digital resources are available side by side.
- Outreach Services
- [BLUEcloud Mobile Circulation App](#) allows for remote (outside of the network) ILS access and is available for staff and libraries performing Outreach services.
- Reporting: Many customized reports are available to our members. Our members may run reports on a scheduled or ad-hoc basis. Members may request the delivery of reports via the ILS application. Delivery methods include client interface and email.
- [BLUEcloud Analytics](#) allows members a web-based application for on-demand reporting as needed. Currently, members have access to the SirsiDynix BC Analytics tool to accomplish this required self-service function.
- NCIP: As a division of the State Library of Ohio, this module was purchased to provide the ability to place unmediated ILL requests among other in-state consortia. The Z39.50 protocol to search SEO's database and the NCIP protocol to authenticate SEO patrons, place and fulfill holds, and track requests.
- Unlimited SIP license: SEO uses the SIP2 protocol for self-check hardware and patron authentication for a variety of content providers.
- [API: API's](#) are available to SEO staff and third-party vendors
- Database Access: SEO Staff has full access to the ILS database to include command-line access to support API functionality.
- Server Access: SEO staff has the ability to execute Bash scripts, Perl Scripts, look at system, transaction, and history logs in real-time and also performance metrics that helps us make decisions
- Serials Control for serials management
- eContent integration in member OPAC's via [SirsiDynix eResource Central](#).
- Integration of taking online payments via PayPal

## 6.7 Current Server Hardware Characteristics

**SaaS Managed Solution** – Production system and Training environment

## 6.8 Local Support Characteristics

SEO staff is on the following support coverage schedule:

Monday – Friday: 8:00 AM – 7:00 PM

Saturday: 8:00 AM – 5:00 PM

Sunday: Closed

## 7. Desired Vendor Profile

SEO seeks an experienced and reliable library automation vendor with a proven record of accomplishment, delivering excellent library automation and support services. Experience with large library systems, library consortia, and libraries of all types is essential. A vendor must have experience migrating large sites' automation systems successfully. SEO requires the vendor to have experience migrating bibliographic, authority, item, patron, bills, holds, and acquisition data from the SirsiDynix Symphony system.

The selected vendor must have excellent installation, training, documentation, and customer support services.

The vendor will have demonstrated consistently that it continues to develop its system in a timely manner. The successful vendor will not merely be aware of the changing technical environment surrounding Integrated Library Systems but will have developed and implemented a strategy to take advantage of those changes. Part of that strategy will be developing and using mechanisms to obtain and respond to customer input on changes to the system. The new developments in the system must meet the same quality control standards as that of the base system.

The successful vendor will be financially stable and have demonstrated a continuing commitment to the library marketplace. Vendors that are parts of corporations that are not exclusively focused on the library automation marketplace will need to demonstrate the viability of the library division as a standalone entity. While SEO expects that the relationship will fit into the standard vendor/customer model, we also expect that there will be that element of partnership that characterizes the best of those relationships. The vendor must also be willing to work with other SEO partners, including:

- 3M Systems
- EnvisionWare
- OverDrive
- Gale
- EBSCO
- UNIQUE Management Services, Inc.
- BayScan
- Baker & Taylor
- Ingram
- Midwest Tape

- SirsiDynix
- OCLC
- Database providers
- Other Ohio libraries and consortia with who SEO shares resources.

### ***7.1 Corporate Information***

Please provide the following corporate information:

- Company History
- Identify the majority owners of your company
- Identify the minority owners of your company
- How long have your majority owners held your company in their portfolio?
- Describe how much experience your majority owners have in the library technology industry
- Describe the commitment of the majority owners to the library technology industry
- List of Executives, backgrounds, and time with the company
- The current number of people employed
- The current number of support staff
- The current number of locations, sales, service, and training
- Explanation of any lawsuits now pending involving the vendor
- Any plans for merger or acquisitions
- Schedule of implemented releases over the past two years

### ***7.2 Schedule of Planned Releases***

SEO requests that the vendor provide a schedule of planned releases (a product plan of record and/or product roadmap) that includes release features and scheduled release dates for the next three years. SEO is interested in seeing this information for each client platform that appears in this RFP response.

### **7.3 Number of Customers with a Similar Profile**

Please list the number of consortium customers with a similar profile to SEO. Please base this comparison on SEO's database characteristics, number of public libraries, and user characteristics. Please provide the names and addresses of each consortium along with the relevant database and user characteristics.

### **7.4 Vendor Responsibilities**

SEO is looking for a vendor that takes full responsibility for all aspects of development for the ILS software. The vendor should have full authority to manage all aspects of its ILS software development lifecycle.

The development of the ILS should take place under the authority of the vendor and its employees. The vendor and its employees shall have final authority and responsibility for:

1. The source code of the software
2. All product specifications
3. Planning and coordination of all software releases
4. Performing robust quality assurance, including regression, performance, platform, and load testing on the ILS software before each release
5. Ensuring that software meets or exceeds the functional and performance requirements contained within the product specifications
6. Performing all release management activities including alpha and beta testing of the software
7. Ensuring that comprehensive end-user, API, and database documentation is created prior to the beta release of the software
8. Ensuring that development teams fix bugs after the release of the software
9. Providing exceptional customer support services for the ILS software
10. Providing comprehensive and comprehensible end-user training for its software
11. Providing installation services and maintaining all technical documentation related to the development of its software

### **7.5 Sole Source**

The Vendor must be the sole provider of its ILS software in North America.

## **8. Desired System Profile**

The specific system requirements and specifications outlined elsewhere in this document are given in the context of this general statement of what SEO expects of an Integrated Library System:

SEO expects that its system will be a cost-effective tool for its member libraries' customers and staff members. It will be dependable, easy to use, and attractive to both staff and public users.

The system will have the ability to enable users of whatever variety (staff, public, managers, or system staff) to access information, make appropriate modifications of that information, and conduct appropriate transactions using that information. It will accommodate batch/bulk updates to the database, including global updates and changes to patron, bibliographic, item, serials control, acquisitions, and authority records using flexible criteria. Further, the system should support and allow purges of patron, bibliographic, authority, serials, acquisitions, and item records using library established criteria.

One of the primary design features of the system will be the accessibility of meaningful, effective support for SEO and library staff members. This will take the form of an intuitive user interface with interactive help, tutorials, prompts, and responses to user errors, and superior end-user documentation.

The system will be characterized by a superlative online catalog (OPAC). This catalog will have modes of operation that are simple enough to accommodate the first-time user as well as the needs of the most sophisticated searcher. The display of information can be set on a session-by-session basis to look like the catalog of the agency (or even a collection within an agency) or to display whatever wider portion of the information universe that the user has accessed. It will have the widest possible range of search elements and of sorting options for retrieved records. There will be no elements of functionality in the catalog that are not available for the staff to use in its efficient workflow.

The system will have the flexibility to accommodate parameters that reflect the different policy decisions of the various members of the consortium. At the same time, its structure will enhance rather than impede the efforts of these libraries to cooperate with one another and with other parts of the library community.

The system will have the capacity to generate a wide variety of ‘canned’ and custom reports on the characteristics of the database and on the activity that takes place on the system. Ideally, the development of those reports will be able to take place without specialized knowledge of programming or of tools such as SQL and vendor-supported Application Programming Interfaces (API’s). Both reports and standard notices should be able to be generated and produced both centrally and at remote sites.

The system will make use of *de facto* look-and-feel standards to minimize familiarization time and learning time for all classes of users. A full graphical interface is mandatory in all operations. Nevertheless, it is also desirable that there be an ability to implement a web-based or mobile version of the interface in a seamlessly co-resident mode to accommodate those libraries and workflows that require a mobile and offsite operation.

The system will take advantage of the efficiencies of a graphical interface to make staff processing faster and easier. The ability to use such functions as macros, accelerator keys, cut-and-paste, and drag-and-drop that improve the productivity of staff is integral to the system.

The system's security will be a concern. Confidentiality of customer information, maintainable levels of authorization, and 'hack resistance' are all issues. The system's client, DBMS, OPAC, and resident API's should have no less security than the O/S.

The system will have a solid and proven Z39.50 interface and a robust and flexible SIP2 and NCIP circulation functionality. The system will support RDA, Bib-Frame, FRBR, metadata schema such as Dublin Core, and other bibliographic and authority control standards as they emerge. The system shall enable the sharing of non-bibliographic information. The system will continue to develop as a tool for SEO's members to share effectively with the library community.

SEO has migrated many new library systems into the consortium through the years. Any new library migration must not impact the day to day operation of current consortium members. The system must support migrations of new libraries onto the system with no downtime to the production environment.

## 9. Detailing Costs

### 9.1 Software Costs

In the cost detail section, the vendor will specify and detail on a line-by-line, module-by-module basis all costs for the core software components requested by SEO in the "Core Software" section. Provide separately, all costs for subscription and optional components requested by SEO in the "Subscription Services" and "Add-on Software" sections of this document. If any of these costs are subject to price breakpoints depending upon any element (e.g. number of concurrent users, database size, etc.), the vendor shall specify those breakpoints and the breakpoint preceding, as well as following the applicable breakpoint in the vendor's pricing algorithm.

SEO wishes to have the vendor provide costs for the following configurations:

1. **SaaS Managed Solution** - Integrated Library System (ILS) for SEO – Production System.
2. **SaaS Managed Solution** - Integrated Library System (ILS) for SEO – Training System dedicated to SEO with licensing to support SEO's entire bibliographic and patron databases.

If there is a discount applied to the vendor's cost proposal, the vendor will specify it in the proposal. If there are consequences of accepting some--but not all--elements of the vendor's proposal, those consequences should be detailed. If the vendor is proposing to re-sell third-party software, the vendor will specify the consequences of SEO purchasing that software directly from the manufacturer.

### 9.2 Core Software

SEO considers the following modules core products that, in aggregate, make up a modern Library Services Platform/ILS. Respondents should answer “No” if the module is not currently available (e.g., in production) in the vendors' system. The pricing of the core system should include all of the available modules listed below.

| <b>Core product specifications</b>                                 | <b>Yes</b> | <b>No</b> |
|--|------------|-----------|
| The following products or services are included in the core system |            |           |
| Windows Client Circulation   |            |           |
| E-Commerce for Circulation & Cash Drawer                           |            |           |
| Offline Circulation  |            |           |
| Mobile Circulation   |            |           |
| Circulation Policy Grouping (Circ Map, Hold Map, Price Map)        |            |           |
| E-Commerce for Mobile Circulation                                  |            |           |
| Web-Based Circulation, Cataloging, Acquisitions                    |            |           |
| E-Commerce for Web-Based Circulation                               |            |           |
| Cataloging   |            |           |
| Authority Control  |            |           |
| Bibliographic Import/Export (MARC 21)                              |            |           |
| Bibliographic Import/Export (MARC 21 - Unicode)                    |            |           |
| Bibliographic Import/Export (MARC XML)                             |            |           |
| Dublin Core Export   |            |           |
| Authority Import/Export (MARC 21)                                  |            |           |
| Authority Import/Export (MARC 21 - Unicode)                        |            |           |
| Acquisitions with Fund Accounting                                  |            |           |
| Acquisitions Electronic Ordering (EDI) – (ordering & invoicing)    |            |           |
| Serials Control  |            |           |
| Serials Claims (X.12)  |            |           |
| System Administration  |            |           |
| Public Access Catalog (OPAC)                                       |            |           |
| Mobile enabled Public Access Catalog (OPAC)                        |            |           |
| Children’s OPAC  |            |           |
| Multilingual Public Access Catalog (OPAC)                          |            |           |
| English  |            |           |
| Spanish  |            |           |
| French   |            |           |
| OPAC E-commerce for Patrons  |            |           |
| RSS Feeds  |            |           |
| OPAC Z39.50 Database Follow-on Searching                           |            |           |
| OverDrive eContent Integration                                     |            |           |
| HOOPLA eContent Integration  |            |           |
| Z39.50 Interface   |            |           |

| <b>Core product specifications</b>                                   | <b>Yes</b> | <b>No</b> |
|--|------------|-----------|
| SRU/SRW Interface  |            |           |
| Unlimited or Universe SIP2 Interface license                         |            |           |
| NCIP Interface (compatible with Auto-Graphics ShareIt or Relais D2D) |            |           |
| EnvisionWare RFID support  |            |           |
| Reports integration in the staff client (list core reports)          |            |           |
| Web-Based Reporting (500 + users)                                    |            |           |
| Outreach Services  |            |           |
| System API(s) and API Documentation                                  |            |           |
| Community Information Database                                       |            |           |
| Organization Records   |            |           |
| Event Records  |            |           |
| Library Program Records  |            |           |
| OPAC Promotions for events, programs, and organizations              |            |           |
| Import records from event management providers (please list)         |            |           |

### 9.3 Add-on Software

Indicate if the system supports the following add-on products. If the products are available, please include quotations as separate line items in the RFP response under “Other Costs.”

