REQUEST FOR PROPOSALS (RFP) No.643
FOR
INTEGRATED LIBRARY SYSTEM

PRE-PROPOSAL CONFERENCE TO BE HELD ON
Wednesday, September 10, 2008 at 10:00 a.m. (local time)
at
111 NW 1st Street, 13th Floor, Conf. Rm. A
Miami, Florida

ISSUING DEPARTMENT:
DEPARTMENT OF PROCUREMENT MANAGEMENT
for the
Miami-Dade Public Library System

Contracting Officer: Julian R. Manduley
Telephone: (305) 375-2179
E-mail: jmandul@miamidade.gov

PROPOSALS ARE DUE AT THE ADDRESS SHOWN BELOW NO LATER THAN:
Wednesday, October 22, 2008 at 2:00 p.m. (local time)
at the

CLERK OF THE BOARD
STEPHEN P. CLARK CENTER
111 NW 1st STREET, 17th FLOOR, SUITE 202
MIAMI, FLORIDA 33128-1983

The Clerk of the Board business hours are 8:00 a.m. to 4:30 p.m., Monday through Friday. Additionally, the Clerk of the Board is closed on holidays observed by the County.

The County, in exercise of its discretion, may not accept proposals or proposal modifications received after the scheduled time and date noted in this Solicitation. Proposals will be opened promptly at the time and date specified. The responsibility for submitting a proposal on or before the stated time and date is solely and strictly the responsibility of the Proposer. The County will in no way be responsible for delays caused by mail delivery or caused by any other occurrence. All expenses involved with the preparation and submission of proposals to the County, or any work performed in connection therewith, shall be borne by the Proposer(s).

The submittal of a proposal by a Proposer will be considered by the County as constituting an offer by the Proposer to perform the required services at the stated prices. A Proposer may submit a modified proposal to replace all or any portion of a previously submitted proposal up until the proposal due date. The County will only consider the latest version of the proposal.

Requests for additional information or inquiries must be made in writing and received by the County's contact person for this Solicitation. The County will issue responses to inquiries and any changes to this Solicitation it deems necessary in written addenda issued prior to the Proposal Due Date. Proposers who obtain copies of this Solicitation from sources other than the County's Department of Procurement Management website at www.miamidade.gov/dpm or the Vendor Assistance Unit risk the possibility of not receiving addenda and are solely responsible for those risks.

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DEFINITIONS

The following words and expressions used in this Solicitation shall be construed as follows, except when it is clear from the context that another meaning is intended:

(a) The term “Application Software” to mean the programs that will be used to perform the tasks specified in the Scope of Services.

(b) The terms “Contractor” or “Consultant” or “Vendor” to mean the Proposer who receives any award of a Contract from the County as a result of this Solicitation, which is also to be known as “the prime Contractor” or “the prime Consultant.”

(c) The term “County” to mean Miami-Dade County, a political subdivision of the State of Florida.

(d) The term “Days” to mean calendar days.

(e) The term “Deliverables” to mean the tangible work product submitted by the Contractor to the Library.

(f) The term “Enterprise License” to mean licensing covering all Miami-Dade Public Library System facilities and staff.

(g) The terms “Enterprise Technology Services Department” or “ETSD” to mean Miami-Dade County’s central information technology department.

(h) The term “Evaluation/Selection Committee” to mean the group of individuals who will be reviewing the submitted Proposals and eventually recommending a Proposer(s) for award.

(i) The term “Existing Hardware” to mean the items specified in Form B-3 and Appendices A-H.

(j) The term “Final Acceptance” to mean the successful completion of the Hardware Functionality, Data Load, Module Functionality, Third-Party Integration, System Reliability and Response Time tests which demonstrate that all System functions are operational and perform as required by Section 2.0: Scope of Services of this RFP.

(k) The term “GoLive” or “GoLive Date” to mean the date on which the delivered System is used in a production environment.

(l) The term “Library” or “MDPLS” to mean Miami-Dade Public Library System, a department of Miami-Dade County.

(m) The term “Library Computer Network” to mean everything associated with providing Wide Area Network services, Local Area Network services and wireless services, including all servers and applications.

(n) The term “Maintenance” to mean keeping the software and/or hardware in a condition so that it operates as set forth in the documentation and in conformity to Section 2.0: Scope of Services of this RFP.

(o) The term “Module” to mean a distinct component of the integrated software such as OPAC, Circulation, Cataloging, Acquisitions, etc.

(p) The terms “Patron,” “Customer,” or “Borrower” to refer to people using the Library.

(q) The term “Proposer” to mean the primary person, firm, entity or organization submitting a response to this Solicitation.

(r) The terms “Scope of Services” or “Scope of Work” to mean Section 2.0 of this RFP, which details the work to be performed by the Contractor or Subcontractor.

(s) The term “Services” to mean all actions performed or to be performed by the Contractor or its Subcontractors as listed in Section 2.0: Scope of Services of this RFP.

(t) The term “Short-list” to mean a narrowing of the field of consideration.

(u) The term “Solicitation” to mean this Request For Proposal (RFP) or Request For Qualification (RFQ) or Request For Information (RFI) document and all associated addenda and attachments.

(v) The terms “Subcontractor” or “Subconsultant” to mean any person, firm, entity or organization, other than the employees of the Contractor, who contracts with the Contractor to furnish labor, or labor and materials, in connection with the Work or Services to the County, whether directly or indirectly, on behalf of the Contractor.

(w) The term “System” to mean the total complement of hardware, software, goods and services, peripherals and all other items, tangible and intangible, designed to operate as an integrated group.

(x) The term “Technical Review Committee” to mean the group of individuals who will be assessing the software functionality, and the technical, operational, and maintenance requirements of each Proposal and providing reports to the Evaluation/Selection Committee.

(y) The term “Third-Party” to mean any company or subcontractor, other than the Contractor, who will provide software, hardware, and/or services in order to fulfill the requirements of Section 2.0: Scope of Services of this RFP.

(z) The term “User” to mean anyone accessing the System, including both staff and patrons.

(aa) The term “Warm Site Disaster Plan” to mean a plan which includes a site with cooling and electrical capacity, and communications hardware for immediate connectivity. It will also house servers and storage for periodic replication of data from the Library’s data center. The site should be capable of being operational within one week.

(bb) The term “Warranty Period” to mean the period beginning with Final Acceptance of the System and continuing for one year.

(cc) The terms “Work,” “Services,” “Program,” “Project,” or “Engagement” to mean all matters and things that will be required to be done by the Contractor in accordance with Section 2.0: Scope of Services of this RFP and the terms and conditions of this Solicitation.

(dd) The terms “Work Order” to mean a document that defines and describes the parameters of individual projects assigned or awarded by the County to the Contractor in accordance to the terms of the Contract issued as a result of this RFP.

SECTION 1.0 - RFP OVERVIEW AND PROPOSAL PROCEDURES

1.1 INTRODUCTION/BACKGROUND

Miami-Dade County, hereinafter referred to as the "County", as represented by the Miami-Dade County Public Library System, hereinafter referred to as the "Library", is soliciting Proposals from interested and capable parties to provide a robust, commercially available, next-generation Integrated Library System (ILS) to replace the existing legacy SirsiDynix Horizon and Horizon Information Portal System. The Library is seeking a stable, fully-functional System with enhanced features and performance in standard application software (ex: cataloging, circulation, acquisitions, serials, homebound, inventory) as well as a modern Online Public Access Catalog Portal (OPAC) that takes advantage of Web 2.0 and other emerging technologies and includes federated and visual searching capabilities. The System also needs to interface with existing related services (ex: 3M self-check machines and Envisionware computer reservation, time, and print management) and offer additional services for staff and patrons beyond what exists with today's System. **The Library is seeking one Vendor who will be able to provide and be responsible for requested functionality whether already in the proposed product, achieved through custom programming, or achieved through the Proposer using a third-party's products and/or services.**

This Request for Proposal (RFP) is for application software, implementation, planning, migration, training and documentation, and subsequent software/hardware maintenance and support for both a production and separate test/training environment. The Library would like to utilize as much of its existing hardware as possible. Each Proposer should provide a recommended hardware configuration to accommodate at least five years growth and to specify which Library hardware (as listed in Appendices A-I) will be usable and propose any additional hardware needed. The successful Proposer should be able to warrant that the System will perform as specified on the existing and/or proposed hardware and on the Library Computer Network.

The Library seeks an innovative, progressive System with excellent existing functionality, as well as the ability to evolve and adapt to new standards, technologies, and opportunities. The Library views the ILS as the backbone of the Library technology infrastructure and, therefore, seeks a long-term relationship with a Vendor who has a demonstrated record of implementation, support and service in libraries, preferably public, of similar size and complexity. **However, in order to achieve all functionality requested in this RFP, the Library understands there may need to be alliances or partnerships between the primary Proposer and other vendors. All partnerships, alliances, and third-party sub-contractors should be clearly identified.**

While the preference is for visual, faceted searching to be embedded into the OPAC, the Library is willing to accept Proposals for visual, faceted

searching solutions that overlay traditional ILS OPACs, if such functionality is not already included in the OPAC. ILS vendors are encouraged to partner with companies that provide these products. The Library will also consider Proposals directly from companies providing only the OPAC overlay. These solutions may be selected by the County in addition to a solution from an ILS Proposer. Proposer selected should be responsible for the work performed by all subcontractors used in delivering an ILS system that meets the County's requirements.

It is the Library's intention to phase in all of the items requested in this RFP. Phase 1 will include replacement of all existing application software. Other items will be phased in during the course of the contract as budget allows.

The County anticipates awarding a contract for a five (5) year period, with five (5) three-year options to renew, at the County's sole discretion.

1.2 TIMETABLE

The anticipated schedule for this RFP and contract approval is as follows:

RFP Available for Distribution:	Thursday, August 21, 2008
Site Visit:	Wednesday, September 10, 2008, at 9:00 A.M. (local time)
Location:	101 West Flagler, Miami, FL 33130.
Pre-Proposal Conference:	Wednesday, September 10, 2008 at 10:00 a.m. (local time)
Location:	111 NW 1st Street, 13th Floor, Conf. Rm. A Miami, Florida 33128
Pre-Proposal Question Period Ends	Wednesday, September 17, 2008 at 5:00 p.m. (local time)
Deadline for Receipt of Proposals:	Wednesday, October 22, 2008 at 2:00 p.m. (local time) (See Section 1.4 for location)
Evaluation/Selection Process:	Anticipated to begin the week of October 27, 2008
Oral Presentations, If Conducted:	Anticipated to begin the week of December 8, 2008
Deadline for Best and Final Offer (BAFO),If Needed:	Anticipated date of January 7, 2009

Projected Award Date:	Anticipated the week of June 8, 2009
Projected Contract Start Date:	Anticipated to begin the week of June 22, 2009

1.3 SOLICITATION AVAILABILITY

The solicitation package is available at no cost on-line at www.miamidade.gov/dpm or through Department of Procurement Management (DPM) - Vendor Assistance Unit, 111 NW 1st Street, Suite 1300, Miami, FL 33128-1974 at a cost of $10.00 for each Solicitation package and an additional $5.00 fee for a request to receive the Solicitation package through the United States Postal Service. To request the Solicitation package through the United States Postal Service, mail your request with the following information: the Solicitation number and title, the name of Proposer's contact person, Proposer's name, complete address to be mailed to, telephone number and fax number, along with a $15.00 check or money order made payable to: Miami-Dade Board of County Commissioners.

