INVITATION TO BID

The Board of Education of the St Clair County Regional Education Service Agency will accept sealed bids for the installation of a new library automation system. Bids will be opened on June 12, 2007 at 3:00 p.m. and read aloud at the address below. Bids received after this date and time will not be accepted or considered.

Bidders may submit questions regarding this invitation to bid to:

Attn: Kathy Levandowski
St. Clair County RESA
499 Range Rd, PO Box 1500
Marysville, MI 48040
810.364.8990 ext 434

The Board of Education reserves the right to accept or reject any or all bids, in whole or in part, to waive any informality in the bid process and to negotiate contract terms.

The Regional Educational Service Agency is a non-profit, equal opportunity employer. Auxiliary aids and services are available to individuals with disabilities. Voice TDD (800) 649-3777.
General Information

Any questions regarding this bid request must be directed in writing to SCCRESA’s Kathy Levandowski at the above address or via email at quote@sccresa.org or fax at (810) 364-7474. All other communication with SCCRESA staff regarding this bid request outside the pre-bid meeting is prohibited and may result in bid disqualification. Questions will be accepted until 3 pm, June 7, 2007. Questions and answers as posted on the website will be considered part of the bid documents; bidders agree to comply with new information that may be provided on the website by the date and time specified. All bidders are responsible for ensuring that their final bid conforms to any of SCC RESA’s answers to questions posted.

Bidders are required to complete and have notarized the attached Affidavit of Bidder form disclosing familial relationships with its employees and SCC RESA’s superintendent and Board of Education as follows: Superintendent Dan L. DeGrow, Board: Donald B. Cole, Darryl S. Dugas, Lee A. Hulewicz, Robert F. Beattie, Jeffrey S. Beckett. Failure to complete this document may result in disqualification of bid.

Bid Award

The bid will be awarded to one or more bidders at the discretion of SCCRESA. SCCRESA reserves the right to accept or reject any and all bids, in whole or in part, to waive any irregularities in the bid process and to negotiate contract terms, in its sole discretion. The decisions of the RESA are final and bidders have no right to appeal any such decisions.

SCCRESA will award the bid at its regularly scheduled Board meeting June 18, 2007 5:30 p.m. and to notify the successful bidder by June 19, 2007. It is SCC RESA’s intent to complete this work as soon after bid award as possible, with strong preference of completing on/or before August 15, 2007. Please provide a proposed schedule of work starting with bid award and clearly indicating any dependencies on documents or signatures required by SCCREA. Bidders shall note that work on the library automation system that will affect our ability access files must be scheduled at least one day in advance and must be performed after 4:30 pm. All measures/effort will be taken not to disrupt the work process of SCCRESA and the local school districts.

Insurance

The successful vendor will be required to provide proof of general liability, workman’s compensation, bodily injury (for each vehicle) insurance in the amount of at least $1 million EACH, listing St. Clair County RESA as a co-insured, in order to be awarded the project.

Warranty

The Vendor warrants to SCCRESA that the software furnished under the contract will be of good quality, subject to manufacturer warranties and new unless otherwise required or
permitted by SCCRESA. Unless the parties agree otherwise, the Vendor extends a warranty for a period of one-year commencing on the date of the final payment made. The Vendor warrants that the work will be free from defects not inherent in the quality required or permitted. Vendors shall specify the exact periods of on-site warranty coverage for both parts and labor for all equipment and software quoted. Vendor also must state what is covered by the existing warrantee.

**Potential for bonds**

Depending upon the total project cost and alternates accepted by RESA, bidders may be required to supply a 100% performance, labor, and material bond on the work. The requirement of this bond is at SCCRESA’s sole discretion, and vendors shall provide either a fixed dollar amount or percentage of total project cost to secure bond protection in their bid response.

**Non-Discrimination and Assistance**

The Board of Education of the St. Clair County RESA complies with all federal and state laws and regulations prohibiting discrimination, including the requirements of the United State Department of Education and the Michigan State Department of Education.

It is the policy of the Board that no person on the basis of race, color, religion, sex, age, national origin, ancestry, height, weight, marital status, familial status, political belief or affiliation, disability, handicap or legally protected classification shall be discriminated against, excluded from participation in, denied the benefits of, or otherwise subjected to discrimination in any program, employment practice, or activity for which it is responsible or for which it receives federal or state financial assistance.

If you would like to attend and require assistance or accommodations to participate in the bid opening or award meeting, please contact the SCC RESA’s Superintendent at (810) 364-8990 at least 72 hours before the meeting.

**Proposal Submission**

Three (3) copies of the entire proposal must be delivered in a sealed envelope or package and clearly marked as CENTRALIZED LIBRARY, TEXTBOOK, MEDIA, and ASSET MANAGEMENT SYSTEM PROPOSAL by the date and time on the front cover. The package must be sent to Cliff DuPuy, St. Clair RESA, 499 Range Road, Marysville, MI 48040. Proposals received past the deadline will be returned, unopened. Proposals submitted by fax transmission will be rejected. Questions about the RFP should be submitted in writing or faxed to Kathy Levandowski, 499 Range Road, Marysville, MI 4804 fax 810.364.7474. All those receiving the RFP will be sent copies of the questions and responses provided from/to other vendors.
**Indemnification**

Contractor shall defend, indemnify, and hold harmless the owner and its constituent districts, their Board of Education, Board members, officers, employees, agents and representatives from and against any and all claims, liabilities, damages, losses, costs, and expenses (including actual attorney's fees and expenses) incurred by any of them as a result of, arising out of, or relating to the acts and/or omissions of Contractor or any employee or agent of contractor pursuant to or in connection with this agreement.

**Taxes**

Bidder is required to include all applicable taxes (ie-state sales tax and/or use taxeds, etc) and freight in its Bid Proposal, if applicable.

**Payment Schedule**

Payment for the project will be based on milestones that will be discussed with the successful bidder.
AFFIDAVIT OF BIDDER

The undersigned, the owner or authorized office of ___________________________ (the “Bidder”), pursuant to the familial disclosure requirement provided in the advertisement for annual computer equipment bid, hereby represent and warrant, except as provided below, that no familial relationships exist between the owner(s) or any employee of ___________________________ and any member of the Board of Education of the School District or the Superintendent of the School District.

List any Familial Relationships:

BIDDER:

____________________________

By: __________________________

Its: __________________________

STATE OF MICHIGAN    )
COUNTY OF ____________    )

This instrument was acknowledged before me on the ___ day of ____________, 2005, by ____________________________

____________________________, Notary Public

__________________________ County, Michigan

My Commission Expires: ______________

Acting in the County of: ______________
Request for Proposal

Centralized Library,
Textbook, Media, and Asset
Management System
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Instructions to Vendor

Introduction
It is the intent of this request for proposal to seek qualified vendors for a centralized library, textbook, media, and asset management system. The desire is to have a single vendor for the purchase of software, data conversion services, installation, training and ongoing annual technical support and maintenance of the library, textbook, media, and asset management solution.

Background
The St. Clair RESA provides library automation service to its seven local school districts. The system being requested will be installed in 60 different libraries located through St. Clair County.

Currently we are in 54 sites but will be implementing an additional 6 new elementary sites as part of this RFP.

Currently the RESA uses a Dynix system that is seven years old and plan to migrate to the new system. The RESA will provide its own hardware to support the new system. The RESA will purchase the hardware specified by the successful bidder. Each bid should contain the type of hardware and software necessary for the installation of the product. The RESA uses HP Servers for all of its network applications.

As an option we are also looking at textbook management, media management, as well as asset management. However these should all be listed as option.

We currently have one database for all 7 school districts with 500,991 record holdings, and 151,502 bibs. We would look at recommendations to maintain one database or break it up into 7 distinct databases.

Major Critical Requirements
The vendor of the centralized library, textbook, media, and asset management system under consideration should be in a position to meet the following critical requirements by the proposal due date. None of these critical elements are optional. Vendors must provide references of districts that have the implemented the proposed centralized library, textbook, media, and asset management solution meeting these requirements and have been operational for at least one full school year.

The library, textbook, media, and asset management system must meet these critical technology requirements:

- One single district library, textbook, media, and asset management application installation that supports all schools via the district wide area network (no library, textbook, media, and asset management application installations required on school-level servers or workstations, no installation of multiple applications on the district server)
• All library, textbook, media, and asset management functionality available within a standard web browser interface (no client software requirements outside of a web browser, no installs of Java Virtual Machine on client workstations)
• No use of Windows Terminal Services or Active X controls to deliver functionality to browser
• The system supports SQL 2005.
• Data maintained in a single SQL Server 2005 database for entire district
• Application server support for Windows 2003
• Configuration that meets district firewall, webserver and proxy server environment, including HTTPS support
• Supports Microsoft Active Directory and Novell eDirectory via LDAP (Lightweight Directory Access Protocol)
• Support for barcode scanners and handheld devices
• Support for automated interface with district student system for patron data maintenance (additions, updates, deletes and transfers)

The vendor must be prepared to give demonstrations of the following critical district and school functionality:

• Circulation (including support for off-line circulation in library, textbook, and media modules, functionality to circulate materials and process holds/reserves across the district, the ability to define independent school-level circulation policies, and support for patron data maintenance across the district)
• Searching (including advanced searches for library and textbook staff, cross-references, browsing by standard bibliographic headings, keyword searching, district-wide and school-level searching, and interfaces and functionality specifically designed to support student and teacher searching and empowerment)
• Cataloging (including support for centralized cataloging, the ability to restrict items from showing in patron searches, integrated access to K-12 MARC records, and school-level maintenance of holdings and reading program information)
• Reporting (including customizable school-level and district-level reporting, and the ability to e-mail or print the information from any function in the system)
• Inventory (including the completion of independent school-level inventory processes without disruption of normal circulation activities, and support of handheld devices to support remote inventory)
• Z39.50 client and server functionality
• Configuration and setup features (including customizable user access levels, support for overlapping barcode ranges across the district for patrons and copies for library and textbook modules, and support for varying barcode format/lengths and symbologies within each school)

The implementation project provided must include the following critical services:

• Data conversion from current library, textbook, media, and asset automation solution
• Installation of centralized library, textbook, media, and asset management system software, data loading and application configuration
- Project management services to coordinate with district staff
- Staff functional and technical training
- Ongoing technical support and maintenance

**Scope of the Project**

Proposals are sought for a complete implementation solution including software, data conversion, installation, training, and ongoing technical support and maintenance. While quotations are sought for a complete solution, this RFP differentiates between those to be part of the base bid and those to be offered as options.

- Metasearching - Support for metasearching (or broadcast searching) across several paid or free subscription databases and the library and textbook collection
- Cataloged websites - Searching and access to pre-cataloged K-12 approved websites
- Enhanced content - Access to enhanced content such as book covers and reviews within the searching functions
- Reading program data enhancement - Subscription access to integrated web-based data services to maintain reading program data in the library and textbook collection
- Audio-visual MARC records – Subscription online access to MARC records for K-12 audio-visual materials.
- State and provincial standards searching – Subscription access to curriculum standards and searching for websites and titles that support those standards.
- Integration of all software modules purchased from the vendor.
- Web-based training in addition to other training options should be available.

**Proposal Submission**

Three (3) copies of the entire proposal must be delivered in a sealed envelope or package and clearly marked as CENTRALIZED LIBRARY, TEXTBOOK, MEDIA, and ASSET MANAGEMENT SYSTEM PROPOSAL by the date and time on the front cover. The package must be sent to Cliff DuPuy, St. Clair RESA, 499 Range Road, Marysville, MI 48040. Proposals received past the deadline will be returned, unopened. Proposals submitted by fax transmission will be rejected. Questions about the RFP should be submitted in writing or faxed to Kathy Levandowski, 499 Range Road, Marysville, MI 4804 fax 810.364.7474. All those receiving the RFP will be sent copies of the questions and responses provided from/to other vendors.

**Additional Information**

The district reserves the right to request any additional information, which might be deemed necessary after reviewing this document.
Withdrawal of Proposals

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

Non-discrimination

The district requires that all of its contractors abide by non-discriminatory practices in hiring, recruitment, placement, selection for training, promotion, and compensation.

