



REQUEST FOR QUOTES

**Code Development for Enhancements
to build NCIP connector for SHAREit**



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 an interface that will facilitate communication between Evergreen and SHAREit (provided by the company, Auto-Graphics).

Background:

The Massachusetts Library Network Cooperative (MassLNC) is a collaborative project among three consortia running 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.

SHAREit is a product from Auto-Graphics that facilitates resource-sharing among disparate Integrated Library Systems. The Massachusetts Virtual Catalog plans to move to SHAREit in the summer of 2014.

Scope of Work:

Any development procured through this RFQ must be made available under the GNU General Public License version 2 or later. The code for this development must be contributed to a public git repository no later than five days after MassLNC's final acceptance of the development work.

SHAREit utilizes NCIP versions 1 and 2 to connect to Integrated Library Systems. MassLNC's preference is to use NCIP Version 2. SHAREit supports the following NCIP messages:

Borrowing Role

LookUpUser
AcceptItem
CheckInItem

Lending Role

LookUpUser
CreateUser (Optional)
RequestItem
CheckOutItem
CheckInItem
CancelRequestItem



See Appendix A for a set of sample messages used by SHAREit.

Although SHAREit supports NCIP, this request is not asking to build full NCIP functionality in Evergreen. MassLNC primarily needs a simple program that can respond to SHAREit's messages. Potential developers are encouraged to investigate existing open-source code that may be leveraged for this project:

- Biblio-NCIP1 - <https://github.com/fenway-libraries-online/Biblio-NCIP1> - a responder built by Fenway Libraries Online to connect Voyager to the SHAREit system.
- iNCIPit - <https://github.com/jonscott/iNCIPit> - an NCIP responder built to connect Evergreen with III's Inn-Reach system.
- NCIPServer - <http://git.evergreen-ils.org/?p=NCIPServer.git;a=summary> – an NCIP responder to connect Koha to the SHAREit system.

Temporary bib records and copies should be created automatically for these incoming items and these temporary records should be automatically deleted once the loan is complete.

See Appendix B for an expected workflow with a SHAREit request.

Responding to this Request:

Please submit your proposal 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: The cost proposal should include pricing for development and subsequent testing and modifications.
- 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:

- compliance with the RFQ;
- how closely the proposal meets the requirements of the RFQ;
- demonstrated relevant previous experience;
- demonstrated involvement in the Evergreen community;
- costs and value for money.

Reference checks 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:

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

Contact:

Kathy Lussier, Project Coordinator
Massachusetts Library Network Cooperative
klussier@masslnc.org

Timeline:

Please return the completed quote to Kathy Lussier by 11:59 p.m. (EDT) Wednesday, April 16, , 2014. Requests for additional information should be sent to Kathy Lussier by April 4, 2014. Responses to these requests will be posted to the MassLNC site at www.masslnc.org by April 9, 2014.



