

Q.1. What format will these assets be available for inclusion in the end solution?

A.1. A snippet of code is provided that is inserted into configuration files. The review content will appear in the online catalog. Since the data is served on a remote server, the function of displaying and posting the third party content is not really part of the catalog.

Q.2. Will they need to be managed by the site administrator?

A.2. Yes

Q.3. What role does the Equinox Development Company have with the project?

A.3. Equinox Software (<http://www.esilibrary.com/>) is the primary developer working with KCLS, to enhance the Evergreen ILS to support the needs of a large public library. Development that modifies the underlying architecture of the application will require a review by Equinox to insure no functionality has been lost before the changes will be committed to trunk.

Q.4. Please define “the greater Evergreen Community” developers?

A.4. For a list of libraries that have implemented Evergreen visit:

http://open-ls.org/dokuwiki/doku.php?id=evergreen_libraries.

Q.5. Is KCLS looking for the following reporting techniques?

Video of user interaction.

Paper based testing.

Click tracking analysis.

A.5. KCLS is looking for one-on-one interviews with patrons and staff to identify if the patrons can complete the top 10 tasks of the Library Catalog. The usability will also include an online survey to collect input and to create a user base for the user interviews

Q.6. Will KCLS secure the location for the user testing?

A.6. Yes. Testing will occur at two of our libraries. In the past we have used Covington and Bellevue libraries

Q.7. Will KCLS do the testing subject recruitment?

A.7. Yes. KCLS will handle the scheduling and the recruitment.

Q.8. Do you have an estimated page count based on your understanding of the project to date?

A.8. Currently we believe the highest number of pages would be approximately 200.

Q.9. Do you have a target budget in mind for this initiative?

A.9. Currently KCLS is budgeting an estimate of \$230,000 for this initiative.

Q.10. Can you describe intended and foreseeable parties that will need access to the source code of the final solution? To what extent will the source code be distributed?

A.10. During the development process Equinox Software and the KCLS Web Services department will need access to the source code. The Evergreen ILS is an open source application, licensed under the GNU license, so when the final solution is rolled into the trunk version of Evergreen any source code changes to Evergreen will need to be made available under that same license.

Q.11. How will you measure the success of this project? What is important to you and what are you looking for in your ideal partner?

A.11. The success of this project will be measured based upon how well the KCLS OPAC development requirements are met, how smoothly the transition to the new OPAC goes, and whether or not the level of service provided by the OPAC is greater than with our current system. In addition, our goal is to complete the project on time and within the budget allotted.

Q.12. How many agencies are included in this stage of the RFP process?

A.12. We don't know the answer to this, but would not be able to inform you if we did. Along with notifying firms that we know of, we have published an advertisement to solicit additional interested parties.

Q.13. Can you describe the level of customization on a page by individual users / needs?

A. 13. Currently, our catalog provides the following options: It allows users to see how many holds they have and which ones are ready for pick up. Users may view fine balances, details about the titles that incurred fees, and have the option of paying the fine via credit card. The system allows for the viewing of checked out material tracking and renewals. In addition, users may save favorite searches and select an email report function for those selections.

Our goal is to create an interface that will provide the ability to work with third party vendors, allow the users to choose which items are displayed and control page layout. We are open to solutions that may provide toward that end.

Q.14. How many and which languages should the design support? Is localization part of this project?

A.14.

ARABIC

CHINESE

FRENCH

GERMAN

HEBREW

HINDI

ITALIAN

JAPANESE

KHMER

KOREAN

MARATHI

PANJABI

PERSIAN

POLISH

PORTUGUESE

RUSSIAN

SERBO-CROATIAN

SOMALI

SPANISH

TAGALOG

TAMIL

THAI

UKRAINIAN

VIETNAMESE

As the information is included within the records, our goal is to display and allow patrons/staff to search in their native scripts.

However, KCLS realizes it is not the most important requirement for the OPAC to display and provide search ability of non-Roman scripts.

KCLS is not looking into localization at this point.

Q.15. Do you intend for all mobile devices to easily view the site or would you prefer an experience designed for a specific device?

A.15. We are looking at smart phones for our mobile devices.

Q.16. Is there certain content you would prefer not require a plug in? We assume Flash falls under this classification and intend to be mindful of if, where, why it may be applied.

A.16. We would only consider using Flash if it was a promotional piece that is not central to the function of the catalog. The catalog should be able to provide its tasks without the need for flash. If you have a solution that enhances the user experience we might consider it.

Q.17. Is there anything driving the Sep 2010 delivery date within your organization?