Contractors and their subcontractors must insure that applicants and employees are not discriminated against on the basis of race, color, religion, ancestry, national origin, age, handicap, or sex.

Guarantees and Warranties

All guarantees and warranties should be stated in writing and submitted as part of the proposal.

The vendor shall warrant that the system will meet the reliability and performance requirements set forth in the RFP and will continue to do so as long as the system remains under vendor maintenance.

Award of Contract

The district shall have a period of 60 calendar days after opening of the proposals in which to award the contract. Prices will remain valid for this time.

Evaluation and Selection Criteria

- Adherence of the proposal to the response format
- Adherence of the proposal in meeting the technology, functional and implementation services requirements outlined in the document
- Feedback from references
- Company’s overall experience
- Company’s stability and commitment

Cost of Proposal Preparation

All costs of preparing the proposal are to be borne by the respondent and may not be included in the proposal price.
**Response to Specifications**

Vendors must respond to every functional, technical, and general implementation requirement contained in the Specifications section of the RFP using the following criteria. Vendor’s responses must be in the same order in which points appear in this RFP.

- **Y**  YES. Feature, function, product, or service is available as requested and is fully operational using the version proposed at one or more districts.

- **D**  IN DEVELOPMENT. Feature, function, product, or service is under active development and operating in a test environment.

- **P**  PLANNED. Feature, function, product, or service is planned. No development has begun.

- **N**  NO. Feature, function, product, or service is not available, in development or planned.

For any specifications to which the vendor answers other than YES, vendor must describe:

- **a)** The feature, function, product, or service being planned or developed, indicating the date after which the function and feature will be available in general release and operation in the system proposed.

- **b)** Whether the district will incur any added cost for the feature, function, product, or service once it becomes available, either as a direct cost of the feature, function, product, or service, or because the feature, function, product, or service will require replacement of or addition to hardware or software originally proposed for initial installation.

- **c)** If the feature, function, product, or service is not available, in development or planned, an explanation of how the specification might otherwise be met using alternative features, functions, products, or services available from the vendor, including availability dates for any such alternative and any added costs, either direct or indirect.

Any such exception taken to any specification must be stated immediately following the specification in question. Vendors are advised that the district is interested in receiving proposals from vendors who can offer a centralized library, textbook, media, and asset management system 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. The district reserves the right to evaluate all proposals solely on the basis of currently existing features, functions, products, or services meeting the specifications as stated.
Solution Specifications

General Implementation Requirements

The vendor must quote and be able to provide all of the following products and services, to the full extent required for successful system implementation and operation:

- Application software
- Data conversion and enhancement (including conversion of outstanding transactions and statistics from current Follett Circulation Plus/Catalog Plus systems)
- Installation, application configuration and database loading
- Ongoing technical support and software maintenance
- Project management services to support district staff in implementation
- Staff functional and technical training
- Documentation/Online Help
- Barcode scanners and handheld devices for remote functions

The system includes one year of technical support and software maintenance provided without added cost.

Access to technical support and maintenance of the software is available from the vendor on an annually renewable contract basis.

The vendor must agree to accept requests for technical support via:

- Toll-free phone number
- FAX
- Electronic mail (Internet)
- 24-hour voice mail service

The vendor logs all problems and requests reported by the district for tracking and escalation procedures.

Technical support is available Monday through Friday during normal business hours. 24/7 emergency support can be obtained for an additional cost.

Software maintenance is available by special request for times outside normal business hours including weekends and company holidays.

The district will have access to a vendor sponsored electronic discussion group and customer care website.

User groups are available.
The vendor provides instructors and all necessary instructional materials that may be required for effective instruction and training.

The vendor will train personnel to provide first-level support on a day-to-day basis, with expected competencies including abilities to:

- Use each functional component
- Train other staff members in daily operation and use of their systems
- Handle emergencies that might arise before district support staff can assist or vendor support staff can be contacted
- Troubleshoot and solve simple problems in lieu of calling district staff or the vendor’s technical support staff.

The vendor will train district technical staff to manage and operate the system on a day-to-day basis, with expected competencies including abilities to:

- Start up and shutdown the system
- Monitor and operate the system on a day-to-day basis
- Handle emergencies with the system that might arise before the vendor support staff can be contacted
- Troubleshoot and solve simple problems with the system in lieu of calling vendor support staff
- Load software enhancements received from the vendor
- Process student information obtained from the district’s student information system
- Run system and data backup operations
- Use the supplied system maintenance utilities
- Perform recommended preventive maintenance and security measures

The vendor offers refresher-training opportunities both on-line and on-site.

The vendor offers a variety of workshops.

**Technology Requirements**

The system consists of a single centralized district library, textbook, media, and asset management application that is installed at one location for the district. All or some of the modules may be purchased.

The system is fully integrated, using a single, common database and application for all features and a common user interface across all functions.

All functionality of the system (all circulation, cataloging, reporting, searching, and inventory functions) can be accessed at any workstation on the district’s wide
area network with a standard browser (Internet Explorer, Netscape Navigator, Mozilla Firefox, Apple Safari).

The district can make any portion of the library, textbook, media, and asset management functionality available via the Internet for home and/or community access.

The system does not require any library, textbook, media, and asset management client applications to be installed on the workstation.

The system supports web browsers.

The system does not require use of Terminal Services on either the workstations or servers to support the delivery of any application functionality to the browser.

System data is stored within SQL Server 2005.

Application servers can run on Windows Server 2003.

The system does not require ActiveX controls or installation of Java Virtual Machine on the workstations.

The system can function within a Microsoft IIS or Apache Web Server environment.

The system does not require use of Microsoft IIS or Apache Web Server.

The system can supports integration with Microsoft Active Directory and Novell eDirectory for LDAP.

The system can work in a proxy server environment.

The system includes support for an automated interface with the district’s student information system (SIS).

The automated interface with the district’s student information system (SIS) supports adding new patrons, deleting existing patrons, updating existing patrons, and transferring patrons from one school in the district to another. When a student is transferred, all outstanding circulation transactions and statistics history are maintained with the patron.

The automated interface with the district’s student information system (SIS) can support matching on either the patron’s library and textbook barcode or some other district-defined patron identifier field.

The system requires no additional hardware or software purchases beyond the hardware/software system requirements outlined by the vendor.

The system requires no local application programming in order to become operational.
The system includes support for barcode scanners and handheld devices for use with remote/off-line functions.

The system allows printing of information displayed in the interface from any function within the system (without requiring copy/paste operations).

The system provides for reports in a PDF format.

The system allows automatically scheduled checkout/overdue materials and unpaid fine notices reports.

The system provides for HTTPS support in all functions where usernames and/or passwords are transmitted.

**General Functional Requirements**

The following functionality is operational and in current use at multiple existing customer districts:

- School-level circulation and circulation across the district
- Off-line circulation with handheld device or scanner for library and textbook modules
- Inventory
- Remote inventory with handheld device or scanner
- Centralized cataloging of bibliographic data, authority data and holdings data
- Integrated access to K-12 MARC record database
- School-level and district level cataloging of textbooks, media, and assets, bibliographic data, holdings data and reading program information
- School-level and district-level reporting
- Staff searching functions including LCCN/ISBN/ISSN, call number, control number and barcode searches for library materials
- Searching for hyphenated words or names can be done with or without using the hyphen.
- Student and teacher searching functions including cross-references, keyword searching, reading program and Lexile searching, material type and publication date limiters, lower-grade level interface and browsing of standard bibliographic headings
- Student and teacher patron empowerment functions (including review of current outstanding transactions, maintenance of personal booklist, generation of bibliographies, renew, submit hold/reserve requests)
- Z39.50 Client and Server
- Customizable user access levels, user logins and passwords
Support for holdings and patron barcodes with overlapping ranges across the district for the library and textbook modules, and varying formats/lengths and symbologies within each school. Support for international currencies, date formats, province, country, and Turkish diacritics are available.

The system provides an online “help” function that users can access without losing their place in the feature being used. Pop-up help windows must contain a menu bar that allows staff to print help topics. The interface can be customized with the district’s logo or individual school logos at each school. The interface can be customized at the school-level to include additional information regarding the media center, and links to customer-defined resources, and other customer-defined webpages/websites.

The system allows for defining access levels that control the functions available to each user when they login. The system allows staff to modify user passwords from a central location. The system must allow batch updating of patrons by uploading a file of patron barcodes and allow up to three patron fields to be changed at a time.

The system must allow automatic assignment of a patron barcode when a student is transferred and no district-wide student barcoding system is used. The system must be able to match on ISBN and LCCN when displaying reading program information. The system must allow the system administrator to post a message to all users. The system must allow the administrator to configure the hours and days as well as the tasks they want to limit to prevent lengthy tasks from running during certain timeframes. The system must display the last backup date.

Library Management

Circulation Requirements

Access to circulation functions and records are restricted to authorized persons. The system provides for scanning of barcode labels affixed to patron cards and library and textbook materials. Circulation transactions are updated online in real time.
The system allows capture of circulation transactions offline and loading of these transactions when the system is available.

The system supports capture of off-line or remote circulation transactions using a scanner or portable handheld device.

The system allows for easy movement between circulation functions based on hotkeys and barcode command sheets.

The system allows for the user to reset the display of circulation functions and clear patron information to protect patron privacy.

The system allows for editing of patron information from directly within the circulation functions.

The system provides access to patron records by barcode number, any portion of the patron’s name (first, last, middle and nickname), grade level, homeroom and other user-defined patron fields, in the circulation functions.

The system provides access to title/copy records in circulation function by barcode, or title keywords in the circulation functions.

The system permits staff to allow check out of items to patrons from other schools in the district, if desired, to support interlibrary loan within the district.

The system will be able to process the following types of checkout and check-in transactions:

- Regular checkout for patron with item in hand
- Renewal checkout for patron with item in hand (renewal by patron)
- Renewals without prior knowledge of which patrons have the items currently checked out (renew by copy barcode)
- Recording of materials used in library prior to re-shelving (in-library usage)
- Regular checkin

The system provides staff with notification of automatic blocks in circulation for conditions including:

- Patron has requested hold of materials that are ready
- Patron has overdue materials
- Patron has outstanding fines
- Patron has expired card
- Renewal limit reached for item
- Holds limit reached
- Checkout limit reached
- Inactive or restricted patron
- Patron attends another school
The system permits staff to easily view if the patron is in violation of any configured library policies, the patron’s outstanding transactions, the patron’s school and personal demographic information, and a picture of the patron.

The system lists each outstanding checkout for the patron in the checkout function when the patron record is accessed.

The system allows the user to renew all items for a given patron in one step.

The system can allow the staff to set up policies with a loan period of 1-23 hours.

The system can allow the staff to set up policies with fixed due dates.

The system can allow the staff to see the loan periods for all patron type or circulation type combinations.

The staff has the option to print receipts to a standard printer and to a 40-column printer.

The staff has the ability to see historical circulation statistics based on years, months, days and hours

The system allows each school to configure the display of the locally defined patron fields in the circulation functions, if desired.

The system can allow the staff to define patron notes that are automatically displayed in the circulation functions when the patron is identified for a transaction.

The system can allow the staff to define copy notes that are automatically displayed in the circulation functions when the copy is identified for a transaction.

Patrons are able to checkout materials on their first visit.

The system has the capability of limiting patrons to use of specific types of materials.

Renewal of an item is blocked if the patron is delinquent, title has a hold registered against it, renewal limit has been reached, or item is restricted in some other way.

Circulation features provide audible and visual signals to indicate:

- Acceptance of the patron card
- Acceptance of the item identification number
- Any condition that must be reviewed for the transaction to complete

Only one entry of patron identification will be required per batch of items to be checked out to that patron at that time.

The system may be set up to allow limited access to the circulation features, so aids or student helpers can circulate items.

The system allows for all loan policies and circulation parameters/configuration to be defined on a school-by-school basis.
The system will accommodate a ceiling due date to signal all checkout transactions are due by a specified date at the end of the school year.

The system will accommodate an unlimited number of patron types/categories and material types/categories for defining loan policies.

