
Request for Information

Integrated Library System

MONTH 2022

V-Cat Consortium

Wisconsin Valley Library System (WVLS)

301 North First Street, Wausau WI

Statement of Intent

WVLS is evaluating integrated library system software to fulfill a goal from its current long-term strategic plan. This is a necessary task that should be undertaken periodically. The purpose is to ensure our organization is providing and will continue to provide the best library automation software that supports the needs of our consortium of public libraries and their patrons. There are many requirements to consider when assessing both our current ILS as well as any potential new one. This document is intended to help collect useful information for these different areas. We appreciate it if you would supply up-to-date and complete information about your product following our timeline below. This will allow WVLS and its stakeholders to identify the best product for our current and future needs. WVLS asks for the right to circulate your company's response internally among our member library staff, and among our partner libraries. The responses will not be a matter of public record but are subject to freedom of information act requests. Submission of a response by your company signifies acceptance of this condition.

WVLS and the V-Cat Consortium

WVLS is primarily funded by the State of Wisconsin, overseen by the Department of Public Instruction, and administered by a fifteen-member Board of Trustees. It functions as a membership organization - with its membership made up of Clark, Forest, Langlade, Lincoln, Marathon, Oneida and Taylor Counties. WVLS serves 25 administratively autonomous and fiscally independent public libraries in these counties. WVLS administers the V-Cat Library Consortium, which libraries join voluntarily by signing a membership agreement. [Appendix A includes a list of member libraries along with their service population and a summary of their annual circulations for 2019 and 2021.](#)

The WVLS central office is based within the same building as the Marathon County Public Library's Main Wausau Library located in downtown Wausau, Wisconsin. WVLS Office staff consist of 8.5 full time employees.

[Add additional information her about services WVLS provides.](#)

WVLS manages the shared library automation system, V-Cat, using Sierra from Innovative as well as Aspen Discovery, supported by Bywater Solutions. Along with the materials of member libraries found in V-Cat, WVLS purchases a few shared electronic subscriptions such as Gale Courses and Novelist Select and represents its members in the Wisconsin Public Library Consortium (WPLC) which coordinates OverDrive access. OverDrive bibliographic records appear in V-Cat.

Overview to the Current ILS

The V-Cat Consortium was formed in 1999, and consisted of two libraries. **Insert history of automation systems in use over time here.** The V-Cat Consortium had been on SirsiDynix's Horizon software system **since ????** and migrated to Innovative's Sierra system in 2013. **Insert detailed information about self hosting and LEAN Technology Collaboration.**

Within the V-Cat database, bibliographic records are shared among members with local holdings represented via attached records. Member libraries are trained to evaluate and import records into the ILS from OCLC daily via the z39.50 protocol. Member libraries are also able to edit and improve records as necessary following local guidelines. Member libraries also can add brief records when an OCLC record does not exist or is unsuitable. Original cataloging is performed when needed by system staff. Spot checking is done on bib records to assist with quality control. Maintaining the integrity of this database structure including how the results display to the public is of utmost importance to V-Cat.

Throughout our library system, our buildings have a total of 5 Bibliotheca self-check units and two self-check units using Innovative's Express Lane. We one building set up with an automatic materials handling (AMH) sorter using 3M - Bibliotheca.

It is important to V-Cat not to lose any existing functionality. Currently the libraries in V-Cat make use of the following functional areas or products:

- Acquisitions including electronic ordering; funds management and invoicing;
- Authority control and duplicate record control;
- Cataloging management of bibliographic and item records;
- Circulation and patron record management;
- Circulation notifications for library users offered through email, phone (via integration with Shoutbomb), text (via integration with Shoutbomb) and paper formats;
- E-Commerce for online fine payment (PayPal);
- Holds management functionality for both staff and patrons that includes the ability to
 - limit hold placement and hold fulfillment on items by patron type and owning location,
 - freeze and unfreeze holds,
 - designate multiple priority levels for paging,
 - set local hold priority;
- Offline circulation;
- Online patron catalog or discovery catalog;
- Online library card registration;
- Serials management (available, but not currently used)

Instructions for Responding

Sections

This RFI consists of six sections (see below). Respondents are asked to complete all sections. With regards to [Section II. ILS Functionality Assessment](#), some areas feature questions requiring brief responses as well as a checklist. Others only feature the checklist. For [Section VI. Costs](#), respondents are asked to provide a breakdown of anticipated costs. This information will factor into our group's final decision.