If the vendor considers any of these products part of its core system, please indicate that the product is included in the “Core” system pricing.

| <b>Add on products</b>                      | <b>Yes</b> | <b>No</b> |
|---|------------|-----------|
| Inventory Manager                           |            |           |
| Digital Collection Management               |            |           |
| EBSCO Discovery Services Integration        |            |           |
| OPAC RELAIS NCIP integration                |            |           |
| Multilingual Public Access Catalog (OPAC)   |            |           |
| Spanish                                     |            |           |
| Korean                                      |            |           |
| French                                      |            |           |
| Linked Data Integration (Zepheira/BIBFRAME) |            |           |
| Debt Collection Interface                   |            |           |
| Telephony Notification                      |            |           |

### 9.4 Subscription Services

In the chart below, indicate if the system supports the itemized subscription services. If the subscription service exists, please include quotations as separate line items in the RFP response under “Other Costs.

If the vendor considers subscriptions to any of these products part of its core system, please indicate that the product is included in the “Core” system pricing.

| <b>Subscription services</b>                      | <b>Yes</b> | <b>No</b> |
|---|------------|-----------|
| Real-Time Authority Updates                       |            |           |
| Weekly Authority Updates                          |            |           |
| Cataloging Record Services                        |            |           |
| Lexile and Accelerated Reader Service Integration |            |           |
| OPAC Freegal Integration                          |            |           |
| OPAC BiblioBoard Integration                      |            |           |
| OPAC Proquest EBL Integration                     |            |           |
| OPAC Hoopla Integration                           |            |           |
| OPAC Recorded Books                               |            |           |
| OPAC Zinio Integration                            |            |           |
| OPAC Comics Plus Integration                      |            |           |
| OPAC Overdrive Integration                        |            |           |

### **9.5 Implementation Services Costs**

The vendor will detail the cost for migration and implementation services; these costs should include the cost for system profiling, software staging, training, data extractions, and data loads. The vendor should load the software on SEO’s training and production environments.

### **9.6 Other Costs**

The vendor will detail any and all other costs for which SEO would be liable. Failure to include such costs in the vendor’s proposal will result in the vendor being liable for those costs.

### **9.7 Maintenance Costs**

The vendor will specify and detail on a line-by-line basis ongoing maintenance costs for all elements of the system. The vendor will provide those costs for SEO for the next seven years.

### **9.8 SEO Tax-Exempt Status**

SEO is tax-exempt. Do not include taxes in your proposal.

## 10. Contract and License Terms

The vendor must include in this section a copy of the vendor's proposed agreement(s) for system purchase, software licensing, and ongoing support. By submitting a proposal, the Vendor certifies that, if selected, vendor will execute such an agreement without further addition of costs or terms. SEO reserves the right to negotiate the terms of any proposed agreement. SEO intends to send this contract for review by our legal counsel before negotiations begin.

## 11. Implementation

### 11.1 Configuration Testing

The vendor will propose a test that can be used at any point in the five-year period covered by the preceding configuration quantities to determine the adequacy of the hardware and software proposed to meet the specified loads. The test will allow the system to be tested in isolation from the network in order to eliminate the network as an element in system response. The vendor will propose the response times that it will be willing to warrant to be achieved in this test. The vendor will warrant that any additional equipment that is necessary to bring the system performance in line with that which is specified will be supplied by the vendor at no cost to SEO. All terms of the test, including response times and procedures, will be subject to final contract negotiation.

### 11.2 Training

SEO expects to train using the data migrated from our current ILS.

The vendor will outline a comprehensive on-site training program to assure that SEO staff and staff in the member libraries are proficient in the use of the system at the time that it goes live. SEO anticipates that no more than 260 total SEO and library staff will require on-site training. And from that point, a train the trainer model would be necessary to accommodate the remaining 3000 staff members.

The vendor should provide training and training documentation in the following functional modules for SEO and library staff:

1. OPAC / Mobile OPAC
2. Circulation / Offline Circulation
3. Mobile Circulation (if available)
4. Cataloging / Serials Control
5. Authority Control
6. Acquisitions

This training must prepare staff at SEO and member libraries for the initial implementation and the ongoing operation of the system. The training program will need to address the

issue of multiple geographically separated locations. The training will also need to address any interim implementations (e.g., offline circulation) that are a part of the overall migration program that the vendor proposes. The vendor will submit a copy of all documentation and printed support material used in the training process. This material will be returned upon request to vendors at the completion of the evaluation process.

The vendor will provide training for technical staff at SEO. The vendor should provide training and training documentation for the following technical areas:

1. System Administration: Must include detailed information on the initial and ongoing set of parameters within the system.
2. SQL Database Training: Training in the use of the SQL database as it relates to the ILS schema.
3. Reports Training
4. API Training

### **11.3 Warranty**

1. The vendor must warrant, at a minimum, that on the cut-over date the system shall be in good working order and installed in a workmanlike manner; that the system shall be free of defects, shall be installed and conform to manufacturer's official published specifications, and shall be installed and operate in full compliance with this RFP. This warranty information must be provided to the SEO in writing with the vendor's response.
2. The vendor must warrant that, at a minimum, the system is free of all defects in equipment, material, and workmanship for a minimum period of one (1) year from the system acceptance date (the warranty period.) Also desired is a one (1) year money-back satisfaction guarantee. All warranty information must be provided in the vendor's response.
3. Describe any warranty given for application software and procedures for filing warranty claims and the consideration and resolution of them.
4. Maintenance services during the warranty period shall meet all general specifications and be included as part of the warranty.
5. The vendor must state how warranty information is compiled regarding the software installed. If the software is changed or added, how is the warranty on these items identified and supported?

### **11.4 Implementation Schedule**

The vendor should provide a detailed implementation schedule as part of its response to this RFP.

### **11.5 Data Migration**

Existing database information must be converted from the Symphony ILS database (an Oracle database) to the chosen vendor's record structure, based on options, parameters, and conversion tables developed jointly by SEO and the vendor. SEO requires that all **data extraction and load processes be handled by the vendor and/or sub-contractors hired and monitored by the vendor**. SEO holds the vendor responsible for the data load and extraction quality and success. SEO expects all aspects of the data conversion to be handled in a workmanlike manner and shall be free of defects.

SEO requires at least two full data load and extraction processes:

- A training data load and extraction intended for use as a training environment AND for the purposes of an extensive quality control check.
- A production data load and extraction performed shortly prior to go-live on the vendor's system.

SEO plans to move the following consortium member data into the new system:

- Bibliographic records including locally created records
- Authority records including locally created records
- Circulation information on outstanding fines, bills, holds, and overdue items
- Item historical circulation statistics for YTD and lifetime in-house and out-of-house use
- Patron historical circulation statistics for YTD and lifetime hold and checkout counts
- Circulation transactions for items currently on loan, on hold, in transit, lost, claims returned, etc.
- Item records including circulation status, loan types, hold types, OPAC display status, item statistical categories, collection codes, shelf locations, and custom data fields
- Item call number information including prefix, classification number, cutter number, suffix, and volume number
- Item notes
- Patron records including status, statistical categories, patron types, address information, e-mail address, telephone numbers, text notification numbers (and carrier information), and custom data fields.
- Patron notification types and associated methods (e-mail, text, print, phone, SMS, etc.)
- Patrons saved OPAC title lists
- Patrons saved reading history
- Patron notes
- Patron blocks

- Acquisitions vendor records
- Acquisitions fund records

## 12. Support Requirements:

The vendor shall supply:

- 24 hours a day, 7 day-a-week Software / OS / DBMS support
- The ability and willingness to work with other SEO vendors and partners to solve problems and optimize network configurations
- System Security expertise and support to maintain patron confidentiality and System integrity
- Upgrade support and off-peak upgrades
- System Monitoring tools, including memory, CPU usage, and Disk Usage
- Database space monitoring & manipulation tools
- Database repair tools
- Database schema documentation
- System administration documentation
- Reports documentation
- System job documentation
- System job control tools (to set job priority, kill jobs, monitor jobs in progress, etc.)

## 13. Experience with Like Upgrades and Conversions:

Vendors should have experience with upgrades from Symphony ILS environments of similar complexity. Further, the vendor should provide contact names and numbers from recently upgraded sites for us to evaluate the success of like conversion processes and their potential impact on SEO member libraries and their operations.

## 14. References

Please provide three references that are similar in size to SEO and that have possibly migrated from the same system as we currently use. If you have customers that have migrated from the Symphony ILS, please select at least one of those customers as a reference.

| <b>Reference 1</b> |  |
|--------------------|--|
| Name               |  |
| Title              |  |
| Library            |  |
| Telephone          |  |
| Email              |  |
| Web address        |  |
| Date of install    |  |

| <b>Reference 2</b> |  |
|--------------------|--|
| Name               |  |
| Title              |  |
| Library            |  |
| Telephone          |  |
| Email              |  |
| Web address        |  |
| Date of install    |  |

| <b>Reference 3</b> |  |
|--------------------|--|
| Name               |  |
| Title              |  |
| Library            |  |
| Telephone          |  |
| Email              |  |
| Web address        |  |
| Date of install    |  |

## 15. Vendor Hardware Operating System Requirements

### 15.1 Workstation Requirements

|  |
|--|
| Please describe the minimum and recommended PC configuration for staff and public clients. |
|  |

## 16. Response to Product Specifications

Proposers must respond to every functional, technical, and performance requirement contained in the FUNCTIONAL SPECIFICATIONS section of the RFP on the table provided and use the following criteria.

|          |                |   |
|----------|----------------|---|
| <b>A</b> | Available      | Vendor currently supplies this capability as a part of a general software release.  |
| <b>V</b> | Variance       | Feature, function, product or service is partially available. Provide a narrative to describe the level of compliance or workarounds. |
| <b>D</b> | In development | The feature, function, product, or service is actively in development with a specific release target date.                            |
| <b>P</b> | Planned        | Capability planned; no development is underway. Specify anticipated date of availability.   |
| <b>N</b> | Not available  | Not planned, and no development underway.   |

**NOTE:** Library Service Platforms support multiple clients that provide similar functionality. For example, a circulation client may be available in Windows, mobile, and/or HTML5. If you are proposing multiple clients, please create a separate table for each one offered. If the vendor thinks there is a better way to represent this information, please contact SEO in advance of your RFP response.

For any specifications to which the Vendor answers other than A (Available), the Vendor must:

- Include a description of how the system partially complies.
- For “In development” or “Planned”, indicate the date after which the function, product, or service will be available in general release and operation in the system proposed to SEO. Indicate also whether SEO will incur any added cost for the feature, function, product, or service once it becomes available, either as a direct cost or because the feature, function, product, or service will require replacement of or addition to hardware or software originally proposed for initial installation.
- For “Not available,” “In development,” or “Planned” items, the vendor may choose to offer an explanation of how the specification might otherwise be met using alternative features, functions, products, or services available from the Vendor or a third party partner, including availability dates for any such alternative and any added costs, either direct or indirect.

Do not indicate planned developments with target dates more than 2 years in the future. SEO considers these developments as “Planned but date not set.” List these developments as “Not available.”

Vendors should enumerate exceptions to any specification on the deviations from specifications form. SEO is interested in receiving proposals from vendors who can offer an Integrated Library System (ILS) already in use by an installed customer base, and that proposals for systems in an Alpha or Beta phase of development will not be considered

favorably. SEO reserves the right to evaluate all proposals solely based on currently existing features, functions, products, or services meeting the specifications as stated.

**Please Note:** For some specifications, SEO requires a **description of the functionality or a list of options**. Please provide additional detail as requested, in the table labeled “Additional Detail” below. Vendors may also use this table to highlight special features that they consider differentiators for their products in the ILS marketplace.

**16.1 Variance from Specifications**

Are there any deviations from full compliance with the specifications described in this RFP?