It is possible for the system to determine loan periods from the material and patron category.

It is possible for authorized staff to override loan periods and specify special due dates.

The ability to override blocks can be username/password controlled.

The system has the ability to limit the number of items on loan to a patron by patron category, with capability of override.

Variations in amount of fines assessed daily, grace periods, and maximum fine amount for overdues, for various materials and patron types, are accommodated.

The system can automatically assess overdue fines for materials that are checked in after their due date.

The system allows each school to maintain a calendar that identifies closed days.

The system alerts the user that an item not previously checked-in is being checked-out or checked-in.

The system alerts the user that an item previously marked as lost is being checked-out.

The system is capable of accommodating the circulation of a variety of material types including serials, pamphlets, documents, maps, microforms, kits, and audio-visual materials.

The system accommodates the circulation of partially cataloged or uncataloged materials (checkout of temporary items).

The system permits staff to easily determine the current circulation status of any item (whether any particular title is currently in circulation and when it is, or was, due back, if the item is marked as lost) from directly within the circulation functions.

The system will allow the staff to specify a timeframe after which the status of an overdue book will be changed to a lost status.

The item record contains current patron and due date (if checked out), the last patron and due date, and circulation statistics.

The system permits staff to mark an item as lost – independent of whether or not the item is currently checked out, and independent of any inventory process.
The system permits staff to automatically charge a patron for a lost item based on the copy price or a user-defined fine amount.

Capability of accepting full or partial payment of fines against any specified items is provided.

The system allows the placement of holds on any copy of a title or on a specific copy, with ability to modify the priority of the hold queue.

The system allows staff to review a list of items being held for patrons, for whom they are being held and the expiration date for the hold.

The system allows staff to review a list of outstanding hold requests where items are not yet available to fulfill the hold request.

The system allows staff to review a list of outstanding hold requests where items are available to fulfill the hold request, and indicate that the material has been placed on the hold shelf.

The system allows holds/reserves to be placed for materials from other schools, if desired, to support interlibrary loans within the district.

The system allows automated routing of materials and the ability to view request status of interlibrary loans within the district.

Hold requests submitted by patrons for materials in another library can be reviewed and approved by the library media specialist of the patron before the hold request is provided to the library that has the material requested.

The system allows the authorized user to select a school to fulfill a hold request for materials available off-site.

The system has the ability to place a hold on a title or to place a hold on any specific item in any library within the district.

The system has the ability to define the following hold parameters by patron type: default hold priority, number of days before a ready hold is expired, and number of days before an expired hold is deleted.

The system is able to place a hold on the first copy that becomes available within the library.

The system will cancel holds automatically based on a configurable number of days after the material becomes available and will delete the holds based on a configurable number of days after the expiration date.

The system will automatically alert the user each day regarding hold requests that need to reviewed or acted upon.

The system is able to accept partial payments for fines.
The system allows the user to print a receipt when a fine is paid.

The system is capable of allowing authorized staff to waive or pay fines.

The system provides reporting on patrons’ fine history including how much was assessed, paid, and waived even if the titles or copies no are no longer in the system.

The system allows the user to create fines for various user-defined reasons (such as copier fee) where the fine is not associated with a specific title/copy.

The system supports retention of historical records on title use, and also limits display of individual patron use information to protect the privacy of patrons.

The system will allow a reserve or hold to be placed for a specific copy for a future date.

The system will retain fines and history after deleting copy information.

The system will retain fines and history after deleting patron information.

Patron files shall accommodate:

- Patron barcode
- Patron school
- Patron name
- Patron addresses and telephone numbers (2)
- Patron email addresses (2)
- Date of birth
- Gender
- Patron picture
- Patron status (Active, Inactive, Restricted)
- Patron access level (rights to functionality)
- Indication of Patron’s Acceptable Use Policy on file
- Patron’s homeroom
- Patron’s nickname
- Patron’s grade level
- Patron username and password (for access to patron empowerment)
- Patron Type (for loan policies)
- Fines Owed
- Materials Outstanding
- Pending and Ready Hold Requests
- Pending and Ready Reserve Requests
- Card Expiration Date
- Graduation Date
- Patron usage statistics
- 5 Locally Defined Patron Fields
- Unlimited Locally Defined Notes

It is possible to import patron records using standard comma-delimited files at the individual school level.
The patron import function reports errors and warnings and allows direct access to the editing function for records with warnings.

It is possible to import patron picture files.

It is possible to produce a list of patrons sorted by user-defined patron fields (for example, Language Arts Teacher).

The system is able to purge an entire group of patrons, but should retain for later deletion individual patron records with outstanding obligations against them.

**Inventory Requirements**

The system is capable of supporting an inventory of the library without impacting the ability to circulate items.

The system can process barcode scans for inventory by the following methods: scanning directly into the inventory interface, from a text file containing a list of barcodes, or from a hand-held device used to scan barcodes remotely at the shelves.

The system can automatically identify items in circulation (existing checkouts) as accounted for during an inventory.

The system can automatically checkin items (existing checkouts), using normal checkin processing, when they are scanned during an inventory.

The system can produce a listing of all items not accounted for during the inventory.

The system can produce a listing of all items marked as lost during the inventory.

The user can review the displayed list of unaccounted for items and can indicate, directly in the system from the list, that the item has been found, or the item should be marked as lost.

The user can review the displayed list of items marked as lost and can indicate, directly in the system from the list, that the item has been found (can be accounted for), or the item should be deleted.

The system can allow parameters set up for the shelf checking and can check order based on:

- Call Number
- Call number/Author
- Call Number/Author/Title

The staff can choose to be alerted if Dewey differences are greater than:

- 100
- 50
The system must have the ability to delete all the copies marked “lost” on or before date field.
The system must allow the staff to count only part of the collection based on a call number range.

**Searching Requirements**
The system allows the staff to configure searching options and patron empowerment functions available to different groups of patrons or staff.
The system allows the staff at each school to configure a home page that contains information regarding the media center as well as links to other resources available to the students.
The system allows the students to perform searches in the library, and maintain a list of items of interest, without having to login to the application.
The system allows search results to be sorted by relevance.
The system will save sorting preference for users who log into the system.
The system will reset an inactive search station after the specified number of minutes.
There is a system-contained stop list of words that automatically excluded from searches to minimize the number of unnecessary hits for patrons.
The system allows the staff to identify items that will not be displayed in patron searches.
The system provides keyword searches for materials by the following search strategies: title, author, subject, series, and all keyworded tags.
The system allows users to browse materials by the following MARC headings: title, author, subject, and series.
The display of bibliographic headings in browse functions will contain SEE and SEE ALSO references to guide patrons to other materials.
The display of bibliographic headings in browse functions will identify the number of titles with each heading.
The system provides for search of materials by LCCN, ISBN, ISSN, control number, call number, barcode number and user-defined copy-level categories.
The system supports reading program searches where the search can be narrowed by reading level, point value, title, subject and author. Reading program point values and reading levels are included in search results and can be sorted.

Reading program searches support the following reading programs: Accelerated Reader and Reading Counts.

Reading program searches are based on test information for each specific school.

The system supports Lexile searches where the search can be narrowed by Lexile measure and/or code (i.e. BR, AD, etc.). Lexile measures are included in search results and can be sorted.

Keyword searches support internal or imbedded truncation (wildcards), e.g., one entry can retrieve ‘woman’ and ‘women’, or ‘organization’ and ‘organisation’ and phrase searching.

The system enables a user to enter multiple words or phrases to be searched in one, more than one, or all fields.

The system allows the user to limit searches based on material type and/or publication date (before, after or during a specific year).

The system accommodates Boolean searches using terms in AND, OR, and NOT relationships.

The system allows the patron to search for items within their school library, across all schools in the district, or in selected groups of libraries defined by staff.

The system is able to search on the MARC 856 tags which will link to pre-approved Internet web sites and other applications.

Variations in punctuation, capitalization, use of diacritics, and spacing does not impede searching.

The system will list the number of hits retrieved from a search request and will provide navigation controls to move between the hits.

The system allows the user to display a list of search results associated with a selected heading from the browse functions.

The list of search results will identify the search term used to produce the list.

The system allows the patron to sort the search results by relevance, title, author, call number, publication year, material type, and status.

The list of search results will contain the following information for each title: title, author, call number, publication date, material type and number of copies owned and available.
The list of search results for searches including materials outside of the patron’s library will identify titles that are available off-site, and the number of copies available off-site.

The system displays bibliographic records in a labeled format that is easily understood by patrons.

The system can display reading level, interest level, point value and quiz number in the bibliographic record display for reading program titles.

The system can display bibliographic records from search functions in a MARC format for staff use.

The system displays the following holding information for each bibliographic record in the search functions: call number, barcode, circulation status, description and sublocation.

The system displays the following holding information for each bibliographic record in the search functions for titles held by other libraries: call number, barcode, circulation status, description and sublocation.

The system allows the user to search for other items by the same authors, subjects, series directly from within the bibliographic record display.

The system allows the user to search for other items with SEE ALSO cross-references for authors, subjects and series directly from within the bibliographic record display.

It is possible to print any information from the searching interface including individual titles, the search results or the user-maintained list of items of interest.

Students are able to print the entire sets of hits resulting from a keyword search.

The system allows the patron to build and edit a list of items of interest and produce a bibliography that can be printed or saved to a file.

The system allows bibliographies with or without annotations to be printed by the patron.

The system allows ebooks to be searched and displayed.

The system provides patron empowerment functions to permit authorized patrons to view and print their own checkouts, fines and holds information, to renew their own items, and to place holds and reserves on any materials within the district.

The system allows staff to set a limit on the number of holds a patron may place.

The system has an icon-based search function with sets of icons and searches of interest to K-12 patrons and these searches will not require the purchase of additional software.
Library staff may define custom icons and searches for the icon-based search functions.

Library staff may design custom pre-set searches to retrieve the best results for standard topics such as science projects, crafts, or specific holidays.

The system must have the ability to search for brief records by a call number range.

The system allows users to search both media and library collections at the same time in an integrated search with one hit list returned.

**Cataloging Requirements**

All schools in the district share a system-wide bibliographic file.

The system can support a central cataloging model where district catalogers can maintain title and holdings information for each school from a single login.

The system allows the cataloging of library materials at the district level without assigning a barcode, adding a copy, or assigning it to a site.

The system can support spine label printing for items cataloged at the district level without assigned barcodes.

The system can support a school-level cataloging model where each school has rights to maintain title and holdings information.

The system can allow site staff to assign site-specific subject headings to a title record that only that site can search in order to support local learning initiatives.

The system allows the cataloging user to locate MARC records by searching a vendor-supplied database over 6 million K-12 records from directly within cataloging functions.

When performing a recon against a vendor-supplied database of MARC records, the user must be able to view records that were not updated.

When performing a recon against a vendor-supplied database of MARC records, the user must be able to choose to recon only brief library records or all library records.

The system must be able to do a recon on a selected number of records in the database.

When editing a MARC record, the user must be able to add, edit and delete tags and subfields.

The vendor-supplied MARC database can be searched with the following search strategies: title, author, ISBN (with 10 and 13 digits), ISSN and LCCN.

The system includes initial access to the vendor-supplied MARC database at no additional cost and access in subsequent years as part of the normal ongoing support costs.
The software vendor maintains the vendor-supplied MARC database and new records are added on at least a monthly basis.

The system allows the cataloging user to locate MARC records added by other schools, or available from the vendor-supplied database, automatically as part of adding a title to facilitate keeping the number of duplicate records in the system at a minimum.

The system allows the cataloging user to duplicate existing records as a template for adding similar titles.

The system allows the cataloging user to add a record from the vendor-supplied database directly into the district’s collection without use of any separate export or import functions.

The system allows the import of MARC bibliographic records at the district level and at the individual school level.

The system allows the export of MARC bibliographic records at the district level and at the individual school level.

The system allows the import of MARC authority records at the district level.

The MARC bibliographic import function has matching logic based on title, author, material type, ISBN/LCCN/ISSN and publication date, and copy barcode, to minimize duplicate records in the system.

The MARC bibliographic import function has additional “relaxed” matching logic based on title, author, material type, and publication date to reduce the number of duplicate records in the system.