Appendix A

Set of Sample Messages

AcceptItem Message

```
<?xml version="1.0" encoding="utf-8"?><!DOCTYPE NCIPMessage PUBLIC "-//NISO//NCIP DTD
Version 1//EN" "http://www.niso.org/ncip/v1_0/imp1/dtd/ncip_v1_0.dtd">
<NCIPMessage version="http://www.niso.org/ncip/v1_0/imp1/dtd/ncip_v1_0.dtd">
  <AcceptItem>
    <InitiationHeader>
      <FromAgencyId>
        <UniqueAgencyId>
          <Scheme>http://www.auto-
graphics.com/ncip/schemes/uniqueagencyid/agencynames.scm</Scheme>
          <Value>CPomAG:massvc:FLO-WHEELLOCK</Value>
        </UniqueAgencyId>
      </FromAgencyId>
      <ToAgencyId>
        <UniqueAgencyId>
          <Scheme>http://schema.flo.org/ncip/ag</Scheme>
          <Value>FLO-WHEELLOCK</Value>
        </UniqueAgencyId>
      </ToAgencyId>
    </InitiationHeader>
    <UniqueRequestId>
      <UniqueAgencyId>
        <Scheme>http://schema.flo.org/ncip/ag</Scheme>
        <Value>FLO-WHEELLOCK</Value>
      </UniqueAgencyId>
      <RequestIdentifierValue>250</RequestIdentifierValue>
    </UniqueRequestId>
    <RequestedActionType>
      <Scheme>http://www.niso.org/ncip/v1_0/imp1/schemes/requestedactiontype/requestedactiontype.scm</S
cheme>
      <Value>Hold For Pickup And Notify</Value>
    </RequestedActionType>
    <UniqueUserId>
      <UniqueAgencyId>
        <Scheme>http://schema.flo.org/ncip/ag</Scheme>
        <Value>FLO-WHEELLOCK</Value>
      </UniqueAgencyId>
      <UserIdentifierValue>4444</UserIdentifierValue>
```



```
</UniqueUserId>
<UniqueItemId>
  <UniqueAgencyId>
    <Scheme>http://schema.flo.org/ncip/ag</Scheme>
    <Value>FLO-WHEELOCK</Value>
  </UniqueAgencyId>
  <ItemIdentifierValue>0113801584633</ItemIdentifierValue>
</UniqueItemId>
<DateForReturn>2013-11-13T23:59:00</DateForReturn>
<ItemOptionalFields>
  <BibliographicDescription>
    <Author>Guertin, Mike.</Author>
    <BibliographicItemId>
      <BibliographicItemIdentifier>1561584630</BibliographicItemIdentifier>
      <BibliographicItemIdentifierCode>
        <Scheme>http://www.niso.org/ncip/v1_0/imp1/schemes/bibliographicitemidentifiercode/bibliographicite
midentifiercode.scm</Scheme>
        <Value>ISBN</Value>
        </BibliographicItemIdentifierCode>
      </BibliographicItemId>
      <PublicationDate>c2001.</PublicationDate>
      <Publisher>Taunton Press ; Publishers Group West [distributor]</Publisher>
      <Title>Precision framing</Title>
      <MediumType>
        <Scheme>http://www.niso.org/ncip/v1_0/imp1/schemes/mediumtype/mediumtype.scm</Scheme>
        <Value>Book</Value>
      </MediumType>
    </BibliographicDescription>
    <ItemDescription>
      <CallNumber>694.2 .G84 2001</CallNumber>
    </ItemDescription>
  </ItemOptionalFields>
</AcceptItem>
</NCIPMessage>
```



LookUpUser Message

```
<?xml version="1.0" encoding="utf-8"?><!DOCTYPE NCIPMessage PUBLIC "-//NISO//NCIP DTD
Version 1//EN" "http://www.niso.org/ncip/v1_0/impl/dtd/ncip_v1_0.dtd">
<NCIPMessage version="http://www.niso.org/ncip/v1_0/impl/dtd/ncip_v1_0.dtd">
  <LookupUser>
    <InitiationHeader>
      <FromAgencyId>
        <UniqueAgencyId>
          <Scheme>http://www.auto-
graphics.com/ncip/schemes/uniqueagencyid/agencynames.scm</Scheme>
          <Value>CPomAG:massvc:FLO-WENTWORTH</Value>
        </UniqueAgencyId>
      </FromAgencyId>
      <ToAgencyId>
        <UniqueAgencyId>
          <Scheme>HTTP://schema.flo.org/ncip/ag</Scheme>
          <Value>FLO-WENTWORTH</Value>
        </UniqueAgencyId>
      </ToAgencyId>
    </InitiationHeader>
    <UniqueUserId>
      <UniqueAgencyId>
        <Scheme>HTTP://schema.flo.org/ncip/ag</Scheme>
        <Value>FLO-WENTWORTH</Value>
      </UniqueAgencyId>
      <UserIdentifierValue>FLO-WHEELOCK</UserIdentifierValue>
    </UniqueUserId>
    <UserElementType>
      <Scheme>http://www.niso.org/ncip/v1_0/schemes/userelementType/userelementType.scm</Scheme>
      <Value>Name Information</Value>
    </UserElementType>
    <UserElementType>
      <Scheme>http://www.niso.org/ncip/v1_0/schemes/userelementType/userelementType.scm</Scheme>
      <Value>User Address Information</Value>
    </UserElementType>
    <UserElementType>
      <Scheme>http://www.niso.org/ncip/v1_0/schemes/userelementType/userelementType.scm</Scheme>
      <Value>User Privilege</Value>
    </UserElementType>
    <UserElementType>
      <Scheme>http://www.niso.org/ncip/v1_0/schemes/userelementType/userelementType.scm</Scheme>
      <Value>Block Or Trap</Value>
    </UserElementType>
  </LookupUser>
```