Yes       No

If yes, state any proposed deviations below. **The vendor must include the specification number for each requirement with a deviation.**

Deviations may be considered if the vendor submits an adequate explanation and justification.

| <b>Deviations from Specifications</b>  |                                    |
|--|------------------------------------|
| <b>Deviation<br/>(Specification #)</b> | <b>Explanation / Justification</b> |
|  |                                    |
|  |                                    |
|  |                                    |
|  |                                    |
|  |                                    |
|  |                                    |
|  |                                    |
|  |                                    |
|  |                                    |
|  |                                    |

**16.2 Additional Detail**

Use this table to provide additional detail as required by the specifications below.

| <b>Additional Details</b>     |                                |
|-------------------------------|--------------------------------|
| <b>Detail Specification #</b> | <b>Detail Requested by SEO</b> |
|                               |                                |
|                               |                                |
|                               |                                |
|                               |                                |
|                               |                                |
|                               |                                |
|                               |                                |
|                               |                                |
|                               |                                |

## 17. Product Specifications

### 17.1 Technology Specifications

| <b>Technology specifications</b>   | <b>A</b> | <b>V</b> | <b>D</b> | <b>P</b> | <b>N</b> |
|--|----------|----------|----------|----------|----------|
| 17.1.1 The system must employ n-tier architecture with an intelligent workstation client accessing a central database through the software on a server optimizing processing power through the distribution of business logic. |          |          |          |          |          |
| 17.1.2 The system must place no limit on record size, other than the limits imposed by the MARC21 standard.  |          |          |          |          |          |
| 17.1.3 Vendor must describe the proposed software's expandability and portability, with specific reference to the system capacity requirements presented in this RFP.  |          |          |          |          |          |
| 17.1.4 The system must be fully self-contained and capable of being operated by SEO staff with no dependency on vendor for its routine operation.  |          |          |          |          |          |
| 17.1.5 The vendor must list all supported operating system platforms.  |          |          |          |          |          |
| 17.1.6 The system must permit, but must not require, distribution across multiple servers, specifically to an application server, a database server, and/or a web server.  |          |          |          |          |          |
| 17.1.7 The system must be an open system, with access to vendor created and fully documented API's and a fully documented SQL compliant database.  |          |          |          |          |          |
| 17.1.8 The system must keep a log of each transaction that alters the database. Logs must be dated and time-stamped so as to allow the system to reconstruct activity for any period.  |          |          |          |          |          |
| 17.1.9 The system must support right-click menus.  |          |          |          |          |          |
| 17.1.10 The system must support shortcuts and accelerator keys. Describe.  |          |          |          |          |          |
| 17.1.11 The system must support cascading or tiling multiple windows, as well as the ability to toggle from one module/window while retaining the information for a selected record.   |          |          |          |          |          |
| 17.1.12 The system must allow staff to cut, copy, and paste from within all modules as well as from external sources.  |          |          |          |          |          |
| 17.1.13 The system should support drag and drop from within all modules as well as from external sources.  |          |          |          |          |          |
| 17.1.14 The system must include a staff administrative interface which provides centralized access to staff applications for all libraries on the system. Describe.  |          |          |          |          |          |

### 17.2 Library Standards Specifications

| <b>Library standards specifications</b>                                      | <b>A</b> | <b>V</b> | <b>D</b> | <b>P</b> | <b>N</b> |
|--|----------|----------|----------|----------|----------|
| 17.2.1 The system must support the following formats for bibliographic data: |          |          |          |          |          |

| <b>Library standards specifications</b>  | <b>A</b> | <b>V</b> | <b>D</b> | <b>P</b> | <b>N</b> |
|--|----------|----------|----------|----------|----------|
| 17.2.2 MARC21 Bibliographic  |          |          |          |          |          |
| 17.2.3 MARCXML   |          |          |          |          |          |
| 17.2.4 DUBLIN CORE   |          |          |          |          |          |
| 17.2.5 The system must support the following formats for Authority Data:   |          |          |          |          |          |
| 17.2.6 MARC21 Authority  |          |          |          |          |          |
| 17.2.7 The system must support RDA. Describe.  |          |          |          |          |          |
| 17.2.8 The system must support Linked Data models including BIBFRAME. Describe.  |          |          |          |          |          |
| 17.2.9 The system must support the NCIP protocol.  |          |          |          |          |          |
| 17.2.10 The system must support the SIP2 protocol.   |          |          |          |          |          |
| 17.2.11 The system must support 10 and 13 digit ISBNs.   |          |          |          |          |          |
| 17.2.12 The system must offer Web Services and Application Programming Interfaces (APIs) that enable the Library to develop custom interfaces for all modules. The vendor must provide training and documentation. |          |          |          |          |          |
| 17.2.13 The system, both client and server, must be fully Z39.50 version 3 compliant.  |          |          |          |          |          |
| 17.2.14 The system must be Unicode compliant.  |          |          |          |          |          |
| 17.2.15 The system must support SRU/SRW.   |          |          |          |          |          |
| 17.2.16 The system must support OpenURL standards.   |          |          |          |          |          |

### 17.3 Security Specifications

| <b>Security specifications</b>  | <b>A</b> | <b>V</b> | <b>D</b> | <b>P</b> | <b>N</b> |
|---|----------|----------|----------|----------|----------|
| 17.3.1 The system must provide security at the database, workstation, and individual operator levels. Describe.   |          |          |          |          |          |
| 17.3.2 SEO must be able to create individual user accounts for staff.   |          |          |          |          |          |
| 17.3.3 The system must check each user's access privileges at login, and automatically disable or enable client functions (in real-time) based upon the user's profile. |          |          |          |          |          |
| 17.3.4 The system must require staff to log in only once.   |          |          |          |          |          |

### 17.4 Consortium Support Specifications

| <b>Consortium support specifications</b>  | <b>A</b> | <b>V</b> | <b>D</b> | <b>P</b> | <b>N</b> |
|---|----------|----------|----------|----------|----------|
| 17.4.1 The system must support a centralized catalog and patron database while allowing each SEO member library to define its own hours, holidays, etc. |          |          |          |          |          |
| 17.4.2 The system must allow each member library within SEO to set its own circulation policies based on patron, item type, and location.               |          |          |          |          |          |

| <b>Consortium support specifications</b>   | <b>A</b> | <b>V</b> | <b>D</b> | <b>P</b> | <b>N</b> |
|--|----------|----------|----------|----------|----------|
| 17.4.3 The system must allow individual member libraries to produce and maintain orders, claims, etc.  |          |          |          |          |          |
| 17.4.4 The OPAC must allow each member library to have a unique look and feel (e.g., colors, fonts, logos, etc.).  |          |          |          |          |          |
| 17.4.5 The system must provide the ability to set record ownership parameters for all types of data: circulation (holds, mail delivery, bills, circulation, users, credits); cataloging (items, call numbers, MARC holdings data); acquisitions (funds, vendors, orders); and serials (check-in, control records). |          |          |          |          |          |
| 17.4.6 The system must allow each member library in the consortium to determine which other member libraries will incur rights for Display (read-only display and copy) and/or Maintenance (create, modify, and remove).   |          |          |          |          |          |
| 17.4.7 The system must include the ability to customize policy and parameter lists for each member library in SEO. This will allow each member library a custom selection of policies for each module.   |          |          |          |          |          |

### 17.5 OPAC Patron Account Specifications

Please indicate if the following features are available to patrons once they log into the OPAC.

| <b>OPAC patron account specifications</b>  | <b>A</b> | <b>V</b> | <b>D</b> | <b>P</b> | <b>N</b> |
|--|----------|----------|----------|----------|----------|
| 17.5.1 Patron can edit and add an e-mail address                                 |          |          |          |          |          |
| 17.5.2 Patron can edit and add telephone numbers                                 |          |          |          |          |          |
| 17.5.3 Patron can edit their physical address or request an address change       |          |          |          |          |          |
| 17.5.4 Patron can change notification options                                    |          |          |          |          |          |
| 17.5.5 Patron can change their password  |          |          |          |          |          |
| 17.5.6 Patron can add or change their username                                   |          |          |          |          |          |
| 17.5.7 Patron can set circulation receipt options                                |          |          |          |          |          |
| 17.5.8 Patron can manage text notification options (including carrier)           |          |          |          |          |          |
| 17.5.9 Patron can see their blocks   |          |          |          |          |          |
| 17.5.10 Patron can see their notification history                                |          |          |          |          |          |
| 17.5.11 Patron can see messages from library staff                               |          |          |          |          |          |
| 17.5.12 Patron can save title lists  |          |          |          |          |          |
| 17.5.13 Patron can save searches   |          |          |          |          |          |
| 17.5.14 Patrons saved searches can generate email alerts                         |          |          |          |          |          |
| 17.5.15 Patron can manage their holds on physical items (Cancel/Suspend/Group)   |          |          |          |          |          |
| 17.5.16 Patron can manage their holds on electronic items (Cancel/Suspend/Group) |          |          |          |          |          |

| <b>OPAC patron account specifications</b>  | <b>A</b> | <b>V</b> | <b>D</b> | <b>P</b> | <b>N</b> |
|--|----------|----------|----------|----------|----------|
| 17.5.17 Patron can manage their ILL requests (Cancel/Suspend/Group)  |          |          |          |          |          |
| 17.5.18 Patron can see checked out items   |          |          |          |          |          |
| 17.5.19 Patron can renew their checked-out items   |          |          |          |          |          |
| 17.5.20 Patron can see their fines and fees  |          |          |          |          |          |
| 17.5.21 Patron can pay fines and fees using a credit card  |          |          |          |          |          |
| 17.5.22 Patron can opt into saving their reading history   |          |          |          |          |          |
| 17.5.23 Patron can opt out of saving their reading history   |          |          |          |          |          |
| 17.5.24 Patron can delete one or more items in their reading history   |          |          |          |          |          |
| 17.5.25 Patrons can self-register for a library card   |          |          |          |          |          |
| 17.5.26 Patron self-registration de-duplicates patron information - <b>Describe</b>                                      |          |          |          |          |          |
| 17.5.27 Patron can select which branch to register with  |          |          |          |          |          |
| 17.5.28 During self-registration postal codes are validated - <b>Describe</b>  |          |          |          |          |          |
| 17.5.29 During self-registration the city and state are derived from postal code entered by the patron - <b>Describe</b> |          |          |          |          |          |
| 17.5.30 Individual SEO libraries can determine self-registered patrons' circulation parameters                           |          |          |          |          |          |
| 17.5.31 Individual SEO libraries can determine defaults for various patron data fields                                   |          |          |          |          |          |
| 17.5.32 Individual SEO libraries are notified when a patron self-registers   |          |          |          |          |          |
| 17.5.33 Options for patron self-registration expiration periods  |          |          |          |          |          |
| 17.5.34 The patron can print a title list - <b>Describe citation formats available</b>                                   |          |          |          |          |          |
| 17.5.35 The patron can e-mail a title list - <b>Describe citation formats available</b>                                  |          |          |          |          |          |
| 17.5.36 The patron can place holds on one or more titles on a title list   |          |          |          |          |          |
| 17.5.37 The patron can group holds - <b>Describe</b>   |          |          |          |          |          |
| 17.5.38 The patron can set OPAC preferences - <b>Describe</b>  |          |          |          |          |          |

### 17.6 General OPAC Specifications

This is a list of general feature specifications that should be available in the vendor's OPAC product.