The MARC bibliographic import function at the district level allows the import of holdings information for multiple schools in a single MARC file.

The MARC bibliographic import function allows the user to choose to replace or skip matching records.

The MARC import functions reports errors and warnings and allows direct access to the editing function for records with warnings.

The MARC bibliographic import function has logic to ensure that existing records will not be replaced by matching records which have an inferior quality (fewer access points and MARC content).

The system provides for MARC templates containing required and recommended tags/subfields for several different types of material.

The system supports entry and maintenance of cataloging information via a full MARC editor with support for adding, editing and deleting individual tags and subfields.
The system provides for detailed online help on most MARC tags and subfields including examples.

The system supports entry and maintenance of cataloging information via an easy editor with forms and prompts that do not require detailed knowledge of MARC tags and subfields.

The easy editor allows the user to catalog the following information: title, LCCN, ISBN, ISSN, material type, author, publication information, physical description information, series, interest level, notes, subjects, electronic resources, reading program quiz information, alternate titles, co-authors, illustrators, editors, etc.

The system allows the cataloger to maintain individual holdings records that capture information for each specific item/copy in the collection.

The copy/item information that can be maintained includes: call number, acquisition date, barcode, copy price, circulation type, user-defined copy categories, copy notes, up to 3 description/enumeration fields, copy number, sublocation, vendor and funding source.

The system will allow scanning of the ISBN barcode of an item to speed database searches and increase accuracy while cataloging.

The system supports the ability to remove subject headings by type (LC, Sears, etc.) as records are added to the system.

The system supports the ability to globally remove subject headings by type (LC, Sears, etc.) from the system.

The system enables a bibliographic record or holdings/item record to be retrieved and modified at any time, once it has been entered.

The system enables a partial record to be entered if complete information is not yet available.

The system allows designated materials to not display in patron searches.

The system allows item/copy records to be duplicated to allow for easy adding of new copies.

The system accommodates:

- Personal, corporate and meeting name headings in a name authority file
- Title, uniform title, and series entries in a title authority file
- Topical and geographical subject headings in a subject authority file

The system records the source of each authorized heading or entry.
The system is able to match LC or other national standard authority records against the local file.

The system stores authority records in conformance with the MARC formats for authority records.

The system automatically links each authorized heading to each occurrence of the heading in the bibliographic database.

System’s authority function generates SEE and SEE ALSO references from authority records to direct searchers to other headings as follows:

- See references (aeroplanes to airplanes)
- Narrower terms (automobiles to sports cars)
- Broader terms (automobiles to motor vehicles)
- Related terms (airplanes to flying machines)

The system enables an authorized user to browse through the list of terms maintained for authority control.

The system provides an easy editor that will enable library staff to make local modifications to imported authority records, and to create local authority records, without detailed knowledge the MARC authority format.

The system enables an authorized operator to maintain authority lists by adding new terms, removing terms or modifying existing terms.

The system imposes no limit on the number of SEE and SEE ALSO headings that may be added to an authority record.

The system automatically creates see- and see-also references from the authority record, and must automatically link these references to matching headings in the searching interface.

Library staff may define and assign copy-level categories (user-defined copy fields) to organize items in standard topics such as science projects, crafts, or specific holidays.

Library staff may assign copy-level categories by scanning items individually, or by assigning the category to groups of items from a selected list, from barcodes scanned into a text file or the handheld device.

Library staff may automatically remove titles with no copies from the collection, and limit the process to preserve catalog records for electronic resources, eBooks, and titles still in processing (added within a specified number of days).

The system must allow for the library staff to have the ability to search by call number.

Library staff must be allowed to configure the basic search options that are available and the order in which they will appear.
When doing a keyword search, the keywords should be highlighted when found through the basic search.

The system should display state and provincial standard examples.

The library staff must have the ability to show full or brief information on title details.

The system must recognize the primary English, French, and Spanish/Portuguese leading articles:
- English: a, an, d’, de, the, ye
- French: l’, la, le, un, les, une
- Spanish/Portuguese: el, la, las, lo, los, o, os, um, uma, un, una

The system must have the ability to acknowledge or ignore leading articles in title search terms.

The system must have the ability to find titles with duplicate standard numbers and titles without standard numbers.

When removing titles without copies, the system must be able to preview the titles before they are deleted.

When importing copies, the system must be able to assign the next available barcode number to a copy.

Upon import, circulation type, categories, sublocation, vendor and funding source must be able to be assigned.

When exporting library titles, users have the ability to delete titles/copies after export. Copies that are currently checked out will not be deleted.

Upon exporting library bibliographic records, users can include all records, full records only or brief records only. Plus have the option of copy information to appear or not to appear in the export file.

Users must have the ability to preview the effects of an import on their collection before performing the actual import of a record.

The system must have the ability to add a title without having to perform a search for the title first.

When enhancing a tag in the MARC record, the system allows users to type in the tag number or use a scroll bar to choose the desired tag.

Users must be able to update subject, author and series headings globally.

Users must have the ability to globally delete tags (including 526, 856, or 9xx). Plus have the ability to remove all tags or only those that have data that matches specific subfield information.

Users have the ability to globally update a copies category, call number prefix, circulation type, description, funding source, sub location and vendor.

Users have the ability to delete every copy scanned.
Users can update/assign a particular circulation type, category, sublocation or copy status to every copy scanned.

Users must be able to see copy status from cataloging, as well as from circulation.

**Reporting Requirements**

This section outlines reporting requirements that are in addition to those printing and list requirements outlined in other functional sections. Note that the application must allow printing of information displayed in the interface from any function within the system (without copy/paste operations). Many lists displayed within the searching, cataloging and circulation functions must be printed to serve reporting needs. The additional reporting outlined in this section is used primarily to support collection development and maintenance, to monitor and promote library usage and to communicate with users regarding outstanding transactions.

The system provides district wide reporting and school-level reporting.

The system has the ability to display and print for a given patron the current outstanding transactions (checkouts, fines, holds).

The system supplies fines reports indicating all outstanding fines with the following information: the date the fine was created, and the type of fine assessed, fine amount, the patron name and the first two user-defined patron fields, the title, barcode and call number of any associated material.

The system supplies checkout and overdues reports indicating all outstanding checkouts and/or overdues with the following information: the due date, an estimated fine amount indicating the overdue fine that would be charged on checkin, the patron name and the first two user-defined patron fields, the title, barcode, price and call number of any associated material.

Checkout/overdue and fine reporting can be configured to report on various limiting parameters:

- Only checkouts currently overdue
- Only checkouts overdue within a range of number of days
- Only checkouts due within a specific date range
- Only checkouts/overdues for selected patron types
- Include patrons from other schools who have checkouts/overdues or fines for materials from the library user
- Include patrons from the library who have checkouts/overdues or fines for materials in other libraries in the district
- Only checkouts/overdues for selected material types
- Only patrons with a selected name or range of patron names
- Only patrons with a select user-defined patron field or range of user-defined patron fields (for example, homeroom teacher)
User can print multiple overdue notices per page (2 or 4)

Checkout/overdue and fine reporting can be sorted by patron name or any of the user-defined patron fields (for example, by homeroom teacher).

The system allows the hiding of title on checkout/overdue and fine reporting to protect patron privacy.

The system allows the display of patron phone-number on checkout/overdue and fine reporting to protect patron privacy.

The system provides for communicating checkout/overdue/fine reports in both a list format (for internal distribution) and a notice format (for distribution to patrons).

The system provides for editing of the text on the checkout/overdue notice.

The system allows the user to define and save parameters for checkout/overdue/fine reporting once and then re-use the parameters whenever the report needs to be produced.

The system has the ability to print a list of overdue items by call number.

The system has the ability to print ‘held item available notices’ for mailing or distribution.

The system can produce a usage report showing the following information grouped by each Dewey range (000-999, including each 100’s, 10’s and 1 level) and/or call number prefix:

- Number of circulations today
- Number of circulations this month
- Number of circulations this year
- Number of total circulations
- Number of copies in the collection
- Number of copies with cataloged publication date
- Average age of materials (based on publication date)
- Number of copies with cataloged price information
- Value of materials (based on actual and estimated copy price)
- Number of copies in the collection

The system provides the usage report identified above at the district level – listing the same information for each school in the district.

The system allows limiting the usage report identified above to only items with combinations of the following parameters:
Copies with selected Dewey ranges or call number prefixes
Copies which have circulated today or within a specific date range
Copies which have more or less than a specified number of circulations

The system allows drill-down from the usage report identified above to the following usage information on each specific copy in the collection:
- Number of circulations today
- Number of circulations this month
- Number of circulations this year
- Number of circulations last year
- Number of total circulations

The system provides a report of the copies that do not have cataloged call number information.

The system provides a report of the following information:
- A count of items currently checked out
- A count of items currently overdue
- A count of items currently marked as lost
- A count of ready hold requests (item is available to fulfill the hold)
- A count of pending hold requests (item is not available to fulfill the hold)
- A count of expired hold requests
- A count of unpaid fines and the total amount associated with these fines
- A count of all titles and copies in the collection
- Number of circulations today, this month and this year (broken down regular checkouts, in-library usage, and renewals)
- A count of renewals today and this year performed by patrons using patron empowerment features
- A count of hold requests today and this year performed by patrons using patron empowerment features
- A count of items circulated to patrons of other schools (interlibrary loans within the district) today, this month and this year
- A count of hold requests by patrons of other schools (interlibrary loan requests within the district) today, this month and this year
- A count of total holds placed today, this month and this year
- A count of all patrons in the school (broken down by patron status)

The system provides a shelf list report sorted by call number, author and title for all copies or a specified range of copies (specified by Dewey number or call number prefix).
The system provides printing of patron and copy barcode labels, and spine labels (either in groups or individually).

The system can produce a summary-level usage report showing the following information grouped by each defined patron type, patron status, or user-defined patron field (with up to two levels of sorting by these fields):

- Number of patrons
- Number of circulations today
- Number of circulations this month
- Number of circulations this year
- Number of total circulations

The system provides the usage report identified above at the district level – listing the same information for each school in the district.

The system allows the user to drill-down from the summary-level usage report above to same usage statistics at the individual patron level.

The system allows the user to produce other custom reports using leading report writer applications and applications that support ODBC access to SQL Server 2005 databases.

The system must have the ability to run call number reports by:

- Copies with call number prefixes
- Copies with different call numbers (for the same title)
- Copies without any call numbers

The system provides title and copy list that allows you to limit by:

- A range of titles
- One or all circulation types
- One or all categories

The date a copy was added to the collection

The date a title was added to the collection

The date a title was updated

The system must have the ability to run a report that allows the staff to identify bibliographic headings that do not have corresponding authority 1xx headings.
The system must be able to run a report that shows collections for library materials for a specific time frame and can be organized by call number prefix or Dewey. The report can also be limited to a specific call number range.

The system must be able to run a report that shows patron circulations for library materials or textbooks. The report must be able to run for a specific time frame and can be sorted by Patron Status, Patron Type, and all user defined fields.

The system must be able to run a hold statistic report that has the ability to select by Title or Call Number and can limit by more than, equal to, or less than a certain number of holds for the year.

When printing patron barcodes, the staff must be able to select by patron name or any user defined field and limit the range.

The system must be able to print patron ID cards by Name, user defined field, or a list of barcodes.

The system must be able to run a patron name list report that will create a patron list by name, user defined field or uploaded file.

The library staff must be able to print spine/pocket labels and barcode labels based on items in a user defined list, by date added, or by a list of barcodes.

The system must have the ability to generate and print unused copy barcode labels.

In a holds report, the system must allow staff to customize the holds view to limit by date and/or holds status.

The system must allow staff to run a report to see library copies weeded from the collection based on specific criteria.

Optional Solution Specifications

Optional Implementation Requirements

The vendor will supply data services to convert bibliographic and holdings information provided by the district to the required MARC format for the proposed system.

The vendor will supply data services to perform custom cleanup of the district’s MARC records, with specific services to be defined based on an analysis of the district’s data.

The vendor will supply data services to perform custom cleanup of the district’s MARC records, with specific services to be defined based on an analysis of the district’s data.

