Ministry of Earth Sciences
Earth System Sciences Organization
Prithvi Bhavan, 4th Avenue, Lodhi Road,
New Delhi – 110003

Sealed tenders are invited from qualified software vendors for "development and Implementation of KOHA library management system (LMS), development and integration of digital library solution; document classification, processing & stock taking of library resources." The vendor should have experience in automating and networking of Specialized Libraries Knowledge Resources Centers (KRC).

Tender form may be collected directly from the reception of this Ministry (Ministry of Earth Sciences," Prithvi Bhavan", Lodhi Road, New Delhi-110003) or may also be generated from the Ministry's website **(www.moes.gov.in) or CPP portal (www.eprocure.gov.in).**

The technical and price bid should be as per format mentioned in the tender document, and should be addressed to "Library In-charge, Ministry of Earth Science "Prithvi Bhavan", Lodhi Road, New Delhi-110003 and it should be dropped in the tender box kept in Reception, Ministry of Earth Sciences, "Prithvi Bhavan", Lodhi Road, New Delhi-110003. Latest by **2nd April 2015 at 13:00 hours**.

For any clarification please contact
Dr. P.G Dastidar
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Phone no: 011-24669520
24669641

MoES/15/Lib-6/2012
Format for submission of tender for "Implementation, support services, data migration and training on KOHA Library Management System".

Ministry of Earth Sciences (MoES)
OFFICE OF MoES-ESSO Knowledge Resource Center (Library)
Prithvi Bhawan, Lodhi Road
New Delhi-110003

Sir,

Sub: Invitation of quotation for **"Implementation, support services, data migration and training on KOHA Library Management System (LMS)"**.

1. **Sealed competitive quotations are invited by the undersigned for the above mentioned purpose as per following details:**

Sl. No.	Brief description of the job	Brief Specifications	Quantity	Delivery Period	Place of delivery
I.	Installation and configuration of KOHA LMS on centralised server with multiple independent library instances, each having its own OPAC, staff client and independent databases along with Union Catalogue of all libraries and full maintenance for one year. The OPAC should be boot strap enabled.	Installation should be done on the server to be provided by MoES. Number of independent library instances may be 4 or more. Setup should be able to provide Koha Software as a Service (SaaS) to libraries spread all over India under MoES. Maintenance may be done remotely or physically if necessary.	Centralized Koha installation for minimum 4 or more libraries having holdings ranging from 3000 to 20000 books/documents (approximately) and journals – from 1000-40000 issues (approximately) in each institutes.	4 months	Location of libraries (List annexure-I) MoES-New Delhi NCMRWF-Noida IMD-New Delhi INCOIS-Hyderabad and/or Pune.

II	Setting up of mirror server at defined library location for their own instance.	Mirror server should frequently update complete data from central server and serve the individual library. In the event of connectivity failure or server problem the library operation should continue, Mirror Server will be provided by ESSO-Institutes	-	4 months (one month each at the institute)	-do-
III	Data migration from existing proprietary Library Management System (LMS) e-granthalaya etc. to KOHA	Should include Catalog data, Users data and daily transaction data etc. and other data required for on integrated Library management system	4 or more such servers, rate should be quoted per server basis	4 months (one month each at the institute)	-do-
IV	On-site training on KOHA for library staff	Training on all features of the software for successful functioning of the library automation including maintenance.	-		(1)New Delhi (2) Noida (3)Hyderabad (4) Thiruvanantha puram (5) Pune
V	AMC	- Support and help desk facilities for day to day use of Koha LMS, on annual basis. Support should be provided through Email, Phone, online docketing system. - Failure to rectify the problem within 18 hours of reporting will attract penalty 2% of AMC amount per hour.	-	1 year (quote should be given for year wise warranty for additional two years)	-

| VI. | Data entry | | Rate should be quoted per record wise (it is expected that information from around 16000 work sheets need to be entered in the database, after migrating from existing database maintained in e-granthalaya/other softwares

- In case data entry already done, information from the old database should be migrated into KOHA, validated and additional information, if any, should be entered. | - | - |

| VII | Bidder will also develop mobile applications under difference software platforms like android, iPhone, windows etc. for accessing library resources and services including other e-resources through mobile and other platforms. | | | | 5 |

VIII	Document Classification using UDC classification system. Data entry Error check worksheet preparation, Data validation with existing databases and migration and data entry to KOHA library automation system, digital library system (D-space), spine label printing and pasting, stock verification of documents/books/ Journals/ and other library materials, Shelving as per UDC Pasting of book pockets (material will be supplied) on each book Pasting of imprint on each book.		MoES library is having approximately 16000 documents. NCMRWF, NOIDA is having approximately 7000 documents. - RATE SHOULD BE QUOTED PER DOCUMENT WISE. - In case of availability of databases in other institutes only data migration and validation will be needed. (Entire job to be completed in 4 months).		
IX	Integration with RFID based Library automation system <u>with NCIP/SIT2 enabled protocols</u>, implemented with KOHA software. (to be taken up in phase II). Vendor will be responsible for developing a compatible system for smooth integration with RFID.				