| <b>General OPAC requirements</b>  | <b>A</b> | <b>V</b> | <b>D</b> | <b>P</b> | <b>N</b> |
|---|----------|----------|----------|----------|----------|
| 17.6.1 Link to "Ask a librarian"  |          |          |          |          |          |
| 17.6.2 Link to library events information   |          |          |          |          |          |
| 17.6.3 SEO can promote materials, programs, services, events, and databases in the OPAC - <b>Describe</b> |          |          |          |          |          |
| 17.6.4 SEO can curate lists of material in the OPAC - <b>Describe</b>                                     |          |          |          |          |          |

| <b>General OPAC requirements</b>   | <b>A</b> | <b>V</b> | <b>D</b> | <b>P</b> | <b>N</b> |
|--|----------|----------|----------|----------|----------|
| 17.6.5 Holdings information appears on brief display   |          |          |          |          |          |
| 17.6.6 Holdings information appears on full display  |          |          |          |          |          |
| 17.6.7 Federated or multiple database search available in OPAC   |          |          |          |          |          |
| 17.6.8 Patron can add (z39.50 or federated) databases to expand the scope of their search  |          |          |          |          |          |
| 17.6.9 Individual SEO Libraries can determine which databases require log-in   |          |          |          |          |          |
| 17.6.10 OpenURL linking (Federated or Z39.50 search)   |          |          |          |          |          |
| 17.6.11 Individual SEO Libraries can define a list of electronic resources (E-sources) that appear in the OPAC   |          |          |          |          |          |
| 17.6.12 Individual SEO Libraries can determine which electronic resources (E-sources) require log-in   |          |          |          |          |          |
| 17.6.13 Individual SEO Libraries can define databases to automatically "follow on" a patron's search if no titles are found in the local database- <b>Describe</b> |          |          |          |          |          |
| 17.6.14 Patron can place a request (on brief display)  |          |          |          |          |          |
| 17.6.15 Patron can place a request (on full display)   |          |          |          |          |          |
| 17.6.16 Patron can place an item level hold request ( <b>on <u>brief</u> results display</b> )   |          |          |          |          |          |
| 17.6.17 Patron can place a volume level hold request ( <b>on <u>full</u> results display</b> )   |          |          |          |          |          |
| 17.6.18 Patron can place an item level hold request ( <b>on <u>brief</u> results display</b> )   |          |          |          |          |          |
| 17.6.19 Patron can place a volume level hold request ( <b>on <u>full</u> results display</b> )   |          |          |          |          |          |
| 17.6.20 Patron can add a title to a title list ( <b>on <u>brief</u> results display</b> )  |          |          |          |          |          |
| 17.6.21 Patron can add a title to a title list ( <b>on <u>full</u> results display</b> )   |          |          |          |          |          |
| 17.6.22 SEO can allow patrons to place mediated ILL requests within remote databases   |          |          |          |          |          |
| 17.6.23 SEO can allow patrons to place unmediated (NCIP) ILL requests within remote databases - <b>Describe</b>  |          |          |          |          |          |
| 17.6.24 SEO can determine which remote databases allow unmediated or mediated ILL requests - <b>Describe</b>   |          |          |          |          |          |
| 17.6.25 SEO can determine which MARC tags/subfields are displayed on brief level   |          |          |          |          |          |
| 26. SEO can determine which MARC tags/subfields are displayed on full level  |          |          |          |          |          |
| 17.6.26 SEO can determine which item data fields appear in the holdings display  |          |          |          |          |          |
| 17.6.27 SEO may customize all labels and messages in the OPAC  |          |          |          |          |          |
| 17.6.28 SEO may customize all icons in the OPAC  |          |          |          |          |          |
| 17.6.29 The OPAC style sheets are created using CSS3 for responsive design   |          |          |          |          |          |

| <b>General OPAC requirements</b>   | <b>A</b> | <b>V</b> | <b>D</b> | <b>P</b> | <b>N</b> |
|--|----------|----------|----------|----------|----------|
| 17.6.30 The OPAC is compliant with Section 508, The Electronic and Information Technology Standards Rehabilitation Act of 1973 - <b>Describe</b> |          |          |          |          |          |
| 17.6.31 Social media tagging (meta tags) available on brief display  |          |          |          |          |          |
| 17.6.32 Social media tagging (meta tags) available on full display   |          |          |          |          |          |
| 17.6.33 Google books preview   |          |          |          |          |          |
| 17.6.34 eContent Preview   |          |          |          |          |          |
| 17.6.35 Content Café-enriched content supported  |          |          |          |          |          |
| 17.6.36 NoveList Select-enriched content supported   |          |          |          |          |          |
| 17.6.37 NoveList Plus-enriched content supported   |          |          |          |          |          |
| 17.6.38 NoveList "On the shelf"-enriched content supported   |          |          |          |          |          |
| 17.6.39 Library Thing (Tagging)  |          |          |          |          |          |
| 17.6.40 Social Media Reviews and Ratings   |          |          |          |          |          |
| 17.6.41 RSS Feeds for new title lists - <b>Describe</b>  |          |          |          |          |          |
| 17.6.42 Recently viewed titles   |          |          |          |          |          |
| 17.6.43 Format icons   |          |          |          |          |          |
| 17.6.44 Text call number   |          |          |          |          |          |
| 17.6.45 Item call number on brief display  |          |          |          |          |          |
| 17.6.46 Google Maps integration  |          |          |          |          |          |
| 17.6.47 FRBRized results available   |          |          |          |          |          |
| 17.6.48 Ability to change the number of results per page   |          |          |          |          |          |
| 17.6.49 Sticky results per page  |          |          |          |          |          |
| 17.6.50 Sticky sort types  |          |          |          |          |          |
| 17.6.51 Highlighting of search terms (why did I get this result)   |          |          |          |          |          |
| 17.6.52 Search suggestions (autocomplete)  |          |          |          |          |          |
| 17.6.53 Search Suggestions (autocomplete) change with index selected   |          |          |          |          |          |
| 17.6.54 Print lists and result sets  |          |          |          |          |          |
| 17.6.55 Did You Mean (with alternate spelling suggestions based on a dictionary built from the bibliographic and authority database)             |          |          |          |          |          |
| 17.6.56 Patron facing customizable help  |          |          |          |          |          |
| 17.6.57 MARC display   |          |          |          |          |          |
| 17.6.58 Alternate Graphic Representations (880) Display Appropriately - <b>Describe</b>  |          |          |          |          |          |

### 17.7 OPAC Indexing Specifications

This table lists the OPAC indexes and index types required by SEO. Certain browse indexes (Author, Subject, Genre, Uniform Title, and Series) require tracings in established headings (See From, See Also, and Complex Name References)

| <b>OPAC indexing requirements</b>   | <b>A</b> | <b>V</b> | <b>D</b> | <b>P</b> | <b>N</b> |
|---|----------|----------|----------|----------|----------|
| 17.7.1 General Keyword  |          |          |          |          |          |
| 17.7.2 Author Keyword   |          |          |          |          |          |
| 17.7.3 Title Keyword  |          |          |          |          |          |
| 17.7.4 Subject Keyword  |          |          |          |          |          |
| 17.7.5 Series Keyword   |          |          |          |          |          |
| 17.7.6 Genre Keyword  |          |          |          |          |          |
| 17.7.7 Notes Keyword  |          |          |          |          |          |
| 17.7.8 Publisher Keyword  |          |          |          |          |          |
| 17.7.9 Author Browse (Tracings required)  |          |          |          |          |          |
| 17.7.10 Title Browse (Tracings required for uniform title MARC fields)  |          |          |          |          |          |
| 17.7.11 Subject Browse (Tracings required)  |          |          |          |          |          |
| 17.7.12 Series Browse (Tracings required)   |          |          |          |          |          |
| 17.7.13 Genre Browse (Tracings required)  |          |          |          |          |          |
| 17.7.14 Call Number Browse  |          |          |          |          |          |
| 17.7.15 Author Exact Match  |          |          |          |          |          |
| 17.7.16 Title Exact Match   |          |          |          |          |          |
| 17.7.17 Subject Exact Match   |          |          |          |          |          |
| 17.7.18 Series Exact Match  |          |          |          |          |          |
| 17.7.19 ISBN Exact Match  |          |          |          |          |          |
| 17.7.20 ISSN Exact Match  |          |          |          |          |          |
| 17.7.21 LCCN Exact Match  |          |          |          |          |          |
| 17.7.22 OCLC Number Exact Match   |          |          |          |          |          |
| 17.7.23 Author Phrase   |          |          |          |          |          |
| 17.7.24 Title Phrase  |          |          |          |          |          |
| 17.7.25 Subject Phrase  |          |          |          |          |          |
| 17.7.26 Series Phrase   |          |          |          |          |          |
| 17.7.27 Genre Phrase  |          |          |          |          |          |
| 17.7.28 Alternate Graphic Representation tags (880) are indexed appropriately and retrievable - <b>Describe</b> |          |          |          |          |          |
| 17.7.29 SEO can select the default OPAC index for each individual member library                                |          |          |          |          |          |

### 17.8 OPAC Search Limits and Filters Specifications

Please indicate which of the following item and bibliographic data characteristics are available as filters and/or search limits.

| <b>OPAC search limit requirements</b> | <b>A</b> | <b>V</b> | <b>D</b> | <b>P</b> | <b>N</b> |
|---------------------------------------|----------|----------|----------|----------|----------|
| 17.8.1 Bibliographic format           |          |          |          |          |          |
| 17.8.2 Bibliographic literary form    |          |          |          |          |          |
| 17.8.3 Bibliographic target audience  |          |          |          |          |          |

| <b>OPAC search limit requirements</b>                            | <b>A</b> | <b>V</b> | <b>D</b> | <b>P</b> | <b>N</b> |
|--|----------|----------|----------|----------|----------|
| 17.8.4 Bibliographic publication date                            |          |          |          |          |          |
| 17.8.5 Bibliographic language code                               |          |          |          |          |          |
| 17.8.6 Available items only                                      |          |          |          |          |          |
| 17.8.7 Item circulation status                                   |          |          |          |          |          |
| 17.8.8 Items home branch(es)                                     |          |          |          |          |          |
| 17.8.9 Expand search to "all libraries"                          |          |          |          |          |          |
| 17.8.10 Limit to items owned in the current organization context |          |          |          |          |          |
| 17.8.11 Item collection code                                     |          |          |          |          |          |
| 17.8.12 Item material types                                      |          |          |          |          |          |
| 17.8.13 Item statistical classes                                 |          |          |          |          |          |
| 17.8.14 Item shelf location                                      |          |          |          |          |          |
| 17.8.15 Include / Exclude electronic materials                   |          |          |          |          |          |
| 17.8.16 Select a local or remote database                        |          |          |          |          |          |

### **17.9 OPAC Search Facet Specifications**

Various elements in the bibliographic and item data are categorizing and summarizing elements resulting from the data retrieved in the context of search results. Facets are available only in keyword search results. A user can narrow his/her search results by clicking on one or more search facets.

| <b>OPAC search facet specifications</b>     | <b>A</b> | <b>V</b> | <b>D</b> | <b>P</b> | <b>N</b> |
|---|----------|----------|----------|----------|----------|
| 17.9.1 Bibliographic type of material       |          |          |          |          |          |
| 17.9.2 Location                             |          |          |          |          |          |
| 17.9.3 Collection                           |          |          |          |          |          |
| 17.9.4 Subject                              |          |          |          |          |          |
| 17.9.5 Author                               |          |          |          |          |          |
| 17.9.6 Series                               |          |          |          |          |          |
| 17.9.7 Publication Date                     |          |          |          |          |          |
| 17.9.8 Target Audience                      |          |          |          |          |          |
| 17.9.9 Language                             |          |          |          |          |          |
| 17.9.10 Branch                              |          |          |          |          |          |
| 17.9.11 Literary Form                       |          |          |          |          |          |
| 17.9.12 Popularity                          |          |          |          |          |          |
| 17.9.13 Item Material Type                  |          |          |          |          |          |
| 17.9.14 Item Circulation Status (Available) |          |          |          |          |          |

### **17.10 OPAC Sort Specifications**

Indicate which sort fields are available in the OPAC

| <b>OPAC sort field requirements</b>   | <b>A</b> | <b>V</b> | <b>D</b> | <b>P</b> | <b>N</b> |
|---|----------|----------|----------|----------|----------|
| 17.10.1 Relevancy   |          |          |          |          |          |
| 17.10.2 Popularity  |          |          |          |          |          |
| 17.10.3 Author  |          |          |          |          |          |
| 17.10.4 Title   |          |          |          |          |          |
| 17.10.5 Publication Date  |          |          |          |          |          |
| 17.10.6 Author / Title  |          |          |          |          |          |
| 17.10.7 Author / Title / Publication Date   |          |          |          |          |          |
| 17.10.8 SEO can specify the default sort for keyword searches for each member library |          |          |          |          |          |

### 17.11 OPAC Library Customization Specifications

Please indicate if the following features are present and definable/customizable according to which library that the end-user has selected as an entry point for the OPAC.

| <b>OPAC customization specifications</b>           | <b>A</b> | <b>V</b> | <b>D</b> | <b>P</b> | <b>N</b> |
|--|----------|----------|----------|----------|----------|
| 17.11.1 Local library databases                    |          |          |          |          |          |
| 17.11.2 OverDrive advantage scoping                |          |          |          |          |          |
| 17.11.3 Search limits & filters available          |          |          |          |          |          |
| 17.11.4 Ask a librarian                            |          |          |          |          |          |
| 17.11.5 Content carousels                          |          |          |          |          |          |
| 17.11.6 New materials Lists                        |          |          |          |          |          |
| 17.11.7 Local availability (on brief display)      |          |          |          |          |          |
| 17.11.8 Local availability (on full display)       |          |          |          |          |          |
| 17.11.9 Local call number (on brief display)       |          |          |          |          |          |
| 17.11.10 Local holdings (on brief display)         |          |          |          |          |          |
| 17.11.11 Local holdings (on full display)          |          |          |          |          |          |
| 17.11.12 Ability to promote local library programs |          |          |          |          |          |
| 17.11.13 Ability to promote local library events   |          |          |          |          |          |
| 17.11.14 Ability to promote local library services |          |          |          |          |          |