</NCIPMessage>



RequestItem Message

```
<?xml version="1.0" encoding="utf-8"?><!DOCTYPE NCIPMessage PUBLIC "-//NISO//NCIP DTD
Version 1//EN" "http://www.niso.org/ncip/v1_0/imp1/dtd/ncip_v1_0.dtd">
<NCIPMessage version="http://www.niso.org/ncip/v1_0/imp1/dtd/ncip_v1_0.dtd">
  <RequestItem>
    <InitiationHeader>
      <FromAgencyId>
        <UniqueAgencyId>
          <Scheme>http://www.auto-
graphics.com/ncip/schemes/uniqueagencyid/agencynames.scm</Scheme>
          <Value>CPomAG:massvc:FLO-WENTWORTH</Value>
        </UniqueAgencyId>
      </FromAgencyId>
      <ToAgencyId>
        <UniqueAgencyId>
          <Scheme>HTTP://schema.flo.org/ncip/ag</Scheme>
          <Value>FLO-WENTWORTH</Value>
        </UniqueAgencyId>
      </ToAgencyId>
    </InitiationHeader>
    <MandatedAction>
      <DateEventOccurred>2013-09-19T12:08:00</DateEventOccurred>
    </MandatedAction>
    <UniqueUserId>
      <UniqueAgencyId>
        <Scheme>HTTP://schema.flo.org/ncip/ag</Scheme>
        <Value>FLO-WENTWORTH</Value>
      </UniqueAgencyId>
      <UserIdentifierValue>FLO-WHEELLOCK</UserIdentifierValue>
    </UniqueUserId>
    <UniqueBibliographicId>
      <BibliographicRecordId>
        <BibliographicRecordIdentifier>134119</BibliographicRecordIdentifier>
        <UniqueAgencyId>
          <Scheme>HTTP://schema.flo.org/ncip/ag</Scheme>
          <Value>FLO-WENTWORTH</Value>
        </UniqueAgencyId>
      </BibliographicRecordId>
    </UniqueBibliographicId>
    <UniqueRequestId>
      <UniqueAgencyId>
        <Scheme>HTTP://schema.flo.org/ncip/ag</Scheme>
        <Value>FLO-WENTWORTH</Value>
```



```

</UniqueAgencyId>
<RequestIdentifierValue>253</RequestIdentifierValue>
</UniqueRequestId>
<RequestType>
  <Scheme>http://www.niso.org/ncip/v1_0/imp1/schemes/requesttype/requesttype.scm</Scheme>
  <Value>Loan</Value>
</RequestType>
<RequestScopeType>

<Scheme>http://www.niso.org/ncip/v1_0/imp1/schemes/requestscopetype/requestscopetype.scm</Scheme>
e>
  <Value>Bibliographic Item</Value>
</RequestScopeType>
<NeedBeforeDate>2013-12-18T00:00:00</NeedBeforeDate>
<AcknowledgedFeeAmount>
  <CurrencyCode>
    <Scheme>http://www.bsi-
global.com/Technical+Information/Publications/_Publications/tig90x.doc</Scheme>
    <Value>USD</Value>
  </CurrencyCode>
  <MonetaryValue>000</MonetaryValue>
</AcknowledgedFeeAmount>
<ItemElementType>
  <Scheme>http://www.niso.org/ncip/v1_0/schemes/itemelementtype/itemelementtype.scm</Scheme>
  <Value>Bibliographic Description</Value>
</ItemElementType>
<ItemElementType>
  <Scheme>http://www.niso.org/ncip/v1_0/schemes/itemelementtype/itemelementtype.scm</Scheme>
  <Value>Circulation Status</Value>
</ItemElementType>
</RequestItem>
</NCIPMessage>