- I. [General Information](#)
- II. [ILS Functionality Assessment](#)
- III. [Public Catalog \(included with base product\)](#)
- IV. [Discovery Catalog \(add-on product, if available\)](#)
- V. [Integration with Other Companies](#)
- VI. [Implementation Timeline and Known Constraints](#)
- VII. [Costs](#)

RFI Timeline

By Date TWO WEEKS, 2022	Respondents are asked to submit a notification of intent via email to ils.admin@wvls.org
By Date THREE WEEKS, 2021	Questions or requests for clarification should be submitted via email to ils.admin@wvls.org
By Date ONE MONTH, 2022	Respondents are asked to submit their responses electronically in PDF format and sent to ils.admin@wvls.org
By Date TWO MONTHS, 2021	Select respondents will be contacted to schedule a vendor demonstration consisting of a full day broken down by V-Cat designated functional groups. Demonstrations for V-Cat libraries will be scheduled to take place no later than DATE, 2022

I. General Information

A. Please provide a brief history of the library system including information about the following:

1. The majority and minority owners of your company
2. How many years the library system has been in the market
3. If there are any plans for a merger or acquisition
4. Any plans or roadmaps for the library system coming up over the next one-to-five years.
5. The commitment of the majority owners towards on-going support for this library system over the next five-to-ten years
6. The number of public library consortia added between 2016 and 2021 broken down by year, and from which automated system
7. How your library system stands apart from other products with regards to supporting consortia

B. Please describe your library system including information about the following:

1. The client hardware and workstation requirements for optimal performance by the ILS
2. Your model for Software as a Service / cloud hosting
3. The underlying database structure or architecture
4. The database language and whether ILS administrators have direct database access
5. The number of client workstations running and database size, at your largest consortia
6. The options available for database backup
7. The types of APIs available to third-party applications

C. Please summarize information about your library system with regards to the following:

1. The schedule for new releases and bug-fix releases of your library system in a year's time
2. The software development cycle, including the process used to collect, evaluate, and implement customer-suggested enhancements
3. The process for delivering and applying patches between major software releases
4. The methods for communication available for customers to work with the company during business hours and off-hours

D. Please describe the process for on-boarding new customer, including the following:

1. Describe the extent and the type of staff training provided with implementation
2. Describe the extent of project management services and resources provided with implementation
3. Describe the extent and currency of online training materials the company offers on the library system

II. ILS Functionality Assessment

A. Acquisitions, Serials and E-Resource Management

1. Please complete the below checklist:

	Yes – Part of the Current Base Software	No – Not Part of the Current Base Software	In Development	Available via a Custom Development	Add-On Product
<i>Acquisitions</i>					
Ability to create & manage multiple funds and budget tracking, including funds management to support a library consortium with different accounting methods and agencies					
Ability to create funds earmarked as different funding types within system					
Ability to generate fund management reports and statistics for each member library					
Ability to perform fiscal close (end of year rollover) & fiscal open					
Ability to auto-generate and/or schedule reports & statistics on funds management & fiscal data					
Ability to create a funds organizational structure, including funds hierarchies, for ease of use & statistical reporting					
Ability for order records to include all necessary fixed and variable fields for accurate order submission & processing					
Ability to generate, load and submit order records manually and integrated with external vendors, including EDIFACT Ordering					
Ability to automatically queue purchase orders via vendor order loads					
Ability for on orders & in process titles to show on public display					
Ability to generate reports & statistics for each member library's orders					
Ability to search orders using multiple points of access					
Ability to create order records for standing orders					
Ability to auto-generate and/or schedule reports & statistics on order records					