### 17.12 Circulation Specifications

| <b>Circulation Specifications</b>   | <b>A</b> | <b>V</b> | <b>D</b> | <b>P</b> | <b>N</b> |
|---|----------|----------|----------|----------|----------|
| 17.12.1 Supports an unlimited number of patron types without vendor intervention.   |          |          |          |          |          |
| 17.12.2 Allows permissions to be set at the staff member or workstation level to restrict viewing and/or modifying of patron records. |          |          |          |          |          |
| 17.12.3 Allows for the removal of patron identification data from circulation transaction records and item histories.                 |          |          |          |          |          |
| 17.12.4 Preserves patron account, notification, and borrowing activity when merging patron records.                                   |          |          |          |          |          |
| 17.12.5 Allows default values to be set when creating new patron records.   |          |          |          |          |          |
| 17.12.6 Supports the ability to display patron photos in the patron registration and checkout screens.                                |          |          |          |          |          |
| 17.12.7 Supports loading patron photos from a webcam, a digital camera, device camera, or an existing file                            |          |          |          |          |          |
| 17.12.8 Allows individual libraries to define required patron fields  |          |          |          |          |          |
| 17.12.9 Accommodates multiple patron addresses in the patron record.  |          |          |          |          |          |
| 17.12.10 A patron's last activity date is updated for online activity as well as circulation.   |          |          |          |          |          |
| 17.12.11 Supports reading histories for patron viewing.   |          |          |          |          |          |
| 17.12.12 Supports linking associated patrons (family links).  |          |          |          |          |          |

| <b>Circulation Specifications</b>   | <b>A</b> | <b>V</b> | <b>D</b> | <b>P</b> | <b>N</b> |
|---|----------|----------|----------|----------|----------|
| 17.12.13 Supports the ability to designate a member (or members) of the associated patrons' group who can pick up held items for other members of the group.  |          |          |          |          |          |
| 17.12.14 Allows SEO to set all loan period calculations, loan limits, and thresholds at the individual member library level.  |          |          |          |          |          |
| 17.12.15 Provides an option to configure what patron data displays during check-out.  |          |          |          |          |          |
| 17.12.16 Supports "book drop" or bulk check-in to allow rapid check-in with minimal staff involvement.  |          |          |          |          |          |
| 17.12.17 Supports the ability to display (in the staff client, the PAC and Mobile PAC, and via smart phone) an estimated fine amount (accrued fines) for items a patron currently has checked out   |          |          |          |          |          |
| 17.12.18 Supports check-in free days set by calendar date.  |          |          |          |          |          |
| 17.12.19 Keeps all completed account transactions in a patron account history for an individual member library for a determined length of time.   |          |          |          |          |          |
| 17.12.20 Supports the ability to retain item data in the patron financial history (charges/payments) even if the item is deleted.   |          |          |          |          |          |
| 17.12.21 Supports the ability to delete billed items from a patron's card, while retaining the bill with relevant information.  |          |          |          |          |          |
| 17.12.22 Supports the ability for staff 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 (For example, the first available copy of season one of a TV series.). |          |          |          |          |          |
| 17.12.23 Supports the ability to place multiple requests for a single patron in one operation, rather than placing multiple individual requests.  |          |          |          |          |          |
| 17.12.24 Supports the ability to place requests for a single title for multiple patrons in one operation, rather than placing multiple individual requests.   |          |          |          |          |          |
| 17.12.25 Allows for grouping multiple requests so that when anyone is filled, the others in the group are canceled. (For example, to get the first available copy of any of several Shakespeare's plays.)   |          |          |          |          |          |
| 17.12.26 Supports the ability for a suspended request to maintain its position in the queue or to be placed at the end of the queue when reactivated, depending on individual member library policy.  |          |          |          |          |          |
| 17.12.27 Supports the ability for staff to quickly transfer hold requests from one patron to another.   |          |          |          |          |          |
| 17.12.28 Enable operator to circulate uncatalogued items "on the fly" (e.g., add a brief title, add copies).  |          |          |          |          |          |
| 17.12.29 Display, create, edit, copy, and remove patron records   |          |          |          |          |          |
| 17.12.30 The Circulation module supports a patron load utility that allows user records to be imported and updated <i>en masse</i> , with multiple library-defined match points.  |          |          |          |          |          |

| <b>Circulation Specifications</b>   | <b>A</b> | <b>V</b> | <b>D</b> | <b>P</b> | <b>N</b> |
|---|----------|----------|----------|----------|----------|
| 17.12.31 The Circulation module supports checkout transactions of impermanent materials. These checkout transactions are recorded for statistical reports and checkout data but are not used to generate late notices or bills.   |          |          |          |          |          |
| 17.12.32 The system has proven NCIP vendor support for unmediated ILL.  |          |          |          |          |          |
| 17.12.33 The system allows automatic item renewal with email notification providing successful and unsuccessful renewal items.  |          |          |          |          |          |
| 17.12.34 Volume level holds must be allowed for items that are not under serials control  |          |          |          |          |          |
| 17.12.35 Provides options to register patrons at a location different from where they live, with access to third-party database subscriptions authenticated by hometown rather than issuing library.  |          |          |          |          |          |
| 17.12.36 Supports configuration of a lost item recovery process, in order to prevent lost item returns from crediting a patron's account after the item has been lost and paid for.   |          |          |          |          |          |
| 17.12.37 Supports a configuration that allows patrons to have a credit balance on their account.  |          |          |          |          |          |
| 17.12.38 Describe any visual or audio cues that alert staff members that a patron is delinquent.  |          |          |          |          |          |
| 17.12.39 Describe the data elements that are used in patron de-duplication.   |          |          |          |          |          |
| 17.12.40 Printed 'pick lists' or 'pull lists' can be filtered by collection, shelf location, or call number range.  |          |          |          |          |          |
| 17.12.41 The system supports patron self-registration.  |          |          |          |          |          |
| 17.12.42 The system supports a circulation rule that limits a particular patron type to checking out materials from only one library in the network.  |          |          |          |          |          |
| 17.12.43 The Circulation module provides multiple levels of library-defined hold policies. For example, enabling a library to allow only its own patrons to place holds on its items. Another example would be enabling a library to automatically assign a higher priority ranking to its users' hold requests (i.e., allow a library to state, 'Fill requests for my library patrons first, then other libraries' patrons.') Describe hold functionality. |          |          |          |          |          |
| 17.12.44 The system supports patron notes that can only be seen by staff at a particular library.   |          |          |          |          |          |
| 17.12.45 The Circulation module supports printing replacement barcodes for damaged item barcodes immediately upon item check-in.  |          |          |          |          |          |
| 17.12.46 The Circulation module supports loan privilege suspensions (manually or automatically, according to policy) as an alternative to bills/fines.  |          |          |          |          |          |
| 17.12.47 Patron registration via mobile or offline circulation enables staff to scan a driver's license for instant user registration.  |          |          |          |          |          |

### 17.13 Notification Specifications

The following notification types and methods should be available in the vendor’s system. Create a separate table for each client offered.

| Notification specifications   | A | V | D | P | N |
|---|---|---|---|---|---|
| 17.13.1 Notification specifications   |   |   |   |   |   |
| 17.13.2 Hold notification (print)   |   |   |   |   |   |
| 17.13.3 Hold notification (e-mail)  |   |   |   |   |   |
| 17.13.4 Hold notification (text)  |   |   |   |   |   |
| 17.13.5 Courtesy (pre-expiration) hold notification (print)                   |   |   |   |   |   |
| 17.13.6 Courtesy (pre-expiration) hold notification (e-mail)                  |   |   |   |   |   |
| 17.13.7 Courtesy (pre-expiration) hold notification (text)                    |   |   |   |   |   |
| 17.13.8 Hold expiration notification (print)                                  |   |   |   |   |   |
| 17.13.9 Hold expiration notification (e-mail)                                 |   |   |   |   |   |
| 17.13.10 Hold expiration notification (text)                                  |   |   |   |   |   |
| 17.13.11 Hold cancellation notification (print)                               |   |   |   |   |   |
| 17.13.12 Hold cancellation notification (e-mail)                              |   |   |   |   |   |
| 17.13.13 Hold cancellation notification (text)                                |   |   |   |   |   |
| 17.13.14 Courtesy (pre-overdue) notification (print)                          |   |   |   |   |   |
| 17.13.15 Courtesy (pre-overdue) notification (e-mail)                         |   |   |   |   |   |
| 17.13.16 Courtesy (pre-overdue) notification (text)                           |   |   |   |   |   |
| 17.13.17 Overdue notification (print)   |   |   |   |   |   |
| 17.13.18 Overdue notification (e-mail)  |   |   |   |   |   |
| 17.13.19 Overdue notification (text)  |   |   |   |   |   |
| 17.13.20 XX day interval billing notification (print)                         |   |   |   |   |   |
| 17.13.21 XX day interval billing notification (print)                         |   |   |   |   |   |
| 17.13.22 XX day interval billing notification (print)                         |   |   |   |   |   |
| 17.13.23 Patron record expiration notice (print)                              |   |   |   |   |   |
| 17.13.24 Patron record expiration notice (e-mail)                             |   |   |   |   |   |
| 17.13.25 Patron record expiration notice (text)                               |   |   |   |   |   |
| 17.13.26 Combined notification (hold, overdue, bill, etc.) - print            |   |   |   |   |   |
| 17.13.27 Combined notification (hold, overdue, bill, etc.) - email            |   |   |   |   |   |
| 17.13.28 Combined notification (hold, overdue, bill, etc.) - text             |   |   |   |   |   |
| 17.13.29 Notices are available in a PDF format                                |   |   |   |   |   |
| 17.13.30 Print notices are grouped by branch library                          |   |   |   |   |   |
| 17.13.31 Print notices may be generated by staff for their registered patrons |   |   |   |   |   |
| 17.13.32 Print notices may be picked up by staff on a file share              |   |   |   |   |   |
| 17.13.33 Print notices may be picked up by staff via e-mail                   |   |   |   |   |   |

## 17.14 Circulation Slip Specifications

Circulation slips should be available in the vendor's system. Slips should be available in both the Windows (native) staff client and web client. Slip printing should be available for any mobile circulation and HTML circulation clients.

When a patron has opted into e-mail and/or text notification, slips should be able to not be printed; rather, the patron should receive a text message or e-mail. The system should notify the staff member that the patron should receive their slip using a non-print method.

| <b>Circulation slip specifications</b>  | <b>A</b> | <b>V</b> | <b>D</b> | <b>P</b> | <b>N</b> |
|---|----------|----------|----------|----------|----------|
| 17.14.1 Circulation slip specifications   |          |          |          |          |          |
| 17.14.2 In-transit slip for Windows client  |          |          |          |          |          |
| 17.14.3 In-transit slip for HTML/mobile client  |          |          |          |          |          |
| 17.14.4 Hold shelf wrapper for Windows client   |          |          |          |          |          |
| 17.14.5 Hold shelf wrapper for HTML/mobile client   |          |          |          |          |          |
| 17.14.6 Hold shelf slip for Windows client  |          |          |          |          |          |
| 17.14.7 Hold shelf slip for HTML/mobile client  |          |          |          |          |          |
| 17.14.8 Check out receipt (print) Windows client  |          |          |          |          |          |
| 17.14.9 Check out receipt (print) HTML/mobile client  |          |          |          |          |          |
| 17.14.10 Check out receipt (e-mail)   |          |          |          |          |          |
| 17.14.11 Check out receipt (text)   |          |          |          |          |          |
| 17.14.12 Fine / Fee payment receipt (print) Windows client  |          |          |          |          |          |
| 17.14.13 Fine / Fee payment receipt (print) HTML/mobile client  |          |          |          |          |          |
| 17.14.14 Fine / Fee payment receipt (e-mail)  |          |          |          |          |          |
| 17.14.15 Fine / Fee payment receipt (text)  |          |          |          |          |          |
| 17.14.16 Circulation slips may be set to print automatically (Windows client)   |          |          |          |          |          |
| 17.14.17 Circulation slips may be set to print automatically (HTML/mobile client)   |          |          |          |          |          |
| 17.14.18 Circulation slip printing can be disabled (Windows client)   |          |          |          |          |          |
| 17.14.19 Circulation slip printing can be disabled (HTML/mobile client)   |          |          |          |          |          |
| 17.14.20 If a patron has requested that circulation slips delivered via e-mail or text, the slip will not be printed - <b>Describe staff workflow in detail</b> |          |          |          |          |          |