Proposers who obtain copies of this Solicitation from sources other than the County's Department of Procurement Management website or the Vendor Assistance Unit risk the potential of not receiving addenda, since their names will not be included on the list of firms participating in the process for this particular Solicitation. Such Proposers are solely responsible for those risks **(see Section 1.8)**.

1.4 PROPOSAL SUBMISSION

All Proposals must be submitted on 8 1/2" X 11" paper, neatly typed on one side only, with normal margins, and spacing. The original document package must not be bound and the document package copies should be individually bound. **A printed, unbound one-sided original, twenty (20) printed, bound copies and twenty (20) electronic copies on individual flash drives in Excel, Microsoft Word or PDF format (a total of 41)** of the **complete** Proposal must be received by the deadline for receipt of Proposal specified in this RFP Timetable (see Section 1.2). The original and all copies must be submitted in a sealed envelope or container stating on the outside the Proposer's name, address, telephone number, the RFP number, RFP title, and deadline for Proposals to:

Clerk of the Board
Stephen P. Clark Center
111 NW 1st Street, 17th Floor, Suite 202
Miami, FL 33128-1983

Hand-carried Proposals may be delivered to the above address **ONLY** between the hours of 8:00 a.m. and 4:30 p.m., Mondays through Fridays (however, please note that Proposals are due at the Clerk of the Board on the date and at the time

indicated in Section 1.2. Additionally, the Clerk of the Board is closed on holidays observed by the County). Proposers are responsible for informing any commercial delivery service, if used, of all delivery requirements and for ensuring that the required address information appears on the outer wrapper or envelope used by such service.

Proposals must be signed by an authorized officer of the Proposer who is legally authorized to enter into a contractual relationship in the name of the Proposer. The submittal of a Proposal by a Proposer will be considered by the County as constituting an offer by the Proposer to perform the required services at the stated prices.

All Best and Final Offers (BAFO) are to follow the same Proposal format; however the Proposal must indicate on the cover page that this is a BAFO with the submission date. All Proposals are to be received by 2:00 p.m. on the submission date at the above address.

1.5 PRE-PROPOSAL CONFERENCE/EXAMINATION OF SITE

A Pre-Proposal conference has been scheduled for **the date, time and place specified in the Timetable (see Section 1.2).** Attendance is highly recommended. Proposers are requested to inform the Contracting Officer of the number of persons expected to attend no later than 48 hours before the scheduled date. Proposers are encouraged to submit any questions in writing to the Contracting Officer **(see Section 1.6)** in advance of the Pre-Proposal conference.

It is highly recommended that all interested Proposers attend the scheduled site visit of the Main Library, which has been scheduled for Wednesday, September 10, 2008, at 9:00 A.M. (local time) at 101 West Flagler, Miami, FL 33130. This visit will precede the recommended Pre-Proposal conference which is scheduled for 10:00 A.M. Proposers are requested to inform the Contracting Officer **(see Section 1.6)** of the number of persons expected to attend no later than 48 hours before the scheduled date.

If you need a sign language interpreter or materials in accessible format for this event please call the DPM ADA Coordinator at (305) 375-1564 at least five days in advance.

1.6 CONE OF SILENCE

Pursuant to Section 2-11.1(t) of the Miami-Dade County Code, as amended, a "Cone of Silence" is imposed upon each RFP or RFQ after advertisement and terminates at the time the County Manager issues a written recommendation to the Board of County Commissioners. The Cone of Silence **prohibits any communication** regarding RFPs or RFQs between, among others:

- potential Proposers, service providers, lobbyists or consultants and the County's professional staff including, but not limited to, the County Manager and the County Manager's staff, the Mayor, County Commissioners or their respective staffs;

- the Mayor, County Commissioners or their respective staffs and the County's professional staff including, but not limited to, the County Manager and the County Manager's staff; or

- potential Proposers, service providers, lobbyists or consultants, any member of the County's professional staff, the Mayor, County Commissioners or their respective staffs and any member of the respective Evaluation/Selection Committee.

The provisions do not apply to, among other communications:

- oral communications with the staff of the Vendor Assistance Unit, the responsible Procurement Agent or Contracting Officer, provided the communication is limited strictly to matters of process or procedure already contained in the Solicitation document;

- oral communications at Pre-Proposal conferences, oral presentations before Evaluation/Selection Committee, contract negotiations during any duly noticed public meeting, public presentations made to the Board of County Commissioners during any duly noticed public meeting; or

- communications in writing at any time with any county employees, official or member of the Board of County Commissioners unless specifically prohibited by the applicable RFP or RFQ documents.

When the Cone of Silence is in effect, all potential vendors, service providers, bidders, lobbyists and consultants shall file a copy of any correspondence concerning the particular RFP, RFQ or bid with the Clerk of the Board, which shall be made available to any person upon request. The County shall respond in writing (if County deems a response necessary) and file a copy with the Clerk of the Board, which shall be made available to any person upon request. Written communications may be in the form of e-mail, with a copy to the Clerk of the Board at CLERKBCC@MIAMIDADE.GOV.

In addition to any other penalties provided by law, violation of the Cone of Silence by any Proposer shall render any RFP award or RFQ award voidable. Any person having personal knowledge of a violation of these provisions shall report such violation to the State Attorney and/or may file a complaint with Ethics Commission. Proposers should reference Section 2-11.1(t) of the Miami-Dade County Code for further clarification.

This language is only a summary of the key provisions of the Cone of Silence. Please review Miami-Dade County Administrative Order 3-27 for a complete and thorough description of the Cone of Silence.

All Proposers will be notified in writing when the County Manager or designee makes an award recommendation.

The Contracting Officer for this Solicitation is:

Julian R. Manduley, IT Procurement Contracting Officer
Miami-Dade County, Department of Procurement Management
111 N.W. 1st Street, Suite 1300, Miami, FL 33128-1977
Telephone: (305) 375-2179
Fax: (305) 375-5688
E-mail: jmandul@miamidade.gov

1.7 CONTRACT MEASURES

This Solicitation includes contract measures for Miami-Dade County Certified Small Business Enterprises (SBE's), a selection factor applies to this Solicitation.

A SBE/Micro Business Enterprise is entitled to receive an additional ten percent (10%) of the total technical evaluation points on the technical portion of such Proposer's Proposal. An SBE/Micro Business Enterprise must be certified by the Department of Business Development (DBD) for the type of goods and/or services the Proposer provides in accordance with the applicable Commodity Code(s) for this Solicitation. For certification information contact the Department of Business Development at (305) 375-3111 or access www.miamidade.gov/sba.
.
The SBE/Micro Business Enterprise must be certified by Proposal submission deadline, at contract award and for the duration of the contract to remain eligible for the preference.

1.8 ADDITIONAL INFORMATION/ADDENDA

Requests for additional information or clarifications must be made in writing and received by the County's Contracting Officer for this Solicitation, in accordance with **Section 1.6** above, no later than the deadline for receipt of questions specified in the Timetable **(see Section 1.2)**. The request must contain the RFP number and title, Proposer's name, name of Proposer's contact person, address, phone number, and facsimile number.

The County will issue responses to inquiries and any other corrections or amendments it deems necessary in written addenda issued prior to the deadline for Proposal submission. Proposers should not rely on any representations,

statements or explanations other than those made in this Solicitation or in any written addendum to this Solicitation. Where there appears to be conflict between the Solicitation and any addenda issued, the last addendum issued shall prevail.

It is the Proposer's responsibility to assure receipt of all addenda. The Proposer should verify with the designated Contracting Officer prior to submitting a Proposal that all addenda have been received. Proposers are required to acknowledge the number of addenda received as part of their Proposals **(see attached Form A-3)**.

Proposers who obtain copies of this Solicitation from sources other than the County's Department of Procurement Management's Vendor Assistance Unit or website risk the potential of not receiving addenda, since their names will not be included on the Vendor List for this particular Solicitation. Such Proposers are solely responsible for those risks.

1.9 PROPOSAL GUARANTEE DEPOSIT

No Proposal Guarantee Deposit is required for this Solicitation.

1.10 MODIFIED PROPOSALS

A Proposer may submit a modified Proposal to replace all or any portion of a previously submitted Proposal up until the deadline for Proposals. The County will only consider the latest version of the Proposal.

1.11 WITHDRAWAL OF PROPOSALS

Proposals shall be irrevocable until contract award unless the Proposal is withdrawn. A Proposal may be withdrawn in writing only, addressed to the County contact person for this Solicitation (in accordance with **Section 1.6)**, prior to the deadline for Proposals or upon the expiration of ONE HUNDRED EIGHTY (180) calendar days after the opening of Proposals.

1.12 LATE PROPOSALS AND LATE MODIFICATIONS

Please be advised that the County, in exercise of its discretion, may not accept bids and or Proposals received after the scheduled time and date noted in this Solicitation. Sealed Bids/Proposals will be opened promptly at the time and place specified. The responsibility for submitting a sealed Bid/Proposal on or before the stated time and date is solely and strictly the responsibility of the Bidder/Proposer. Miami-Dade County is not responsible for delays caused by any mail, package or courier service, including the U.S. Mail, or caused by any other occurrence. Modifications received after the deadline for Proposals are also late and will not be considered.

1.13 SOLICITATION POSTPONEMENT/CANCELLATION

The County may, at its sole and absolute discretion, accept any and all, or parts of any and all Proposals; reject any and all, or parts of any and all Proposals; re-advertise this Solicitation; postpone or cancel, at any time, this Solicitation process; or waive any irregularities in this Solicitation or in the Proposals received as a result of this Solicitation.

1.14 COSTS INCURRED BY PROPOSERS

All expenses involved with the preparation and submission of Proposals to the County, or any work performed in connection therewith, shall be borne by the Proposer(s). No payment will be made for any responses received, nor for any other effort required of or made by the Proposer(s), prior to commencement of work as defined by a contract executed by County.

1.15 BUSINESS ENTITY REGISTRATION

Prior to being recommended for award, the Proposer shall complete a Miami-Dade County Vendor Registration Package. Effective June 1, 2008, the new Vendor Registration Package, including a Uniform Affidavit Packet (Affidavit form), must be completed. The Vendor Registration Package, including all affidavits can be obtained by downloading from the DPM website at www.miamidade.gov or from the Vendor Assistance Unit at 111 N.W. 1st Street, 13th Floor, Miami, FL. The recommended Proposer shall affirm that all information submitted with its Vendor Registration Package is current, complete and accurate, at the time they submitted a response to the Solicitation, by completing an Affirmation of Vendor Affidavit form.

1. Disclosure of Employment – pursuant to Section 2-8.1(d) of the County Code.
2. Disclosure of Ownership Affidavit – pursuant to Section 2-8.1(d) of the County Code.
3. Drug-Free Affidavit – pursuant to Section 2-8.1.2(b) of the County Code.
4. W-9 and 8109 Forms – the vendor must furnish these forms as required by the Internal Revenue Service.
5. Social Security Number – the vendor must provide a copy of the primary owner's social security card if the social security number is being used in lieu of the Federal Identification Number (F.E.I.N.).
6. Americans with Disabilities Act (A.D.A.) Affidavit – it is the policy of the County to comply with all requirements of County Resolution R182-00 and the A.D.A.
7. Collection of Fees, Taxes and Parking Tickets Affidavit – pursuant to Section 2-8.1 (c) of the County Code.