2. Quoted Price:

(a) The bidder shall quote for items in the format of quotation attached. The experience expertise of the organization in automating networking of Library activities should be kept in a folder superscribed on **"TECHNICAL BIDS".** The Price bid should be kept in a folder superscribed a **"PRICE BIDS".** Both the sealed covers should be placed in the <u>main sealed envelope</u> super scribed **"Tender for development and Implementation of KOHA library management system (LMS), development and integration of digital library solution; document classification, processing & stock taking of library resources."**

(b) All duties, taxes and other levies payable by the bidder shall be included in the item rate.

(c) The rates quoted for each item shall be fixed for the duration of the contract and shall not be subject to adjustment.

(d) Rates or partial quantity of an item is not acceptable.

(e) Corrections if any shall be made by crossing out, initialling, dating and rewriting.

(f) Telex/Facsimile/quotations are not acceptable/e-mail.

3. Each bidder must submit only one quotation.

4. Validity of quotations:

The quotation shall remain valid for a period not less than one year after the deadline fixed for submission of quotations.

5. Evaluation of tender:

5.1 Technical bids:

5.1.1 The bidder shall quote for items in the format of quotation attached. Certificate of experience & expertise from organizations where bidder has successfully implemented similar projects in automating and networking of Library activities should be kept in a folder superscripted on **TECHNICAL BIDS".** Bidder should certify that bidder is having experience to develop, implement and maintain items mentioned in the tender document.

5.1.2 Certificates from organizations stating successful implementation & smooth maintenance are to be attached from the head of the organization where the vendor has implemented KOHA based library management system under Linux platform and successfully established digital library (D-space etc.) solutions in organizations.

5.2 Price bid

(a) **5.2.1** The price bid should be kept in a folder supersized a **"PRICE BIDS"** Both the sealed covers should be placed in the <u>main sealed envelope</u> superscripted.**"Tender for development and Implementation of KOHA library management system (LMS), development and integration of digital library solution; document classification, processing & stock taking of library resources."**

5.2.2 The certificate should be sign by authority's signature of the company.

5.3 The technical bids and price bids may be opened in same day.

6. **Earnest Money Deposit (EMD):**

6.1   An EMD of 15000/- (Rupees Fifteen Thousands Only) in the form of Demand Draft/Pay Order/Banker's Cheque/Fixed Deposit Receipt/Bank Guarantee drawn in favor of the DDO, Ministry of Earth Sciences, and payable at New Delhi, **from any of the commercial banks** must be submitted along with the technical bid.

6.2   Bids not accompanied by EMD shall be rejected as non-responsive.

6.3   No interest shall be payable by the Ministry for the sum deposited as EMD.

6.4   EMD of the unsuccessful bidders would be returned back within one month of signing of the contract/agreement with the successful bidder or any decision on the tender.

6.5   EMD shall be forfeited by the MoES in the following events:

6.5.1   If the bid is withdrawn during the validity period.

6.5.2   If the bid is varied or modified in a manner not acceptable to the Ministry after opening of bids, during the validity period.

6.5.3   If the bidder tries to influence the evaluation process.

7.0 Performance Guarantee :

On award of the contract, a security deposit of an amount equivalent to 5% of the total contract value, in the form of Bank Guarantee valid for a period more than two months over the expiry of contract period, from a Nationalized Bank, shall be deposited with Ministry towards Performance Guarantee, which shall be refunded within two months of date of expiry/completion of the contract without any interest payable thereon. After depositing the Performance Guarantee, EMD amount would be released to the successful tenderer. In the event of the contractor failing to comply with any provision of the contract, Performance Guarantee shall stand forfeited.

7.1. Unsatisfactory progress of work will lead to forfeiter of the performance guarantee amount.

8. The PRICE BIDS of the successful applicants will be opened, who qualify the   technical requirement of the Ministry.

9. The professional deployed shall not claim any Master and Servant relationship with this Ministry.

10. The Technical Bids of the firms will be opened first on 02nd April 2015 at 14:30 hours and these will be examined with reference to the Minimum Eligibility Conditions. The Price Bids of only those Tenderers will be opened who qualifies the Technical Bid Criteria. Before opening of Price Bids, the technically qualified Tenderers will be informed of the date & time for opening of their Price Bids. The Bidder who qualifies the Minimum Eligibility Criteria and quotes lowest rate (overall lowest rate in respect to items 1, 1.1 & 1.2 in the format of price bid) shall be awarded the Tender. In case more than one Tenderer quotes the lowest rates the Tender will be awarded to the firm which has more experience in the relevant field and have required infrastructure. The decision of the Tender Committee shall be final in this regard.

11. Ministry of Earth Sciences reserves the <u>right to cancel the Tender/ contract at any stage</u> without assigning any reason.

12. Award of contract:

(a) MoES will award the contract to the bidder whose quotation has been determined to be substantially responsive and who has offered the lowest price (overall lowest rate in respect to items 1, 1.1 & 1.2 in the format of price bid) for the items together.

(b) The MoES reserves the right at the time of contract award to increase or decrease the quantities of items indicated in brief description of work above without any change in the unit price or any other terms and conditions.

