



REQUEST FOR QUOTES

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

The Massachusetts Library Network Cooperative (MassLNC) is seeking quotes to develop enhancements to 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 plans to go live on Evergreen in May 2011. C/W MARS and NOBLE plan to go live later in 2011 and 2012. The participating networks have identified these initial development requirements contained in this RFQ for enhancements required before deploying Evergreen.

Any development procured through this RFQ, along with associated testing and modifications, is expected to be completed by February 1, 2011.

Scope of Work:

Any development procured through this RFQ must be made available under the GNU General Public License version 2 or later (Appendix A.)

Category: Circulation

Project ID: CIRC-01

Name: Automatic rollover of patron active/inactive addresses.

Description: This enhancement will provide a mechanism to automatically switch patron addresses to active or inactive based on a date entered in the patron record.

Requirements:

1. In the address section of the "register patron" record, the system will provide an option to provide an active date range.
2. Upon reaching the starting date of this date range, the system will automatically change the active mailing and/or billing address to this address.

3. Upon reaching the ending date of this date range, the system will automatically revert to the patron's default mailing and/or billing address.
4. The system will provide an option allowing users to add and update their active/inactive dates via their account in the public catalog.

Scenario:

Summer resident John Smith uses his Summer Town address as his mailing address when registering for his Summer Town Library card. This is his default mailing address in the system. However, staff also adds his Snowbird City address as a mailing address that is active from October 1 to April 30. When October 1 arrives, his Snowbird City mailing address automatically becomes active. On May 1, the mailing address automatically reverts to his default Summer Town address.

Project ID: CIRC-02

Name: Grace periods for org units and specific items

Description: This enhancement will provide more flexibility to grace period for fines by allowing libraries to set their own default grace period and to apply different grace periods for specific items.

Requirements:

1. The system provides the option for organizational units to set their own grace periods for fines.
 2. The system also provides the ability to change the grace periods for particular items based on its circulation modifier or another piece of information in the copy or MARC record.
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Project ID: CIRC-03

Name: Collect fines at check-in

Description: This enhancement will provide one-click access to fine payment at the time a patron returns items with overdue fines.

Requirements:

At the "Item Check In" screen, staff will be able to click on any "balance owed" to open up the bills portion of the patron's record in a separate tab.

Category: Public Catalog

Project ID: PAC-01

Name: Additional boosts for relevance ranking

Description: This enhancement will adjust Evergreen's relevance ranking by including more data, particularly usage data, in the algorithm when calculating relevance scores.

Requirements:

Libraries can currently adjust search relevancy based on fields in the MARC record using the search.relevance_adjustment table. This enhancement will add the following tweakable boosts:

- Publication date (newer titles get a bigger boost than older ones)
- Circulation activity (titles with more checkouts get a bigger boost than titles with fewer checkouts)
- Holds queue (titles with a long holds queue get a bigger boost than titles with no holds queue)
- Number of items attached (titles with more items attached get a bigger boost than titles with fewer items attached)
- Number of orders (titles with more orders get a bigger boost than titles with fewer orders)

Category: System

Project ID: SYS-01

Name: Warning prompts

Description: This enhancement will provide a safeguard for staff that accidentally closes a data entry screen without saving the record.

Requirements:

1. If staff closes the data entry screen without saving the record, the system provides a prompt asking if the information should be saved before exiting.
2. The system will provide options to save the record, to continue editing, or to close the record.
3. Data entry screens that require this enhancement include the patron registration screen (circulation), the MARC editor (cataloging), the copy editor (cataloging), the new brief record screen (acquisitions), the provider data entry screen (acquisitions), and the new provider address data entry screen (acquisitions.)

Project ID: SYS-02

Name: Logging the last editor and creator for a user record

Description: This enhancement will store information about the creator and last editor of a user record and display this information in the user interface for the record.

Requirements:

1. Create fields in the actor.usr table to store the record's creator, last editor, the workstation from which the last edit was performed, and the last edit date.
 2. Add the creator, editor, workstation and last edit date data to the table when a user record is saved.
 3. Provide the ability to customize the view of the patron's record in the client to display these fields.
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Project ID: SYS-03

Name: Logging user information for transit transactions

Description: This enhancement would store information about the logged-in user and workstation whenever a copy is received from or placed into transit.

Requirements:

1. Add fields to the action.transit_copy table to store the logged-in user and the workstation data.
 2. Add the logged-in user and workstation data to the table whenever an item is received from or sent into transit.
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Project ID: SYS-04

Name: Last date of authentication added to patron record

Description: Authentication facility with third-party products to add the last date of authentication to the patron record.

Requirements:

1. When a patron uses a third-party product that authenticates against Evergreen using the SIP2 protocol, the date of authentication is added to the patron's record along with the client's service name.
 2. This field should be available for queries in the Evergreen reports interface.
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Responding to this Request:

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

- A. *Scope of Work and Cost Proposal:* Respondents to this RFQ may provide quotes for one or any number of projects outlined in the Scope of Work section. A separate quote should be provided for each project the respondent is bidding on (use the same numbering system.) Each quote 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 a quote for each of those pieces.
- B. *Methodology:* Describe how you or your firm will approach the described tasks.
- 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 RFQ;
- B. how closely the proposal meets the requirements of the RFQ;
- C. demonstrated relevant previous experience;
- D. demonstrated involvement in the Evergreen community;
- E. discussion with supplied references;
- F. costs and value for money.

MassLNC reserves the right to:

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- B. accept or decline any or all quotes;
- 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 quoted;
- E. award more than one contract.

Contact:

Kathy Lussier, Project Coordinator
Massachusetts Library Network Cooperative
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Suite 201
Worcester, MA 01606
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Timeline:

Please return the completed quote to Kathy Lussier by 5 p.m. Wednesday, September 22, 2010. Requests for additional information should be sent to Kathy Lussier by September 8, 2010. Responses to these requests will be posted to the MassLNC site at www.masslnc.org by September 15, 2010.

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

Milestone	Deadline
Release of RFQ	August 24, 2010
Questions from potential respondents about scope or approach	September 8, 2010
Answers to questions about scope or approach	September 15, 2010
Quotes due	5 p.m. September 22, 2010
Target date for review of quotes	September 29, 2010
Selection of contractor(s)	September 30, 2010
Anticipated commencement date of work	October 7, 2010

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Version 3, 29 June 2007

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