8. Conflict of Interest and Code of Ethics – pursuant to Sections 2-8.1(i) and 2-11.1(b) (1) through (6) and (9) of the County Code and County Ordinance No. 00-1 amending Section 2-11.1(c) of the County Code.
9. Code of Business Ethics – pursuant to Section 2-8.1(i) of the County Code.
10. Debarment Disclosure Affidavit – pursuant to County Code 10-38.
11. Office of the Inspector General – pursuant to Section 2-1076 of the County Code.
12. Minority and Disadvantaged Business Enterprises – the County endeavors to obtain the participation of all minority and disadvantaged business enterprises pursuant to Sections 2-8.2, 2-8.2.3 and 2-8.2.4 of the County Code and Title 49 of the Code of Federal Regulations.
13. Individuals and Entities Doing Business with the County not current in their obligations to the County – pursuant to Sections 2-8.1 (h) and 2-11.1(b)(8) of the County Code.
14. Nondiscrimination – pursuant to Section 2-8.1.5 of the County Code.
15. Family Leave – pursuant to Section 11A-30 of the County Code.
16. Living Wage – pursuant to Section 2-8.9 of the County Code.
17. Domestic Leave – pursuant to Section 11A-60 of the County Code.
18. Antitrust Laws – by acceptance of any contract, the vendor agrees to comply with all antitrust laws of the United States and the State of Florida.

Section 2-11.1(d) of Miami-Dade County Code as amended by Ordinance 00-1, requires any county employee or any member of the employee's immediate family who has a controlling financial interest, direct or indirect, with Miami-Dade County or any person or agency acting for Miami-Dade County from competing or applying for any such contract as it pertains to this Solicitation, must first request a conflict of interest opinion from the County's Ethic Commission prior to their or their immediate family member's entering into any contract or transacting any business through a firm, corporation, partnership or business entity in which the employee or any member of the employee's immediate family has a controlling financial interest, direct or indirect, with Miami-Dade County or any person or agency acting for Miami-Dade County and that any such contract, agreement or business engagement entered in violation of this subsection, as amended, shall render this Agreement voidable. For additional information, please contact the Ethics Commission hot line at (305) 579-2593.

1.16 ORAL PRESENTATIONS

The County may require Proposers to give oral presentations in support of their Proposals or to exhibit or otherwise demonstrate the information contained therein.

1.17 PROPOSER REGISTRATION AFFIDAVIT

Proposers are advised that in accordance with Section 2-11.1(s) of the Code of Miami-Dade County, the attached Affidavit of Miami-Dade County Lobbyist Registration for Oral Presentation **(see attached Form A-2)** must be completed, notarized and included with the Proposal submission.

Any person who appears as a representative for an individual or firm for an oral presentation before a County certification, evaluation, selection, technical review or similar committee must be listed on this Affidavit provided by the County. The Affidavit shall be filed with the Clerk of the Board at the time the response is submitted. The individual or firm must submit a revised Affidavit for additional team members added after submittal of the Proposal with the Clerk of the Board at least two days prior to the oral presentation. Any person not listed on the revised affidavit may not participate in the oral presentation.

NOTE Other than for the Oral Presentations, Proposers who wish to address the County Commission, a County Board or Committee concerning any actions, decisions or recommendations of County personnel regarding this Solicitation in accordance with Section 2-11.1(s) of the Code of Miami-Dade County must register with the Clerk of the Board and pay all applicable fees.

1.18 EXCEPTION TO THE SOLICITATION

Proposers may take exceptions to any of the terms of this Solicitation unless the Solicitation specifically states where exceptions may not be taken. All exceptions taken must be specific, and the Proposer must indicate clearly what alternative is being offered to allow the County a meaningful opportunity to evaluate and rank Proposals, and the cost implications of the exception (if any).

Where exceptions are taken, the County shall determine the acceptability of the proposed exceptions. The County, after completing evaluations, may accept or reject the exceptions. Where exceptions are rejected, the County may insist that the Proposer furnish the services or goods described herein or negotiate an acceptable alternative.

All exceptions shall be referenced by utilizing the corresponding Section, paragraph and page number in this Solicitation. However, the County is under no obligation to accept any exceptions. If no exception is stated, the County will assume that the Proposer will accept all terms and conditions.

1.19 PROPRIETARY/CONFIDENTIAL INFORMATION

Proposers are hereby notified that all information submitted as part of, or in support of, Proposals will be available for public inspection after opening of

Proposals, in compliance with Chapter 119, Florida Statutes, popularly known as the "Public Record Law."

The Proposer shall not submit any information in response to this Solicitation, which the Proposer considers to be a trade secret, proprietary or confidential. The submission of any information to the County in connection with this Solicitation shall be deemed conclusively to be a waiver of any trade secret or other protection, which would otherwise be available to Proposer. In the event that the Proposer submits information to the County in violation of this restriction, either inadvertently or intentionally, and clearly identifies that information in the Proposal as protected or confidential, the County shall endeavor to redact and return that information to the Proposer as quickly as possible, and if appropriate, evaluate the balance of the Proposal. The redaction or return of information pursuant to this clause may render a Proposal non-responsive.

1.20 NEGOTIATIONS

The County may award a contract on the basis of initial offers received, without discussions. Therefore, each initial offer should contain the Proposer's best terms from a monetary and technical standpoint.

The County reserves the right to enter into contract negotiations with the recommended Proposer(s). If the County and the recommended Proposer(s) cannot negotiate a successful contract, the County may terminate said negotiations and begin negotiations with another recommended Proposer. This process will continue until a contract acceptable to the County has been executed or all Proposals are rejected. No Proposer shall have any rights against the County arising from such negotiations or termination thereof.

1.21 RIGHTS OF PROTEST

A. A recommendation for contract award or rejection of all Proposals may be protested by a Proposer in accordance with the procedures contained in Sections 2-8.3 and 2-8.4 of the County Code, as amended, and as established in Administrative Order No. 3-21.

B. A written intent to protest shall be filed with the Clerk of the Board and mailed to all participants in the competitive process and to the County Attorney within three (3) County work days of the filing of the County Manager’s recommendation. This three day period begins on the County workday after the filing of the County Manager’s recommendation. Such written intent to protest shall state the particular grounds on which it is based and shall be accompanied by a filing fee as detailed in Paragraph C below.

C. The written intent to protest shall be accompanied by a non-refundable filing fee, payable to the Clerk of the Board, in accordance with the schedule provided below:

Award Amount	**Filing Fee**
$25,000-$100,000	$500
$100,001-$500,000	$1,000
$500,001-$5 million	$3,000
Over $5 million	$5,000

The protester shall then file all pertinent documents and supporting evidence with the Clerk of the Board and mail copies to all participants in the competitive process and to the County Attorney within three (3) County workdays after the filing of a written intent to protest.

D. For award recommendations greater than $250,000 the following shall apply:

The County's recommendation to award or reject will be immediately communicated (via mail, fax or e-mail) to all participants in the competitive process and filed with the Clerk of the Board.

E. For award recommendations from $25,000 to $250,000 the following shall apply:

Each County work day, as appropriate, recommendations to award or reject will be posted in the lobby of the Stephen P. Clark Center, located at 111 N.W. 1st Street. Participants may also call the Awards Line at 305-375-4724, or 800-510-4724, or the contact person as identified on the cover page of the Solicitation.

Any question, issue, objection or disagreement concerning, generated by, or arising from the published requirements, terms, conditions or processes contained or described in the Solicitation document shall be deemed waived by the protester and shall be rejected as a basis for a protest unless it was brought by that Proposer to the attention, in writing, of the Procurement Agent, Buyer, Contracting Officer or other contact person in the County department that issued the Solicitation document, at least two working days (not less than 48 hours) prior to the hour of the due date for Proposal submission.

1.22 LOCAL PREFERENCE

The evaluation of competitive Solicitations is subject to Section 2-8.5 of the Miami-Dade County Code, which, except where contrary to federal and state law, or any other funding source requirements, provides that preference be given to

local businesses. A local business, for the purposes of this Section, shall be defined as a Proposer which meets all of the following:

1. a business that has a valid Local Business Tax Receipt (formerly know as an Occupational License), issued by Miami-Dade County at least one year prior to Bid or Proposal submission, that is appropriate for the goods, services or construction to be purchased;
2. a business that has physical business address located within the limits of Miami-Dade County from which the vendor operates or performs business (Post Office Boxes are not verifiable and shall not be used for the purpose of establishing said physical address.); and
3. a business that contributes to the economic development and well-being of Miami-Dade County in a verifiable and measurable way. This may include but not be limited to the retention and expansion of employment opportunities and the support and increase in the County's tax base. To satisfy this requirement, the vendor shall affirm in writing its compliance with either of the following objective criteria as of the Proposal submission date stated in the Solicitation:
   - (a) Vendor has at least ten (10) permanent full time employees, or part time employees equivalent to 10 FTE ("full-time equivalent" employees working 40 hours per week) that live in Miami-Dade County, or at least 25% of its employees that live in Miami-Dade County, or
   - (b) Vendor contributes to the County's tax base by paying either real property taxes or tangible personal property taxes to Miami-Dade County, or
   - (c) some other verifiable and measurable contribution to the economic development and well-being of Miami-Dade County.

If, following the completion of final rankings, a non-local business is the highest ranked Proposer, and the ranking of a local Proposer is within 5% of the ranking obtained by the highest ranked Proposer, then the highest ranked local Proposer shall have the opportunity to proceed to negotiations with the County under the applicable sections of this Code.

At this time, there is an interlocal agreement in effect between Miami-Dade and Broward Counties until September 30, 2009. Therefore, a vendor which meets the requirements of (1), (2) and (3) above for Broward County shall be considered a local business pursuant to this Section.

The Proposer should complete, sign and submit the attached **Form A-4** "Local Business Preference" with the Technical Proposal in order to be considered for Local Preference.

1.23 RULES, REGULATIONS AND LICENSING REQUIREMENTS

The Proposer shall comply with all laws, ordinances and regulations applicable to the services contemplated herein, especially those applicable to conflict of interest and collusion. Proposers are presumed to be familiar with all federal, state and local laws, ordinances, codes, rules and regulations that may in any way affect the goods or services offered, especially Executive Order No. 11246 entitled "Equal Employment Opportunity" and as amended by Executive Order No. 11375, as supplemented by the Department of Labor Regulations (41 CFR, Part 60), the Americans with Disabilities Act of 1990 and implementing regulations, the Rehabilitation Act of 1973, as amended, Chapter 553 of Florida Statutes and any and all other federal, state and local directives, ordinances, rules, orders, and laws relating to people with disabilities.

1.24 REVIEW OF PROPOSALS FOR RESPONSIVENESS

Each Proposal will be reviewed to determine if the Proposal is responsive to the submission requirements outlined in the Solicitation. A responsive Proposal is one which follows the requirements of the Solicitation, includes all documentation, is submitted in the format outlined in the Solicitation, is of timely submission, and has the appropriate signatures as required on each document. Failure to comply with these requirements may result in a Proposal being deemed non-responsive.

1.25 COMMISSION AUDITOR ACCESS TO RECORDS

Pursuant to Ordinance No. 03-2, all Vendors receiving an award of the contract resulting from this Solicitation will grant access to the Commission Auditor to all financial and performance related records, property, and equipment purchased in whole or in part with government funds.