(c) MoES prior to the expiration of the quotation validity period will notify the bidder whose quotation is accepted of the award of contract.

(d) Payment shall be made immediately after the successful delivery of the services and their acceptance.

(e) Commercial warranty/guarantee shall be applicable.

(f) Notwithstanding the above, the MoES reserves the right to accept or reject any quotations and to cancel the bidding process and reject all quotations at any time prior to the award of the contract.

(g) Ministry reserves the right to give work order for full or partial job.

13. Last date and time of receipt of quotations:

You are requested to submit the sealed quotations superscribed on the envelope as **"Quotations for the implementation on latest by 02 April 2015 at 13:00 hours**.

The technical bids will be opened on 02nd April 2015 at 14:30 hours.

14. Other Terms & Conditions on services required:

I. Latest stable version of open source Koha Library Management Software (LMS) should be implemented.

II. Data Backup: Regular data backups should be made available.

III. Data Privacy, Confidentiality & Security: Vendor should strictly ensure privacy, confidentiality and security of all clients' data.

IV. Freedom from vendor lock-in: Customer will own both software and data and should be able to switch the vendors at any time. In case, for any reason, if vendor discontinues the arrangement of hosting and maintenance of clients data for some reason or client wants to run their own server, a notice of minimum three months should be given from either side and vendor should facilitate smooth transfer of data to customer's server, so that library services are not disrupted at any point of time.

V. Standards compliance: MARC21, Z39.50, UTF8/Unicode, SIP2 etc.

VI. Vendor should have minimum three years experience in implementation, maintenance of KOHA on Linux platform as Library Management System in Academic/ Public libraries and organizing trainings for/day to day running of the software.

VII. Vendor should have implemented of KOHA in at least 30 academic/public libraries or consortia of Academic/public libraries with documented evidence, out of that 15 in Govt. departments/institutes.

VIII. Vendor should have experience in implementing RFID based Library Automation System & integrating RFID with KOHA software.

IX. Vendor should have ability to migrate data from propriety software to Koha

X. Experience of at least one successful and live implementation on centralized server with multiple independent library instances, each having its own OPAC, staff client and independent databases.

XI. KOHA being on open source software, any customization and configuration details as per requirements of client should be documented and provided to client for future references.

XII. Annual turnover of the company should be minimum Rs.15 lakhs annually for last 3 years.

XIII. Offline circulation facility is required in case of failure of internet connectivity for short time.

XIV. Vendor should provide details of Customer base/references and Management profile of the company.

XV. Vendor will bear it own travel cost required for providing training & software installation etc. if any.

Please clearly state compliance to above points and/or submit documents wherever applicable.

The undersigned may be approached for any clarification.

Yours Sincerely,
(Dr. P.G Dastidar)
Name:
Address: MoES Knowledge
Resource Center (KRC)
Prithvi Bhawan, Lodhi Road
New Delhi-110003
Tel. no. 24669520,
Email   Id: **Prabirgd11@gmail.com**

FORMAT OF PRICE BID

L-1 will be selected on consolidated amount only.

Sl. No	Items	Total Amount in Figures per institute	Total Amount in Words
1	2	3	4
1.	Services mentioned in item no. 1 and annexure 2. Terms and conditions mentioned will be followed.	(Quote per institution) **Rs**	
1.1	Document Classification using UDC classification system. Data entry Error check worksheet preparation, Data validation with existing databases and migration and data entry to KOHA library automation system, digital library system (D-space), spine label printing and pasting, stock verification of documents/books/ Journals/ and other library materials, Shelving as per UDC Pasting of book pockets (material will be supplied) on each book Pasting of imprint on each book.	(Quote for the Jobs mentioned at item number 1.1 for 15000 documents, however payment will be made on pro-rata basis for the exact number of documents processed). **Rs**	
1.2	Annual Maintenance Contract (AMC) (yearwise, beyond one year)	(Quote per institute per year) **Rs**	

Gross total Cost: Rs……………………………… (in figures)
Rs ……………………………………………………….. (in words)
We agree to execute the above project in accordance with the technical specifications for a total contract price of Rs …………… (in figures) (Rs ………………………………. (in words) within the period specified in the tender documents.

We also confirm that the normal commercial warranty/guarantee …………………………..of months shall apply to the offered goods.

(Bidder)
Name: …………………………………
Signature: ………………………….
Date: ………………………………..
Address: ………………………….

(Quantities are for indicative purpose only may very upon requirement.)

