Massachusetts Library Network Cooperative

MassLNC

REQUEST FOR PROPOSALS

Code Development for Enhancements to the Evergreen Open Source Integrated Library System

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REQUEST FOR PROPOSALS

Code Development for Enhancements to the Evergreen Open Source Integrated Library System

The Massachusetts Library Network Cooperative (MassLNC) is seeking proposals for developing enhancements for the Evergreen Integrated Library System.

Background:

The Massachusetts Library Network Cooperative (MassLNC) is a collaborative LSTA-funded project among three consortia to implement and initiate joint development projects for Evergreen. The participating networks are Central/Western Massachusetts Automated Resource Sharing, Inc. (C/W MARS), serving 155 public, academic, school and special libraries; Merrimack Valley Library Consortium (MVLC), serving 35 public libraries; and North of Boston Library Exchange (NOBLE), serving 28 public, academic and special libraries.

MVLC is live on Evergreen.. C/W MARS and NOBLE plan to go live later in 2011 and 2012.

Scope of Work:

Any development procured through this RFP must be made available under the GNU General Public License version 2 or later (Appendix A.) Final specifications must be posted for the Evergreen community no later than two weeks (10 business days) of MassLNC's approval of the specs. The code for this development must be contributed to a public repository no later than two weeks (10 business days) after MassLNC's final acceptance of the development work.

All three consortia plan to use Template Toolkit for the public and staff catalog. Any development related to the catalog should be functional in the Template Toolkit catalog.

Development procured through this RFP, along with a 45-day testing period, is expected to be completed by April 30, 2012.

Massachusetts Library Network Cooperative
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Staff client enhancements to improve general usability and navigation

Staff client enhancements have been ranked by priority to assist vendors in providing a timeline for work. If vendors are unable to make the April 30, 2012 timeline for completing work procured through the RFP, priority should be given to completing priority-1 and then priority-2 work by that date.

A. Column Pickers and Related Options

SC-A1: Individual screens use its own settings for column layout
Priority: 1
Related Requirement: SC-E3
The system should provide the ability to save a distinct set of columns for any individual screen using the column picker. In particular, distinct settings should be used for the holds view in the patron holds screen, the title holds screen, the browse holds shelf screen, and the pull list for holds request screen.

Use case:
Jane circulator is setting up the displays for her circulation workstation.
She configures the browse holds shelf screen to display call number, title, author, capture date, current copy, notices, request date, shelf time, shelf expire time, and type. When she selects the option to save these columns, this configuration is saved for the browse holds shelf screen only.
She configures the holds screen in the patron's record to display the title, author, status, available on date, current copy, last notify time, request date, pickup library, expiration date, e-mail notify, phone notify, and type. When she selects the options to save these columns, this configuration is saved for the holds patron record holds screen only.

Jane also makes distinct choices for the columns that display on the holds pull list screen and on the holds screen for the title record.

SC-A3: Consistent method for saving column layout
Priority: 3
Reference: Appendix B. Current methods for saving column layout in Evergreen.

- The system should provide at least one consistent method for saving a column layout on every screen that has a column picker. This requirement does not preclude the availability of additional methods on different screens.
- The system should also provide consistent language on the *List Actions* button for saving column layout. "Save Column Configuration" is preferred.

SC-A4: Multiple-level sorting
Priority: 3

Any interface using column pickers can be sorted by multiple columns.

Use case:

Jane Circulator retrieves her holds pull list on her screen. To assist in locating titles, she sorts the list first by copy location and then by call number.

SC-A5: Line numbers for display screen
Priority: 2

The system should display line numbers for items listed in screens using a column picker. These line numbers can provide a visual cue for staff scanning through a long list of items.

Use case:

John Circulator is assisting Sally Patron who wants to know where she is in the holds queue for *The Help*. When filtered to his library, the list has 220 holds and initially sorts by request date, in descending order. The most recently-placed hold, which is at the top of the list, is line 1 on the list; the hold with the oldest request date, which is at the bottom of the list, is at line 220. John clicks the request date button to re-sort the list by request date in ascending order. Now, the hold with the oldest request date is at line 1. Scanning through the list, he sees Sally's name, and, by glancing at the line number, he can see that she is number 24 on the list for patrons picking up this title at his library. **Note:** Because Sally placed a meta-level hold on *The Help*, the queue position isn't helpful in this situation.