1.26 QUARTERLY REPORTING WHEN SUB-CONTRACTORS ARE UTILIZED

Proposers are advised that when subcontractors or subconsultants are utilized to fulfill the terms and conditions of this contract, Miami-Dade County Resolution No. 1634-93 will apply to this contract. This resolution requires the selected Proposer(s) to file quarterly reports as to the amount of contract monies received from the County and the amounts thereof that have been paid by the Contractor directly to Small Business Enterprises performing part of the contract work.

Additionally, the listed businesses are required to sign the reports, verifying their participation in the contract work and their receipt of such monies. For purposes of applicability, the requirements of this resolution shall be in addition to any other reporting requirements required by law, ordinance or administrative order.

1.27 INSPECTOR GENERAL REVIEWS

A. INDEPENDENT PRIVATE SECTOR INSPECTOR GENERAL REVIEW

Pursuant to Miami-Dade County Administrative Order 3-20 and in connection with any award issued as a result of this Solicitation, the County has the right to retain the services of an Independent Private Sector Inspector General ("IPSIG"), whenever the County deems it appropriate to do so. Upon written notice from the County, the selected Proposer shall make available, to the IPSIG retained by the County, all requested records and documentation pertaining to this Solicitation or any subsequent award, for inspection and copying. The County will be responsible for the payment of these IPSIG services, and under no circumstance shall the Proposer's cost/price for this Solicitation be inclusive of any charges relating to these IPSIG services. The terms of this provision herein, apply to the Proposer, its officers, agents, employees and assignees. Nothing contained in this provision shall impair any independent right of the County to conduct, audit or investigate the operations, activities and performance of the selected Proposer in connection with this Solicitation or any contract issued as a result of this Solicitation. The terms of this provision are neither intended nor shall they be construed to impose any liability on the County by the selected Proposer or third- party.

B. MIAMI-DADE COUNTY INSPECTOR GENERAL REVIEW

According to Section 2-1076 of the Code of Miami-Dade County, as amended by Ordinance No. 99-63, Miami-Dade County has established the Office of the Inspector General which may, on a random basis, perform audits on all County contracts, throughout the duration of said contracts, except as otherwise provided below. The cost of the audit of any Contract issued as a result of this Solicitation shall be one quarter (1/4) of one (1) percent of the total contract amount which cost shall be included in the total proposed amount. The audit cost will be deducted by the County from progress payments to the selected Proposer. The audit cost shall also be included in all change orders and all contract renewals and extensions.

Exception: The above application of one quarter (1/4) of one percent fee assessment shall not apply to the following contracts: (a) IPSIG contracts; (b) contracts for legal services; (c) contracts for financial advisory services; (d) auditing contracts; (e) facility rentals and lease agreements; (f) concessions and other rental agreements; (g) insurance contracts; (h) revenue-generating contracts; (I) contracts where an IPSIG is assigned at the time the contract is approved by the Commission; (j) professional service agreements under $1,000; (k) management

agreements; (l) small purchase orders as defined in Miami-Dade County Administrative Order 3-2; (m) federal, state and local government-funded grants; and (n) interlocal agreements. ***Notwithstanding the foregoing, the Miami-Dade County Board of County Commissioners may authorize the inclusion of the fee assessment of one quarter (1/4) of one percent in any exempted contract at the time of award.***

Nothing contained above shall in any way limit the powers of the Inspector General to perform audits on all County contracts including, but not limited to, those contracts specifically exempted above.

1.28 PUBLIC ENTITY CRIMES

Pursuant to Paragraph 2(a) of Section 287.133, Florida Statutes, a person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a Proposal for a contract to provide any goods or services to a public entity; may not submit a Proposal on a contract with a public entity for the construction or repair of a public building or public work; may not submit Proposals on leases of real property to a public entity; may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under a contract with any public entity; and, may not transact business with any public entity in excess of the threshold amount provided in Section 287.017 for CATEGORY TWO ($10,000) for a period of thirty-six (36) months from the date of being placed on the convicted vendor list.

1.29 REQUIRED LISTING OF SUBCONTRACTORS AND SUPPLIERS ON COUNTY CONTRACTS

Ordinance 97-104, amended by Ordinance 00-30, requires a Bid or Proposal for a County or Public Health Trust contract involving the expenditure of $100,000 or more include a listing of subcontractors and suppliers who will be used on the contract. The required listing must be filed prior to the contract award. The required listing must be submitted even though the Proposer will not utilize subcontractors or suppliers on the contract. In the latter case, the listing must expressly state no subcontractors, nor suppliers, as the case may be, will be used on the contract.

FORM A-5, OR A COMPARABLE LISTING MEETING THE REQUIREMENTS OF ORDINANCE NO. 97-104 AS AMENDED BY ORDINANCE NO. 00-30, MUST BE COMPLETED AND SUBMITTED EVEN THOUGH THE PROPOSER MAY NOT UTILIZE SUBCONTRACTORS OR SUPPLIERS FOR THIS PROPOSAL. THE PROPOSER SHOULD ENTER THE WORD "<u>NONE</u>" UNDER THE APPROPRIATE HEADING(S) ON FORM A-5 IN THOSE

INSTANCES WHERE NO SUBCONTRACTORS AND/OR SUPPLIERS WILL BE USED ON THIS PROPOSAL.

1.30 FAIR SUBCONTRACTING POLICIES (Ordinance 97-35)

All selected Proposers on County contracts in which subcontractors may be used shall be subject to and comply with Ordinance 97-35 as amended, requiring Proposers to provide a detailed statement of their policies and procedures for awarding subcontracts which:

a) notifies the broadest number of local subcontractors of the opportunity to be awarded a subcontract;

b) invites local subcontractors to submit Bids/Proposals in a practical, expedient way;

c) provides local subcontractors access to information necessary to prepare and formulate a subcontracting Bids/Proposals;

d) allows local subcontractors to meet with appropriate personnel of the Proposer to discuss the Proposer's requirements; and

e) awards subcontracts based on full and complete consideration of all submitted Proposals and in accordance with the Proposer's stated objectives.

All Proposers seeking to contract with the County shall, as a condition of award, provide a statement of their subcontracting policies and procedures **(see attached Form A-6)**. Proposers who fail to provide a statement of their policies and procedures may not be recommended by the County Manager for award by the Board of County Commissioners.

The term "local" means having headquarters located in Miami-Dade County or having a place of business located in Miami-Dade County from which the contract or subcontract will be performed.

The term "subcontractor" means a business independent of a Proposer that may agree with the Proposer to perform a portion of a contract.
The term "subcontract" means an agreement between a Proposer and a subcontractor to perform a portion of a contract between the Proposer and the County.

1.31 BANKRUPTCY

Any Proposer who, at the time of Proposal submission, is involved in an ongoing bankruptcy as a debtor, or in a reorganization, liquidation, or dissolution

proceeding, or if a trustee or receiver has been appointed over all or a substantial portion of the property of the Proposer under federal bankruptcy law or any state insolvency law, may be non-responsive.

1.32 COUNTY USER ACCESS PROGRAM (UAP)

A. User Access Fee

Pursuant to Miami-Dade County Budget Ordinance No. 03-192, this Contract is subject to a user access fee under the County User Access Program (UAP) in the amount of two percent (2%). All sales resulting from this Contract, or any contract resulting from this Solicitation and the utilization of the County contract price and the terms and conditions identified herein, are subject to the two percent (2%) UAP. This fee applies to all contract usage whether by County Departments or by any other governmental, quasi-governmental or not-for-profit entity.

The Contractor providing goods or services under this Contract shall invoice the contract price and shall accept as payment thereof the contract price less the 2% UAP as full and complete payment for the goods and/or services specified on the invoice. The County shall retain the 2% UAP for use by the County to help defray the cost of the procurement program. Vendor participation in this invoice reduction portion of the UAP is mandatory.

B. Joint Purchase

Only those entities that have been approved by the County for participation in the County's Joint Purchase and Entity Revenue Sharing Agreement are eligible to utilize or receive County contract pricing and terms and conditions. The County shall have no liability to the Contractor for the cost of any purchase made by an ordering entity under the UAP and shall not be deemed to be a party thereto. All orders shall be placed directly by the ordering entity with the Contractor and shall be paid by the ordering entity less the 2% UAP.

1.33 ORDINANCES, RESOLUTIONS AND/OR ADMINISTRATIVE ORDERS

To request a copy of any ordinance, resolution and/or administrative order cited in this Solicitation, the Proposer must contact the **Clerk of the Board at (305) 375-5126.**

1.34 LOBBYIST CONTINGENCY FEES

a) In accordance with Section 2-11.1(s) of the Code of Miami-Dade County, after May, 16, 2003, no person may, in whole or in part, pay, give or agree

to pay or give a contingency fee to another person. No person may, in whole or in part, receive or agree to receive a contingency fee.

b) A contingency fee is a fee, bonus, commission or non-monetary benefit as compensation which is dependent on or in any way contingent upon the passage, defeat, or modification of: 1) any ordinance, resolution, action or decision of the County Commission; 2) any action, decision or recommendation of the County Manager or any County board or committee; or 3) any action, decision or recommendation of any County personnel during the time period of the entire decision-making process regarding such action, decision or recommendation which forseeably will be heard or reviewed by the County Commission or a County board or committee.

SECTION 2.0 - SCOPE OF SERVICES

2.1 BACKGROUND

The Library is the ninth largest public library system in the United States and exists to "maintain and improve public library services reflecting the informational, educational, and recreational needs of our diverse community."

The Library currently has 47 facilities, which include: (1) Main Library – 200,000 sq. ft.; (2) 7 regional libraries – approximately 25,000 to 52,600 sq. ft. each; (3) 38 neighborhood libraries – approximately 1,300 to 16,000 sq. ft. each; (4) 1 kiosk at the Civic Center Metrorail station – 144 square feet.

The Capital Plan calls for adding 5 additional facilities over the next 5 years.

The Library offers Connections, a free books-by-mail service for the homebound, as well as Borrow-by-Mail, a convenient request mailing service available to all customers for a minimal fee. The Library's early childhood program called Jump Start circulates story time kits to registered daycare facilities.

Last year over 6 million people visited the Library. Currently the Library has 800,000 registered borrowers who checked out over 7.5 million items this past year. The total reference/information questions answered is over 6 million per year.

The Library's service area covers most of Miami-Dade County, a geographical area of 2,419 square miles. The Library employs approximately 625 full time and 270 part time employees. The Library also extends reciprocal borrowing privileges to residents of the cities of Hialeah, North Miami, and North Miami Beach.

2.2 CURRENT TECHNICAL ENVIRONMENT

The Library is currently utilizing SirsiDynix's Horizon version 7.3.4 and Horizon Information Portal (HIP) version 3.08. The Horizon software provides the following Modules:

. Acquisitions

. Cataloging

. Circulation

. Media Scheduling

. Home Services

. Inventory

. Serials

. System Administration

. Searching

. Information Portal

The Library uses SirsiDynix products such as PC Reliance (offline circulation), Telecirc II (voice notification), WebReporter (report writing tool), and Debt Collect (software, for reports on delinquent accounts, which interfaces with Unique Management Services, Inc. collection agency).

The Library has a variety of third-party products that interface with the Horizon ILS via SIP II protocol, such as Envisionware (computer reservation, time, and print management), 3M (self-check), OverDrive (digital media), and Evanced Solutions (events calendar, room reservation, and summer reading program). Two subscription services integrated with the ILS, Syndetic Solutions (enriched content) and WebFeat (federated searching), offer additional services to patrons.

In order to make Horizon fit the Library's needs, SirsiDynix performed custom programming on portions of Circulation, Cataloging, Acquisitions, and the Home Services Modules.