S.NO.	NAME & ADDRESS OF THE ORGANIZATION TO BE AUTOMATED IN THE 1ST PHASE	Remarks
1	Ministry of Earth Sciences **(MoES),** Prithvi Bhavan, Lodhi Road, New Delhi-110003	Database in e-granthalaya is available. Data migration will be required + Dspace integration
2	Indian Metrology Departments **(IMD)**, Lodhi Road, New Delhi-110003 and/or IMD Pune.	Database available in e-granthalaya. Data migration may be required. + Dspace integration
3	National Centre for Medium Range Weather Forecasting **(NCMRWF),** A-50, Secor-62, Noida, U.P, Pin-201309	New development in KOHA + Dspace integration
4	Indian National Centre for Ocean Information Services **(INCOIS)**, "Ocean Valley" Pragathi Nagar (BO), Nizampet (SO), Hyderabad-500090	Open Biblio. To be migrated in KOHA system. + Dspace integration
5.	National Center for Earth Science Studies (NCESS), Trivandrum	KOHA based library automation system

		available. Has to be integrated to the latest application + Dspace integration

	NAME OF OTHER MOES-ESSO INSTITUTES (may be taken up in phase 2)	
6	Indian Institute of Tropical Meteorology **(IITM)**, Pune- 411 008, Maharashtra, India	
7	National Centre for Antarctic and Ocean Research (**NCAOR),** Vasco-da-Gama, Goa -403 804, India	
8	Centre for Marine Living Resources & Ecology **(CMLRE),** 6th Floor, C-Block, Kendriya Bhavan, P.B. No. 5415, CSEZ P.O., Kochi - 682 037	
9	Integrated Coastal and Marine Area Management **(ICMAM)**, 2nd Floor, NIOT Campus, Velacherry-Tambaram Main Road, Pallikkaranai, Chennai - 600100, India	
10.	NATIONAL INSTITUTE OF OCEAN TECHNOLOGY **(NIOT)**, Velacherry-Tambaram Main Road, Narayanapuram, Pallikaranai, Chennai - 600 100	

Technical Specifications that should be incorporated for KOHA software & Services: These are in continuation of the points already mentioned in the tender document under item number 1.

		General System Requirements
	1	Total software solution should be based on Boot-Strap Technology and RFID compatible with advance protocols like NCIP/SIP2.
	2	There should be Module-wise customization
	3	Software should be enabled with one screen technology
	4	There should be scalable/flexible reporting in the reports section
	5	There should be SSL and HTTPS Access and protected from hacking.
	6	Staff must be able to manage the system without vendor intervention and be able to shutdown and restart the system without vendor intervention. The system must check the integrity of the entire file system during each restart of the system and servers must log errors by date and time.
	7	The system must provide protection for all data files through the use of locally defined passwords or other security measures so that information critical functions cannot be performed without proper authorization. That is, the system must allow the restriction of specific functions to specific users.
	8	Procedures and programs must be established which enable rapid data recovery from software failure.
	9	Provision of Remote Database Back-up system should be provided with one click
	10	The system must provide different levels of security: Network, Database, and Application.
	11	There should be provision for MOPAC: Android/windows/iphone application for OPAC in different platforms (Smart phones/Tablets/ipad etc)
	12	The system must allow automatic remote mirroring and periodic backup of data and program files, if necessary.
	13	The system must not restrict the number of workstations that can access programs as long as equipment requirements are met and operating system license limits are not exceeded.
	14	The system must allow restriction of access to local or remote databases based on the IP address of the user and User's log-in ID.
	15	The system must be able to authenticate users by user name & password/RFID cards/SIP and retain the user's authorization as he or she navigates among databases.
	16	Libraries must be able to set individual parameters for material types, locations, patron types, checkout periods, fines, and other library policies.

17	Libraries must have the ability to generate statistical reports for all data relating to the use of library materials, borrowers, and other data needed for operations of a library.
18	The system must allow printing/email/SMS of various alerts/notices.
19	ILS must check each user's access privileges at login, and automatically disable or enable client functions (in real time) based upon the user's profile.
20	ILS should not require a separate login to access different subsystems; the initial login should set all privileges for all subsystems.
21	Integration with open source citation and indexing softwares like Mandelay, Endnote etc. which should be accessible from the OPAC portal.
22	MoES e-journals consortium resources like ScienceDirect, SCOPUS, Web of Science (WoS) or any other digital resources which ministry may be subscribing should be accessible from MoES-ESSO Knowledge Resource System OPAC portal.
23	Provisions to access API (s) applications, if any, from the MoES-ESSO Knowledge Resource System (KRC) digital portal.
24	Integration with digital library solutions using D-Space etc.
25.	The implementation strategy, reviewing mechanism system on daily basis on the progress of work will be formulated in consultation of the ministry before starting of the project which will be followed strictly.