SC-A6: Option to automatically open list CSV in default CSV program
Priority: 3

For lists that have an option to "Save List CSV to File," the system should provide an option to automatically open the list as a CSV file. When selected, the system will automatically open the file in the computer's default CSV program without any further action from the user.

SC-A7: Ability to save a TSV file
Priority: 2

Any list that has the option to export to a comma separated value file should also has the option to export to a tab separated value file.

B. General navigational issues

SC-B1: Customizable toolbar
Priority: 2

The system should provide a customizable toolbar allowing users to identify the toolbar buttons that appear on the workstation.

1. The customized toolbar should only be available on the workstation where it is set.
2. The toolbar should be able to accommodate a minimum of eight buttons on screens set at a resolution of 1024x768 with no horizontal scrolling required to access a toolbar button and with no toolbar buttons falling off the screen.
3. All functions that currently appear on the circulation and cataloging toolbars should be available as options for the customizable toolbar. In addition, buttons should be available for:

- Home (return to portal page)
- Copy buckets
- Record buckets
- Renew items
- Pull list for holds requests
- Browse holds shelf
- Retrieve last patron
- Acquisitions search
- Acquisitions My Selection Lists
- Acquisitions New Brief Record
- Acquisitions Patron Requests
- Acquisitions MARC Federated Search
- Acquisitions Load MARC Order Records
- Acquisitions Create Purchase Order
- Acquisitions Claim Ready Items
- Acquisitions Create Invoice
- Booking Create Reservations
- Booking Pull List
- Booking Capture Resources
- Booking Pick Up Reservations
- Booking Return Reservations

MassLNC will supply required icons for any toolbar buttons that do not have them.
The vendor is responsible for providing size specifications to MassLNC for these icons.

Use case:
Dora Doitall works at a small public library where she is responsible for cataloging and circulating materials. Using the staff client, she can easily configure the toolbar on her workstation with buttons to check in, check out, register patrons, search the catalog, create marc records, and import records via Z39.50.

Cathy Cataloger, on the other hand, does a mix of cataloging and acquisitions. She can easily configure her workstation toolbar with buttons for cataloging functions and acquisitions functions.

SC-B2: Home button for toolbar
Priority: 3
Alternative to Requirement SC-B1
The system should provide a home button that returns users to the portal page. This button should appear on all toolbars. All toolbar buttons should display properly on a screen set at a resolution of 1024x768 with no horizontal scrolling required to access a toolbar button and with no toolbar buttons falling off the screen.

SC-B3: Ability to go back when placing holds for patrons
Priority: 2
When placing a hold for a patron by first pulling up the patron record, clicking the *Holds* button, and then clicking Place Holds, the system should display the *Go Back* button or provide another method allowing users to return to the previous page in the browser.

Use case:
Reginald Reference is placing a number of holds for Patty Patron by first pulling up her patron record and then searching for titles to put on hold. While attempting to place a copy-level hold on one record, he accidentally clicks the *Book now* button instead of *Place hold*. With current functionality, he would be stuck in the booking interface with no way to easily return to the record or search results. The *Go Back* button would allow him to return to the bib record with one click.

SC-B4: Easy return to search results from MARC record view
Priority: 3
The system should provide a one-click method for returning to search results from the MARC record view of a bib record.

Use case:
Rita Reference uses the OPAC view as the default view for bib records. When she performs a search, she can view a bib record and then click the *Go back* button or the *title results* link to return to her search results.

Cathy Cataloger uses the MARC view of a bib record by default. When she performs a search and then views a bib record, she also would like a one-click method, similar to the one Rita Reference uses, to return to the search results screen.

SC-B5: Options for double clicking
Priority: 1
In the patron search form, if a user double-clicks on a name in the search results, the system should retrieve the patron record. In holdings maintenance, if a user double-clicks on a copy barcode, the

system should retrieve either the item attributes editor or the unified volume/copy editor (whichever editor the library is configured to use.)