Horizon is installed on a Sun Microsystem Enterprise X4600 Server, running Red Hat Enterprise Linux 4.0 as the operating system (OS), with Sybase SQL 12.5 as the database. The Library also has a training/test environment operating on the same server.

Horizon is configured for 47 open library branches, 40 bookmobile stops, 8 hidden locations, 4 special services locations and 6 other closed locations for a total of 105 locations configured in the System.

The Horizon Information Portal (HIP) is installed on two Dell PowerEdge 2850s, running Windows 2003 Service Pack 2. The HIP training environment also operates on a Dell PowerEdge 2850 running Windows 2003 Service Pack 2. Future plans include providing redundancy and load balancing for the production application.

Horizon is licensed for 1,200 seat licenses. Both environments currently have a total of 1,069 user IDs. HIP is licensed for 501+ concurrent users.

The current SirsiDynix reporting system (WebReporter) utilizes different user access levels and is licensed by branch, not by user. This license is based on roles allowing staff different access levels and functionality.

The Library has a server license for Sybase.

2.2.1 Third-Party Products and Licensing

The Library currently has an enterprise license through the SirsiDynix contract for Envisionware including all necessary SIP II licenses.

The Library has an enterprise license via SirsiDynix for Evanced Solutions for the following products: events, room reservation and summer reading program.

The Library has licensing, directly from 3M, for up to 200 self-check units, including all necessary SIP II licenses. SirsiDynix is a subcontractor for the self-check project.

The Library also has subscription-based licenses for WebFeat (federated search engine) and Syndetic Solutions (enriched content) via SirsiDynix. The Syndetic Solutions license is based on the number of hits on the Library's web portal.

The Library has a contract with Unique Management Services, Inc. for collection agency services.

2.2.2 Hardware

The Library has a significant investment in Intel-based Dell PowerEdge and EMC^2 equipment for the Library's Storage Area Network (SAN) and Network Area Storage (NAS) for a total of 7.3 Terabytes. This equipment is utilized for web, network, and database applications. Intel-based servers are running various network operating systems including Windows server 2003 Release 2, 32 and 64 bit versions.

The Library's patron PCs are running Windows XP Service Pack 2 on Pentium 4 or higher hardware. The Library is upgrading staff PCs to Windows XP Service Pack 2 with the majority of the PCs being greater than Pentium 3**.** Stand-alone OPACs are a mix of Gateway and Dell Pentium 3 running Windows NT 4 Service Pack 6 and Windows 2000 Service Pack 4 respectively.

See the Appendices A-I for detailed hardware and software information.

See Appendix J for daily tasks needed to maintain the Horizon production and training databases.

2.2.3 Patron Notification

The Library offers different notification options to patrons. They may select to be notified by printed form (data mailer), e-mail or Interactive Voice Response (IVR).

2.2.3.1 Data Mailers

Patrons are sent the following notice types:

Auto notice: This is a system-generated notice informing patrons of holds and/or overdue materials.

Reminder notice: This is a follow-up notice to the auto notice.

Billing notice: This is a bill sent to patrons for replacement charges or late fines exceeding the Library's limit.

When patrons select the printed notification option, the notices are printed on an impact printer using special pre-printed multi-part forms (data mailers). Parameters are configured for the different notice types, page width and height, and multiple printed areas of 255 maximum characters per line.

2.2.3.2 E-mail

When patrons select e-mail notification, the Library sends an e-mail utilizing the Library's dedicated Horizon e-mail server. The following parameters are provided: SMTP host, SMTP port, SMTP user ID, SMTP password, "from" e-mail address, "reply to" e-mail, "bcc" e-mail address and a subject field.

2.2.3.3 Interactive Voice Response (IVR)

When patrons select the telephone notification option, the various notices are sent by Interactive Voice Response (IVR). If the IVR is not successful in leaving a message after multiple attempts, a printed notice is mailed.

The Library's current IVR is Telecirc II Version 8.5 with media. Telecirc II integrates with the Library's current ILS and confirms that calls are properly delivered. Telecirc II includes dial-out capabilities that are scheduled automatically by the Library, such as: holds notification, overdue items and fines. Telecirc II is configured with English as default and Spanish as a second language. Telecirc II runs on a dedicated T1 (voice circuit) and is

configured for 8 simultaneous dial-out lines and 4 simultaneous dial-in lines for a total of 12 voice lines. Telecirc II delivers reports such as Dial-out Statistics Report, Dial-in Statistics Report, Call List Statistics Report, Phone History Report and a Pre-call List Report. WebReporter delivers additional Telecirc II reports. Telecirc II also includes dial-in capabilities that allow patrons to utilize their account barcode and PIN to access features and perform many circulation tasks for themselves (patrons can renew items, cancel holds, determine items that are checked out, overdue, or on hold). Changes to patron accounts are immediately reflected in the Horizon circulation database.

2.2.4 Staffing

The Automated Services Department of the Library consists of 20 staff as follows:

- Automated Services Administrator
- Network Group – 3
- ILS (Horizon) Group – 4
- Technicians – 9
- Web/Programmers – 3

The ILS (Horizon) Group runs the day-to-day operations on Unix servers. Proposers offering alternative solutions should offer appropriate training to ensure that staff gain the needed skill sets to operate and maintain the technology environment. The ILS (Horizon) Group staff are also knowledgeable in using SQL. Proposers, who offer another means for report writing, need to provide appropriate training.

2.2.5 Computer Room

The conditioned space for the Library's computer room includes a Liebert 65 kbs UPS system, 23 ton capacity chilled water air conditioning system, and 8 inch raised floors and a Halon fire retardant system. The existing heat load is estimated at 22 tons. The Library is in the process of expanding the air conditioning capacity to 30 tons. The servers in the computer room are running on CAT 5/6 wiring and the network backbone is running on fiber. This room, which houses all of the servers and telecommunications equipment, has minimum growth capacity.

2.2.6 General Network Information

The Library's network design, which is based on private IP addressing, is divided in two sections: Wide Area Network (WAN) and Local Area Network (LAN). The WAN is based on Frame Relay and Point-to-Point

technologies. The routers located at the branches have been configured to support LAN multi-netting due to the public and staff networks residing in the same Broadcast Domain. This year, the Library is transitioning to a segregated network supporting separate public and staff Virtual Local Area Network (VLAN).

The WAN utilizes a Hub-to-Spoke configuration with a combination of static entries on the routing protocol. The WAN consists of two fully committed T3 circuits connected to an AT&T Frame Relay Network. Direct Mode or one PVC per service is used. Each Frame Relay's PVC is an emulated point-to-point circuit. There are 42 remote sites that consist of a single T1 circuit connected via single PVC to the Library's central operations Hub (Main Branch) located at 101 West Flagler Street. There are five branches that are multi-linked to the Frame Relay cloud via combined T1s for a throughput of up to 6 Mbps.

The network core consists of a single routing switch with redundant switch modules. This core switch supports the central operations Hub and all Library production and test servers. All the Intermediate Data Frame (IDF) Edge devices at the Main Branch and 46 branch sites utilize a combination of routers and switches.

The Library uses its own router to connect to its Internet Service Provider (ISP), Florida Information Resources Network (FIRN), using two fully committed T3 circuits.

An additional T1 circuit is present at the Library's central operations Hub to enhance connectivity for wireless users at the Main Branch. Each branch has wireless access points.

The Library uses its own firewalls; one a primary and the second as a failover. The firewall provides a wide range of security and networking services, including Network Address Translation (NAT); Port Address Translation (PAT); and Uniform Resource Locator (URL) filtering. AAA (RADIUS/TACACS+) integration will be implemented in the near future. Content filtering is provided by two Bluecode appliances.

The Library will be upgrading its telecommunications infrastructure by moving to Metro VPN/Ethernet, where needed, to increase bandwidth from 1.5 or 6.0 Mbps to 10 or 100 Mbps. See Appendix K for Current and Future Peak Network Utilization per Branch.

The current Interactive Voice Response is utilizing one T1 voice line.

2.2.7 Bookmobile

The Library's four bookmobiles access the ILS through the Library's internal network using a Global System for Mobile Communications (GSM) cellular mobile wireless 3G broadband mobile connection. This wireless broadband connection service is contracted through Miami-Dade County. Once a broadband connection is established, a secure Virtual Private Network (VPN) is used to access a terminal server within the Library's internal network and provide access to the client application. The terminal server hosts the client software and allows for up to 10 individual simultaneous terminal server client connections.

In addition to providing connectivity to the bookmobiles, this type of access is desired as a backup connection, when a permanent local area connection has not yet been established for a new branch, or in an existing branch, when the local connection is experiencing an extended outage.

2.3 SCOPE

The successful Proposer should furnish software; any needed hardware; implementation, planning and migration; integration services; professional services; training; documentation; and software/hardware maintenance and support for both a production and training/testing environment, and disaster recovery.

2.4 OBJECTIVES

The Library has several important objectives in issuing this RFP:

(a) Replacement of Legacy ILS

In March 2007, SirsiDynix announced that the company was no longer developing the Horizon ILS. This relegated the Library's existing ILS to a "legacy" status that forces the Library to replace the existing ILS.

(b) User-friendly Online Public Access Catalog (OPAC)

The most important functional area of the ILS is the OPAC, which gives the public access to the Library collection and other resources. The Library would like to implement a next-generation, web-based interface that better meets the needs of users who are accustomed to searching Google and Amazon. The new OPAC should provide a single search point to access the Library's print and media holdings, online databases to which the Library subscribes, digital media and selected Internet resources. The new OPAC should incorporate Web 2.0 functionality,

federated searching, results ranked by relevancy, "Did you mean…?" cloud tags, user reviews, Really Simple Syndication (RSS) feeds, and other new features. The Library seeks a Vendor who is moving in this direction, if all these features are not yet incorporated into the ILS.

(c) Maintain and Improve Existing Functionality

The Library would like to retain and improve all current functionality, some of which was achieved through custom programming by SirsiDynix or via third-party software.

Individual processes can often be accomplished in many ways. The Library is willing to accept alternate methods, custom programming, or third-party products to provide the same level or higher functionality and to achieve more effective and efficient methods of accomplishing all tasks. If the Proposal includes custom programming to achieve a feature, function, or service, the Proposer needs to include the appropriate costs on the price schedule Form B-7: Custom Programming Price Proposal and needs to be willing to commit in the contract to have the feature, function, or service available no later than 180 days after contract signing.

(d) Additional Products and Services

The Library hopes to gain additional products and services, such as OPAC/Circulation access from portable devices and disaster recovery, which will enable us to provide even better customer service.

(e) Service

The Library is seeking a Vendor who is willing to work with the Library to help staff achieve current and future automation goals.

2. 5 DESIRED SOFTWARE FUNCTIONALITY

2.5.1 Existing Application Software (Replaces Existing Horizon/HIP Software)

This section lists Modules that exist in the Library's current SirsiDynix ILS. However, the description provided is that of ideal functionality. Some of the functions specified do not exist in the current ILS and all functions may not exist in the product of any one Proposer. The Library prefers that all functionality be in the Proposer's software but, realizing that this is probably not possible, will accept custom programming or third-party products to achieve all desired functionality. For functionality that is not available at all in the Proposal, the Library is very interested in knowing if

it is being planned and the timeframe for release. The Library would also like to know any additional features or functions that would enhance operations.

2.5.1.1 Overall Appearance and Ease of Use:

The System should have a simple, unified overall appearance for both the OPAC and the staff view.