## 17.15 Cataloging, Authority Control, and Technical Services Specifications

| <b>Cataloging specifications</b>   | <b>A</b> | <b>V</b> | <b>D</b> | <b>P</b> | <b>N</b> |
|--|----------|----------|----------|----------|----------|
| 17.15.1 Ability to merge two or more bibliographic records and automatically transfer holds to the surviving bibliographic record                    |          |          |          |          |          |
| 17.15.2 Ability to merge two or more bibliographic records and automatically transfer item records to the surviving bibliographic record             |          |          |          |          |          |
| 17.15.3 Ability to merge two or more bibliographic records and automatically transfer serials holdings records to the surviving bibliographic record |          |          |          |          |          |
| 17.15.4 Ability to merge two or more authority records and automatically transfer bibliographic authority links to the surviving authority record    |          |          |          |          |          |
| 17.15.5 Ability to merge two or more authority records and automatically transfer authority tracing links to the surviving authority record          |          |          |          |          |          |
| 17.15.6 Ability to create and modify bibliographic record for data entry   |          |          |          |          |          |
| 17.15.7 Ability to create and modify authority record templates for data entry   |          |          |          |          |          |
| 17.15.8 Ability to create and modify item record templates for data entry  |          |          |          |          |          |
| 17.15.9 Ability to create and modify serials publication pattern templates for data entry  |          |          |          |          |          |
| 17.15.10 Automatic authority updates   |          |          |          |          |          |
| 17.15.11 MARC level on-screen help   |          |          |          |          |          |
| 17.15.12 Unicode support for bibliographic records   |          |          |          |          |          |
| 17.15.13 Unicode support for authority records   |          |          |          |          |          |
| 17.15.14 Diacritic support for bibliographic records   |          |          |          |          |          |
| 17.15.15 Diacritic support for authority records   |          |          |          |          |          |
| 17.15.16 Ability to easily add diacritics and Unicode characters to bibliographic and authority records - Describe                                   |          |          |          |          |          |
| 17.15.17 Ability for a user to identify potential duplicate bibliographic records - Describe   |          |          |          |          |          |
| 17.15.18 Ability for a user to identify potential duplicate authority records - Describe   |          |          |          |          |          |
| 17.15.19 Ability for the import process to identify potential duplicate bibliographic records - Describe   |          |          |          |          |          |
| 17.15.20 Ability for the import process to identify potential duplicate authority records - Describe   |          |          |          |          |          |
| 17.15.21 Ability for the import process to identify potential duplicate item records - Describe  |          |          |          |          |          |
| 17.15.22 Describe the process for adding items to existing bibliographic records during import   |          |          |          |          |          |
| 17.15.23 Describe the process for deleting existing bibliographic records during import  |          |          |          |          |          |

| <b>Cataloging specifications</b>   | <b>A</b> | <b>V</b> | <b>D</b> | <b>P</b> | <b>N</b> |
|--|----------|----------|----------|----------|----------|
| 17.15.24 Describe the process of removing MARC tags, subfields, and indicators during import                     |          |          |          |          |          |
| 17.15.25 Describe the process of adding and changing MARC tags, subfields, and indicators during import          |          |          |          |          |          |
| 17.15.26 Ability to mark a bibliographic record not to display in PAC  |          |          |          |          |          |
| 17.15.27 Ability to mark an item record not to display in PAC  |          |          |          |          |          |
| 17.15.28 Ability to mark a bibliographic record not to accept holds  |          |          |          |          |          |
| 17.15.29 Ability to mark an item record not to accept holds  |          |          |          |          |          |
| 17.15.30 Ability to cut and paste; ease of editing   |          |          |          |          |          |
| 17.15.31 Support for easy movement from function to function (cross-module editing)                              |          |          |          |          |          |
| 17.15.32 Real-time indexing for newly created/edited records   |          |          |          |          |          |
| 17.15.33 Ability to block libraries from editing and/or deleting other libraries holdings                        |          |          |          |          |          |
| 17.15.34 Ability to define Z39.50 databases as sources for MARC import   |          |          |          |          |          |
| 17.15.35 Is it possible to copy an item record?  |          |          |          |          |          |
| 17.15.36 Is it possible to copy a bibliographic record?  |          |          |          |          |          |
| 17.15.37 Is it possible to copy an authority record?   |          |          |          |          |          |
| 17.15.38 Is it possible to copy a serials holdings record?   |          |          |          |          |          |
| 17.15.39 Describe the process, user interface, and options for bulk (batch) changes for bibliographic records    |          |          |          |          |          |
| 17.15.40 Describe the process, user interface, and options for bulk (batch) changes for authority records        |          |          |          |          |          |
| 17.15.41 Describe the process, user interface, and options for bulk (batch) changes for item records             |          |          |          |          |          |
| 17.15.42 Describe the process, user interface, and options for bulk (batch) changes for serials holdings records |          |          |          |          |          |
| 17.15.43 Does the system handle bibliographic formats other than MARC? If so, what formats?                      |          |          |          |          |          |
| 17.15.44 Is it possible to view multiple records on a single screen?   |          |          |          |          |          |
| 17.15.45 Describe the options to control permissions for adding/editing bibliographic records                    |          |          |          |          |          |
| 17.15.46 Describe the options to control permissions for adding/editing item records                             |          |          |          |          |          |
| 17.15.47 Describe the options to control permissions for adding/editing authority records                        |          |          |          |          |          |
| 17.15.48 Describe the options to control permissions for adding/editing serials holdings records                 |          |          |          |          |          |
| 17.15.49 Describe the options for exporting bibliographic, (embedded) item, and authority data                   |          |          |          |          |          |
| 17.15.50 Is it possible to export serials data in MFHD format?   |          |          |          |          |          |
| 17.15.51 Define any differences between the staff searching indexes and the OPAC public search indexes           |          |          |          |          |          |

| <b>Cataloging specifications</b>   | <b>A</b> | <b>V</b> | <b>D</b> | <b>P</b> | <b>N</b> |
|--|----------|----------|----------|----------|----------|
| 17.15.52 Define any differences between the staff searching user interface the OPAC public searching user interface indexes  |          |          |          |          |          |
| 17.15.53 Are item records, bibliographic records, authority records, and serials holdings records removed from the database when they are deleted by a user?             |          |          |          |          |          |
| 17.15.54 Describe the process of performing MARC validation for a single record (for authority and bibliographic records)  |          |          |          |          |          |
| 17.15.55 Describe the process of MARC validation during import (for authority and bibliographic records)   |          |          |          |          |          |
| 17.15.56 Describe the process of validating authority links for a bibliographic record   |          |          |          |          |          |
| 17.15.57 Are MARC validation rules included with the system software?<br>Can SEO create custom validation rules?   |          |          |          |          |          |
| 17.15.58 Describe the process of validating authority record links (tracings) for an authority record  |          |          |          |          |          |
| 17.15.59 Is 856 \$u link validation available in the system?   |          |          |          |          |          |
| 17.15.60 The ability to import “carts” from Ingram, Baker & Taylor and Midwest Tape to facilitate on-order item creation outside the context of the Acquisitions module. |          |          |          |          |          |

### **17.16 Acquisitions and Fund Accounting Specifications**

| <b>Acquisitions specifications</b>  | <b>A</b> | <b>V</b> | <b>D</b> | <b>P</b> | <b>N</b> |
|---|----------|----------|----------|----------|----------|
| 17.16.1 Provides a fully functional, integrated acquisitions subsystem that automatically manages encumbrances, un-encumbrances, and expenditures in multiple library-defined accounts based on acquisitions activities including (but not limited to): selecting, ordering, receiving, claiming, canceling, invoicing and reporting. |          |          |          |          |          |
| 17.16.2 Maintains a complete audit trail for fund allocations and adjustments by staff members.   |          |          |          |          |          |
| 17.16.3 Performs all accounting activities in real-time.  |          |          |          |          |          |
| 17.16.4 Supports different order types, including firm orders, subscriptions, continuations, donations, depository agreements, and gifts.   |          |          |          |          |          |
| 17.16.5 The Acquisitions module must support pre-order searching, with the ability to detect multiple orders during the order creation process  |          |          |          |          |          |
| 17.16.6 Acquisitions must support loading of MARC record data with order information contained in embedded 9XX tags.  |          |          |          |          |          |
| 17.16.7 Acquisitions must allow remaining allocations to be carried over from one fiscal year to the next if desired.   |          |          |          |          |          |
| 17.16.8 When placing an order, staff must be able to pay for the order from a single fund or divide costs among multiple funds, either by percentage or by a specific amount.   |          |          |          |          |          |

| <b>Acquisitions specifications</b>  | <b>A</b> | <b>V</b> | <b>D</b> | <b>P</b> | <b>N</b> |
|---|----------|----------|----------|----------|----------|
| 17.16.9 Vendor records must support up to three distinct addresses per vendor, such as ordering, service, and marketing, and also provide notes/comment fields for library staff.   |          |          |          |          |          |
| 17.16.10 The vendor record must include performance statistics updated automatically and in real-time, available online and through reports. Please provide a list of output columns for that report.   |          |          |          |          |          |
| 17.16.11 Supports multiple overlapping fiscal periods in its fund accounting structure.   |          |          |          |          |          |
| 17.16.12 Supports two overlapping fiscal periods, where staff can order from the new fiscal year while continuing to expand out of the old.   |          |          |          |          |          |
| 17.16.13 Supports the ability to suppress on-order items and on-order bibliographic records from display in the OPAC.   |          |          |          |          |          |
| 17.16.14 The Acquisitions module must prevent assignment of duplicate order numbers, whether entered manually or assigned automatically.  |          |          |          |          |          |
| 17.16.15 The Acquisitions module must support electronic submission of orders. Describe the standard used for electronic transmission.  |          |          |          |          |          |
| 17.16.16 The Acquisitions module must link order records to the corresponding bibliographic record.   |          |          |          |          |          |
| 17.16.17 The Acquisitions module must report the current status of any and all titles ordered or received.  |          |          |          |          |          |
| 17.16.18 The Acquisitions module must allow searching across POs and invoices by order status.  |          |          |          |          |          |
| 17.16.19 The Acquisitions module must use templates for one-step creation of fund, distribution, and even split-funding/distribution for an order line.   |          |          |          |          |          |
| 17.16.20 The Acquisitions module must automatically determine how to handle a partial receipt of ordered items, based upon individual library policies. For instance, the system must be able to automatically distribute a partial receipt of copies to multiple distribution locations. Describe.   |          |          |          |          |          |
| 17.16.21 The Acquisitions module must support an unlimited number of invoice records. Staff must have the option to search and retrieve invoices by: invoice ID and optionally, a line number, a vendor ID, or a check number. Staff must be able to specify whether to display summary information, extended information, amounts, dates, and/or numbers associated with invoices. |          |          |          |          |          |
| 17.16.22 Acquisitions module must enable individual libraries to download MARC records (via the web) from materials vendors and use the imported records to create orders automatically within the Acquisitions module.   |          |          |          |          |          |
| 17.16.23 System must enable libraries to use advanced electronic data interchange (EDI) to manage their interactions with vendors and suppliers. Describe.  |          |          |          |          |          |

| <b>Acquisitions specifications</b>   | <b>A</b> | <b>V</b> | <b>D</b> | <b>P</b> | <b>N</b> |
|--|----------|----------|----------|----------|----------|
| 17.16.24 The Acquisitions module must be able to automatically generate a claim/cancellation letter to the appropriate vendor regarding copies/volumes canceled and the reason.  |          |          |          |          |          |
| 17.16.25 A Library must be able to define the 'date to claim', and if an order passes that date the system must automatically add a claim segment to the appropriate outstanding line items on the order. Each claim segment must include a claim reason, number of copies claimed, times claimed, part or volume claimed (for multi-part items), date mailed, vendor response, date of vendor response, and claim status (OPEN, RECEIVED, CANCELLED.) The system must update elements in the claim segment automatically. |          |          |          |          |          |
| 17.16.26 Acquisitions statistics must be available in real-time as well as by statistical report(s). Describe.   |          |          |          |          |          |
| 17.16.27 The Acquisitions module must automatically link purchase line items to item records   |          |          |          |          |          |