The vendor will supply data services to process the district’s bibliographic records to update and enhance records for additional content (access points for searching).
The vendor will supply data services to add the Study Program Information Note (526 tags) to bibliographic records to identify books that are tied to reading programs such as Accelerated Reader and Reading Counts.

The vendor will supply data services to add the Lexile measures (521 tags) to bibliographic records.

**Optional Requirements for Access to Cataloged Websites**

A subscription service is requested to provide automatic links to K-12 approved websites directly from within the searching interface. Links are based on subject headings and are available from browse search results, and individual bibliographic displays. Obsolete and newly inappropriate Internet sites are removed to ensure access to only safe, relevant web sites are viewable. The subscription service should provide statistics on level of usage/access for each subject area.

**Optional Requirements for Access to Enhanced Content in Search Interface**

A subscription service is requested to provide enhanced content in the search interface including display of book covers, book reviews, summaries or tables of contents for titles.

The service provides display of the book cover within search results and on the bibliographic display for patrons.

The service provides access to the additional enhanced content from the bibliographic display for patrons.

**Optional Requirements for Metasearching**

A subscription service is requested to allow the user to submit one search expression and retrieve matches from the library collection and other paid or free subscription online databases.

The service enables users to search multiple online resources, such as other online library catalogs, subscription-based electronic databases, and Z39.50 clients.

The service provides results from the various resources in one hit list.

The service does not require the user to enter a password or ID for each database searched.

The service allows for searching of online databases for K-12 schools such as Britannica®, Electric Library, InfoTrac® and a number of free Internet databases.

The service allows the user to decide which resources to search.

The service allows Boolean operators to be used in subject, title, abstract, keyword, and author searches.
Optional Requirements for Ongoing Reading Program Data Enhancement

_____ A subscription service is requested to automatically update the database with reading program reading level, point value and quiz number information based on information obtained from Accelerated Reader and/or Reading Counts.

_____ The service allows each individual school to upload test information as often as desired throughout the school year and records are updated automatically with reading program information to support searching.

_____ The service identifies titles that match with quizzes owned by the school.

_____ The service identifies quizzes that cannot be matched to titles in the school’s collection.

_____ The service identifies titles that cannot be matched to quizzes in the school’s collection.

Optional Requirements for Audio-Visual Bibliographic Records

_____ A subscription service is requested to provide MARC21 records for commonly used K-12 audio-visual (non-print) materials.

Optional Requirements for State and Provincial Standards

_____ A subscription service is requested to support searching of curriculum standards.

_____ The service allows authorized users to search the standards by state or province, curriculum area and grade level.

_____ Matching standards search results can link to websites or titles in the collection that support a lesson plan associated with the selected standard.

_____ The service allows separate searching within the library module allowing an efficient way to view website only results.

Textbook Management

Setup

The system must:

_____ Include access to setup options for all modules in one common setup area.

_____ Allow the user to add, edit or delete multiple sites within a district from a central location.

_____ Allow the user to add, edit or delete site information including site name, district identification and customer number.

_____ Allow the user to add, edit or delete school departments.
Allow the user to add, edit or delete budget categories.

Include the ability to add, update or delete classes by entering teacher’s barcode or selecting teacher’s name.

Allow the user to include the period, description, location, department, class start date, class end date, as well as due dates for textbooks circulated for that specific class.

Allow the user to add, edit or delete publisher and vendor information.

Include the ability to add, edit or delete textbook loan periods that include: description, start date, end date, and due date.

Include the ability to select one of the defined loan periods as the default due date for circulation.

Include the ability to support multiple barcode symbologies up to 14 characters in length.

Include the ability to print replacement textbook barcode labels, including site name, title, author and location on the barcode label.

Include the ability to print unused textbook barcode labels, including site name on the barcode label.

Allow for the selection of preferred barcode symbology and setup of barcode information for both patron and textbook barcodes. Barcode information must include barcode length, and fixed characters.

Include the ability to set up textbook loan policies from a common setup screen.

Allow the user to set the maximum checkouts for patrons.

Allow the user to block transactions due to fines or overdues.

Allow the user to override blocked transactions.

Allow the user to customize bills/notices text.

Allow the user to customize fine descriptions, select calculation methods (fixed fine amount, percentage of copy replacement cost, or original purchase price).

Include the ability to assign each copy one of at least five copy condition descriptions with related percent values.

Include an auto-conditioning option that allows the user to define the number of circulation cycles before the condition of a textbook is automatically changed to another copy condition.

Include the ability to setup calendar days and hours open.
Provide the ability to configure unlimited access levels (security rights), and specify what functionality is available to an individual user.

**Textbook Circulation**

*The system must:*

- Provide the most commonly performed tasks at one screen, including the following: Check Out, Check In, Fines, Renewals, Copy Status, Lost Copies and Offline Circulations.
- Include the ability to retain the barcode and associated patron when moving to another Circulation module.
- Include the ability to circulate textbooks across the district as well as pay fines across the district.
- Must allow the user to easily switch between common functions during normal operation, using a mouse or keyboard.
- Include the ability to enter a patron barcode using a scanner or keyboard.
- Include the ability to search by patron name if patron barcode number is unknown.
- Include the ability to allow for use of ID numbers instead of barcodes for checkout purposes.
- When a patron barcode is entered, display that patron’s circulation information, along with the patron’s name and ID number.
- Include the ability to enter a copy barcode using a scanner or keyboard.
- Include the ability to search by title during checkout if the copy barcode number is unknown.
- Display all copies attached to a title record during a title search and allow for the selection and check out of any available copy.
- Include the ability to display all related patron information while in the Check Out option, including notes.
- Make the following patron information accessible while in the Circulation module: name, status, barcode number, card expiration date, patron type, ID number, graduation year and copies with check out and due dates.
- Make the following checkout information available for each patron while in the Circulation module: textbook checkouts, textbook title, copy barcode, price, check out and due dates of that copy.
Make the following additional checkout information accessible for each patron while in the Circulation:

- Textbook checkout statistics for that patron, including current checkouts, total number of fines and the balance due.
- Fines information, including title, copy barcode, fine type, amount of fine paid, amount of fine waived, and fine balance.

Include the ability to print patron status from checkout, which provides a snapshot of a patron’s current checkouts and fines. The report must include statistics on the total number of checkouts, overdues, and fines and total fine amount. It also must include a list of copies checked out, copies overdue, and copies with a fine.

Textbook fields of publisher, department, fine type and budget category must contain default data to aid in entry of data. Drop downs can be edited to add or remove desired information.

The system can run a condition or status report for the district, a site type, or an individual site. The report can be a summary or by budget category, publisher, or vendor and can limit by condition/status and choose whether to include title details.

A report can be run on duplicate barcodes across the whole district, between schools of a given site type or between two specific schools.

**Check Out Functionality**

The system must:

- Offer textbook checkout by patron where the application prompts for patron information (barcode, name) and textbook information (barcode, title) and copy chosen is checked out to patron selected. Ability to select due date must be available.
- Include the ability to notify the user if the due date selected is not a default system date as defined by the user or is a date that is prior to the current date.
- Offer textbook checkout to student by class with the following options: First, by entering a teacher’s barcode or name first, textbooks are checked out to an entire class, one student at a time, without re-entering class information. Second, if the student’s barcode is entered first, the textbooks are checked out for all of the student’s classes without re-entering student information.
- Offer textbook checkout to teacher where the teacher’s barcode or name is chosen, a specific class can be selected, the copy’s barcode is entered and the copy is checked out to the teacher for the class specified. A report can be printed detailing the checkouts. The report can be used later to assign the textbooks to individual students in the class in the system and textbook reassignment can be performed directly through the system.
Ability to select due date must be available.
Include the ability to check out copies previously identified as “lost” by responding to a system prompt indicating copy’s previous status.

Check In Functionality

The system must:

Include the ability to enter the barcode of a copy to be checked in using a scanner or keyboard.
Include the ability to search for a copy by title, and then select the appropriate copy to be checked in.
Display selected copy check out information including title, and barcode, due date, condition on return, patron, patron type, teacher, and class.
Include the ability to add a fine, add a copy note, change the textbook condition, and view patron information.
Include the ability to check in copies previously identified as “lost” by responding to a system prompt indicating copy’s previous status.

Textbook Fine Functionality

The system must:

Include the ability to enter a patron barcode using a scanner or keyboard to access that patron’s fines information.
Display the following information when a patron barcode is entered: name, patron barcode number, patron ID number, number of items currently checked out, number of overdues, and total fines.
Include the ability to display all related patron information while in the Fines option, including notes.
Include the ability to display fine information including title, barcode and amount of fine for each fine associated with a specific patron.
Allow the user to add a fine by entering the patron (by barcode or name) and creating a new fine for a specific copy. Fine creation includes identifying the barcode, fine type, title, fine amount, amount paid, amount waived and amount due.
Provide the option to act on a textbook fine as follows:
Create a new fine for a specific copy
Apply a payment to a single fine
Apply a partial payment to a series of fines, with oldest fines being paid first
Waive a partial fine or an entire fine
Edit a fine amount.
And delete a fine without applying a payment
Ability to add custom fine types on the fly.
Allow the user to add user-defined fines for patrons.

Textbook Renewal Functionality

The system must:
Include the ability to enter a patron barcode using a scanner or keyboard to preview all information about the patron holding a copy before a decision is made regarding the type of renewal to be done.
Include the ability to renew all copies currently checked out to a patron.
Include the ability to renew specific copies checked out to a patron.
Include the ability to enter the barcode of a copy to be renewed using a scanner or keyboard.
Display the following information about a copy being renewed: patron name, patron barcode number, copy barcode number, and confirmation of new due date.
Include the ability to activate a new due date and override the default system due date during the renewal process.
Provide the ability to renew all copies checked out to a teacher or specific copies checked out to a teacher.
Provide the ability to renew copies (checked out to patrons) that are linked to a teacher or to a teacher’s selected class.
Provide a function for transferring (from one teacher/class to another teacher/class) selected or all copies checked out to patrons linked to the teachers/classes or copies checked out to a specific individual linked to the teachers/classes.

Textbook Copy Status Functionality

The system must:
Make the following checkout information available in the copy status module: title, author, barcode, due date, status, price, location, name of patron to whom copy is
currently checked out, patron type, patron barcode number, patron ID number, grade level, homeroom and five user-defined fields for that patron.

_____Make the following prior checkout information available in the status module: date copy was returned, name of patron who last had copy checked out, patron type, patron barcode number, patron ID number, grade level, homeroom and five user-defined locations for that patron.

**Lost Textbook Copy Function**

*The system must:*

_____Include the ability to change the status of a copy to “lost” and assign an appropriate fine to the patron record. The system must track the last patron who had the copy.

_____Automatically calculate fines for lost copies and attach those fines to the appropriate patron record when the copy’s status is changed to lost and the option to create a fine is accepted.

_____If a lost copy is checked in, indicate a refund is due to the patron who paid a fine for the lost copy.

**Offline Textbook Circulation Function**

*The system must:*

_____Provide flexible methods for collecting remote circulation information by giving the use the option is either use a portable hand-held device, thin client utility or ability to enter/scan barcodes directly into a simple text file.

_____Ability to reject a remote transaction if a copy barcode is not in the system.

_____Ability to print all remote transactions.

**Patron Maintenance**

*The system must:*

_____Allow the user to add, edit, view or delete patrons.

_____Include the following patron information: barcode, last name, first name, middle name, district ID number, identify as a teacher, patron type, gender, graduation year, birth date, card expiration date, five searchable user-defined fields, patron status, and two address fields (including phone numbers and email address).

_____Include the ability to add unlimited patron notes and/or messages.

_____Include the ability to add or import patron pictures.

_____Include the ability to search for patron by name, barcode number, user-defined fields, grade level, homeroom, nickname or ID number as well as other fields.
Include the ability to define, edit or delete an unlimited number of patron types.

Support at least three patron statuses including Active, Inactive, and Restricted.

Include the ability to set any patron type as the default patron type, which is added when importing new patron records or when manually creating new patron records.