2.5.1.1.1 General:

a. The System should be compliant with the Americans with Disabilities Act (ADA) and should provide functional keyboard equivalents for user interface elements such as menus, push buttons, scroll bars, etc., that can be activated by pointing devices such as a mouse. The use of a touch screen or stylus would be beneficial. The System should provide keyboard equivalents/shortcuts for primary commands and these should be easily indicated to the user. Users should be able to perform all work with minimal key strokes.

b. The System should have the ability to use standard Windows functions and Windows Wizards, when applicable, ex: print screen, copy, cut and paste, from one screen/view to another within a Module and between Modules.

2.5.1.1.2 User Preferences:

a. The appearance of the System should be easily adaptable by Library staff. The Library should be able to adapt the contents and display of the menu bar across Modules and control keyboard mapping.

b. Individual staff should be able to adapt fields or parts of the record display for a particular session or based on their login ID.

c. Individual staff should have control over screen size, colors, and other visual attributes.

d. The System should allow staff to save a profile of screen design to re-use in later sessions.

e. The System should allow the Library to define

certain fields to be unique and/or required.

f. The System should provide authorized staff the ability to create dropdown/code lookup lists wherever a selection from a pre-determined list is required, ex: city and zip code in registration, location and collection codes in linking, etc.

g. Authorized staff should be able to update and/or refine lists as needed.

h. The System, wherever possible, should provide assisted data entry to improve consistency and speed and help avoid problems.

i. The System should provide calendars to select from, for all fields requiring dates.

j. The System should automatically add plus 4 digits to zip codes entered if entered without these digits. Ideally, the System should be able to interface with the Enterprise Technology Service Department's (ETSD) address verification program and add the additional four digits to the zip codes.

k. The System should accept complex PINs of six or more characters using a combination of letters and numbers to ensure security, or simpler PINs if the Library desires.

l. Authorized staff should be able to change PIN requirements, as security needs change.

m. The System should restrict access as necessary to authorized staff accounts, ex: access to Cataloging/Authority Control should be limited to designated staff.

n. The System should be able to create work-forms as needed. These forms should be available only to authorized staff and should be password protected, ex: in Cataloging, Circulation, Serials and Acquisitions for item creation, modification and deletion.

o. There should be screens for input support and error checking.

p. The System should be able to easily design, create and print an assortment of typical labels for all Modules. Label formats vary, ex:

i. **Cataloging**

a. Book spine: 1x1 ½ in.

b. Children's EASY: 1x1 ¼ in.

c. DVD spine: 1 ¾ x ½ in.

d. DVD/VHS/Kits Content/Information: 2 5/8 x 1 ¼ in.

ii. **Social Sciences/Government Docs**

a. Docs/Hold ID: 1x3 in.

iii. **Books-By-Mail**

a. Packing List/Mailing label: 8 ½ x 11in. shipping label sheet

iv. **Homebound**

a. Mailing labels: 1 x 4 on 8 ½ x 11 in. sheets

2.5.1.1.3 Simplicity

a. The System should provide user-friendly, self-explanatory screens across all Modules. In addition, there should be a context-sensitive help function that is easy to use and easy to find.

b. The System should allow staff to easily toggle between all Modules and staff functions with a minimal number of steps.

c. The System should allow for easy accessibility between Modules, ex: from Cataloging/Authority to Acquisitions, Serials, Circulation, Holds/ILL, etc.

d. The System should allow for easy accessibility from all Modules to all bibliographic and authority records, items, acquisitions, check-in, circulation records, etc.

e. The Library would like a System that displays results on views allowing real-time editing of the displayed data so that staff do not need to perform

additional searches or visit additional screens to correct or adjust the data.

f. Authorized staff should be able to make bibliographic and item record updates in real time across Modules.

g. The Library has numerous locations and staff frequently work at multiple sites during the work week. Therefore, it is preferable that staff login not be tied to location.

h. All transactions, by default, should be based on the physical location of the computer at which the transaction is performed.

i. Staff should be able to change the location of a computer to a location other than the physical location, as necessary.

j. Regardless of location, the System should capture and display the login ID of the last staff member who changed or updated any record, ex: patron, item, etc.

k. The System should be able to search all types of records, ex: patron, bibliographic, acquisitions, etc, in a variety of ways.

l. The System should be able to perform advanced searching by combining multiple fields from different tables, ex: vendor name and order date.

m. The System should be able to search fields based on selected match criteria, ex: for the whole field, any part of the field, or start of the field.

n. Authorized staff should be able to perform group/batch changes.

o. The System should be able to support a free form note field, of at least 1,024 characters, for all types of records as necessary.

p. The System should ignore leading articles “a,” “an,” “the,” and their foreign equivalents in titles, when sorting.

2.5.1.2 OPAC/Portal (English, Spanish, and French)

a. The nature of the OPAC is changing. The Library is seeking an OPAC that is innovative, easily customizable, and that utilizes an updated interface, as well as Web 2.0 functions.

The OPAC should be able to integrate with the Library's web portal and contain features that will empower its users to access the Library's resources using a single search tool.

b. The OPAC should be the Library's/community's best search engine.

c. Federated searching, relevancy ranking, faceted navigation, "Did you mean?" popularity searching, cloud tags, clustering of search results, user reviews, and a rapid, comprehensive search environment are highly desirable.

d. The OPAC should use industry standard Web browsers and Windows conventions.

e. The OPAC should provide real-time access and display of all current data in the Library's bibliographic, authority, and item records.

f. The OPAC should also provide real-time access to the circulation status of all holdings and patron records.

g. The OPAC should operate in complete synchronization with all other ILS Modules.

h. The OPAC should provide guided navigation, allowing users to refine their search results.

i. The results list should display materials in different formats, ex: books, CD, or DVD.

j. The OPAC search engine should not only search the Library's catalog, but the attached third-party enriched content for results as well.

k. A single search should access multiple resources, including databases and web-based streaming media, and allow users to select which resources to search if desired.

l. When searching the Library-subscribed databases, patrons should have the option of either selecting specific databases or searching them all at once.

m. The OPAC should also automatically display results based on Library-defined relevancy ranking. Faceted navigation should be displayed to allow OPAC users to narrow or broaden their search results based on Library-defined fields.

n. The display of the search screen, faceted navigation, and search results should be customizable by the Library.

o. The Library desires an OPAC that is easily accessible to computer users of varying skill levels, ranging from the novice to the expert.

p. Graphics, help screens, icons, symbols, home pages, or introductory screens should be appropriate for the intended audience.

q. The OPAC should also provide an interface/overlay, customized by the Library, for children.

r. The OPAC should support multiple language interfaces for screen display and help screens, and should allow users to toggle between languages without losing their searches or search results. Besides English, Spanish and Canadian-French are the two languages critical to the Library. The Library would like to be able to adapt the Spanish and Canadian-French interfaces.

s. The Library should be able to easily define all record display screens to suit its needs and preferences, including the selection, order, and captions of displayed fields.

t. The OPAC should be able to display enhanced content, including, but not limited to: book jacket/cover art images; reviews; author biographies; table of contents; summaries, excerpts of media track and chapter content; etc. This enriched content should be displayed for all media types, as well as books. Although SirsiDynix currently provides enriched content through Syndetic Solutions, the Library has no preference as to what third-party product is used for enriched content

u. The OPAC should allow authenticated users to access their accounts to renew items; to cancel, place or edit holds; to update contact information; to view holds and financial information; and to create and edit bibliographies.

v. The Library is interested in an OPAC that offers RSS feeds to its users.

w. This feature would allow patrons to subscribe to receive updates on a variety of types of information, ex: new titles added to the collection within the users' interests or Library programming news.

x. The Library prefers a System that allows patrons to access the OPAC from Personal Digital Assistants (PDAs) or cellular phones. The OPAC should be developed utilizing industry standards for security, accessibility, and design which includes Wide Area Local Area Network Authentication and Privacy Infrastructure (WAPI), Wired Equivalent Privacy (WEP), and Wireless Application Protocol (WAP).

y. The Library is willing to accept an overlay product to achieve desired functionality in the OPAC. The preference is for a Vendor who currently has all of this functionality in the OPAC or will within the time frame of any contract that issues as a result of this RFP.

z. The Library would also like the OPAC to include web-based payment options. The Vendor should be able to implement an online payment solution, whether at initial project implementation phase or at a later date, that meets the County's standards, as specified in Appendix L: Electronic Payment Requirements.

2.5.1.3 Staff Searching

Staff should be able to search the Library's Catalog for materials in an efficient and effective manner. The Staff Searching Module should have the same search features as the OPAC. Staff should also be able to view supplementary information not available in the OPAC, ex: holdings of closed branches, bibliographic records with no holdings, and item history. In addition to searching the Library catalog, the Staff Searching Module should provide the option of including paid electronic resources and Internet sites available in the OPAC. Staff should be able to select from a variety of individual record and summary display formats, ex: brief, long, or Machine Readable Cataloging (MARC). The staff Searching Module should offer the ability to adapt screens and refine, limit, and expand searches.

2.5.1.4 Circulation and Back-up

a. The Circulation Module controls not only the circulation of materials by customers and staff, but also the building and maintenance of the patron database for over 800,000 library customers. This includes all transactions such as checkouts (charges), requests/holds, renewals, checkins (discharges), overdues, fines, payments, notices, etc.

b. The System should support existing Library Circulation Policy (see Appendix M: Library Circulation Policy) such as different borrowing privileges for patron categories, different loan periods for different types of materials, limitation of privileges based on financial obligations, etc.

c. The System should also ensure that staff is made aware of any issues that may affect a patron's ability to borrow.

d. Much of the activity on a patron's record can involve financial issues. The System should be able to retain information of each patron's financial history in an easily retrievable manner with no risk of the data being deleted, and also have the ability to archive data that is rarely needed, ex: financial information more than five years old.

e. There should be a method that is resident in the System for purging inactive patron records. The parameters should be easily definable and not require knowledge of any special programming language.

f. The Library typically has over 45,000 active patron requests for materials. It is critical that searching for the requested items does not overburden the staff at any one branch. The System should have a load-sharing mechanism for producing "pull lists" of requested materials at each branch.

g. The Library needs an Offline Circulation method that permits, in the event of a server or network failure, the ability to checkout or checkin materials in offline mode.

h. The Offline Circulation should automatically upload transactions to Circulation, at the moment Circulation is back on-line and available.

i. Transactions should be posted to the database for all the branches based on date and time.

j. The Library prefers a System that will provide complete flexibility to adapt and configure printed receipts.

k. The System should allow for customization of different sections of the receipt (header, body, footer, logo), different field types, labels, columns, maximum character lengths, justifications left, center or right; different tables, and font types/colors.

2.5.1.5 Cataloging/Authority

2.5.1.5.1 Bibliographic Database:

a. The Cataloging/Authority Control Module should support and accommodate the following standards: MARC21 Formats for Bibliographic, Authority, and Holdings Data; OCLC MARC format; Z39.50 NISO/ANSI Standard; and Bath Profile. The Module should have the capacity to provide full-MARC records without limit to the record length, the number of fields, the

length of the fields, or the number of iterations of repeatable fields.

b. The System should support Functional Requirements for Bibliographic Records (FRBR) standards, allowing the Library to consolidate multiple versions of a title (formats and/or editions) into one bibliographic record, manage separate records for related manifestations at the global level and consolidate them for display at the local level. The System should also support future cataloging developments such as Resource Description and Access (RDA) and xISBN service from OCLC.

c. The Module should be designed to provide reliable access to all records of bibliographic holdings, licensed electronic resources, selected web resources, and digitized audio and image collections. The Module should allow for keyword, browse, numeric, phrase string, bibliographic call numbers, 10- and 13-digit ISBNs, and Boolean indexing on specified MARC tags.

d. The Module should have the capability to display all data, without alteration, in every field upon retrieval of a record in Cataloging. Staff should be able to create, edit and delete records, and the changes should be available for both staff and patron use in real-time. The Module should support the American Library Association (ALA) character set and non-Roman alphabets currently available. The Module should also be able to convert ALA character set and non-Roman alphabets to Unicode. The Module needs to fully support Unicode.