	Cataloguing, Database, and Authority Control Requirements
26	The Catalogueuing interface must support context sensitive hyperlink help functionality that can connect directly to a locally loaded or Internet accessible Catalogueuer's reference database.
27	Librarians must have the ability to define if records are immediately available for the Library Public Access Catalogue or must be hidden for a specified period of time.
28	When deleting records, restrictions must occur when records have fines or fees due, holds pending, or pending action from Acquisitions with a message alert for staff with the reason why the record cannot be deleted and a choice to either abort or continue, stating the results of deletion, i.e. "if the record is deleted, fines will also be deleted", or "holds will be moved to the next copy, "hold will be deleted" if no more copies.
29	Item records must link in real-time to due date (if checked out), the last check-in date, number of circulations since a specified date, and holds against the item and display that information in staff programs, displaying borrower information.
30	The system must support global updates of all occurrences of a heading in a bibliographic file with a single machine transaction. Catalogueuing must include a global editor. It must be possible to globally edit any field within the MARC record.
31	The system must allow authorized headings or entries to be added, changed, or deleted as part of a new bibliographic record.
32	The system must display "see" and "see also" references, scope notes, reference notes, and general information notes in Library Public Access Catalogueue and staff displays.
33	The system must support customized label printing of spine call numbers, property stamps, and other appropriate labels. It should also support printing of Catalogue cards (Main Card, Added entries) directly or in batch mode.
34	The real-time update of Catalogue records that are imported throughout the rest of the subsystems and modules.
35	The retrieval of records by at least accession number, title control number, title, author, ISBN, and ISSN etc.
36	It must be possible for the brief MARC record to automatically be updated to a full MARC record from a hierarchy of defined sources.
37	The Cataloguing module must have the abilities to create and edit by: (a) A full screen MARC edits view. (b) The use of templates in MARC format that contain required and recommended bibliographic fields. (c) An interface for staff members unfamiliar with MARC. The data from this interface must be stored in MARC format allowing it to be retrieved, indexed, and searched the same as full MARC records.

38	Ability to change record formats (e.g. Book to sound recording).
39	10 and 13 digit ISBN searching.
40	Indexing of 505 subfield codes.
41	URL checker for 856 tags
42	Ability to edit item records regardless of circulation status (e.g. Checked out, on hold)
43	The library OPAC and other applications should be integrated with **social media** to keep members informed about the new arrivals and other required information.
44	KOHA application should be integrated with digital archive (D-Space) digital archieve (open source). Provisions should be kept to upload photographs, videos. Some functions are as follows with provisions for onsite training. • Customization includes: • Customization of submission process • Metadata Input Form • Welcome message • Creation of appropriate E-Groups and E-People etc • Configuration of CNRI Handler and OAI-PMH • Software must meet network & security requirements • Run on latest Linux Version/or any other Linux version on which KOHA application will be developed, along with KOHA on the same server • Institutional repository should be enables with web 2.0 features such as; • RSS Feeds • Current News • Feedback • Email alerts • User statistics • Complete Documentation

	Public Access Catalogue and User Portal Requirements
45	The general functions of the Online Public Access Catalogue (OPAC) are: • The portal must be custom designed by the vendor based on the specifications of library staff. It is desirable for the vendor to offer a template or templates, but not to limit the library to templates only. • Patrons must be able to what type of search strategy they want to use. • Patrons must be able to limit search by format, language, call number, and publication date. • OPAC must interact with the circulation system in real time. • Catalogue enrichment such as book jackets (stored locally or remotely) and reviews are available. It should be hyperlink to the library Catalogue. • If no cover art image is available the system must display a "generic" cover art image as an option • <u>It must be possible to link directly from an item to a MAP of the library (virtual model of the library, shelves, racks and documents.</u> • It must be possible to configure a MAP of the library to highlight holdings by using call number range or collection. • It must be possible to highlight various call number ranges or collection(s) on a MAP with differing colors and shapes. • The System must offer a federated search option to include at a minimum: Library Catalogue, Remote Resources including news feeds & websites, and Subscription Databases all in ONE search. • The Web-based OPAC should have the capability to be accessible from Phone (any android or windows or iphone) / PDA /other mobile devices with necessary graceful degradations. • OPAC must provide English, Hindi versions.

		Circulation, Inventory, Holds, Fines, and Fee Requirements
		General Functions
46		Circulation must manage all basic Circulation operations of the library -- check-out, check-in, renewal, fine and fee processing, managing holds and recording statistical usage of library collection and borrowers.
47		Circulation must allow librarians to profile circulation parameters using types of materials, types of borrowers, overdue thresholds, and various fines, maximum fines and fees.
48		An offline circulation product must be available to enable the check out and check in of materials on a circulation workstation or portable device and to be able to load these transactions to the online system at a later time and within the circulation interface.
49		At the time of new borrower registration, the system must perform a duplicate check to determine if there are existing records that meet the criteria being entered.
50		Borrower records must contain at least name, borrower id, permanent address and telephone, secondary address and telephone, cell telephone number, e-mail address (es), and must be searchable by all of these fields.
51		Circulation must support a calendar function to define closed days and automatically adjust check-in times accordingly.
52		Provision should be made to enter details of the documents and other materials written in Hindi, English and other Indian offical languages.
53		An automatic update in the Catalogue of item status when it is checked in or checked out etc.
54		Statistical records kept for all transactions.
55		The system must produce a "purchase alert" for titles when certain number of holds is place on certain numbers of copies. This ratio should be a library defined ratio.
56		Patron record does not lock if accessed on multiple staff workstations
57		Permissions that can be set by staff role and workstation to restrict access and/or modification to patron records.
58		Support patron types tied to different expiry periods.
59		Support ability for the Library to specify which kinds of materials can be borrowed by specific patron types.
60		Support ability for the Library to specify limits on number of items held and/or the type of items held by a patron at any one time; this limit to be set by the Library for each patron type/item type.