A.17. This project needs to fit into our overall Evergreen ILS initiative. The timeline was developed as part of that overall project, while keeping in mind the time needed for development and testing of several staff modules being

enhanced as well as the time needed to train staff and prepare the library system for conversion to a new ILS.

Q.18. What is meant by the statement “third party public access patron empowerment tools”?

A.18. KCLS contracts with many services such as ChiliFresh, Librarything and Baker and Taylor to add enrichment to the OPAC. For example, Baker and Taylor provide all of the cover images that are displayed in the catalog.

Q.19. Can you elaborate on the "reports and statistics" item?

A.19. KCLS will continue to use Google Analytics. However, some reporting such as the top twenty searches executed, and search term used should be built into the catalog itself. We would also like to know the type of searches users are conducting, for example author, title, keyword, etc. and the search string used i.e. dog training.

Q. 20. Can you describe which parties and the ideal approval workflow envisioned for change requests, functional requests, and coding suggestions? We will recommend an approach but thought it worthwhile to inquire given the multiple parties.

A. 20. Change requests will be discussed with the KCLS project manager and OPAC SMEs, agreed upon change requests that

require development by a party other than the author of said request will be submitted to the secondary party for proper review. A time period will be agreed upon by all parties involved in advance. Once the secondary party has been allowed sufficient time for review of the change request a clarification session will be held prior to any coding. Proofs of Concept reviews during the development process are preferred, this allows for course corrections at the earliest opportunity.

Q. 21. Can you describe the extent to which this project involves modifications and enhancements to the underlying data and web services?

A.21. Some modifications will likely be required; the exact level will depend upon how solutions are implemented to meet the KCLS Development Requirements. Information on the Evergreen OPAC may be found in the Evergreen Community's documentation here: <http://open-ils.org/documentation.php>.

Q.22. Does the project include any modifications to the Evergreen system? If not, will we have full access to that system during the development phase?

A.22. This project will include some changes to the Evergreen system. Those changes have not been fully realized. Yes, the vendor selected will have full access to that system.

Q.23. Please clarify the meaning of the term "Web Services" as used in the SRS. Does this refer to back-end systems, or to the entire web application including front end, business model, and data access?

A.23. Web Services, for the purpose of this RFP, refers to the business model. The Web Services team for KCLS is comprised of 3.5 FTE. This includes two librarians, who will serve as the OPAC SMEs.

Q.24. What are the existing data stores? Does each data store have its own data access layer or API? What modifications to those are in scope?

A.24. All data is stored in the ILS, core services access data via a primary API, some secondary APIs are used for additional layers of access. Modifications that are necessary to achieve the functionality outlined in the requirements are within scope. Additional information may be found in the developer documentation here: <http://open-ils.org/dokuwiki/doku.php>.

Q.25. Who is Equinox, and what will their role be in this project?

A.25. Equinox Software (<http://www.esilibrary.com/>) is the primary developer working with KCLS to enhance the Evergreen ILS to support the needs of a large public library. Development

that modifies the underlying architecture of the application will require a review by Equinox to insure no functionality has been lost before the changes will be committed to trunk.

Q.26. Please clarify the priority levels used in the SHS. Does priority 3 suggest a feature that could be postponed until a later phase?

A.26. The priorities were assigned for use by KCLS staff, it should not be assumed that a priority 3 on a specific requirement equates to what phase of development it should be included in. Ultimately, a priority 3 indicates the highest level of need for a requirement in an ILS as determined by KCLS staff.

Q.27. Can we split the project into separate discovery and build phases with separate contracts?

A.27. Yes, this is preferable.

Q.28. Given this statement from the RFP

"The design must support all current versions and one-version-back of Internet Explorer and Mozilla browsers available in Windows, Macintosh, Unix, and Linux environments."- *Can we assume that the only version of Internet Explorer that need to be supported on Windows are IE7 and IE8?*

How does that relate to the following statement in the SI~S:

"Web Services shall be accessible through Microsoft Internet Explorer (v.6.0 and later) and Mozilla Firefox (v.2.0 and later)."

A.28. KCLS has a service commitment to support for current version of the browser minus one. We prefer to support current minus two depending upon what version is provided to our patrons on our public computers.

Q.29. Are you open to a fully integrated Content Management System? Is there such a system commonly used for online library catalogs, and if so, would you prefer we integrate with that system? Or do other libraries generally have custom implementations of the online catalogs?

A.29. No we are not open to a fully integrated Content Management System. Typically other library catalogs do not utilize a fully integrated CMS. The content of the catalog is made up of authority, holdings, and bibliographic records and there are standard formats required for these records. Here is where you may view standards for bibliographic records:

<http://www.oclc.org/bibformats/default.htm>

Here are further details describing an ILS:

http://en.wikipedia.org/wiki/Integrated_library_system

Q.30. What documentation is available for the OPAC web services?