Ability to move, manipulate and cancel orders					
Ability to generate multiple order records & rough bibliographic records using imported data					
Ability to see Order Record history, including users & dates for creations and changes					
Ability to manually add or remove an order from FTP data load					
Ability to import invoices with outside vendors (EDIFACT invoicing)					
Ability to pay invoices via ILS system					
Ability to search for invoices through multiple data points					
Ability to create vendor profiles, including unique profiles for each account within a vendor using fixed and variable length fields.					
Ability to search for vendors through multiple data points					
Ability to interface with outside vendor payment software					
Ability to retrieve a record of adjustments to fund records (fund activity report)					
Ability to allow multi-fund orders fund fixed field to be broken out by percentage or dollar amount					
Ability to allow multiple payments against a single order record in the same session for all order types					
Ability to export more than 1 order file per FTP session to the same vendor					
Ability to view fund balances while ordering without needing to post first					
Ability to import more than one invoice file per FTP session from the same vendor					
Ability to encumber funds at the discount/estimated price					
Ability to allow multiple payments against a single order record in a different session for all order types (partial payments)					
Ability to create and edit vendor codes					
Ability to search invoices (including by vendor and invoice date)					
Ability to delete and/or edit an invoice after posting (to correct an error)					
Ability to view and/or edit the unencumbered amount during invoice entry					
<i>Electronic Resource Management (ERM)</i>					
Ability to manage e-resources either included with ILS or as a separate product					
Ability to manage e-resource licenses					
Ability to load e-resources order & vendor records similar to traditional resources					
Ability to verify URL for e-resources					

Ability to interface and authenticate with publisher web site or resources					
Ability to use APIs to display e-resources without loading them into the database					

Serials					
Ability for system to have distinct serials specific serial records and item records, including bibliographic records, order records, check-in records, holding records					
Ability for efficient functionality of check in record, including check in of a title with volume and issue number.					
Ability to check in and track serials issues/subscriptions for multiple libraries with a library consortium					
Ability to support MARC or non-MARC serial holdings					
Ability to cleanly export serial holdings out of the system					
Ability to use and execute a claims function for serials, including ability to use in submission to external serials vendors					
Ability for granularity with serial permissions to accommodate consortium, including ability for each branch/library to limit visibility to own serials data.					
Ability to make batch check-in record or serial item record changes					
Ability to have 'public notes' on titles that are visible in discovery catalog					
Ability to set up automatic numbering of volumes and issues by title (based on publication pattern)					
Ability to efficiently identify and report late issues					
Ability for software to handle periodical 'supplements'					
Ability to create serials-specific statistics and reports					
Ability to identify status of a volume/issue number as not received, missing, unavailable, etc.					
Ability to link users to previous or future title changes in discovery catalog (CONTINUES, CONTINUED BY links)					
Ability to link users to digital/electronic versions of same title available in discovery catalog					
Ability for order records & associated check-in records to be directly linked					
Availability of a check-in or serial record that includes all necessary fixed & variable fields for accurate processing & reporting					
Availability of a check-in record card that is associated with each check-in record					
Ability to assign holdings or a holdings record to each check-in record					
Availability of limited retention holding statements					
Availability of a routing record for each check-in record					
Ability to automatically sort new item records created at serials check-in					
Ability to view order record and check-in card of the same bib record simultaneously					

Ability to preview spine labels during check-in process					
Ability to automatically merge holdings when a missing issue is checked in					
Ability to generate reports and lists based on check-in box status, including ability to export reports					

B. Cataloging, Authority Control and Records Management

1. Please complete the below checklist:

	Yes – Part of the Current Base Software	No – Not Part of the Current Base Software	In Development	Available via a Custom Development	Add-On Product
<i>General record management for all types of records</i>					
Ability to edit all types of records in groups					
Capability to export/print groups of records or single records					
Ability to toggle back and forth between the backend and public interfaces					
Ability to add text macros as shortcuts					
Availability of duplicate record checking by specified field(s)					
Are navigation options clear and clearly labeled?					
Availability of complete record modification and record deletion history tracking for all record types					
Ability to administratively control ownership and management of all types of records					
Ability to duplicate, print and delete all record types					
<i>Bibliographic record management</i>					
Integration with Bibliographic Formats and Standards					
Ability to handle current RDA fields and future RDA fields					
Ability to bring in records either singly or in batches from a variety of third-party providers					
Ability to easily create, overlay and modify bib records for all material formats					
Ability to easily select, insert and correctly display diacritical marks					
Ability to limit by other index fields when searching in one index					