	Checkouts
61	System must be able to check out items when the online system is not operational.
62	The system must treat each checkout as a separate transaction but be able to list all checkouts for each person on one receipt.
63	The system must check all items for outstanding holds, charges, and circulation restrictions before allowing them to be checked out.
64	The system must allow for ephemeral records to be created to check out and count statistics, but not create an inventory trail, for items such as periodicals, brochures, and other library defined materials.
65	Circulation must support expiration dates for borrower privileges and must automatically message library staff when that date is approaching and not check out items beyond that date.
66	Circulation must support extension of expiration dates with a simple keystroke at the time of checkout or access to the user's record.
67	If a claims returned, missing, or lost items are scanned during inventory, in library use, or at check-in or check-out, the status must automatically revert to on shelf or checked out status without requiring staff intervention.
68	Circulation must restrict checking out of materials designated as non-circulating and allow library staff intervention to proceed with a single keystroke
69	The system must display at least the following on the checkout screen: Patron name, Borrowing category, Lending status, Item identification number, Short title, Call number, Due date, Outstanding blocks (if any), Comment field on Patron's record.
70	The system must alert (audio and text) staff if the item being checked out is already checked out to another patron. Staff must also have the ability to override the alert and checkout the item.
71	Staff must be able to check out items in case internet/system is down for some reason. And will be able to enter into the system with appropriate time and date when the system resumes its normal functions.
72	Support backdate of check out.
73	Support in house check out/in to track materials used within the Library.

		Check-ins
	74	Circulation must allow manual reset of check-in date to accommodate book drop check-in and unexpected closures.
	75	Circulation must support a batch check-in that does not message and require action for each fine transaction calculated during check-in.
	76	The system must support retention of the last four borrowers for each item in order to manage problems such as damages, at the library's option.
	77	If an item is deemed to be damaged, the system must allow the operator to identify the responsible borrower and invoke a message to be sent through standard notification parameters.
	78	Staff must be able to check in items by title, membership number or RFID/library card.
	79	The system must display at least the following on the checkout screen Patron name, Title, Due date, Shelving location, Overdue alert (if any).
	80	During check-in the system must alert (audio and text) staff if an item is on hold and give the option to print a hold slip.
		Blocks
	81	The block functions of the circulation module are: The system must provide automatic restriction of borrower privileges for Library-defined criteria, That blocks can be overridden by staff, That blocks alerts must be audio and/or visual, Fines must be able to be paid easily from the same window, System must block patrons with overdue materials and unpaid fines from placing holds, borrowing, or renewing items.
	82	The system must automatically block borrowers from continued privileges based on library defined parameters such as over dues, fines, claims returned, and lost books with a display message with the entire reason for the block without the need for library staff to conduct other inquires, and with the ability for the operator to proceed with a single keystroke.
	83	The system must allow library staff to quickly and easily place manual blocks with explanation note ("need address update," etc.) with a display message with the entire reason for the block without the need for library staff to conduct other inquires, and with the ability for the operator to proceed with a single keystroke.
	84	Authorized library staff must be able to override restrictions on borrowers or on materials by using one keystroke without leaving the transaction in progress.

		Holds, Renewals
85		The holds and renewal functions of the circulation module are: • That it must generate e-mail/sms notifications when items become available. • System must block the placing of holds on lost, missing items, available item, or non-circulating items. • System must allow staff view and alter the sequence of holds in a queue, • System must automatically activate the next hold in the queue when a hold is removed and generate a hold notice to the next patron in the queue. • System must monitor the length of time that an item sits on the hold shelf. • System must automatically print hold slips when items on hold are checked in. • System must allow the Library to restrict the number of renewals.
86		Circulation must allow for a library defined number of renewals, for renewals in person, via telephone software, via access to the user's record from any location and the calculation of the new due date when items are renewed.
87		The system must allow for renewal of all items or individual items for a borrower with a single command.
88		The system must allow library defined blocks of renewals if the patron is delinquent, the title has a hold registered against it, the renewal limit has been reached, or an item is restricted in some other way.
89		Circulation must allow library staff to place holds from staff workstations or borrowers to place holds as part of the User Portal from any library or remote location if no restrictions are on the material or the user.
90		Circulation must alert the operator when placing holds that a borrower is blocked, their privileges have expired, or if materials have restrictions against holds and allow the operator to proceed with a single keystroke.
91		The system must allow librarians to define individual copies and/or titles that may not have holds placed on them so they always go to the shelf, available for borrowers who prefer to browse shelves.
92		The system should allow library staff to remove a hold by a simple straightforward action. Librarians must have the ability to move a copy up or down in the hold list and define a priority for filling holds
93		The system must support holds for "on shelf" items
94		The system must allow staff to initiate a recall for specific titles or copies with a recall message notice produced and managed with standard notice procedures.
95		Support ability for the Library to specify limits on the total number of hold requests any patron may have at any given time; limits to be set by each patron type.
96		Ability to automatically delete all cancelled, unfilled or expired hold requests after a library specified period of time.