SC-B7: Additional shortcut menus available for copying data to the clipboard
Priority: 3

The system should provide additional right-click shortcut menus for copying selected data to the clipboard in the interfaces identified below. If there is a text box, options for cutting and pasting data should be available as well.

- The basic and advanced search screen
- The search results screen.
- The bib record display
- The MARC view of the bib record
- The place hold screen, including the barcode entry screen and the screen where patrons set hold options
- The patron registration form
- Vandelay MARC file upload screen
- Vandelay Export Records screen
- Acquisitions search screen
- Acquisitions new brief record form
- Acquisitions federated search results
- Load MARC Order records screen
- Selections lists
- Purchase Orders
- Invoices
- Booking Pull List
- Booking Capture Resources

In the following interfaces, the system should provide additional right-click shortcut menus with an option to *copy to clipboard*" that subsequently prompts for the data field that should be copied.

- The in-house use screen.
- The patron search results screen
- Record buckets
- Copy buckets
- Z39.50 results
- Booking Reservations
- Booking Reservations Pickup
- Booking Reservations Return

In the following interface, the system should allow users to select text and provide a right-click shortcut menu with an option to copy the selected text to the clipboard.

1. Vandelay import queue.

SC-B8: Improved navigation of acquisitions providers and funds.
Priority: 1

1. When navigating through a list of providers and funds, the first page of results should retrieve and display those providers that the user has permission to view. The user should not be required to page to subsequent pages before they are able to view their own providers.
2. The provider and fund interfaces should provide the ability to filter or search on the displayed fields.

Use Case:
Abigail Acquisitions works at the Mayberry Public Library. When her "View Providers" permissions are set at the consortium level and she can see all the providers in the consortium, the 25 providers for Mayberry are displayed on the 4th and 5th pages of the Providers interface. Her permissions are adjusted so that she can only see the providers owned by Mayberry. She now sees the first 15 of Mayberry's providers on the first page of providers and the next 10 providers on the second page of providers.

Arlo Acquisitions work at the Plum Creek Public library, which has 78 providers and 102 funds. Rather than paging through the providers or funds display to find names that land in the middle of the alphabet, he is able to find a specific fund or provider by inputting a free-text search value for the provider name or fund name field.

C. Tab Behavior

SC-C1: New tab button
Priority: 3
The system should provide a button to open a new tab in the staff client. This button should be located near the "x" that closes a tab or should be located to the right of the tabs (as in the below example.)

SC-C2: Preferred functions
Priority: 2
The system should provide a method for users to identify their preferred functions and to easily open up their preferred functions in individual tabs.

1. Users should be able to call up these preferred functions with one mouse click and/or keystroke.
2. This mouse click and/or keystroke should also close any open tabs that are already in use.
3. When closing these open tabs, the system should provide its standard warning prompt if there is unsaved data in the patron registration form, the MARC editor, or the copy editor.

Use case:
Charlie Circulator likes to have Check In, Check Out, Patron Search, and Catalog Search open in individual tabs at all times. He has already configured Evergreen to open with those tabs by using command line options. However, after one hour on the circ desk, he now has 10 tabs open for various functions, and he needs to reinstate his preferred tabs. By clicking a button (perhaps a reset button), he is able to clear out his open tabs and open up four new tabs with these functions.

SC-C3: Remembered functions in tabs
Priority: 2

- When a user calls up a function, and that function is already available in another tab, the system should bring the user to the function in the existing tab instead of opening it a second time in a new tab.
- Users should be able to enable/disable this functionality through a setting that is tied to the workstation or to the user's account.
- Preference is for this functionality to be available for any function available through the non-administrative menus.
- Preference is for this functionality to occur whenever a user tries to call up a function using a hotkey, a toolbar button, or a menu option.
- When enabled, users should have a simple and consistent method for overriding it for individual actions (possibly via a keystroke or clicking with the right mouse button.)

Use case:
Charlie Circulator starts his circ desk shift by taking over a workstation that already has 5 tabs open and starts to tackle a pile of DVD's that need to be checked in. Upon clicking the Check In button, the system immediately returns him to the tab on the screen that was already open to the check-in function.