Immediate indexing of completed records, even when multiple accounts are active concurrently					
Ability to customize indexing					
Ability to quickly check for duplicate ISBNs in the database.					
Is there a way to report bibliographic errors to a central mailbox from within the system?					
Ability to suggest titles when searching if the original search returns no results					
Supports searching despite non-English articles that start titles (non-English skip digits)					
Supports searching for titles in a series					
Ability to see and manage/transfer holds while cataloging					
Ability to limit by format, language, date, publisher, audience and owning library					
<i>Authority control management</i>					
Ability to maintain multiple authority thesauri without conflict					
Ability to batch update controlled terms/fields					
Ability to identify and print off or export duplicate, first time use, and/or invalid headings					
Ability to easily identify blind authority records					
<i>Item record management</i>					
Can the system restrict permissions on certain fields in an item record?					
Can on-the-fly items have different permissions and be easily distinguished in the database?					
Does the system use a volume field for items?					
Ability to transfer items between records					
Ability to quickly identify bad codes (mistakes, typos)					
Ability to export/print the lists of codes applying to each controlled field					
Ability to manage codes based on permissions					
Ability to print item spine and book labels from within the ILS					
Ability to customize spine and book labels to meet individual owning library's needs					
Ability to print item labels in batches					
Ability to display call number scroll of a specific member library while creating Cutter numbers					
Ability to manipulate the order in which items display to staff and the public					
Item records include a history of status changes in an item record for past 5 or so changes.					

<i>Collection management</i>					
Can the ILS assist selectors with determining nonfiction areas of high and low interest at each physical location?					
Can the ILS help set data benchmarks for when material becomes unusable due to condition without requiring physical examination of every piece first?					
Can it create weeding & missing lists?					
Can it determine the most popular fiction authors for each audience level at each physical location?					

C. Circulation and Self-Checkout

1. Please complete the below checklist:

	Current Base Software Yes – Part of the Current Base Software	No – Not Part of the Current Base Software	In Development	Available via a Custom Development	Add-On Product
<i>Patron Record Management</i>					
Ability to batch update patron records					
Ability to batch extend due date					
Ease of editing patron records					
Ability to have multiple types of patron records (child, adult, temp, educator, institutional, homebound, and other community types)					
Ability to designate internet use permissions for minors					
Ability to view details of patron fines in check out					
Offers needed fixed and variable patron fields (home/residence field, circ active field, etc.)					
New Patron record templates by branch and patron type					
New patron record template can auto-calculate a default expiration date (prefer set by library/location)					
Duplicate record check alert when creating new patron records					
An alert message can notify staff a set number of days before expiration date					
Availability of multiple ways to look up a patron record (barcode, last name, address, e-mail, phone, birthdate)					
Ability to designate a patron's preferred name, and for that preferred name to appear on circulation notices and in patron online interface.					
Ability to add notes (hidden from patron) and messages (hidden from patron but pop-up message to staff) to a patron record					
Ability to allow patrons to opt in for email or SMS notifications such as newsletter or emergency closures					
Can patron records be merged?					
Ability for staff to select a default hold pick up location to any location (not tied their 'home' library)					
Ability to view last patron and circ history on an item record					