Include the ability to require a barcode or ID number for each patron record.

Allow the user to access all textbook checkout information for a patron while viewing the patron record, including checkouts (including title, barcode number of item, due date and status), unpaid fines information including title, barcode number and amount of fine.

Allow the user to access all textbook statistics for a patron while viewing the patron record, including: number of checkouts, overdues, and total fines due.

**Patron Update**

The system must:

Provide the ability to globally update patrons based on: patron type, five user-defined fields, grade level, homeroom, graduation year, card expiration date, currently teaching status, patron status and access level.

Include the ability to update the patron type, five user-defined fields, grade level, homeroom, graduation year, card expiration date, currently teaching status, patron status and access level fields for an individual patron.

Provide the ability to globally delete patrons based on: grade level, homeroom, graduation year, card expiration date, patron type and patron status. Allowing the user to allow patrons to be deleted even if they have outstanding transactions.

Include the ability to import, edit or transfer patrons from one school to another school in the district.

Provide the ability to import patron data in an XML format, which can be used to add/update patrons from another system such as a student information system.

**Patron Import/Export**

The system must:

Include the ability to accept patron records from an ASCII comma-delimited file.

Include the ability to choose how to process duplicate patron records by skipping the incoming record, replacing the existing record or merging with the existing record.
Include the ability to choose the method of duplicate record detection by matching either patron barcode or ID number.

Include the ability to export patron records to an ASCII comma-delimited file.

Include the ability to export all patron records.

Include the ability to limit export patron records by patron status (all patrons, active, inactive, restricted), patron type (all patrons or selected patrons), grade level, homeroom, card expiration date, or by graduation year.

**Student Schedule Information**

*The system must:*

Allow user to add, edit, view student schedule information.

Include the following student schedule information: department name, class name, class ID, section ID, period, day(s) of the week the section meets, date class begins and ends, students and teacher that are assigned to the class, textbooks that are assigned to the class.

Provide the ability to import student schedule data in an XML format, which can be used to add/update schedule data from another system such as a student information system.

**Textbook Catalog**

*The system must:*

Allow user to add, edit, view or delete textbook titles.

Allow central cataloging of textbooks.

Allow central cataloging of textbooks without having to enter barcode, copy, or school information.

Support a district-wide cataloging user to add, edit and view all district textbook titles and copies.

Provide the ability to add the cover image to the textbook record.

Include the ability to manage eTextbooks.

Include the ability to delete individual copies by just scanning or entering the barcode.

Include the ability to delete copies in batch by scanning or entering barcodes (with or without a portable handheld device) to build a file of copies to be deleted from the textbook collection. When the user is ready all copies in the file can be deleted and a report produced.
Include the ability to search the existing title database by title, author, ISBN, or barcode number.

Support a single title record with multiple copies linked to that record.

Include a built-in default template that includes all valid user-defined material types.

Provide easy cataloging of textbook information including title, authors, edition, copyright, ISBN, material type, budget category, course ID, grade level (from/to), publisher name and catalog number, vendor name and catalog number, replacement price, and title note.

Include the ability to add, edit and delete adoption information including text ID, state adopted date, district adopted date and when the adoption ends.

Include the ability to add, edit and delete teacher’s editions and kits, assigning them to a main entry title.

Make available copy statistics for a specific title. The statistics must include a count for the total copies, the number out, available, or lost.

Offer a select list of all copies of this title by barcode and include the title, barcode number of the item, location, condition, and current status.

Include options to add a single copy, edit a copy, delete a copy, and add a range of copies.

Include the following copy information: titles, status, number of copies, starting barcode, condition, location, date acquired, purchased price and copy note fields.

Include the ability to view the availability status of a copy while in the textbook module.

Display, if the item is checked out, the patron name to whom the item is checked out, including the following information: due date, patron type, patron barcode number, grade level, homeroom and associated teacher and class.

Make available prior checkout information when viewing a copy record in the textbook module.

Include the following prior checkout information: date returned, patron name, patron type, barcode number, grade level, homeroom and five user-defined patron location codes for that patron.

Include the ability to delete copy information, leaving the textbook title record intact.

Include the ability to merge duplicate textbook titles.
Include the ability for site staff to transfer and track textbooks to another site within a district.

Include the ability for district staff to transfer and track textbooks between any sites within a district.

Include the ability to print a summary of the textbook transfer.

Include the ability to cancel any textbook transfer.

Include the ability to receive textbook transfers into inventory by scanning item barcodes. Any missing items should be marked Lost by the system automatically. The system should allow a user to mark all items received with a single click.

Include the ability to manage textbook transfers via wireless handheld device, accessing the system directly via an optimized web interface.

**Textbook Title Import/Export**

The system must:

Include the ability to import textbook title record data from an ASCII comma-delimited file.

Include the ability to import records from any valid drive and/or subdirectory, including network drives.

Include the ability to import textbook titles from an online textbook subscription service that includes information on state adoption. The users can limit the records search by their adoption state.

Include the ability to check for duplicate records based on a match of the title or standard number (ISBN).

Include the ability to skip the incoming record or replace the existing record if a matching record already exists.

Attach copy information to an existing textbook title record if a matching record exists, to avoid creating duplicate textbook title records.

Include the ability to check for duplicate copy information based on a match of the barcode number.

Reports the number of records read; number of errors encountered; and number of titles and copies added, replaced, and skipped.

Automatically generate a report listing any errors encountered and/or corrections made to records during the import process.

Include the ability to view exception reports prior to printing or saving the report.
_____Include the ability to export all records.
_____Include the ability to export to any valid drive, including network drives.

**Textbook Reports**

*The system must:*

_____Include the ability to preview and print selected reports.
_____Include the ability to save reports to a file and access previously run reports at a later date.

**Checked Out/Overdue Materials & Unpaid Fines**

_____Provide the ability to report on materials checked out or overdue, as well as who has unpaid fines.
_____Includes the ability to print report or notice formats.
_____Includes the ability to limit reports by patron type, patron status, library items, and textbooks (if integrated with the library and textbook modules).
_____Includes the ability to select range and sort options including patron name, grade level, homeroom and five user-defined fields.

_____Provide options to include library title (if library module purchased), copy price, patron barcode, patron phone number, subtotals and ability to start a new page for each group.

_____Includes the ability to distribute notices internally or externally, page layout options, custom notice text and support of double window envelopes (#10) that include patrons address and site’s return address.

**Textbook Statistics**

_____Provide textbook statistics reporting that includes circulation counts, fines, materials (number of titles and copies) and patron information.

_____Includes overall checkouts for today, this month and this year.

_____Ability to see if other sites in the district have available textbook copies.

**Patron Statistics Summary**

_____Provide patron statistics reporting that includes textbook circulations (today, this month, this year and totals).

_____Ability to group report by patron type, patron status, grade level, homeroom and five user-defined patron fields.
Ability to drill into groups to see individual patron statistics.

Ability to limit report by patron type and patron status.

**Class List**

Provide the ability to generate a report that contains a list of teachers and their classes, along with the ability to include patron transactions.

Include the ability to sort by teacher’s name and option to start a new page after each teacher.

Include the ability to show all students assigned to a class as well as if they have textbooks checked out.

Include the ability to limit report by class period range.

Include the ability to limit textbooks by status for each class.

**Title and Copy List**

Provide title and copy reports with range and sort options including title, publisher and vendor.

Include title information and copy count summary.

Include the ability to include or exclude copy specific information.

Include the ability to limit the report based on copy status. (available, checked out, loaned out, on order, out for repair, in-transit and lost)

Include the ability to limit the report based on copy condition. (new, good, fair, poor and unusable)

Include the ability to include or exclude the teacher’s editions and/or resource kits.

Ability to transfer copies of textbooks into a holding area.

**Textbook Adoption List**

Provide textbook adoption reporting with range and sort options including title, publisher and vendor.

Include the ability to include or exclude copy specific information.

Include the ability to limit the report by specifying the beginning and ending State Adoption Year, District Adoption Year, or End Adoption Year.

**Patron Barcode Labels**

Provide ability to print both used and unused patron barcodes.
Include the ability to sort by patron name, grade level, homeroom and user-defined patron fields.

Include the ability to limit by patron type and patron status.

Include formatting options for multiple barcode label stocks.

Include the ability to print barcodes for use at circulation desk, including textbook circulation command codes.

Include the ability to print a range of unused patron barcodes that can fill in gaps in the assigned barcode range.

District Textbook Statistics

Provide the ability to see statistics for all sites within a district, including textbook and patron counts, overall checkouts and overdues, fines and amount due and the collection value for each site.

Student to Textbook Statistics

Provide the ability to see statistics for textbook assignment by class for all sites or for a specific site within a district, including textbook and patron counts, overall surplus and any shortages.

Weeding

The system must allow staff to run a report to see textbook copies weeded from the collection based on specific criteria.

Inventory

The system must:

Include the ability to enter copy barcodes directly into inventory by typing or scanning barcodes.

Include the ability to check in a copy that had been checked out to a patron when it is encountered. Interactive messages must notify the user when copies that are checked out or lost are inventoried. The system must track and report on refunds owed to patrons for the return of “lost” copies and for which a fine had been paid.

Include the ability to enter copy barcodes into inventory using a portable handheld device or remote thin client utility.

Provide the ability to include an exception report that includes a refund log that tracks refunds owed to patrons for the return of lost copies for which fines had already been paid.

Indicate number of copies inventoried as well as number remaining uncounted.

Provide the ability to conduct a partial textbook inventory by location.
Provide the ability to restart the inventory process.
Include the ability to set all uncounted items to a status of lost. The system must also indicate the date the item was lost.
Include the ability to reset all copies marked as ‘lost’ in inventory to ‘unaccounted’ for.
Include the ability to reset all copies marked as lost on a specific date to unaccounted for.

Media Management

General
The media management software is designed exclusively with a K-12 focus.
Onsite and remote project management is available from the vendor.
Onsite and remote software installation is available from the vendor.
Non-print data conversion from your existing database is available from the vendor.
A subscription to a database for non-print MARC records is available from the vendor.
Onsite and web-based training for the media management software is available from the vendor.
The software allows seamless switching between media, circulation, and textbook modules.
The software allows customizable administrative views.
The software allows automated media data backups and patron data updates.
The software allows customizable security levels.

Circulation
The system allows for instructional material to be reserved for a future timeframe or checked out immediately.
The system is capable of checking instructional media material in and out via barcode labels.
The system generates a list for the instructional materials to be picked and shipped.
The system will generate booking labels to facilitate the shipping process.
The booking labels will display the call number, title, patron name, shipping date, return date, zone number, and name of the site sending the material.

The system will generate packing lists that display the teacher name, title, call number, site shipped to, copy number, and date due.

The system allows authorized users to view the status of an item in the patron status area.

The system allows staff to define loan periods for different types of media items as well as how many times a booking may be extended.

**Searching**

The system will display instructional media material with a description of the item, current borrower, due date, and who needs the item next.

The system will not display instructional media material in the student OPAC.

The system is browser-based.

The system has 24/7 centralized access via any Internet enabled computer.

The system allows teachers to search multimedia materials for the classroom by curriculum needs.

The system shows the age of the material requested in the search results.

The system shows the availability status of the material requested in the search screen.

When teachers reserve material, they will get immediate feedback if the material is available for all the desired dates or some of them.

The system allows searching support of State Standards.

**Booking**

The system must be able to let the user book multiple copies of a title with one booking request.

The system allows the user to select and store titles for booking and then allow the user to book multiple titles at one time.

The system allows the user to quickly see what dates the items are available when making a booking request.
The system will generate an email to the user if the booking notification has been declined.

The system must allow the user to extend or edit a booking request easily. If the user editing the booking is not the original requesting patron, a notification of the date change is emailed to the user who requested the item.

Cataloging Instructional Media

The system must store instructional media material separately from the library material.

The system must import and export non-print MARC records.

The system allows the cataloger to hand key non-print MARC records.

The system must allow images of media to be added to the record.

Shipping

The system must allow the staff to scan the item barcodes or let the system automatically pick the copies of items ready to ship.

Reports

The system must generate overdue lists.