### 17.17 Serials Control Specifications

| <b>Serials Control specifications</b>   | <b>A</b> | <b>V</b> | <b>D</b> | <b>P</b> | <b>N</b> |
|---|----------|----------|----------|----------|----------|
| 17.17.1 The serials control module must control the receipt of journals, monographic series and supplements, using the database common to all other modules, so no information is duplicated. Comment, if needed.   |          |          |          |          |          |
| 17.17.2 For serial subscriptions, the Serials Control module must include the following capabilities:   |          |          |          |          |          |
| 17.17.3 For serial subscriptions, the Serials Control module must include Prediction  |          |          |          |          |          |
| 17.17.4 For serial subscriptions, the Serials Control module must include Check-in / Receiving  |          |          |          |          |          |
| 17.17.5 For serial subscriptions, the Serials Control module must include Claiming  |          |          |          |          |          |
| 17.17.6 For serial subscriptions, the Serials Control module must include Routing   |          |          |          |          |          |
| 17.17.7 For serial subscriptions, the Serials Control module must include Reporting   |          |          |          |          |          |
| 17.17.8 SEO, or each individual library member, may maintain its own serials control record, which allows SEO to designate whether or not to enter copy specific information into the catalog at check-in, establish the number of latest issues to display in the OPAC by an authorized operator able to override this designation at check-in, establish custom naming patterns |          |          |          |          |          |
| 17.17.9 Using the serials control record pattern, the Serials Check-In and Control module must have the ability to generate predictions and expected issues for each serial. A prediction record must contain   |          |          |          |          |          |

| <b>Serials Control specifications</b>  | <b>A</b> | <b>V</b> | <b>D</b> | <b>P</b> | <b>N</b> |
|--|----------|----------|----------|----------|----------|
| information about a particular issue such as enumeration, chronology, and number of copies expected.   |          |          |          |          |          |
| 17.17.10 The Serials module must support the generation of patterns using the 891 tag (CONSER).  |          |          |          |          |          |
| 17.17.11 The system must support centralized and decentralized check-in.   |          |          |          |          |          |
| 17.17.12 The system must handle supplements, special issues, and combined issues.  |          |          |          |          |          |
| 17.17.13 The Serials module must make it easy for staff to receive issues. Describe the process.   |          |          |          |          |          |
| 17.17.14 The Serials module must be SISAC compliant and support check-in by scanning the SICI barcode.   |          |          |          |          |          |
| 17.17.15 The system must alert staff that an issue has not been received.  |          |          |          |          |          |
| 17.17.16 The system must allow a routing list to be maintained for each copy of a title to be received and must print a routing list for each copy received. At the time of check-in, the system must enable an authorized operator to indicate that the routing is not to be activated. |          |          |          |          |          |
| 17.17.17 The Serials Control module must flag items as late.   |          |          |          |          |          |
| 17.17.18 The Serials Control module must enable an authorized operator to:   |          |          |          |          |          |
| 17.17.19 - Automatically generate claim notices at intervals specified, in printed and machine-readable format   |          |          |          |          |          |
| 17.17.20 - Add a claim to the claim list for a title by filling in a screen work form  |          |          |          |          |          |
| 17.17.21 - Send as many claims as desired for a missing issue or copy  |          |          |          |          |          |
| 17.17.22 - Specify the text of each claim  |          |          |          |          |          |
| 17.17.23 - Determine claim action dates by expected receipt dates combined with an operator-specified claim interval   |          |          |          |          |          |
| 17.17.24 - Change the claim interval for each title at any time  |          |          |          |          |          |
| 17.17.25 - Identify issues requiring second and third claims according to SEO-determined time lags that may be defined for various item types  |          |          |          |          |          |
| 17.17.26 - Identify items for which three claims have been issued without a response being recorded, and make them available for staff review to determine further action  |          |          |          |          |          |
| 17.17.27 - Record specific details of responses to claims.   |          |          |          |          |          |
| 17.17.28 - Generate claims on demand.  |          |          |          |          |          |
| 17.17.29 Describe how serials display in the OPAC for consortia  |          |          |          |          |          |

### **17.18 Data Migration Specifications**

| <b>Data migration specifications</b>  | <b>A</b> | <b>V</b> | <b>D</b> | <b>P</b> | <b>N</b> |
|---|----------|----------|----------|----------|----------|
| 17.18.1 Vendor must migrate SEO's present databases to the proposed system so that the system must be fully operational on 'Day One of go live.' Describe the data migration process. |          |          |          |          |          |

| <b>Data migration specifications</b>  | <b>A</b> | <b>V</b> | <b>D</b> | <b>P</b> | <b>N</b> |
|---|----------|----------|----------|----------|----------|
| 17.18.2 Vendor or its sub-contractor to pull SEO's data from its Symphony System. Is the vendor willing to guarantee the accuracy and quality of the sub-contractor's work? |          |          |          |          |          |
| 17.18.3 What sub-contractor does the vendor intend to use?  |          |          |          |          |          |
| 17.18.4 How much experience does that sub-contractor have pulling data from the Symphony system?  |          |          |          |          |          |
| 17.18.5 How much experience does that vendor have providing data for the vendor's system?   |          |          |          |          |          |
| 17.18.6 Migration must include, to the extent such files are in presently used by SEO:  |          |          |          |          |          |
| 17.18.7 Bibliographic records (titles)  |          |          |          |          |          |
| 17.18.8 Items / copies  |          |          |          |          |          |
| 17.18.9 Authority records   |          |          |          |          |          |
| 17.18.10 Circulation transactions (charges, bills, holds)   |          |          |          |          |          |
| 17.18.11 Acquisitions (vendor, orders, funds)   |          |          |          |          |          |
| 17.18.12 Serials (control, check-in, chronology)  |          |          |          |          |          |
| 17.18.13 Vendor must agree that the details of the final implementation plan must be mutually determined by SEO and the Vendor.   |          |          |          |          |          |
| 17.18.14 Vendor must perform a test migration and allow SEO to review and approve the data before performing a final migration.   |          |          |          |          |          |

### **17.19 Training and Documentation Specifications**

| <b>Training specifications</b>  | <b>A</b> | <b>V</b> | <b>D</b> | <b>P</b> | <b>N</b> |
|---|----------|----------|----------|----------|----------|
| 17.19.1 Vendor must provide training for all modules purchased. Describe the training proposed.   |          |          |          |          |          |
| 17.19.2 Vendor must provide a brief description of training courses.  |          |          |          |          |          |
| 17.19.3 Vendor must include alternate methods of training, including but not limited to: self-paced web-based training and distance training via the web.                       |          |          |          |          |          |
| 17.19.4 Vendor must include a description of the complete documentation package available with the system.  |          |          |          |          |          |
| 17.19.5 Documentation updates for all appropriate manuals must be provided on a regular basis as additional capabilities, enhancements, or improvements are made to the system. |          |          |          |          |          |
| 17.19.6 Vendor must make documentation updates and release notes available for local printing or downloading via the World Wide Web.  |          |          |          |          |          |

### 17.20 Software Maintenance Specifications

| <b>Software maintenance specifications</b>   | <b>A</b> | <b>V</b> | <b>D</b> | <b>P</b> | <b>N</b> |
|--|----------|----------|----------|----------|----------|
| 17.20.1 Maintenance of proposed software must be available from the Vendor on an annually renewable contract basis.  |          |          |          |          |          |
| 17.20.2 Vendor must provide a software maintenance program to include all future software updates and system enhancements applicable to system modules licensed.   |          |          |          |          |          |
| 17.20.3 Vendor must provide optional levels of software support. Please describe.  |          |          |          |          |          |
| 17.20.4 Vendor must describe Help Desk hours and its procedure for prioritizing requests for assistance.   |          |          |          |          |          |
| 17.20.5 Emergency assistance must be available 24 hours a day, seven days a week, at no additional cost to the consortium.   |          |          |          |          |          |
| 17.20.6 The consortium must be able to submit requests using a toll-free telephone number, by email, or over the internet.   |          |          |          |          |          |
| 17.20.7 Vendor must describe its Web-enabled help desk interface.  |          |          |          |          |          |
| 17.20.8 The consortium should be able to search requests and resolutions on the Vendor's support site.   |          |          |          |          |          |
| 17.20.9 The consortium should have a single vendor contact they can contact who is responsible for acting as the liaison between the consortium and the Vendor regarding any issue or problem or question. Describe. |          |          |          |          |          |
| 17.20.10 Vendor should describe any way its customer support is differentiated from other vendors.   |          |          |          |          |          |

### 17.21 Self-Check Units

| <b>Self-Check Units</b>                  | <b>Supported Via SIP 2</b> | <b>Not Supported</b> |
|--|----------------------------|----------------------|
| EnvisionWare Self Check                  |                            |                      |
| 3M Self-Check Version 1.41.0<br>Build 42 |                            |                      |
| 3M Self-Check Version<br>4.60.192.0      |                            |                      |
| BayScan Self-Check                       |                            |                      |

### 17.22 PC Reservation Systems

| PC Reservation Systems                                | Supported Via SIP 2 | Not Supported |
|---|---------------------|---------------|
| Cassie PC Reservation Version 3.7                     |                     |               |
| EnvisionWare PC Reservation - Ver. 3.5.x / 4.3 /4.4.x |                     |               |
| Libke Kiosk Mangement System -Open Source             |                     |               |
|   |                     |               |

### 17.23 Materials Handling Systems

| Materials Handling Systems | Supported Via SIP 2 | Not Supported |
|----------------------------|---------------------|---------------|
| List supported systems     |                     |               |

### 17.24 Receipt Printers

| Receipt Printers |          |          | Printer is supported by client (Y/N) |                   |     |        |
|------------------|----------|----------|--------------------------------------|-------------------|-----|--------|
|                  |          |          | PC                                   | Terminal Services | Web | Mobile |
| Epson            | TM T88V  | Network  |                                      |                   |     |        |
| Epson            | TM T88V  | USB      |                                      |                   |     |        |
| Epson            | TM 88IV  | USB      |                                      |                   |     |        |
| Epson            | TM 88IV  | Parallel |                                      |                   |     |        |
| Epson            | TM 88IIP | Parallel |                                      |                   |     |        |
| Epson            | TM-T20   | USB      |                                      |                   |     |        |
| Epson            | TMT20II  | USB      |                                      |                   |     |        |
| Star Micronics   | TSP650   | USB      |                                      |                   |     |        |
| Star Micronics   | TSP65-II | USB      |                                      |                   |     |        |
| Star Micronics   | TSP100   | USB      |                                      |                   |     |        |
| Star Micronics   | SP 200   | USB      |                                      |                   |     |        |
|                  |          |          |                                      |                   |     |        |
|                  |          |          |                                      |                   |     |        |