```

CheckInItem Message

```

<?xml version="1.0" encoding="utf-8"?><!DOCTYPE NCIPMessage PUBLIC "-//NISO//NCIP DTD
Version 1//EN" "http://www.niso.org/ncip/v1_0/imp1/dtd/ncip_v1_0.dtd">
<NCIPMessage version="http://www.niso.org/ncip/v1_0/imp1/dtd/ncip_v1_0.dtd">
  <CheckInItem>
    <InitiationHeader>
      <FromAgencyId>
        <UniqueAgencyId>
          <Scheme>http://www.auto-
graphics.com/ncip/schemes/uniqueagencyid/agencynames.scm</Scheme>
          <Value>CPomAG:massvc:FLO-WENTWORTH</Value>

```



```
</UniqueAgencyId>
</FromAgencyId>
<ToAgencyId>
  <UniqueAgencyId>
    <Scheme>HTTP://schema.flo.org/ncip/ag</Scheme>
    <Value>FLO-WENTWORTH</Value>
  </UniqueAgencyId>
</ToAgencyId>
</InitiationHeader>
<MandatedAction>
  <DateEventOccurred>2013-09-19T15:23:00</DateEventOccurred>
</MandatedAction>
<UniqueItemId>
  <UniqueAgencyId>
    <Scheme>HTTP://schema.flo.org/ncip/ag</Scheme>
    <Value>FLO-WENTWORTH</Value>
  </UniqueAgencyId>
  <ItemIdentifierValue>0113801584633</ItemIdentifierValue>
</UniqueItemId>
<ItemElementType>
  <Scheme>http://www.niso.org/ncip/v1_0/schemes/itemelementtype/itemelementtype.scm</Scheme>
  <Value>Bibliographic Description</Value>
</ItemElementType>
<ItemElementType>
  <Scheme>http://www.niso.org/ncip/v1_0/schemes/itemelementtype/itemelementtype.scm</Scheme>
  <Value>Circulation Status</Value>
</ItemElementType>
<UserElementType>
  <Scheme>http://www.niso.org/ncip/v1_0/schemes/userelementtype/userelementtype.scm</Scheme>
  <Value>Name Information</Value>
</UserElementType>
<UserElementType>
  <Scheme>http://www.niso.org/ncip/v1_0/schemes/userelementtype/userelementtype.scm</Scheme>
  <Value>User Address Information</Value>
</UserElementType>
<UserElementType>
  <Scheme>http://www.niso.org/ncip/v1_0/schemes/userelementtype/userelementtype.scm</Scheme>
  <Value>User Privilege</Value>
</UserElementType>
<UserElementType>
  <Scheme>http://www.niso.org/ncip/v1_0/schemes/userelementtype/userelementtype.scm</Scheme>
  <Value>Block Or Trap</Value>
</UserElementType>
</CheckInItem>
</NCIPMessage>
```