	Fines, Overdues
97	The fines and overdue functions of the circulation module are: • That it must generate e-mail/sms notifications of overdue notices. • System must allow the Library to set the parameters for overdue and bill notices. • Fines must be calculated at the time of check-in, renewal, or checkout. • System must allow full or partial payment of fines with receipts. • Staff must have the capability to exempt fees and fines. • System must automatically cancel the lost status when an item is returned. • System must keep a history of patron fine and fee payments.
98	Circulation must support library defined fines and fees with automatic calculation of fines when items are checked in late and calculation of estimated fines due if overdue books were returned today by borrower.
99	The system must support a cash register function and print receipts for collections of fines, fees, *lost* books, and miscellaneous fees assessed such as photocopies and printing.
100	The system must produce an overdue notice for the hold shelf so library staff can manage those items not retrieved by borrowers in a timely manner with library defined parameters.
101	Alert staff of overdue fines on incoming items, allowing staff to pay, waives or charge such fines to the patron's account.
102	Support ability to account for closed days and holidays or grace periods in the calculation of overdue fines; grace periods being defined by library.
103	Support ability to manually add a charge to a patron record and for staff to be able to select a reason for the added charges from a list originating from the Library.
104	Keep all completed account transactions in a patron account history for a library-determined length of time.
105	Store and display a history of overdue notices and invoices sent to the patron for all items currently overdue or billed, and include an item's title, date of notice sent and method sent (telephone, email, mail or text message).

		Notifications (Print/Email/SMS)
106		Circulation must support printing of date due slips, fine and fee payments, hold flags, or other system alerts to an assigned printer that prints formats (such as a cash register type format).
107		Circulation must produce "expiration date notices" to be sent to users when their expiration date approaches using the standard notice delivery parameters.
108		Circulation must support communicating channels of notification to registered library users through e-mail, phone notification, and printed notices and the ability to define a hierarchy of notices to be sent, i.e. e-mail notices sent first, if e-mail addresses are contained in borrower's record, then phone notification (SMS), and if not an adequate result, a printed notice to be mailed.
109		The library must have the ability to create a mailing list from the borrower's file and to create its own message for notification to users.
110		Borrower records are managed by library defined profiles which link to and display at least the following information when accessed: name, id, borrowing restrictions, patron type code, fines and fees owed, outstanding materials, hold requests, last activity date, expiration date, notes field, and personal identification number.
111		Support and permit customization, but not be limited to, each of the following notices and be able to exclude from notices certain patron groups (staff): Alert (issued prior to an item's due date), overdue, fine, hold pickup, hold cancellation, registration to expire in 30 days, non-use of library card in specified period of time, holiday/closure notices
		Inventory Control
112		Circulation must support item status of missing with library staff action invoking status of missing.
113		Circulation must support item status of lost, which is automatically invoked after a library defined period of time of being overdue, or can be invoked by library staff, at which time the borrower is sent a bill for lost item.
114		Library staff must have the ability to define whether or not lost items are displayed in the Library Public Access Catalogue.
115		When copies are flagged as missing, claims returned, or lost, a report must be automatically routed to the technical services staff defined by the library.
116		When items in the lost, claims returned, or missing status are withdrawn from the system, any fines and fees owed and the associated titles should be retained in the patron's history until they are paid.
117		Reports and Notices Requirements
118		Circulation must provide reports of the number and type of transactions on a variety of library defined criteria, such as daily, weekly, monthly, annually, time, location, workstation, user type, material type, classifications, reciprocal borrowers, and all reports must be sorted by library defined parameters.
119		The system must retain circulation history of individual items but not of individual borrower's information to protect the privacy of patrons.

120	Circulation must compile a list of overdue, missing, claims returned and lost items for searching shelves, which can be printed, downloaded, or e-mailed.
121	The system must allow reports to be generated by any authorized library or computer staff.
122	Libraries must be able to design report and notice formats.
123	The system must allow for a variety of library defined notices to be generated for notification using mail, e-mail, or SMS.
124	The system must support customizable report generation and production functions that will allow library and computer staff to prepare customized reports as necessary.
125	The system must support a variety of standard reports and notices for users based on library defined parameters such as over dues, fines and fees, lost books.
126	The system must support the ability to send user notifications by email, SMS, and print through mail and must allow librarians to define a hierarchy to send e-mail notices first (if e-mail is in the user record), phone notices second, and print notices as the last resort.
127	Circulation must send an alert message at check-out, renewal, or check-in, or any other transaction that accesses the borrower records that items are available on the holds shelf and accumulated fines etc.