Records the number of times the patron record was used in a given time period (not just the last use)					
Ability to link patrons in the staff interface					
Ability to set parameters to extend select blocks to linked patrons					
Patron records include both a creation date and an updated date					
Is there a signature for user who last updated the patron account					
Ability to view patron's OverDrive use/holds in staff interface					
<i>Holds Management</i>					
Availability of bib-level and item-level holds					
Ability to place item-level holds that page but do not transfer					
Ability for patron to select the default hold pick up location to any location, not limited their 'home' location.					
Ability to change pickup location for a hold already in transit or on a hold shelf.					
Ability for staff to see frozen holds and freeze or unfreeze holds for patrons					
Ability to freeze holds when the item is available or has no holds.					
Ability to see cancelled holds and reinstate cancelled holds					
Ability to batch extend hold pick up dates for a single location (emergency closures)					
Ability to easily exclude locations from filling holds (emergency closures)					
Holds management offered in the patron catalog					
Hold shelf management tools (clear the hold shelf report, current list, pick up date, location)					
Easily generate a list of expired holds on the hold shelf					
Easily generate a report of holds unfilled with available items to fill by either pickup location or owning location					
Ability to format paging lists by library branch					
Ability for patrons to freeze holds and ease of unfreezing					
Staff interface includes OverDrive use/holds information					
<i>Checkins</i>					
Ability to backdate check in date for materials					
Ability to check in with overrides to not fulfill hold or send items in transit					
Ability to waive fines within check in interface					
Ability to edit item from Check In (add note, change status etc.)					
Support (or note added) when checking in damaged items					

Availability of pop-up messages when checking in items to alert staff					
Ability to have warning sounds and/or obvious visual alerts when checking in items					
Ability to toggle from checked in item to patron in Checkout interface					
In transit messages are added to an item record with origin, destination, date and time when the status is updated to in transit via the Check In interface					
Is check-in available in within the patron record/checkout interface?					
<i>Checkout</i>					
Ability to extend or modify the due date during Checkout					
Ability to batch extend due dates for a group of items or patrons (emergency closures)					
A way to mark items lost in patron record AND to mark items damaged					
Is there ability to block number of items checked out by patron type or other patron record field.					
Is there an ability to block number of items by a combination of patron type and type of items.					
Is there an implicit check in notification when an item is checked out to another patron?					
Block / warning when a patron tries to check out an item on hold for another patron					
Ability to customize check out receipts and statements of checked out items by location.					
<i>Loan Rules Management</i>					
Availability of administrative area that allows for the creation and management of complex loan rules based on patron type, material type, location					
Strength and ease of loan rule management in a consortium					
Ability to sort or group loan rules based on loan rule facets					
Ability to batch update a single facet of selected loan rules					
<i>Notifications</i>					
Delivery methods must include paper, email, and phone					
SMS or text message notifications must be available (included with the ILS or as an add on service), or integrates with Shoutbomb					
Support for Shoutbomb phone notifications, or integration availability with another third-party phone notification system					
Availability of these notice types: overdue, courtesy, hold pickup, statement of charge or bill					

<i>Fines Management and Fines Paid</i>					
Ability to easily collect money and waive charges (no negative balances)					
Ability to accept partial payments or for patrons to select which charges they want to pay					
Ability to assign predefined charges and add new ones to the system					
System retains patron fine payment history for a set length of time with specific information for all charge types					
Availability of fines management tools to review fines paid, review waived fines and globally purge fines by library or by file					
Ability to reinstate manual fines paid or waived in error.					
Ability to reinstate overdue, replacement, and other automatically generated fines paid or waived in error.					
<i>E-Commerce</i>					
Ability to support e-commerce payment via PayPal credit card payments					
Ability to report on e-commerce payments					
Ability for standalone fine payments independent of the catalog via API or other method					
Ability to integrate e-commerce payment with third-party discovery catalogs such as Aspen Discovery					
<i>Online Patron Registration</i>					
Availability of an online self-registration form included with the ILS or as an add-on product.					
Online patron registration form is customizable					
Online patron registration form performs duplicate record checking against the patron database using more than one field along with the patron name field					
<i>Paging Slips for Holds</i>					
Availability of customizable paging slips for bib and item holds management					
Availability of transit slips					
Availability of hold shelf slips that are customizable					
Availability of date due and receipt slips					
Ability to restrict frozen holds from showing up on paging slips					
<i>Self-Checkout / SIP2</i>					
SIP2 integrated into the ILS package (no licenses)					
The ILS product supports a variety of self-check vendors: Bibliotheca/3M, Logitech, Envisionware and related AHMs.					
Availability of ILS information tied to SIP2 management					
Ability to select receipt paper options and formats (none, paper, email)					