2.5.1.5.2 Authority Control

a. The Module should support multiple authority files in full-MARC format, including but not limited to Library of Congress Subject Headings (LCSH), Library of Congress Children's Subject Headings, and Spanish Bilindex Headings.

b. The System should allow automatic linking between bibliographic and authority records in Cataloging. The System should accept and modify corrected authority files from a vendor who provides authority control services such as Library Technologies, Inc. (LTI), OCLC, etc. These files should be checked for matches and overlay existing records as they are processed. The Module should also have the capability of locally creating, modifying, or deleting authority records.

c. All blind references, including “See” and “See Also,” should be displayed only to authorized staff members.

2.5.1.5.3 Importing, Exporting, and Loading of Records:

a. The Module should be capable of loading bibliographic, authority and acquisitions records from multiple vendors. It should also be configurable by local staff to accommodate records from new vendors.

b. The loader should import records from files that contain both single records or groups of several records. When importing data from external sources, the System should not strip any fields or characters, unless the Library specifically chooses to do so. The loader should create item information from MARC tags in the bibliographic record containing holdings information, ex: 949 tag. It should also load bibliographic records that do not contain MARC tags with holdings. The loader should identify and filter out duplicate records in the loading process.

c. The Library needs to load authority records into the Cataloging Module by importing files. The default loading of authority records should be based on Leader Byte-05 (Record status) indicated on the incoming record. The Module should match Library of Congress or other national standard authority records against the local file in order to add, change, or delete authorized headings or entries. The Module should match incoming authority records against existing authority records to identify duplication. The Module should overwrite existing authority

records with new records when they match, but retain existing links with bibliographic records.

d. The Module should also support exporting files of bibliographic records.

2.5.1.5.4 Item Records:

a. The Library uses Codabar barcodes for items in the collection. The System should work with 14-digit Codabar barcodes.

b. Monographic sets, series, and serials should include a holdings record capable of including a summary format in addition to volume-specific and copy-specific data.

c. The item record for materials that are not serials should describe a specific copy.

d. The Module should provide a summary display of item records when several are linked to a single bibliographic record.

e. The Module should allow for the transfer of holdings information, either individually or in groups, from one bibliographic record to another.

f. The Module should be able to generate and print various types of spine labels for a variety of media types.

2.5.1.5.5 Call Numbers:

a. The Module should support multiple classification schemes, including Dewey Decimal, Library of Congress, and SuDocs.

b. The System should also support free-text call numbers as well as multiple call numbers assigned to the same bibliographic record.

c. When multiple call numbers are assigned to the same bibliographic record, the item record should display the call number associated with each individual copy.

d. The Module should be capable of sorting numerical elements in call numbers as integers or decimals, as appropriate.

2.5.1.5.6 Electronic Resources:

a. The Module should support URLs and other future technologies as they are developed, ex: Uniform Resource Names (URNs) and Uniform Resource Identifier (URIs).

b. The Module should support the 856 tag, Library-defined tags, and future tags as defined for electronic location and access information.

2.5.1.5.7 Database Maintenance:

a. Staff should have a full-screen edit interface that displays the MARC record with all fixed fields, tags, indicators, subfields, text, and diacritics.

b. An alternative input interface, with input shortcuts and natural language displays, should be available to allow staff to input without the knowledge of MARC.

c. The Module should support the following editing capabilities: manual addition, correction, and deletion of bibliographic records; descriptive menus of available options for each MARC tag; language sensitive spell checker; full screen editing and the ability to view or edit multiple records at one time; ability to easily create diacritics and special characters; ability to cut, copy, and paste between records; ability to define macros; ability to create and store templates that can be used to create new records; ability to validate authority records.

2.5.1.6 Acquisitions:

The Acquisitions module is critical for the Library's operations.

a. The System should support an extensive number of orders, invoices, fund accounts, vendor records, vendor accounts, selection lists, claims and other acquisitions transactions, to accommodate the Library's current and future activities.

b. The System should allow the Library to track multiple funds, including encumbered, expended and available amounts, in real-time.

c. The Library should be able to see a hierarchy which displays fund information, categorized and grouped as the Library specifies.

d. The System should allow the Library to define the dates of its fiscal year and should allow multiple fiscal years to be open and active simultaneously.

e. The System should also allow creation and tracking of funds that are not associated with a fiscal year.

f. Encumbered amounts and open orders should be transferable from one fiscal year to another.

g. The System should be able to support decentralized selecting of materials.

h. The Library needs to create selection lists in a variety of ways.

i. Multiple users at multiple locations need to be able to select titles from the lists, but it is critical that each user is limited to his/her own location(s) and fund account(s).

j. After a purchase order is created, the System should provide the Library with multiple ordering methods, including via electronic data interchange (EDI).

k. The System should be able to accept electronic order confirmations.

l. It is critical that the Library knows which items have been received in all locations when invoices are entered for payment. Since most items are drop-shipped by vendors directly to branches, the Library relies upon the System as a means to determine that all materials on an invoice have been received and the invoices can be paid. The Library prefers that when an item is checked in using Circulation, it is automatically marked received in Acquisitions. This allows staff to easily see which items on a purchase order have been received without looking up each title. This is currently being achieved through third-party software. Because the Library strongly prefers not to give public service staff access to Acquisitions, the Library prefers a Vendor who is willing to perform custom programming to achieve this, if it is not already in the software.

m. The System should generate a list of items that have not been received after a Library-defined amount of time and produce claims to be transmitted to vendors.

n. The System should also include electronic invoicing capabilities, in which vendor-transmitted files are uploaded

into the System, linking to the corresponding purchase order.

o. Just as with manually entered invoices, staff should be able to determine that all items have been received before approving the invoice for payment.

2.5.1. 7 Serials

The Library currently subscribes to serial publications at all its locations.

a. The System should provide a means of: predicting when issues are expected; allowing staff to check in their own location's issues; displaying serials holdings for both the staff and the public; and providing information about issues not received so they may be claimed from the vendor.

b. The System should allow serials staff to create, modify and delete all serials records, including the publication patterns that predict when issues are expected by the System.

c. Ideally, serials staff should be able to import these patterns, either from an existing database by title or ISSN, or by some other means, to minimize effort and repetition.

d. Serials staff should have the ability to access serials subscriptions records for all locations, advance predicted issues, and edit any checkin, claims, or holdings information.

e. The System should allow branch and department staff to access listings of expected issues of each subscription, check the issues in as they arrive, and have the holdings information in the Library catalog automatically update in real-time.

f. The System should allow a variety of search methods to locate serials, including UPC.

g. Library branches and departments should be able to check in the serials subscribed to by their own location; edit and update their location's holdings summaries; and claim their own missing issues. They should not be able to access the subscriptions of any other locations or modify serials records or publication patterns.

h. The System should have a set number of expected issues be available to staff automatically as issues are checked in, but should prevent staff from advancing predicted issues.

i. The System should clearly display all checked in or manually entered serials holdings, preferably in a summarized form,

and automatically update this information as new issues are checked in. The System should keep complete checkin history files of all issues received and automatically update them.

j. The Library is looking for a System that can provide discard lists based on retention settings for subscription(s) at each location.

k. The System should set time limits for expecting issues, after which they can be claimed.

l. The System should produce lists of missing, late, and damaged issues in order to claim them from vendors or publishers.

m. Staff should be able to review the lists, which can be sorted and printed, before generating claims, and be able to make corrections if necessary.

n. The System should support follow-up claims and claim alerts if a specific issue fails to arrive.

o. The System should be able to retain information about claims transactions for missing or damaged issues.

2.5.1.8 Homebound/Borrow-by-Mail

2.5.1.8.1 Homebound

a. The System should support the Library's existing ability to provide library service to homebound patrons. Enhancements are welcomed, but minimally the System should enable staff to continue to provide individualized Readers' Advisory service in an efficient manner, providing a mechanism for the easy selection, delivery and return of materials.

b. The Homebound Module should operate in conjunction with Circulation for the branches and bookmobiles in real time performing all the typical circulation functions: check in; checkout; search for, place and fill customer requests; enter and maintain patron records; blocks; acquisitions; inventory, etc.

c. The Homebound Module should enable staff to provide individualized Readers' Advisory service as well as handle all specific patron requests.

d. The materials selection process should be based on customer specified preferences including, but not limited

to: the number of items desired; material formats; languages; preferred or excluded interests, criteria and authors.

e. To assist with Readers' Advisory selections, the Homebound Module should provide the ability to view, from the bibliographic entry, the list of customers currently waiting for a title and a list of registered Homebound customers who were already sent the title and the rating they assigned it.

f. At time of checkout the Homebound Module should be able to alert staff if an item is already on the customer reading history and give staff the option to abort the transaction or continue and allow the duplication when requested.

g. The Homebound Module should generate, at time of checkout: large print date due (packing) slips with a place for patrons to enter ratings for each item and any comments, and corresponding mailing labels.

h. The Homebound Module should keep a reading history, or log, of all items loaned to each customer with the ability to record and display customer ratings on items borrowed.

i. The reading history display, accessible to authorized staff, should be sortable by author, title, checkout date, call number, customer rating number, or bibliographic record number and should ignore leading articles (a, an, the), or their foreign equivalents, in title.

j. Authorized staff should be able to print the reading history of individual or multiple customers from the reading history display screen or from a report writing tool.

k. The Homebound Module should provide a daily report or list of customers due for service. The current module compiles this report based on the patron's frequency of service preference, ex: daily, once a week, once a month, and calculates from the patron's last checkout date. This report may be generated by specific customer; by assigned customer group; or by date, for one day or multiple days to accommodate weekends, holidays, etc. This report, one page per patron, contains all information from the customer record to assist staff in Readers' Advisory selections and is also kept with

customer items on “checkout” truck to identify which items are to be sent to which customer.

l. At check in, the Homebound Module should provide a mechanism for entering the customer rating, which will appear on the patron’s history.