CancelRequestItem Message

```
<?xml version="1.0" encoding="utf-8"?><!DOCTYPE NCIPMessage PUBLIC "-//NISO/NCIP DTD
Version 1//EN" "http://www.niso.org/ncip/v1_0/imp1/dtd/ncip_v1_0.dtd">
<NCIPMessage version="http://www.niso.org/ncip/v1_0/imp1/dtd/ncip_v1_0.dtd">
  <CancelRequestItem>
    <InitiationHeader>
      <FromAgencyId>
        <UniqueAgencyId>
          <Scheme>http://www.auto-
graphics.com/ncip/schemes/uniqueagencyid/agencynames.scm</Scheme>
          <Value>CPomAG:massvc:FLO-WENTWORTH</Value>
        </UniqueAgencyId>
      </FromAgencyId>
      <ToAgencyId>
        <UniqueAgencyId>
          <Scheme>HTTP://schema.flo.org/ncip/ag</Scheme>
          <Value>FLO-WENTWORTH</Value>
        </UniqueAgencyId>
      </ToAgencyId>
    </InitiationHeader>
    <UniqueUserId>
      <UniqueAgencyId>
        <Scheme>HTTP://schema.flo.org/ncip/ag</Scheme>
        <Value>FLO-WENTWORTH</Value>
      </UniqueAgencyId>
      <UserIdentifierValue>FLO-WHEELOCK</UserIdentifierValue>
    </UniqueUserId>
    <UniqueRequestId>
      <UniqueAgencyId>
        <Scheme>HTTP://schema.flo.org/ncip/ag</Scheme>
        <Value>FLO-WENTWORTH</Value>
      </UniqueAgencyId>
      <RequestIdentifierValue>252</RequestIdentifierValue>
    </UniqueRequestId>
    <RequestType>
      <Scheme>http://www.niso.org/ncip/v1_0/imp1/schemes/requesttype/requesttype.scm</Scheme>
      <Value>Loan</Value>
    </RequestType>
  </CancelRequestItem>
</NCIPMessage>
```

CreateUser Message



```
<?xml version="1.0" encoding="utf-8"?><!DOCTYPE NCIPMessage PUBLIC "-//NISO//NCIP DTD
Version 1//EN" "http://www.niso.org/ncip/v1_0/imp1/dtd/ncip_v1_0.dtd">
<NCIPMessage version="http://www.niso.org/ncip/v1_0/imp1/dtd/ncip_v1_0.dtd">
  <CreateUser>
    <InitiationHeader>
      <FromAgencyId>
        <UniqueAgencyId>
          <Scheme>http://www.auto-
graphics.com/ncip/schemes/uniqueagencyid/agencynames.scm</Scheme>
          <Value>CPomAG:massvc:FLO-EMERSON</Value>
        </UniqueAgencyId>
      </FromAgencyId>
      <ToAgencyId>
        <UniqueAgencyId>
          <Scheme>HTTP://schema.flo.org/ncip/ag</Scheme>
          <Value>FLO-EMERSON</Value>
        </UniqueAgencyId>
      </ToAgencyId>
    </InitiationHeader>
    <MandatedAction>
      <DateEventOccurred>2013-09-04T09:22:00</DateEventOccurred>
    </MandatedAction>
    <UniqueUserId>
      <UniqueAgencyId>
        <Scheme>http://www.auto-
graphics.com/ncip/schemes/uniqueagencyid/agencynames.scm</Scheme>
        <Value>CPomAG:massvc:FLO-EMERSON</Value>
      </UniqueAgencyId>
      <UserIdentifierValue>MASSVC</UserIdentifierValue>
    </UniqueUserId>
    <NameInformation>
      <OrganizationNameInformation>
        <OrganizationNameType>
          <Scheme>http://www.niso.org/ncip/v1_0/imp1/schemes/organizationnametype/organizationnametype.sc
m</Scheme>
          <Value>Official Name</Value>
        </OrganizationNameType>
        <OrganizationName>Massachusetts Virtual Catalog</OrganizationName>
      </OrganizationNameInformation>
    </NameInformation>
    <UserPrivilege>
      <UniqueAgencyId>
        <Scheme>HTTP://schema.flo.org/ncip/ag</Scheme>
        <Value>FLO-EMERSON</Value>
```



```
</UniqueAgencyId>  
<AgencyUserPrivilegeType>
```

```
<Scheme>http://www.niso.org/ncip/v1_0/imp1/schemes/agencyuserprivilege/public.scm</Scheme>  
  <Value>Staff</Value>  
</AgencyUserPrivilegeType>  
<ValidFromDate>2013-09-04T00:00:00</ValidFromDate>  
<UserPrivilegeStatus>  
  <UserPrivilegeStatusType>
```

```
<Scheme>http://www.niso.org/ncip/v1_0/imp1/schemes/userprivilegestatus/userprivilegestatus.cm</Scheme>  
  <Value>Active</Value>  
</UserPrivilegeStatusType>  
</UserPrivilegeStatus>  
<UserPrivilegeDescription>user status</UserPrivilegeDescription>  
</UserPrivilege>  
<UserPrivilege>  
  <UniqueAgencyId>  
    <Scheme>HTTP://schema.flo.org/ncip/ag</Scheme>  
    <Value>FLO-EMERSON</Value>  
  </UniqueAgencyId>  
<AgencyUserPrivilegeType>
```

```
<Scheme>http://www.niso.org/ncip/v1_0/imp1/schemes/agencyuserprivilege/public.scm</Scheme>  
  <Value>Staff</Value>  
</AgencyUserPrivilegeType>  
<ValidFromDate>2013-09-04T00:00:00</ValidFromDate>  
<UserPrivilegeStatus>  
  <UserPrivilegeStatusType>
```

```
<Scheme>http://www.niso.org/ncip/v1_0/imp1/schemes/userprivilegestatus/userprivilegestatus.cm</Scheme>  
  <Value>ILL</Value>  
</UserPrivilegeStatusType>  
</UserPrivilegeStatus>  
<UserPrivilegeDescription>patron type</UserPrivilegeDescription>  
</UserPrivilege>  
</CreateUser>  
</NCIPMessage>
```