The system must generate circulation statistic reports.

The system must generate usage statistic reports.

The system must print packing lists with teacher name, title, call number, site shipped to, copy number, barcode, date due, ship date, and patron number.

Inventory

The system is capable of supporting an inventory of the instructional media material without impacting the ability to circulate items.

The system is capable of supporting full or partial instruction media inventory.
**Asset Manager**

**General**
*The system must:*

- Allow browser-based management of fixed and portable assets.
- Optimize access, availability and use of assets and identifies asset accountability throughout the district.
- Provide the ability to track fixed and portable assets including, but not limited to, software licenses, maintenance equipment, computer hardware, assistive technology aids, video systems, sports equipment, uniforms, buses, curriculum kits, and fixed assets that require maintenance.
- Be specifically designed for the unique needs of the K-12 school district.
- Provide comprehensive information about each asset, tracking its history from purchase to retirement.
- Be installed and maintained centrally at the district.
- Allow authorized users to search, manage, circulate, prepare inventory and create reports for assets.
- Uses wireless scanner technology for greater speed, ease and accuracy.
- Be SIF certified.

**Setup**
*The system must:*

- Include access to setup options for all modules in one common setup area.
- Allow the user to add, edit or delete multiple sites within a district from a central location.
- Allow the user to add, edit or delete site information including site name, district identification and customer number.
- Include the ability to add, edit or delete asset loan periods that include a description and desired loan period. Loan periods could be for a specific or fixed date, a certain number of days or unlimited.
- Include the ability to define a system default due date.
- Include the ability to assign asset loan periods to the specific asset types from a common setup screen.
Include the ability to define, edit or delete an unlimited number of patron types.

Include the ability to assign which asset types the various patron types are allowed to check out from one common setup screen.

Provide the ability to configure unlimited access levels (security rights), and specify what functionality is available to an individual user.

Allow the user to block transactions due to patron type not having permission to check out a specific asset type.

Allow the user to override blocked transactions.

Include the ability to setup calendar days and hours open.

The system allows each school to maintain a calendar that identifies closed days.

Include the ability to support multiple barcode symbologies up to 14 characters in length for items, locations and patrons. Barcode information must include barcode length and fixed characters.

Allow the user to customize up to five patron fields and configure the display of the locally defined fields in the circulation functions, if desired.

Allow the user to add locations, assign and print barcodes for the newly added locations.

Allow the user to edit or delete locations.

Allow the user to add, edit or delete school departments and include who is the head of the department.

Allow the user to identify the school principal.

**Cataloging**

*The system must:*

Provide a system-wide asset data file.

Support a central cataloging model where the district cataloger can maintain asset and item information for each school from a single login.

Allow asset cataloging at the district level without assigning a barcode, adding an item, or assigning it to a site.

Support a school-level cataloging model where each school has rights to maintain asset and item information.
Allow the cataloger to locate asset records added by other schools as part of adding an asset to facilitate keeping the number of duplicate records in the system at a minimum.

Include a built-in default template that includes all system and required fields for both an asset and associated item.

Support asset templates for an unlimited number of asset types.

Allow asset templates to be organized into hierarchical groups and subgroups to simplify data entry and asset search.

Allow asset templates to include asset description fields such as the name of the asset, the manufacturer, model number, a replacement price, and so forth, with the ability to add fields appropriate to the specific asset type.

Allow asset templates to include item specific fields, such as the barcode, status, condition, home location, custodian, department, funding source, district identifier, purchase price, date acquired, purchase order, serial number, salvage value and projected life.

Allow asset template fields to be optional or required, of a specific data type including currency, date, dropdown list, memo, number, text or yes/no checkbox.

Allow user to populate dropdown lists to minimize data entry and maximize data consistency. Dropdowns can be edited to add or remove desired information.

Allow user to add, edit, view or delete asset records.

Support a single asset record with multiple items linked to that record.

Provide the ability to add the digital photo of the item to the asset record.

Allow the cataloger to duplicate an asset record as a template for adding similar asset records.

Allow the cataloger to duplicate an item record as a template for adding new items.

Include options to add a single item, edit an item, delete an item, and add a number of items at one time.

Include the ability to add “On Order” items with or without a barcode.

Allow software programs loaded onto a computer to be connected and tracked with hardware.

Include the ability to assign automatically a software license to all items specified in an item barcode list or an item barcode file.
Include the ability to upgrade automatically software in order to remove software licenses currently assigned to items and replace them with other software license assignments.

Allow the cataloger to maintain individual records that capture information for each specific item in the collection.

Allow an individual asset or item record to be retrieved and modified at any time, once it has been entered.

Include the ability to search the existing asset database by asset type, “Starts with” and keyword.

The system must have the ability to add an asset without having to perform a search for the asset first.

Allow for updates of individual assets.

Allow for updates of a subset, or batch, of assets.

Allow for global updates of all assets.

Include the ability to delete item information, leaving the asset record intact.

Include the ability to delete individual items by just scanning or entering the barcode.

Include the ability to delete items in batch by scanning or entering barcodes to build a file of items to be deleted from the asset collection. When the user is ready all items in the file can be deleted and a report produced.

When the last item of an asset is deleted, remove the asset from the collection.

Users must be able to see item status from cataloging, as well as from circulation.

Offer a select list of all items of an asset record by barcode and include the asset name, barcode number of the item and condition.

Include the ability to view the availability status of an item while in the asset module.

Include the ability to merge duplicate asset records.

Include the ability for site staff to transfer and track assets, currently in the database or “On Order,” to another site within a district.

Include the ability for district staff to transfer and track assets, currently in the database or “On Order,” between any sites within a district.

Include the ability to print a summary of the asset transfer.

Include the ability to cancel any asset transfer.
Include the ability to receive asset transfers into inventory by scanning item barcodes. Any missing items should be marked Lost by the system automatically. The system should allow a user to mark all items received with a single click.

**Searching**

*The system must:*

- Include the ability to search for assets that start with certain characters.
- Include the ability to search for assets by keyword.
- Allow the user to limit searches based on asset type.
- Include the ability to browse for asset by asset type.
- Include the ability to search for items by barcode, district identifier, purchase order or serial number.
- Include in the search results the search term that was used to produce the result list.
- Provide keyword searches that support internal or imbedded truncation (wildcards), e.g., one entry can retrieve ‘woman’ and ‘women’, or ‘organization’ and ‘organisation’ and phrase searching.
- Accommodate Boolean searches using terms in AND, OR, and NOT relationships.
- Allow variations in punctuation, capitalization, use of diacritics, and spacing so that search entry does not impede searching.
- Allow the patron to sort the search results by asset name, asset type and relevance.
- Include a system-contained stop list of words that automatically excluded from searches to minimize the number of unnecessary hits.
- Allow the staff to configure searching options and patron empowerment functions available to different groups of patrons or staff.
- Provide patron empowerment functions to permit authorized patrons to view and print their own checkouts.
- Save search preferences for users based on their login.
- Allow the user to create and save a list of assets.
- List the number of hits retrieved from a search request and will provide navigation controls to move between the hits.
- Include the ability to print any information from the searching interface including individual asset information, the search results or the user-maintained list of items of interest.
Allow the patrons to search for items within their school, across all schools in the
district, or in selected groups of schools.

Display the following information for each asset in the search functions for items
held by other schools: asset name, barcode, circulation status, condition and
school.

Show the availability status of the asset requested in the search screen.

**Record Import/Export**

*The system must:*

Include the ability to import asset record data from an XML file.

Include the ability to import records from any valid drive and/or subdirectory,
including network drives.

Include the ability to import a file to add new records or update existing records.

Include the ability to check for duplicate records based on a match of the
displayable name and asset type.

Include the ability to skip the incoming record if a matching record already exists.

Attach item information to an existing asset record if a matching record exists, to
avoid creating duplicate records.

Include the ability to check for duplicate item information based on a match of the
barcode number.

Reports the number of records read; number of errors encountered; and number of
asset records and items added, replaced or skipped.

Automatically generate a report listing any errors encountered and/or corrections
made to records during the import process.

Include the ability to view exception reports prior to printing or saving the report.

Include the ability to export all records to an XML file.

Include the ability to export to any valid drive, including network drives.

Allow the user to delete asset and item records after export. Items currently
checked out should not be deleted.

Provide a report showing the number of asset records exported and, optionally, the
number deleted, and a listing of the assets and items deleted.
Circulation - General

The system must:

- Restrict access to circulation functions and records to authorized persons.
- Provide the most commonly performed tasks at one screen, including Check Out, Check In, Asset Status and Patron Status.
- Allow the user to easily switch between common functions during normal operation, using a mouse or keyboard.
- Include the ability to enter a patron barcode using a scanner or keyboard.
- Display that patron’s circulation information, along with the patron’s name when a patron’s barcode is entered.
- Allow for use of an ID number instead of barcode for checkout purposes.
- Include the ability to search, if patron barcode or ID number is unknown, by any portion of the patron’s name (first, last, middle and nickname), grade level, homeroom and up to 5 user-defined patron fields to select the patron.
- Provide access to patron records by barcode number, any portion of the patron’s name (first, last, middle and nickname), grade level, homeroom and up to 5 user-defined patron fields, in the circulation functions.
- Allow for editing of patron information directly from within the circulation functions.
- Provide access to asset records by barcode, asset name or keyword in the circulation functions.
- Include the ability to retain the barcode and associated patron when moving to another Circulation module.
- Include the ability to reset the display of circulation functions and clear patron information to protect patron privacy.
- Include the ability to circulate items to patrons from other schools in the district, if desired, to support resource sharing within the district.
- Include the ability to circulate items to departments in other schools in the district, if desired, to support resource sharing within the district.
- Provide for scanning of barcode labels affixed to patron cards and items.
- Update online circulation transactions in real time.
- Permit staff to easily determine the current circulation status of any item (whether any particular item is currently in circulation, when it is, or was, due back, if the item is marked as lost) from directly within the circulation functions.
Provide audible and visual signals to indicate:

Acceptance of the patron card
Acceptance of the item identification number
Any condition that must be reviewed for the transaction to complete
Provide lists of each outstanding checkout for the patron in the checkout function when the patron record is accessed.

Make the following patron information accessible while in the Circulation module: name, status, barcode number, card expiration date, patron type, ID number, graduation year and items with check out and due dates.

Make the following checkout information available for each patron while in the Circulation module: asset checkouts, asset name, item barcode, check out and due dates of that item.

Allow the staff to define patron notes that are automatically displayed in the circulation functions when the patron is identified for a transaction.

Provide the staff with notification of automatic blocks in circulation for conditions including:

Patron has overdue materials
Patron has expired card
Inactive or restricted patron
Patron attends another school

Provide access to asset/item records in circulation function by barcode, or asset name keywords in the circulation functions.

Display all items attached to an asset record during an asset search and allow for the selection and check out of any available item.

Allow limiting patrons to use of specific types assets.

Provide authorized staff the ability to override loan periods and specify special due dates.

Include the ability to enter a item barcode using a scanner or keyboard.

Alert the user that an item previously marked as lost is being checked-out.
Alert the user that an item previously marked as lost is being checked-in.
Alert the user that an item not previously checked-in is being checked-out.
Provide username/password controlled block overrides.

Include the ability to allow for use of ID numbers instead of barcodes for checkout purposes.

Allow authorized users to view the status of an item in the patron status area.

Include the ability for the system to determine loan periods from the asset and patron types.

Only require one entry of patron identification per batch of items to be checked out to that patron at that time.

Allow limited access to the circulation features, so aids or student helpers can circulate items.

Include the ability to print patron status from checkout, which provides a snapshot of a patron’s current checkouts. The report must include statistics on the total number of checkouts and overdues. It also must include a list of items checked out or overdue.

Include the ability to enter an item barcode using a scanner or keyboard.

Include the ability to search by keyword during checkout if the item barcode number is unknown.

Permit the staff to easily view if the patron is in violation of any configured asset policies, the patron’s outstanding transactions, the patron’s school and personal demographic information, and a picture of the patron.

Allow each school to configure the display of the locally defined patron fields in the circulation functions, if desired.