A.30. The documentation that is currently available may be found here: <http://open-ils.org/documentation.php>

Q.31. What technologies are the web services provided in, (FST, SOAP, other)?

A.31. Currently the OPAC services are provided through HTML, JavaScript, and some server-side XML replacement. Additional information may be found in the developer documentation here: <http://open-ils.org/dokuwiki/doku.php>

Q.32. What type of payment gateway will be in place for the website to integrate with?

A.32. The King County Library System currently uses PayPal's Pay Flow Pro, which is the required gateway with our current ILS vendor. We would prefer that the OPAC allow KCLS to select a gateway provider from among those available in the marketplace.

Q.33. What is the bandwidth at the KCLS slowest location? We need this information to determine page load speeds.

A.33. A single T1 is the slowest connection at our Skykomish branch. All other locations have two or more point to points.

How many languages would KCLS like to support?
Please see attached sheet

Q.34. Regarding reporting and analytics, will KCLS continue the use of Google Analytics or will another analytics package be used for the updated site and catalog?

A.34. KCLS will continue to use Google Analytics. However, some reporting such as, the top twenty searches executed, and search term used should be available through the catalog itself. We would also like to know the type of searches users are conducting for example: author, title, keyword, etc. and the search strings used i.e., dog training.

Q.35. In addition to satisfying the Administrative System Requirements, creation of patron views, requesting and loan rule management, and on-behalf-of-patron activities, are there unique staff interface requirements or components that need to be created for the UI design portion?

A.35. No.

Q.36. What are the "competing" services, resources, and departments that are to be served by the OPAC interface?

A.36. The OPAC ultimately, is the main point of access to all KCLS materials. Additionally, it serves as a place to advertise events and services that are of interest to the vast majority of

patrons. This online tool provides the exclusive environment for patrons to interact with library accounts both day and night, without staff assistance.

Q.37. In personalizing the interface, will patrons be able to create and configure their own web components (based on search queries or catalog selections) or will the components be a set list defined by KCLS?

A.37. The components will be a set list defined by KCLS.

Q.38. Requirement on Page 5: The vendor must thoroughly assess current OPAC strengths and deficiencies, based on data already accumulated...- Does the scope of this RFP include UI design for any "non-patron" facing modules (Acquisitions, cataloging, patron record creation, etc.)?

A.38. No.

Q.39. Requirement on Page 6: The screen must fit within an 800 by 600 screen resolution without requiring the user to scroll left to right vertical scrolling must be minimal.- What is the basis or driver for the 800 X 600 screen resolution requirement? Is this due to known browser screen size statistics or a library kiosk/systems limitation?

A.39. Currently 15% of our users have systems set up to render in 800 x 600. We are looking to use kiosks in the future that utilize 800 x 600 resolutions. Our goal is that the pages be

optimized for use with 1024 x 768. We do require that the pages be functional for use with 800 x 600 resolutions.

Q.40. Requirement on Page 7, Number 7 N: Text Messaging- Is the chat box referred to for the Catalog Home Page only for chat between patrons and staff or will patron-to-patron chat be required?

A.40. Currently, we use this for patron to staff communication.

Q.41. Requirement on Page 8 Section 1 Item J: In regards to "Communicate staffing, role, and responsibility recommendations that you have for KCLS". -How does this differ from what is asked in Part Five - Staff Qualifications? Please clarify the intention of the requirement and is KCLS asking something extra of vendors other than how they are going to staff the project work on the vendor team?

A.41.It does not. It is the same.

Q.42. Requirement in "Strategic Assumptions" on Pages 7 & 8: Proposals should be based upon all requirements listed in this RFP, and should not be limited only to the Galecia specifications for the OPAC.-Is there any user/business process flow documentation or Use Cases that can be shared prior to the final RFP submission? (Note: The Galecia Group document appears only to be a high-level list of web services requirements but there is no documentation of business rules

these support or of the actual business processes the system should support.)

A.42. All requirement specification documents prepared by The Galecia Group are available online here:

<http://oss4pl.org/resources/other-resources/>

There are examples of specific workflows included in several of these documents. Specific needs not mentioned in these documents have been mentioned as needed in the RFP.

Q.43. Requirement on Page 11 "Print Portfolio": KCLS requires vendors to provide a printed portfolio as part of the RFP process.-Can a printed portfolio be submitted in an electronic format or is print format absolutely required? Our concern is that KCLS won't be able to access the hyperlinks in the printed portfolio.

A.43. Yes. Submission of portfolio in an electronic format is acceptable.