CheckOutItem Message

```
<?xml version="1.0" encoding="utf-8"?><!DOCTYPE NCIPMessage PUBLIC "-//NISO//NCIP DTD  
Version 1//EN" "http://www.niso.org/ncip/v1_0/imp1/dtd/ncip_v1_0.dtd">
```



```
<NCIPMessage version="http://www.niso.org/ncip/v1_0/imp1/dtd/ncip_v1_0.dtd">
<CheckoutItem>
  <InitiationHeader>
    <FromAgencyId>
      <UniqueAgencyId>
        <Scheme>http://www.auto-
graphics.com/ncip/schemes/uniqueagencyid/agencynames.scm</Scheme>
        <Value>CPomAG:massvc:FLO-WENTWORTH</Value>
      </UniqueAgencyId>
    </FromAgencyId>
    <ToAgencyId>
      <UniqueAgencyId>
        <Scheme>HTTP://schema.flo.org/ncip/ag</Scheme>
        <Value>FLO-WENTWORTH</Value>
      </UniqueAgencyId>
    </ToAgencyId>
  </InitiationHeader>
  <MandatedAction>
    <DateEventOccurred>2013-08-27T02:34:00</DateEventOccurred>
  </MandatedAction>
  <UniqueUserId>
    <UniqueAgencyId>
      <Scheme>HTTP://schema.flo.org/ncip/ag</Scheme>
      <Value>FLO-WENTWORTH</Value>
    </UniqueAgencyId>
    <UserIdentifierValue>FLO-WHEELOCK</UserIdentifierValue>
  </UniqueUserId>
  <UniqueItemId>
    <UniqueAgencyId>
      <Scheme>HTTP://schema.flo.org/ncip/ag</Scheme>
      <Value>FLO-WENTWORTH</Value>
    </UniqueAgencyId>
    <ItemIdentifierValue>0113801609828</ItemIdentifierValue>
  </UniqueItemId>
  <UniqueRequestId>
    <UniqueAgencyId>
      <Scheme>HTTP://schema.flo.org/ncip/ag</Scheme>
      <Value>FLO-WENTWORTH</Value>
    </UniqueAgencyId>
    <RequestIdentifierValue>224</RequestIdentifierValue>
  </UniqueRequestId>
  <AcknowledgedFeeAmount>
    <CurrencyCode>
      <Scheme>http://www.bsi-
global.com/Technical+Information/Publications/_Publications/tig90x.doc</Scheme>
```



```
<Value>USD</Value>
</CurrencyCode>
<MonetaryValue>000</MonetaryValue>
</AcknowledgedFeeAmount>
<ItemElementType>
  <Scheme>http://www.niso.org/ncip/v1_0/schemes/itemelementtype/itemelementtype.scm</Scheme>
  <Value>Bibliographic Description</Value>
</ItemElementType>
<ItemElementType>
  <Scheme>http://www.niso.org/ncip/v1_0/schemes/itemelementtype/itemelementtype.scm</Scheme>
  <Value>Circulation Status</Value>
</ItemElementType>
</CheckOutItem>
</NCIPMessage>
```