Integration with self-checks for date due receipts for format (email and text)					
<i>Offline Circulation</i>					
Availability of offline circulation processes					
Availability of offline circulation documentation					
<i>Patron API</i>					
System communication with Cassie and Pharos for patron sign on to PC management system					
System communication with OverDrive for patron authentication					
<i>Inventory</i>					
Availability of inventory functionality either included with the ILS, as an add-on product, or via integration with a third-party vendor					
Availability of statistical reports and fields tied to inventory					
Inventory functionality separated out by branch library					
<i>Miscellaneous</i>					
Collection Agency functionality offered with consortia support, or integration with Collection Agency such as Unique Management					
Ability to see information a userid, date/time stamp on transactions (e.g., new card set up, card last updated, item record changes, etc.)					
Support for multiple custom item statuses					
Ability to set items in transit between locations and have an item status that indicates this					
Ability to designate an item as 'damaged', 'in repair', 'in bindery'					
Ability to add notes and messages to item records					
Support for RFID tags on materials					
Support for old or new item and patron barcode labels					
Availability of reciprocal borrowing statistics for a consortium to track usage of owning and non-owning items					
<i>Interlibrary Loan</i>					
Interlibrary Loan functionality is included with the ILS or offered as an add-on product					

D. Reports and Statistics

1. Please complete the below checklist:

	Current Base Software Yes – Part of the	No – Not Part of the Current Base Software	In Development	Available via a Custom Development	Add-On Product
Ability to create custom reports for different record types					
Ability to create canned and custom reports at branch/location level and at consortia level					
Ability to create canned and custom reports for circulation and hold transactions					
Ability to edit lists or reports directly in the ILS					
Ability to edit records in reports without exiting from the report					
Ability to export reports in a variety of formats					
SQL reporting or some other equivalent					
Ability to create custom queries					
Ability for reports to interface directly in the discovery catalog					
Reporting allows for automatic charts/images to be output to facilitate dashboards for libraries					
Ability to limit access to reports/reporting tool(s) by user sign on					
Can reports be shared directly in the ILS or must they be removed to be shared?					
Ability to save, edit, and re-run custom reports					
Ability to schedule regularly run reports					
Unlimited or very large capacity for the number of reports at any given time					
Analytics support a consortium of different libraries					
Offers several different reports of use to a single library and a consortium					
Statistical reports are able to be modified before printing					
Statistical reports can be printed directly from the ILS					
How many factors can be run on all record types					
Statistical reports can be run on all record types					

Statistical reports can be exported into Excel, not just a text (.csv) format					
Ability to create collection development reports that accommodate a consortium and local call numbers					
Ability to track in-house statistics for item records					
Ability to modify facets of reports within the interface to compare and contrast results					
Item records contain yearly cumulative checkout totals for current and past year automatically (without modifying a record's last updated date)					

E. Systems Administration & Authentication

1. Please provide a brief description of the following functions or features:

- The main features of the administration module
- The level of access to the database for consortium staff

2. Please complete the below checklist:

	Yes – Part of the Current Base Software	No – Not Part of the Current Base Software	In Development	Available via a Custom Development	Add-On Product
Documentation and Training					
Availability of a current manual that covers the entire library system and its different functionality					
Company provides in-person staff training					
Availability of additional/ongoing training					
Company provides online training materials on system administration functions					
Availability of a test server / sandbox					
Systems Administration					
System can accommodate record and workflow set up for multiple libraries and multiple branches					
System allows for the customization of some amount of fixed and variable length fields in all types of records					
System allows for patron and item barcodes of varying lengths. Currently our patron barcodes or school IDs range between 6-digits and 14 digits and have different prefixes. Our item barcodes are 14 digits in length and tend to start with 352.					
System accommodates z39.50 record searching and record loading from outside databases					
Availability to export the entire database to outside vendors via FTP or another method.					
System provides a field option to suppress records of any type from public view					
System administration module offers the ability to manage and modify record templates for all types of records.					
System administration module offers both group and granular levels of staff permissions					
Staff administration module offers the ability to create and duplicate individual and group logins (accounts)					