On the other hand, Rita Reference is doing a catalog search when she is approached by a patron who needs assistance finding a book. She opens up a new tab and has an easy method she can use to click on the "Search Catalog" toolbar button to force it to open in this new tab instead of returning to the existing tab.

SC-C4: Close all tabs functionality
Priority: 2

The system provides an easy method for closing all tabs with a keystroke (two or fewer keys) and/or with a mouse click.

D. Forms

SC-D1: Date-of-birth search
Priority: 3

The system provides the ability to search for patrons by date of birth.
SC-D3: Removal of unused fields from copy editor

SC-D3: Removal of unused fields from copy editor
Priority: 3

The system should provide org units with the ability to remove unused fields from the item attributes editor (or the copy half of the unified volume/copy editor.)

Use case:
Many libraries in Library Consortium A do not have rental or deposit collections. These libraries can configure their copy editors so that the "Deposit?" and "Deposit Amount" fields do not display. However, the Mayberry Public Library has an active rental collection and is able to display these fields in its copy editor.

E. Miscellaneous Staff Client Improvements

SC-E1: Automatic reload
Priority: 2

When staff modifies information in the staff client, the corresponding screen should automatically reload to display the updated information. This functionality is desired in the following places:

- The bib record display in the catalog.

    a. When a new item is added to a title, the system automatically returns the user to the bib record. This display should automatically reload to show the copy that was just added.

b. After receiving issues in the Serials Control view, when the user returns to the OPAC view of the record, the screen should automatically reload to display the updated holdings information.

- Check out – When scanning items at checkout, the screen should automatically reload to display the updated number of items out and to update the list of titles on the Items Out screen.
- Import records (Batch import & overlay) – Upon returning to the Import Records screen from any other screen in Batch Import & Overlay, the screen should automatically reload.
- Purchase Order - after entering prices for all lineitems on a purchase order, the purchase order should become activatable without requiring the user to first click the reload button.

SC-E2: CSV export option on administrative interfaces
Priority: 3

The system should provide an option to export settings in various administrative interfaces to a CSV file. This option should be available in the following interfaces:

- Circulation policies
- Hold policies
- Circulation duration rules
- Acquisitions Funds
- Acquisitions Providers

SC-E3: Individual screens use its own settings for receipt templates
Priority: 1
Related Requirement: SC-A1
The system should provide the ability to save distinct receipt templates for an individual screen. In particular, distinct templates should be used for the holds view in the patron holds screen, the title holds screen, the browse holds shelf screen and the pull list for holds request screen.

SC-E4: Additional hold options on check-in screen
Priority: 1

When staff scans an item at check-in that needs to be routed to the Holds shelf, there should be an easily-accessible option to check out the hold to the patron who placed the hold. There should also be an easily-accessible option to cancel the hold.

Use case: Patty Patron stops by the library to pick up a hold, but had forgotten her library card. Instead of looking up Patty's account, Charlie Circulator simply goes to the check-in screen to scan the item and then selects an easily-accessible option to check out the item to Patty's account.

Record matching and overlay in acquisitions

ACQ-02

1. When uploading records via the *Load MARC Order Records* function with "Load Bibs and Items into the ILS" selected, the system should locate matching records in the database before loading bibs and items.
2. The system should use a Vandelay machpoint set identified by the user as criteria in determining if an existing record is a match.
3. If the system finds no matches, it should load the bibs as new bib records.
4. When a match is found, the system should overlay/merge the record based on a Vandelay merge/overlay profile identified by the user.
5. When uploading records, the user should be able to identify the Best/Single Match Minimum Quality Ratio required to determine whether the incoming record should overlay or merge with the existing record.
6. If the incoming record quality is not high enough to overlay or merge with the existing record, the system should load items and attach them to the existing matching record.

Flexible scopes

PAC-04

Related Requirement: PAC-05

1. The system should provide the ability to build flexible scopes based on a library's copy locations.
2. These scopes should appear as options in the library selector in the Template Toolkit catalog.
3. Users should also be able to embed parameters for these scopes into the catalog URL so that libraries can provide a direct link to this scoped search of the catalog.
4. When building the scopes, staff should have the ability to include multiple copy locations within one scope.
5. A scope can belong to a particular library (e.g. Library A children's materials) or can belong to the entire consortium (All Children's materials.)
6. Scopes belonging to the entire consortium should have the ability to incorporate copy locations owned by the consortium, by any system, and by any branch.
7. Scopes belonging to a system should have the ability to incorporate copy locations owned by the consortium, by that particular system, and by any child branches.
8. Scopes belonging to a branch should have the ability to incorporate copy locations owned by the consortium, by the parent library system, and by that particular branch.