### 17.25 Spine Label Printers

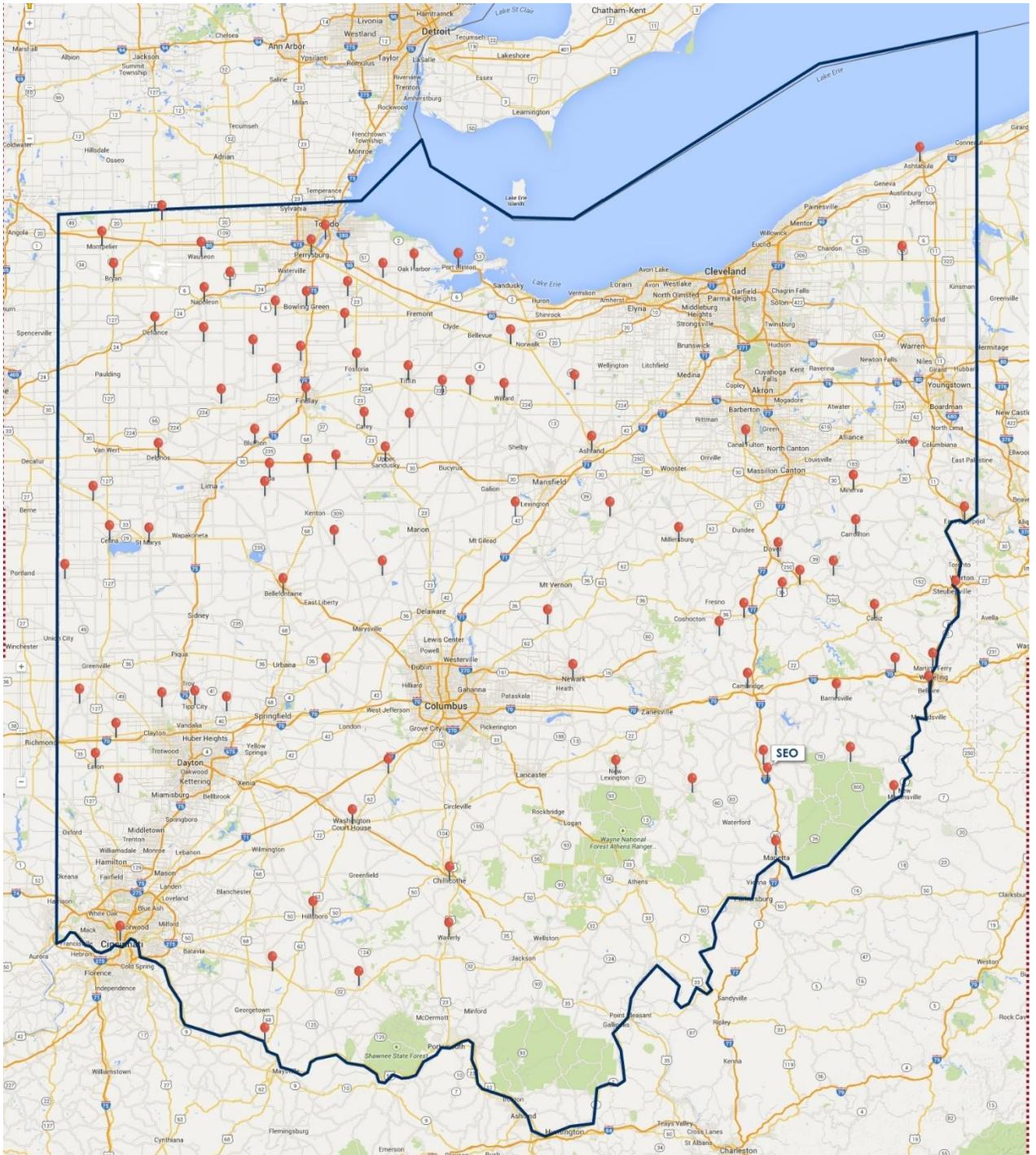
| Spine Label Printers |                               |     | Printer is supported by client<br>(Y/N) |                      |     |        |
|----------------------|-------------------------------|-----|---|----------------------|-----|--------|
|                      |                               |     | PC                                      | Terminal<br>Services | Web | Mobile |
| Dymo                 | Labelwriter 450               | USB |   |                      |     |        |
| Dymo                 | Labelwriter 450 Turbo         | USB |   |                      |     |        |
| Dymo                 | Labelwriter 400               | USB |   |                      |     |        |
| Dymo                 | 1750283                       | USB |   |                      |     |        |
| Dymo                 | 1750160                       | USB |   |                      |     |        |
| Dymo                 | Labelwriter 450 Twin<br>Turbo | USB |   |                      |     |        |

## Appendix A –SEO Member List

| SEO Member List |  |
|-----------------|--|
| 1               | ADAMS COUNTY PUBLIC LIBRARIES                  |
| 2               | ADA PUBLIC LIBRARY                             |
| 3               | ASHTABULA COUNTY DISTRICT LIBRARY              |
| 4               | ALGER PUBLIC LIBRARY                           |
| 5               | ASHLAND PUBLIC LIBRARY                         |
| 6               | SENECA EAST PUBLIC LIBRARY                     |
| 7               | BARNESVILLE PUBLIC LIBRARY                     |
| 8               | WILLIAMS COUNTY PUBLIC LIBRARY                 |
| 9               | BROWN COUNTY PUBLIC LIBRARY                    |
| 10              | BOWERSTON PUBLIC LIBRARY                       |
| 11              | BELLAIRE PUBLIC LIBRARY                        |
| 12              | BLUFFTON PUBLIC LIBRARY                        |
| 13              | BLISS MEMORIAL PUBLIC LIBRARY                  |
| 14              | BROWN MEMORIAL LIBRARY                         |
| 15              | CALDWELL PUBLIC LIBRARY                        |
| 16              | CARROLL COUNTY DISTRICT LIBRARY                |
| 17              | CARNEGIE PUBLIC LIBRARY (EAST LIVERPOOL)       |
| 18              | CANAL FULTON PUBLIC LIBRARY                    |
| 19              | CHILLICOTHE AND ROSS COUNTY PUBLIC LIBRARY     |
| 20              | COSHOCTON PUBLIC LIBRARY                       |
| 21              | CLAYMONT PUBLIC LIBRARY                        |
| 22              | DORCAS CAREY PUBLIC LIBRARY                    |
| 23              | DELPHOS PUBLIC LIBRARY                         |
| 24              | DESHLER MEMORIAL LIBRARY                       |
| 25              | DEFIANCE PUBLIC LIBRARY                        |
| 26              | HARDIN-NORTHERN PUBLIC LIBRARY                 |
| 27              | HARRIS-ELMORE PUBLIC LIBRARY                   |
| 28              | FINDLAY HANCOCK COUNTY DISTRICT PUBLIC LIBRARY |
| 29              | FOREST JACKSON PUBLIC LIBRARY                  |
| 30              | FT. RECOVERY PUBLIC LIBRARY                    |
| 31              | GUERNSEY COUNTY DISTRICT PUBLIC LIBRARY        |
| 32              | GNADENHUTTEN PUBLIC LIBRARY                    |
| 33              | GRATIS PUBLIC LIBRARY                          |
| 34              | GRAND VALLEY PUBLIC LIBRARY                    |
| 35              | GARNET A. WILSON PUBLIC LIBRARY OF PIKE COUNTY |
| 36              | HOLMES COUNTY DISTRICT PUBLIC LIBRARY          |
| 37              | HIGHLAND COUNTY DISTRICT LIBRARY               |

|    |   |
|----|---|
| 38 | HOMER PUBLIC LIBRARY                    |
| 39 | HOLGATE COMMUNITY LIBRARY               |
| 40 | RIDGEMONT PUBLIC LIBRARY                |
| 41 | KAUBISCH MEMORIAL PUBLIC LIBRARY        |
| 42 | KATE LOVE SIMPSON-MORGAN COUNTY LIBRARY |
| 43 | LIBERTY CENTER PUBLIC LIBRARY           |
| 44 | LEETONIA COMMUNITY PL                   |
| 45 | LICKING COUNTY LIBRARY                  |
| 46 | LOGAN COUNTY LIBRARIES                  |
| 47 | LOUDONVILLE PUBLIC LIBRARY              |
| 48 | MCCOMB PUBLIC LIBRARY                   |
| 49 | MERCER COUNTY DISTRICT LIBRARY          |
| 50 | MOHAWK COMMUNITY LIBRARY                |
| 51 | MECHANICSBURG PUBLIC LIBRARY            |
| 52 | BELMONT COUNTY DISTRICT LIBRARY         |
| 53 | MILTON UNION PUBLIC LIBRARY             |
| 54 | MINERVA PUBLIC LIBRARY                  |
| 55 | MONROE COUNTY DISTRICT LIBRARY          |
| 56 | DALLY MEMORIAL LIBRARY [SARDIS]         |
| 57 | MONROEVILLE PUBLIC LIBRARY              |
| 58 | MT. STERLING PUBLIC LIBRARY             |
| 59 | MONTPELIER PUBLIC LIBRARY               |
| 60 | NAPOLEON PUBLIC LIBRARY                 |
| 61 | NORTH BALTIMORE PUBLIC LIBRARY          |
| 62 | NEW CARLISLE PUBLIC LIBRARY             |
| 63 | NEWCOMERSTOWN PUBLIC LIBRARY            |
| 64 | NEW LONDON PUBLIC LIBRARY               |
| 65 | NEW MADISON PUBLIC LIBRARY              |
| 66 | NORMAL MEMORIAL LIBRARY                 |
| 67 | CHATFIELD COLLEGE LIBRARY               |
| 68 | OAK HARBOR PUBLIC LIBRARY               |
| 69 | IDA RUPP PUBLIC LIBRARY                 |
| 70 | PEMBERVILLE PUBLIC LIBRARY              |
| 71 | PERRY COOK MEMORIAL LIBRARY             |
| 72 | PERRY COUNTY DISTRICT LIBRARY           |
| 73 | PUSKARICH PUBLIC LIBRARY                |
| 74 | PREBLE COUNTY DISTRICT OFFICE           |
| 75 | PUTNAM COUNTY DISTRICT LIBRARY          |
| 76 | RICHWOOD-NORTH UNION PUBLIC LIBRARY     |
| 77 | ROCKFORD CARNEGIE LIBRARY               |
| 78 | ROSSFORD PUBLIC LIBRARY                 |

|           |   |
|-----------|---|
| <b>79</b> | ST. MARYS COMMUNITY LIBRARY                       |
| <b>80</b> | ST. CLAIRSVILLE PUBLIC LIBRARY                    |
| <b>81</b> | PUBLIC LIBRARY OF STEUBENVILLE & JEFFERSON COUNTY |
| <b>82</b> | TUSCARAWAS COUNTY PUBLIC LIBRARY                  |
| <b>83</b> | TIPP CITY PUBLIC LIBRARY                          |
| <b>84</b> | TIFFIN-SENECA PUBLIC LIBRARY                      |
| <b>85</b> | TWIN VALLEY SCHOOLS                               |
| <b>86</b> | UPPER SANDUSKY COMMUNITY LIBRARY                  |
| <b>88</b> | WAY PUBLIC LIBRARY                                |
| <b>89</b> | CARNEGIE PUBLIC LIBRARY - WASHINGTON COURT HOUSE  |
| <b>90</b> | WASHINGTON COUNTY PUBLIC LIBRARY                  |
| <b>91</b> | WESTON PUBLIC LIBRARY                             |
| <b>92</b> | HURON COUNTY COMMUNITY LIBRARY                    |
| <b>93</b> | WAYNE PUBLIC LIBRARY                              |
| <b>94</b> | WOOD COUNTY DISTRICT PUBLIC LIBRARY               |
| <b>95</b> | WAUSEON PUBLIC LIBRARY                            |



# Annual Report

January—December 31, 2018

2018

## SEO LIBRARY CENTER






- \* 94 Library Systems
- \* 238 Physical Locations
- \* 48 Counties
- \* 8,035,701 Items
- \* 883,588 Borrowers
- \* 1,383,121 Bibliographic Records
- \* 5,271 Circulated Die Cuts

### Consortium Circulation

- \* 15,067,714 Total Automation Consortium
- \* 160,208 Resource Sharing to Non-Members
  - \* 77 Public Libraries—127,190
  - \* 13 Correctional Institutions—14,554
- \* 6695 OCLC ILL Filled
- \* 278 Periodical Requests
- \* 51 Reference Questions Filled

### Digital Circulation

- \* 1,573,888 Total Digital Circulation
- \* 881,913 Adult ebook Circulation
- \* 434,298 Audiobook Circulation
- \* 160,604 Juvenile & Teen ebook Circulation
- \* 9708 New Electronic Resource Cards

### Technical Services Committee

- \* 863 Original Bibliographic Records Created
- \* 729 Created For Their Own Library
- \* 134 Created For Other SEO Consortium Libraries

### Instructional Videos | Webinars

- \* 73 Videos Available on 
- \* 4548 Instructional Video Views
- \* 38 Niche Academy Tutorials
- \* 11,399 Tutorial Views

### On-Demand Technology Training

|   |   |
|---|---|
| <ul style="list-style-type: none"> <li>* 45 Location Visits</li> <li>* 73 Classes Taught</li> <li>* 983 People Trained</li> </ul> | <p><b>TOP 3 Courses</b></p> <ul style="list-style-type: none"> <li>#1 Cyber Security</li> <li>#2 3D Printing</li> <li>#3 Libby</li> </ul> |
|---|---|

### SEO Library Sharing

- \* 29,794 Total SEO Collection Resource Sharing
  - \* 139,900 SEO Volumes
- \* 769 Out-of-State Libraries
- \* All 50 States Represented
- \* 2394 OCLC ILL Filled

### DigiHub Stats

\* 7 Trainings | 69 Sessions | 7,884 Scans

### SEO Statewide Delivery Bags In/Out



53,189 Total Bags Handled by SEO

## SEO Library Consortium Year In Review

### SEO Director's Meeting

The SEO Director's Meeting was held at the State Library of Ohio and 93 people were in attendance.

### Symphony Upgrade

In August 2018, SEO upgraded Symphony to version 3.5.3 which offered many enhancements, bug fixes, and security updates.

### Enterprise Upgrade

In August 2018, SEO upgraded Enterprise to version 5.0, which was necessary in order to continue using PayPal for secure patron payments.

### New Library Systems

In February 2018, the Mechanicsburg Public Library joined the SEO Consortium and in November 2018, the Perry Cook Memorial Library joined the SEO Consortium.

### Conference Attendance

SEO staff attended several conferences including COSUGI (Customers of SirsiDynix Users Group), SIG (Special Interest Group for Consortia), Right-Click (Library IT Staff), and the Ohio Talking Books Sublending Training.

## 6,824 Total Support Tickets

Ticket Breakdown