Staff administration module offers the ability to temporarily disable staff accounts as well as remove accounts.					
Staff administration module offers password management for scheduled changes.					
Ability to handle circulation/loan rules for a consortium having multiple libraries.					
Ability to set days closed and hours open					
Availability of a tool to reset a fixed field (or restart a date field) annually or as needed by record type					
Profiles for Record Loading					
Availability of load table to bring in batch records					
Ability to customize load profile tables					
Remote Authentication for E-Resources					
Availability of a remote patron authentication module					
Ability to expose minimal data for patron authentication					
Ability to control and restrict patron authentication for holds, payments and account management					
Availability of usage statistics for remote authentication.					
Usage statistics for remote authentication supports a consortium					
Availability of a patron API to facilitate remote access of e-resources.					
Availability of a RESTful API or other programming to automatically create, modify or delete database records.					

III. Public Catalog (included base product)

1. Please describe your basic public catalog product.
2. Please list the catalog features that are only available to users upon account login. Feel free to specify if there are any unique (non-basic) features that do not require account login.
3. Please complete the checklist below:

	Yes – Part of the Current Base Software	No – Not Part of the Current Base Software	In Development	Available via a Custom Development	Add-On Product
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<i>Interface and Search Capabilities</i>					
Offers a clean basic search interface					
Offers keyword, phrase and Boolean searches					
Offers an advanced search option					
Performs well with any/all web browsers					
Offers real-time catalog results and patron information					
Is mobile responsive by design to accommodate searching via many types of devices					
Supports enlarged fonts and WC3 design standards					
Supports multiple world languages					
Ability to search and limit results to one member library					
Ability to limit a search using facets to restrict to one library, one format, etc.					
Supports cross-references and see-also headings					
Supports bib and item level holds					
Ability to sort catalog results					
Features material type icons for ease of format identification					
Failed search attempts should give a "Did you mean?" alternative or close results rather than no results					
Highlights words when results are returned to help explain why results came back					
Offers persistent links to individual titles					
Ability to create persistent links to featured lists					
<i>Patron Account Functionality</i>					
Ability for patrons to edit some of their contact information such as email					
Ability for patrons to access personal checkout/hold data					
Provides patron self service functions (place holds, renew materials, cancel holds, view notes from staff, update contact information)					
Availability of a reading history					
Offers lists or favorites which a patron could curate					
Offers method for patrons to track preferences and interests					
<i>Features and Integration</i>					
Staff interface links back to public view of a given record in the discovery catalog					
Ability to choose FRBR-ized display or non FRBR-ized display					
Provides information on similar titles or other titles in a series (integrates with Novelist Select)					
OverDrive API integration					
Ability to easily integrate carousels into web pages					
Ability for patrons to text or email a title and share on social media platforms					
Ability for users to save searches and search results					
<i>Miscellaneous</i>					
Ability to view a full record as a MARC record					

Availability of an online payment option (e-commerce)					
Availability of an online library card registration form					
Ability for libraries or the system admin to customize the discovery catalog's display					

IV. Discovery Catalog (add-on product)

Please describe your discovery product stands apart from other products with regards to user experience and supporting consortia.

1. Please describe your discovery product stands apart from other products with regards to user experience and supporting consortia.
2. Please list the catalog features that are only available to users upon account login. Feel free to specify if there are any unique (non-basic) features that do not require account login.
3. Please complete the checklist below:

	Yes – Part of the Current Base Software	No – Not Part of the Current Base Software	In Development	Available via a Custom Development	Add-On Product
<i>Interface and Search Capabilities</i>					
Offers a clean basic search interface					
Offers keyword, phrase and Boolean searches					
Offers an advanced search option					
Performs well with any/all web browsers					
Offers real-time catalog results and patron information					
Is mobile responsive by design to accommodate searching via many types of devices					
Supports enlarged fonts and WC3 design standards					
Supports multiple world languages					
Ability to search and limit results to one member library					
Ability to limit a search using facets to restrict to one library, one format, etc.					
Supports cross-references and see-also headings					
Supports bib and item level holds					
Ability to sort catalog results					