Use Case:

Mayberry Public Library provides a scope allowing users to search for all children's materials in their library. The library's children's scope incorporates several copy locations used at the library, including Picture Books, Children's Fiction, Children's Non-Fiction, Easy Readers, and Children's DVD's. The library also builds a similar scope for YA materials that incorporates several copy locations.

At the same time, the consortium has built a scope allowing users to search all children's materials in the consortium. This scope incorporates the Children's copy location owned by the consortium; the Picture Books, Children's Fiction, Children's Non-Fiction, Easy Readers, and Children's DVD's copy locations owned by several systems; and a specialized children's classics copy location owned by just one branch.

The resulting library dropdown list may look something like:

All Libraries
- Mayberry Public Library System
-- Andy Branch
--- Andy Branch Children's Materials
--- Andy Branch YA Materials
-- Opie Branch
--- Opie Branch Children's Materials
--- Opie Branch YA Materials
- Plum Creek Public Library
-- Plum Creek Children's Materials
- All Children's Materials

Greater flexibility in library selector display

PAC-05

Related Requirement: PAC-04

1. The system should provide the ability to remove specific org units from the library selector dropdown menu that displays in the Template Toolkit OPAC. Removing an org unit from this display should not impact the display of child org units.
2. The system should also provide a way to control the sort order for org units and scopes appearing in the library selector.

Use case:

Library Consortium A is set up with the following hierarchy:

- Consortium
-- Region
--- System
---- Branch

The region level of the hierarchy was created for holds policies, but should not be visible as an option in the library selector. The consortium needs to suppress it from the OPAC without impacting the display of its child org units.

Several systems in this consortium are just standalone libraries; they do not have branches. The consortium needs to suppress the system-level org unit and display the branch-level org unit.

The resulting list in the library selector may look something like:

All Libraries
- Mayberry Public Library System
  - Andy Branch
  - Opie Branch
- Mayberry University Library
- Plum Creek Public Library

Last date of authentication added to patron record
SYS-07

1. The system should store the last date that a patron authenticated against the Evergreen database.
2. This date should be added whenever the patron logs into the public catalog, authenticates with a third-party product using the SIP protocol, or authenticates with a third-party product using the remoteauth.cgi script.
3. The last authentication date should be reportable in the Evergreen reports interface.
4. The last authentication date should be visible in the patron's account in the staff client.

Use case:
Raymond Remote is a patron who hasn't stepped into his library for several years, but actively uses his card to access electronic resources. On August 2, 2011, he logs into EZProxy to search for a newspaper article. The last authentication date in his record is updated to August 2, 2011. On August 9, 2011, he logs into the catalog to search for an e-book. The last authentication date in his record is updated to August 9, 2011. When staff runs a report to get a count of patrons who have used the library in the past year, the last authentication date will be available as a reportable field, and Raymond Remote's use of electronic resources will allow him to be counted in these statistics.

Configurable holds pull lists
CIRC-06

1. Staff should have the ability to identify fields that display in the holds pull list.
2. Staff should also have the ability to identify the order in which these fields display.

3. These settings can either be an organizational unit setting or a workstation setting.
4. Staff should have the ability to filter the holds pull list by one or more copy locations at the time they are generating the list.
5. This functionality should be available for a pull list that sorts first by copy location and then by call number. The copy location order should be determined by the *Copy Location Order* interface in the *Local Settings* menu.

Use case:
Cindy Circulator likes to print a pull list that contains the title, author, call number, copy location and barcode (in that order). She has configured her pull list to print these fields. On the other hand, Charlie Circulator, who works at a library in the neighboring town, likes to also see the publication date and the pickup library in the pull list. He wants the pull list to print the call number first before printing other fields. Both users are able to configure the pull list to display their preferred fields in their preferred order.