		Acquisitions Requirements
128		The Acquisitions program must manage the entire Acquisitions process including duplicate check, preparation of approval list, selection lists, purchase orders, receiving, claiming, processing invoices, fund accounting, accessioning and payments.
129		Selection lists must be able to be converted to purchase orders or imported into the purchase order format.
130		Acquisitions must allow for adequate security and password features so that authorized staff has rights to perform only those functions for which they are authorized.
131		Acquisitions must detect duplication and perform de-duplication of records in the library local Acquisitions orders database with options to create a new order record, not add the record, or attach a new order to the existing bibliographic record.
132		The module must allow for MARC record downloads into the acquisitions module directly. Field(s) filtering is required.
133		F-12 should be mapped in such a way that it will accepts prefix of the Accession Series and will show last accession numbe
134		Acquisitions must support viewing of effects on the fund before, during, and after an order is sent.
135		Acquisitions must support entry of brief title records that will be overlaid by full MARC records when each title is received and Catalogued.
136		Acquisitions must be integrated with the library Public Access Catalogue and, at the library's discretion, display title-specific on order status information so holds may be placed.
137		The ability to print labels by individual accession numbers and/or range of accession numbers
138		The library should have the option to display items in the OPAC automatically when the order is released, transmitted, received, approved, or not at all.
139		It should support different order types including firm orders, subscriptions, and gifts.
140		Can it handle Standing Order?
141		Ability to support multiple overlapping fiscal periods in fund accounting structure.
142		Ability to create, manipulates, and order/receive in multiple fiscal years.

143	Capability to produce fund summary reports that include fund allocations, amount encumbered and expended, and remaining percentage free for a given fiscal year.
144	Ability to adjust amount encumbered and expended in a fund, and ability to transfer monies between funds.
145	Ability to search orders/requests, approvals, main Catalogue, Cataloguing working file.
146	Ability to retrieve last/previous order worked on.
147	Ability to track an item through processing.
148	Ability to place orders using overspent funds.
149	Ability to receive items not ordered via acquisitions module (e.g. local purchases).
150	Ability to receive and pay for incomplete orders.
151	Ability to edit amounts and funds when paying, which automatically adjust encumbrances.
152	Ability to receive a partial order.
153	Ability to receive items without purchase order.
154	Ability to suppress on-order items and on-order bibliographic records from displaying in PAC depending on order type.
155	Ability to detect duplicate orders and provide alert of duplication at the time order is created.
156	Acquisition status report that include encumbrances, expenditures, and funds available (e.g. outstanding orders).
157	Monthly reports: generation, verification, payment.
158	Year-end reports: year-end process, fund summary, year-end carry forward Process.
159	Ability to delete items from order or re-order with different vendor.
160	Ability to add new title to existing P.O. or change quantities.
161	Ability to deal with duplicate invoice #'s.
162	Ability to transfer outstanding item from previous years to new year.
	Serials Control Requirements
163	The Serials module must notify staff when a subscription is about to expire.
164	The Serials module must support prediction patterns and notify staff automatically if a new prediction pattern, based on the check in, is needed.
165	The Serials module must support claiming from a list or individual claims.
166	The Serials module must support binding.

167	The Serials Control module must include a fully integrated database with check-in tracking of all periodically published materials.
168	Serials Control must support access to serials information by using standard searches that are available in other programs.
169	Serials Control must keep complete check-in history files of all issues received and automatically update without the need for staff to enter data.
170	Serials Control must keep complete check-in history files of all missing or claimed items and automatically produce notifications for staff review without the need for staff to enter data.
171	Check-in history must be sorted and displayed in issue date order so that issues checked in out-of-order do not skew the receipt history.
172	The system must produce claiming notices and allow claiming of missing and late issues.
173	Serials Control must provide a "notes" option to track claims and subscription extensions.
174	Serials Control must automatically create a summary holdings statement to be displayed in the Library Public Access Catalogue with
175	Ability to check in items by scanning the SICI (Serial item and contribution identifier)
176	The user to override the predicted number if the received issue is not the expected issue but does conform to the prediction pattern.
177	Ability to combine issues that arrive unexpectedly as a combined issue.
178	Ability to undo the check-in of issues erroneously checked in.
179	Ability to manage subscriptions (additions, renewals, cancellations).
180	Ability to view a subscription list, indicating all subscriptions eligible to be renewed.
181	Ability to cancel or reopen a subscription.

182	Allow automatic claiming or mediated claiming.
183	Claim notices must be available in print and electronic formats.
184	Claiming data must include: supplier information, subscription ID, claim response, claim reason, notes, claim history, issue claimed, number of issues claimed.
185	Ability for staff to claim issues from a list of pending claims.
186	Ability to show missing volume/issues along with bound volume data.

	Training, Documentation and Technical Supports
187	Describe and provide a copy of its training plan.
188	Provide a minimum of three five-hour, consecutive days of onsite training in the use of the system modules, features, and administration.
189	Must train the Library and system administration staff to manage and operate the system on a day to day basis including: (a) Start-up and shutdown. (b) Monitor system performance and perform routine management tasks. (c)Handle emergencies. (d) Troubleshoot and resolve routine problems. (e) Load bibliographic and patron records . (f) Perform backups, restoration, recommended preventive maintenance, and security measures. (g) Provide documentation updates and release notes electronically.
190	Should have an "Online Ticketing System" where a customer will be provided a user ID and password wherein he/she can log-in and launch a support ticket. The support call will be recorded and support services will be provided as per the requirement at the earliest possible time. These records can be used for future reference too. The Up-time & Down-time will be calculated and further penalty will be imposed on the vendor if they are not able to provide the services as required within the stipulated time period.
191	Complete documentation manual in international format with a chapter on indexing with page number.