Features material type icons for ease of format identification					
Failed search attempts should give a "Did you mean?" alternative or close results rather than no results					
Highlights words when results are returned to help explain why results came back					
Offers persistent links to individual titles					
Ability to create persistent links to featured lists					
<i>Patron Account Functionality</i>					
Ability for patrons to edit some of their contact information such as email					
Ability for patrons to access personal checkout/hold data					
Provides patron self service functions (place holds, renew materials, cancel holds, view notes from staff, update contact information)					
Availability of a reading history					
Offers lists or favorites which a patron could curate					
Offers method for patrons to track preferences and interests					
<i>Features and Integration</i>					
Staff interface links back to public view of a given record in the discovery catalog					
Ability to choose FRBR-ized display or non FRBR-ized display					
Provides information on similar titles or other titles in a series (integrates with Novelist Select)					
OverDrive API integration					
Ability to easily integrate carousels into web pages					
Ability for patrons to text or email a title and share on social media platforms					
Ability for users to save searches and search results					
<i>Miscellaneous</i>					
Ability to view a full record as a MARC record					
Availability of an online payment option (e-commerce)					
Availability of an online library card registration form					
Ability for libraries or the system admin to customize the discovery catalog's display					

V. Integration with Other Companies

Below is a list of the companies MCFLS and/or individual libraries currently work with in concert with the Sierra library system. Please use the checklist below to indicate which of these companies your ILS product integrates with at present.

- 1. Please briefly describe how your ILS product is equipped to handle AMH Sorters and RFID tags.**

2. Please list if there are any limitations tied to outputting the database to an outside vendor. For example, can this only be done for bibliographic records or in a specific format?

3. Please complete the checklist below:

Company or Equipment	Yes – We have worked with this company and can integrate with their products	No – We have not yet worked with this company or integrated the product	We can work with this company and integrate a product with an add-on cost
Bibliotheca 3M (self-check, AHM, security gate, RFID provider)			
Logitech (self-check, AHM, security gate, RFID provider)			
Envisionware (self-check, AHM, security gate, RFID provider, PC management, laptop kiosk)			
Pharos (PC time management, printing kiosk)			
Cassie (PC time management, printing kiosk)			
Princh (printing kiosk)			
Auto Graphics (software used for statewide catalog integration)			
Aspen Discovery			
Baker & Taylor Content Café Cover Images and Content			
Syndetics Cover Images and Content			
Ebsco Novelist Select or Novelist Plus for enhanced catalog content			
OverDrive API			
Baker & Taylor EDI/FTP Ordering and Invoicing			
Midwest Tape (electronic ordering and invoicing)			
Backstage			
Payflow (e-commerce)			
PayPal (e-commerce)			
Shoutbomb (text/SMS/phone notifications)			
Unique Management Services (collection agency reporting)			

VI. Implementation Timeline and Known Constraints

1. Please list the components that make up a typical migration and implementation timeline as it applies to a consortium.
2. Are there any upcoming staffing / work constraints, or known issues with the company or software that our site should be aware of?

VII. Costs

1. Please supply a breakdown of costs by service and list the options for multi-year contracts or subscriptions.
2. Describe the invoicing process for new products and when maintenance of those products begins.
3. V-Cat may choose to bill back member libraries for maintenance on ILS products that they have purchased separately. Does your company's accounting process provide for the itemization of maintenance for products that are purchased by individual libraries within our consortium?
4. Explain how maintenance increases are applied and what typical annual increase we can expect without multi-year contracts.

Appendix A – Member Libraries & Statistics

V-Cat consists of 25 public member libraries, with 35 locations. Two member libraries have branch locations.

Total Number of Bibliographic Records:

In-Building Circulation: Circulation of items from this library location regardless of ownership. (Checkouts and renewals are considered part of in-building circulation)

Library – Branch Location	2019 Circulation (includes renewals)	2021 Circulation (includes renewals)	Number of Patrons as of 01/01/2022