Charlie usually prints the pull list for all copy locations when pulling holds. However, when he is planning to spend some time in one copy location (e.g. Fiction) to perform other duties, he likes to print out a pull list just for items located in that copy location so that he can pull copies while he is there.

Checking out holds to alternates

CIRC-07

1. The system should provide an option to check out a hold to an alternate patron.
2. When an item that is on the holds shelf is checked out to another patron, the system should provide a prompt that displays the name of the patron for whom the book is on hold.
3. This prompt should also provide an option to cancel the checkout; to proceed with the checkout and remove the original patron from the holds queue; or to proceed with the checkout but leave the original patron in the holds queue.

Use case:
Patty Patron places a hold on a book and receives a notification that it is available. She sends her husband, Paul, to the library to pick up her hold. When staff tries to check the book out to Paul, the system provides an alert informing him that the book is on the holds shelf is for Patty Patron. Since the staff person knows that Paul is picking up the book for Patty, he chooses the option to proceed with the checkout and to remove Patty from the holds queue.

Responding to this Request:

Please submit your proposal electronically in PDF, OpenOffice and/or Microsoft Office format. In responding to this request, the proposal should include the following components:

A. *Scope of Work and Cost Proposal*: Respondents to this RFP may provide proposals for one or any number of projects outlined in the Scope of Work section. Respondents should provide pricing for each project for which they are submitting a proposal (use the same numbering system.) Each proposal should include pricing for development and subsequent testing and modifications, as well as an estimated timeframe for the project. If the respondent believes there is a benefit to breaking up any of the above projects into pieces, he or she is welcome to provide pricing for each of those pieces.
B. *Methodology*: Describe how you or your firm proposes implementing this development, including an estimated timeframe for the project.
C. *Relevant Experience*: Detail your or your firm's experience contributing to the Evergreen Open-Source ILS project. Provide examples of enhancements or bug fixes you or your firm has contributed that were ultimately committed to Evergreen. Provide any other details about your involvement in the Evergreen community.
D. *References*: If you or your firm has previously provided Evergreen development services on behalf of a library or other organization, please provide client contact information. Otherwise, please provide contact information for people you have worked with in the Evergreen community.
E. *Project Lead*: Identify the person who would be responsible for this project and include a resume or CV.

Evaluation:

MassLNC will select the contractor(s) based on the following:

A. compliance with the RFP (10 points);
B. how closely the proposal meets the requirements of the RFP (30 points);
C. demonstrated relevant previous experience (20 points);
D. demonstrated involvement in the Evergreen community (10 points);
E. costs and value for money (30 points).

Reference checks will be conducted for the top scoring respondent and any other respondent that is within 10 points of the top scorer. A maximum of 10 points will be awarded from discussion with supplied references.

A serious deficiency in any one criterion may be grounds for rejection regardless of overall score.

MassLNC reserves the right to:

A. discontinue this RFP process without obligation or liability to any potential vendor;
B. accept or decline any or all proposals;
C. accept all or any part of any proposal, unless specifically stated otherwise in the proposal by the respondent;
D. accept other than the lowest priced proposal;
E. award more than one contract.

Contact:

Kathy Lussier, Project Coordinator
Massachusetts Library Network Cooperative
67 Millbrook St.
Suite 201
Worcester, MA 01606
klussier@masslnc.org

Timeline:

Please return the completed proposal to Kathy Lussier by 5 p.m. (EDT) Thursday, September 22, 2011. Requests for additional information should be sent to Kathy Lussier by September 1, 2011. Responses to these requests will be posted to the MassLNC site at www.masslnc.org by September 8, 2011.

The schedule for the issue of this RFP is expected to be as follows. This timetable may be subject to change at the discretion of MassLNC.

Milestone	Deadline
Release of RFP	August 18, 2011
Questions from potential respondents about scope or approach	September 1, 2011
Answers to questions about scope or approach	September 8, 2011
Proposals due	5 p.m. (EDT) September 22, 2011
Target date for review of proposals	September 26, 2011
Selection of contractor(s)	September 28, 2011
Anticipated commencement date of work	October 12, 2011