Appendix B

Workflow for processing a Pending request

- 1) When a Pending request is received at the lending library SHAREit will send a LookUpUser message to the ILS to determine if the borrowing library has a user record in the system. If the response comes back that the user does not exist SHAREit will send a CreateUserMessage so the ILS can create the user record.
- 2) Once the user is verified from 1 above SHAREit will send a RequestItemMessage which places a hold in Evergreen for an item that is needed by a borrowing library.
- 3) If the lending library changes the status to Will Not Supply and/or SHAREit sends a CancelRequestItem message Evergreen will remove the hold on the item
- 4) If the lending library decides to supply the item, a library staff person pulls the item from the shelf and then goes to SHAREit (or gives it to an ILL staff person for processing). At this step the library can update the status to Will Supply which does not send any messages to Evergreen.
- 5) The ILL staff person updates SHAREit by scanning the item barcode into the SHAREit request and updating the status to Shipped.
- 6) SHAREit sends a <CheckOutItem > message to Evergreen which checks out the item to the borrowing library.
- 7) When the borrowing library returns the item and the lending library updates the status to Checked In in SHAREit, SHAREit will send a CheckInItem message to Evergreen which will clear the record.



Workflow for processing a borrowing request

1. When a patron logs into the system using their library barcode and pin, SHAREit will send a LookUpUser message to Evergreen. If the patron is blocked in Evergreen or does not exist in Evergreen, the patron cannot log in.
2. A staff member can also generate an ILL request on behalf of a patron and when the staff member selects Request This Item SHAREit will prompt the staff member to enter a patron barcode and SHAREit will send a LookUpUser message to Evergreen. If the patron is blocked or does not exist in Evergreen the staff member cannot proceed with the ILL request for the patron.
3. The patron searches the system for the desired item, once found the patron will select Request This Item and the ILL request form displays with all fields filled in including all of the patron contact information that was transferred from the ILS during the LookUpUser process.
4. The patron submits the ILL request which will place the item in Awaiting Approval. Once approved the ILL request is routed to the 1st lending library on the lender list.
5. When the lending library updates the request to Shipped in SHAREit, the borrowing library will see this status and when the borrowing library updates the status to Received SHAREit will send an AcceptItem message to Evergreen. Evergreen will create a brief bib record and associate that record with the patron that the item was requested for. The lending library also sets the due date which is transmitted with the AcceptItem message and Evergreen should use that due date when the item is checked out to the patron. Note most ILS systems will automatically check out the item to the patron as part of AcceptItem message but the actual workflow is governed by the ILS.
6. The patron is notified by Evergreen or SHAREit that the item has arrived
7. Once the patron returns the item, the item is sent to ILL department and the ILL department updates the ILL status to Returned in SHAREit which will send a **CheckInItem** messages to Evergreen. The item is cleared from the patron record and Evergreen can delete the brief bib record that was created. The ILS policy governs if the brief bib is deleted or retained, not SHAREit. *NOTE: MassLNC's preference is that the brief bib is deleted.*
8. Once the item is received at the lending library and the lending library updates the ILL status to Checked In, the ILL request will move to the Completed status at the borrowing library. These transactions do not generate any NCIP messages to Evergreen.
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