Allow for all loan policies and circulation parameters/configuration to be defined on a school-by-school basis.

Accommodate the circulation of a variety of asset types.

Support the retention of historical records on asset use, and also limits display of individual patron use information to protect the privacy of patrons.

Retain history after deleting item information.

Retain history after deleting patron information.

**Check Out Functionality**

*The system must:*

Offer asset checkout to patron where the application prompts for patron information (barcode, name) and asset information (barcode, asset name) and item
chosen is checked out to patron selected. Ability to select due date must be available.

Offer asset checkout to department where the application prompts for the school and department, then item. Additional items are checked out without re-selecting the school and department. Ability to select due date must be available.

Offer asset checkout to location where the location’s barcode or name is chosen, the item’s barcode is entered and the item is checked out to the location specified. Ability to select due date must be available.

Include the ability to check out items previously identified as “lost” or “stolen.”

Include the ability to easily view, in Check Out, all related patron information including the patron’s outstanding transactions, the patron’s school and personal demographic information, notes and a picture of the patron.

Check In Functionality

The system must:

Include the ability to enter the barcode of an item to be checked in using a scanner or keyboard.

Include the ability to search for an item by asset name and then select the appropriate item to be checked in.

Display selected item check out information including asset name, item barcode, check out date, due date, patron name, patron type and patron barcode.

Include the ability to link to asset status or patron status to quickly access all asset and patron status functionality.

Include the ability to check in items previously identified as “lost” or “stolen” and display a system prompt indicating item’s previous status.

Asset Status Functionality

The system must:

Make the following information available in the asset status module: asset name, barcode, date acquired, condition, district identification number, purchase order number, serial number, purchase price, home location, custodian, department, projected life, funding source, status and due date.

Make the following check out information available if checked out by patron: due date, name of patron to whom the item is currently checked out, patron type, patron barcode number, grade level, homeroom, five user-defined fields for that patron and “checked out by” information.
Make the following check out information available if checked out by department: due date, name of department to whom the item is currently checked out and “checked out by” information.

Make the following check out information available if checked out by location: due date, name of location to whom the item is currently checked out, location barcode number and “checked out by” information.

Make the following prior checkout information available: date item was returned, name of patron, department or location who last had item checked out, patron type, patron or location barcode number, grade level, homeroom, five user-defined locations for that patron and “checked in by” information.

Make the following information available in the asset status module: circulation statistics for the current month, current year, previous year and total.

Include the ability to change the status of an item to “lost” or “stolen” – independent of whether or not the item is currently checked out and independent of any inventory process. If the item is checked out, the system must track the last patron who had the item or the last assigned department or location.

Include the ability to edit the item, view its history, assign software and print barcode labels.

Include the ability to add an item-specific circulation note that can be displayed whenever the item is selected for circulation.

**Patron Status Functionality**

*The system must:*

Make the following information available in the patron status module: patron name (first, middle, last or nickname), patron type, patron barcode, status, gender, card expiration date, graduation year, birthdate, district identification number, grade level, homeroom, five user-defined fields for that patron and whether an acceptable use policy is on file or not.

Make the following information available for items checked out: due date, asset name, home location and date checked out. Additionally, include a statistical summary of current transactions, contact information and notes.

Include the ability to edit the patron, view their history, add a patron-specific note that can be displayed whenever the patron is selected and print the patron status or barcode label.

**Reports**

This section outlines reporting requirements that are in addition to those printing and list requirements outlined in other functional sections. Note that the application must allow
printing of information displayed in the interface from any function within the system (without copy/paste operations). Many lists displayed within the searching, cataloging and circulation functions must be printed to serve reporting needs. The additional reporting outlined in this section is used primarily to monitor and promote asset usage and to communicate with users regarding outstanding transactions.

The system must:

_____ Provide district wide reporting and school-level reporting.

_____ Include the ability to preview and print selected reports.

_____ Include the ability to save reports to a file and access previously run reports at a later date.

_____ Facilitate the creation of state, county, federal and other reports needed for compliance with GASB requirements.

_____ Generate reports to help ensure assets are equally and fairly distributed in the district.

_____ Allow users to produce other custom reports using leading report writer applications and applications that support ODBC access to SQL Server 2005 databases.

_____ Generate summary and detailed reports.

_____ Provide reports in PDF format or include the ability to download the report data in an XML file to be imported into another application such as Excel.

Asset Need Forecasting

_____ Provides a report of items that may require replacement based on their acquisition date and projected life.

_____ Tracks damaged or lost assets that need replacement.

_____ Includes the ability to limit assets included in the report by asset type, status and purchase price.

_____ Provides a summary report or a report with details for each item including asset name, barcode number, department, replacement date, purchase price and replacement price.

Asset Value

_____ Provides a report that displays the value of items in a district, a specific site type or an individual site.

_____ Provides the current collection value of assets or displays the depreciated collection value of items for a specified fiscal year.
Includes the ability to limit by asset type, status, purchase price and funding source.

Includes group-by options to provide information in the way that it is most significant for specific reporting needs.

**Deleted Assets**

Provides a report of items that have been deleted from the collection.

Includes the ability to limit assets included in the report to those assets deleted during a certain time frame, to assets of certain types, or both.

Provides a summary report that includes the following information: asset name, barcode, status, condition, date item was acquired, purchase price, district identification number, purchase order number, department, custodian, home location and date the item was deleted. The report should include a total number of items in the report and their asset types.

Provides a detailed report that includes all of the information in the summary report as well as the transaction history. The history should include every transaction involving, movement of, and change to, an asset. For each transaction, the report should include the action, date and user who performed the action.

**Item Barcode Labels**

Includes the ability to print item barcodes either individually or by the sheet.

Includes the ability to print barcode labels based on the acquisition date of the items, a department, or for sites, a home location.

Includes the ability to print used barcode labels that contain the item’s scannable barcode, the eye-readable number, and any of the three optional fields including the site or district name, asset name and home location.

Includes the ability to print unused barcode labels that contain the item's scannable barcode, the eye-readable number, and, if selected, the site name.

Include formatting options for multiple barcode label stocks.

**Item Status**

Provides a report about the status of items in the collection.

Includes the ability to limit by home location, custodian, department, asset type, price, status and funding source.

Provides the option to produce a summary including asset name, barcode, department, status, home location, condition, custodian and check out information.

Provides the option to produce a detailed report including all information in the summary as well as date acquired, district identification number, funding source,
purchase order, purchase price, serial number and any other fields that were defined for each asset type.

**In Progress and Completed Inventories**

- Generates flexible inventory reports for accounting and insurance purposes.
- Includes summary view of inventories and generates reports listing the items in the inventories.
- Provides reports based on inventories including:
  - In-progress inventory report generated at a site
  - Completed inventory report generated at a site
  - In-progress inventory report generated at the district
  - District detail report generated at the district
- Includes for each inventory and for each home location, the total numbers of items counted and uncounted.
- Includes, for each item, the following information: asset name, purchase price, item barcode number, home location, item status and custodian.

**Print Location Barcodes**

- Provides the ability to print location barcodes as labels or a list.
- Includes location’s name, scannable barcode and eye-readable number.

**Software Reports: Software by Item**

- Provides lists of assets that have software assigned to them.
- Includes ability to select assets by asset type or barcode.

**Software Reports: Software by License**

- Provides the numbers of transferable and non-transferable licenses owned, assigned, and available. It can also include information about the hardware to which it is assigned.
- Provides the ability to track licenses, analyze their use, and determine their location.

**Checked Out/Overdue Materials & Unpaid Fines**

- Provide the ability to report on materials checked out or overdue including the following options:
Only checkout currently overdue
Only checkouts overdue within a range of number of days
Only checkouts due within a specific date range
Includes the ability to print report or notice formats.
Includes the ability to limit by patron type and patron status.
Includes the ability to select range and sort options including patron name, grade level, homeroom and five user-defined fields.
Provide options to include, or not, the item price, patron barcode, patron phone number, at least two user defined fields and ability to start a new page for each group.
Includes the ability to distribute notices internally or externally, page layout options, custom notice text and support of double window envelopes (#10) that include patrons address and sites return address.
Includes the ability to email notices.
Includes the ability to save the report setup, to schedule reports to be run on a specified day at a specified time or to be run on a weekly basis, or to select the report and run it on demand.
Includes the ability to edit or delete saved reports and, when included, the run schedule.

**Patron Barcode Labels**

Provide ability to print both used and unused patron barcodes.
Include the ability to sort by patron name, grade level, homeroom and user-defined patron fields.
Include the ability to limit by patron type and patron status.
Include formatting options for multiple barcode label stocks.
Include the ability to print a range of unused patron barcodes that can fill in gaps in the assigned barcode range.

**Patron ID Cards**

Provide ability to print patron ID cards.
Include the ability to sort by patron name, grade level, homeroom and user-defined patron fields.
Include the ability to limit by patron type, patron status, graduation year or card expiration date.

Provide ability to include patron picture, barcode for scanning and up to three additional fields from the following: card expiration date, district identification number, grade level, homeroom, graduation year or any of five user-defined fields.

Include formatting options for multiple patron card stocks.

**Patron Name List**

Include ability to create customized lists of selected patrons.

Include ability to limit by name, grade level, homeroom, five user-defined fields, whether an acceptable use policy is on file or not, or to a specific barcode list.

Include the ability to limit by patron type, patron status, graduation year or card expiration date.

**Inventory**

*The system must:*

Allow each site to conduct an inventory of its assets and generate inventory reports.

Allow the district to initiate a district-wide inventory, monitor its progress, and generate district-wide inventory reports.

Allow for full or partial inventories by home location, custodian or department. A partial inventory could be limited by home location, custodian, department, asset type or purchase price.

Allow for multiple inventories at one time.

Support an asset inventory without impacting the ability to circulate items.

Automatically identify items in circulation (existing checkouts) as accounted for during an inventory.

Process barcode scans for inventory by the following methods:

- Scanning or typing barcodes directly into the inventory interface
- From a text file containing a list of barcodes
- From a wireless hand-held device used to scan barcodes remotely
- Automatically checkin items (existing checkouts), using normal checkin processing, when they are scanned during an inventory.

Indicate number of items inventoried as well as number remaining uncounted.
Include the ability to produce a listing of all items not accounted for during the inventory.

Allow the user to review the displayed list of unaccounted for items and to indicate, directly in the system from the list, that the item has been found, or the item should be marked as lost.

Include the ability to set all uncounted items to a status of lost. The system must also indicate the date the item was lost.

Include the ability to produce a listing of all items marked as lost during the inventory.

Allow the user to review the displayed list of items marked as lost and to indicate, directly in the system from the list, that the item has been found (can be accounted for), or the item should be deleted.

Include the ability to reset all items marked as lost (by an inventory) on a specific date to unaccounted for.

Provide the ability to restart the inventory process.

Additional Utilities
The system must:

Include the ability to schedule automatically back ups of the system using an industry-standard backup procedure.

Include the ability to restore the backup made by using the industry-standard backup procedure.

Include the ability to import patron data and student class schedules in an XML format, which can be used to add/update patrons from another system such as a student information system.

Integration with Library, Textbook, Media, and Asset Automation Software
The system must:

Provide complete library, textbook, media, and asset management integration, which includes sharing of patron data, ability to switch between library, textbook, media, and asset functions seamlessly and combined reporting capabilities.

Include the ability to display and report patron checkouts and fines for library and textbook transactions, just library transactions or just textbook transactions.
Include the ability for patrons to view library, textbook, media, and asset checkouts, fines and renewals.

Ability to configure access levels (security rights) for library, textbook, media management, and asset management functionality in order to provide or restrict user access.

Includes the ability to create a textbook only user account.

Includes the ability to create a library and textbook only user account.

Includes the ability to create a library, textbook, and media only user account.

Includes the ability to create a library, textbook, media, and asset user account.

Includes the ability for the staff to choose to view only the menu selections that are applicable to the features used.

References
List installed sites with a similar configuration.

Vendor Experience
Describe vendor history.
List the vendor’s commitment and experience in automating libraries.

Cost Proposal
Price of proposed solution.

Maintenance pricing for year 2
List price for on-going training/workshops