2.5.1.8.2 Borrow-By-Mail

Borrow-By-Mail refers to the Library’s convenient request mailing service currently being offered to all customers for a minimal fee. Currently, Borrow-By-Mail is centralized.

a. The proposed Module should be capable of being operated as either a centralized or decentralized service in case the Library wishes to decentralize at a future date.

b. The Module should have the ability to limit access to this service by specified customer types.

c. The Library should be able to assess the amount of the fee charged or to offer the service for free.

d. From the customer perspective, Borrow-By-Mail should make the process of requesting an item to be mailed simple and easy to use.

e. When customers select the option to have requests mailed to them, they should be able to enter a suspend date in case they go out of town and a cancellation date.

f. The Module should not accept requests from customers with blocks that deem their account “not in good standing” and should alert them to contact the Library.

g. From their account screen, the customer should be able to see the following information about any Borrow-By-Mail request: status, date checked out, date mailed if different, and delivery confirmation tracking number.

h. Customers should be able to pay in advance or have a credit balance to cover future Borrow-By-Mail. Customers should have the ability to select the option of being notified by e-mail, mail or telephone regarding any communications dealing with Borrow-By-Mail.

i. From the staff perspective, Borrow-By-Mail should be accessible as part of Circulation.

j. The Module should identify an item as a Borrow-By-Mail request at checkin.

k. At checkout, items should only need to be scanned once to automatically place a fee block or charge on the customer record and generate mailing labels and date due slips.

l. The System should have the ability to identify and record a delivery confirmation tracking number assigned to the item.

m. After checkout the Module should automatically generate a packing slip which includes a standardized message or instructions and all pertinent information for the specific transaction.

n. The Module should have a procedure for handling items that cannot be issued to the customer for various reasons, ex: due to financial or address blocks. In addition, the Module should automatically notify customers by e-mail, mail, or telephone of issues that need to be handled before items may be sent or, if processed, the date the item has been checked out and mailed, and the delivery confirmation tracking number.

o. The Module should have an automatic way to handle requests that had to be deferred, ex: replaced in the queue, suspended, or canceled.

p. From the management perspective, Borrow-By-Mail should be capable of generating reports and screen displays that include, but are not limited to, all items checked out in Borrow-By-Mail by location and date or date range and all outstanding (unfilled) Borrow-By-Mail requests.

2.5.1.9 Media Scheduling

a. The Library has a variety of resources that need to be scheduled for specific dates – films, audio/video equipment and meeting rooms. Films and equipment often need to be sent to other locations for programs.

b. The Library needs the Module to control the flow of these assets, allowing staff to request their use, and alerting staff, who need to make them available within specific time spans.

c. The System should be integrated with the Circulation Module and make use of the same databases – patron and item records – to find and reserve assets.

d. All staff should be able to view the availability of assets, such as meeting rooms, and make requests.

e. The dates on requests should allow for travel time before and after the needed date, when the requesting location is different from the owning one.

f. The status of any request should be current and accurate.

2.5.1.10 Inventory

The Library would like an Inventory Module that could be used live with immediate feedback. There should be a way to break large collections, such as nonfiction, into smaller groups for inventory purposes. This would allow staff to perform a complete inventory cycle within a limited time frame. The Library would like a dynamic Module that corrects anomalies as it identifies them, when appropriate, and provides an "exceptions report" for problems that have not been corrected.

2.5.1.11 Statistics Gathering/Report Writing

The Library needs an easy-to-use, comprehensive, flexible, reliable Statistics Gathering/Report Writing Module for gathering statistics and drafting reports in real time.

a. These statistics and reports should cover all aspects of the System.

b. Non-Automated Services staff needs to be able to generate reports, without assistance from Automated Services staff, without any knowledge of a formal query language, and without slowing down System response time. These reports should be standard, but customizable by the Library, and should include all reports needed to properly utilize each Module.

c. There should also be a custom report writer, such as standard SQL or Crystal Reports, for Automated Services staff to generate other management reports which are not necessarily standard within the System.

d. The Library should be able to select input criteria or data elements from all fields in the patron, bibliographic, and item records and all cash register and transaction data from all Modules.

e. The Library should also be able to select output fields and format.

f. The System should include control options to allow Administrators to protect System resources and response times.

g. Reports needed by the Library include, but are not limited to:
   i. Customer usage and trends;
   ii. Item usage and trends;

iii. Demographic data about customers;
iv. Acquisition vendor trend analysis;
v. Network trend analysis;
vi. Capacity planning and utilization statistics.

h. For each report, the Library would also like the ability to:
i. Save report parameters;
ii. Print;
iii. Export and save to Microsoft Excel, Microsoft Word, Microsoft PowerPoint or Adobe PDF;
iv. Save as a webpage;
v. E-mail to a select set of staff;
vi. Export through the use of delimited files;
vii. Run at a specific time or on a specific schedule;
viii. Pre-program and schedule report(s) to run and be e-mailed.

i. The Library prefers an enterprise license to the Report Writing Module so that all staff have access.

j. The report writing tool should integrate with all Modules of the System.

k. The Library should be provided with the table structure, informational guides or e-guides, including Application Protocol Interfaces (APIs), of the complete System database which will allow the Library to easily create reports based on the data residing in the database.

l. All reports should be fully backed-up.

m. Following are examples of reports that are currently being used with Horizon/WebReporter. These reports provide crucial information to support daily operations. The proposed System should have a mechanism for providing the following information (sample copies are shown on Appendix N: Reports).

2.5.1.11.1 Circulation

The major reports needed by Circulation staff deal with patron activity, financial matters, requests/holds, collection maintenance and development.

a. The Statistics report **[CircRpt 1]** provide the statistics of circulation activity within each branch on a monthly basis. The Library prefers that Year-

to-Date statistics and previous year comparisons be available as well.

b. Intrabranch lending activity **[CircRpt 2]** reports are run as needed, showing monthly and cumulative statistics.

c. Monitoring payment activity is extremely important. Each branch runs a daily report of payments and waives **[CircRpt 3]**. This report is critical. The Library is particularly interested in showing the identity of the staff member performing each transaction, and any explanatory notes.

d. Requests/holds need to be fully tracked and require a range of reports. The "pull list" **[CircRpt 4]** tells staff what items to search for in order to fill requests.

e. Other reports track holds that have been filled: Items on the Hold Shelf **[CircRpt 5].**

f. Expired Holds that need to be pulled from the shelf **[CircRpt 6]**.

g. Reports on outstanding holds **[CircRpt 7, 8, 9]** are used for follow up and for collection development purposes. When holds are checked in at a pickup location, the wrappers for the items need to be created.

h. Currently, the Library is using a report to pull the necessary data for printing the wrappers **[CircRpt 10]**.

i. Collection maintenance includes a variety of reports. The most important is a report based on item status such as "trace," "claims return," "transit," etc. **[CircRpt 11]** so that staff can clear unresolved issues.

j. Transit Reports sorted by the "from" or "to" location are used to search for transit items not checked in within a reasonable time period. A "Dusty Cover Report" **[CircRpt 12]** alerts staff to material that is not circulating.

k. There are other reports that give staff information about the collections which help them to make collection development decisions, ex: "Collection Age Report" **[CircRpt 13],** "Items by Collection

Code" **[CircRpt 14]**, and "Items by Collection and Status" **[CircRpt 15]**.

2.5.1.11.2 Cataloging Reports:

a. Library staff needs to be able to generate reports on bibliographic records with zero copies attached and within a certain time period. **[CatRpt 1, 2, 3]**

b. Library staff needs to review the fast adds (on the fly) brief records in the bibliographic database within a time period. **[CatRpt 4]**

c. Library staff needs to be able to generate reports on Authority records which need to be added and/or corrected in System. **[CatRpt 5]**

d. Library staff should be able to generate statistics by time period from the following categories. **[CatRpt 6]**

   i. bibliographic records added
   ii. bibliographic records deleted
   iii. bibliographic records edited
   iv. bibliographic records without holdings
   v. authority records added
   vi. total number of bibliographic records, authority records and item/holding records

2.5.1.11.3 Acquisitions

a. Library staff needs to be able to check encumbrances, expenditures and available balances in all fund accounts at any time **[AcqRpt 1, 2, 3]**.

b. Library staff needs to be able to see titles they have selected in each selection list and fund accounts used before the list has been ordered **[AcqRpt 4]**.

c. Library staff needs to track titles ordered and amounts encumbered and expended for each fund account **[AcqRpt 5, 6, 7, 8, 9]**.

d. Information about cancelled materials should be available as well **[AcqRpt 10]**.

e. Acquisitions staff needs to be able to determine which invoices are eligible for approval for payment, that is, all items on the invoice have been received by the Library **[AcqRpt 11]**.

f. The Library needs a means of identifying instances in which incorrect fund accounts have been used **[AcqRpt 12]**.

g. Collection Development staff needs a method to identify titles for which the ratio of requests to the number of copies warrants the purchase of additional items **[AcqRpt 13]**.

2.5.1.11.4Serials

a. Library staff needs to be able to see a listing of all titles subscribed to by each location, with holdings information **[SerRpt 1, 2]**.

b. They need to be able to identify serials issues that haven't been received within an expected time in order to claim them from the vendor **[SerRpt 3]**.

2.5.1.11.5Homebound

a. The Homebound Module should be capable of generating reports on demand by date range, customer ID, or assigned customer group that provide staff with a list of customers and when they are due for service **[CNRpt1].**

b. A detailed single page report for each customer due for service **[CNRpt2].**

c. A report containing the customer's reading history or log **[CNRpt3].**

d. A Hold Alert report **[CNRpt4]**.

2.5.1.11.6 Borrow-By-Mail:

a. The Borrow-By-Mail Module currently provides two reports: the Mailing Log **[BBMRpt1]** or record of items sent each day and an Error Report **[BBMRpt2]** which displays information on items that could not be sent due to blocks on customer accounts.

b. The Library would like the new ILS to be capable of generating reports that will help staff better evaluate the efficiency and timeliness of the service, including reports that show:

   i. Statistical information by date and/or location for the number of checkouts; number of blocked checkouts; number of request cancellations; number of items checked in; fees generated; and fees collected.

   ii. Pertinent information in a format that would enable the Library to track a request from date requested, to date set to transit, to date checked out to customer.

   iii. All outstanding (unfilled) Borrow-By-Mail requests with customer name and ID number; item author, title, call number and Bib number; date requested and queue position so staff could easily determine if there were any snags in the fulfillment of requests.

2.5.1.12 Patron and Other Notification

The Library prefers a System that provides complete flexibility to adapt and configure data mailers, e-mail, and IVR settings. System tools provided by the Vendor should monitor the data mailer, e-mail and IVR processes.

2.5.1.12.1 Data Mailers

The System should provide Automated Services staff an easy way to configure data mailer parameters for the various notice types:

a. Auto notice: This is a system-generated notice informing patrons of holds and/or overdue materials.

b. Reminder notice: This is a follow-up notice to the auto notice.

c. Billing notice: This is a bill sent to patrons for replacement charges or late fines exceeding the Library's limit.

2.5.1.12.2E-mails

a. The Library would like to send notices by e-mail, through an SMTP e-mail server.

b. The System should use SMTP host, SMTP port, SMTP user ID, SMTP password, “from” e-mail address, “reply to” e-mail, “bcc” e-mail address and a subject field.

c. The Library wants ILS e-mail to be sent from a dedicated ILS e-mail server.

2.5.1.12.3Interactive Voice Response (IVR)

a. The Library prefers a Vendor that provides a sophisticated, Windows-based, IVR Module that integrates with circulation.

b. The Library would prefer the IVR Module to use a T1 voice circuit.

c. The IVR Module should have the capability of recording and delivering customizable messages in at least English, Spanish, and Canadian-French, and should utilize the patron’s account language preference.

d. The Module should include dial-out capability that automatically notifies patrons of holds availability, overdue items and fines. The Module should allow the Library to set the schedule for such notification.

e. It should also confirm that calls have been properly delivered and reflect that information in the patrons’ records.

f. The Module should include dial-in capability to allow patrons to access their accounts and perform many circulation tasks for themselves.

g. The Module should provide a means for gathering call statistics and generating reports, and a method for alerting staff to any problems or errors.

2.5.1.12.4Text Messaging

a. The Library would like to begin using text messaging to allow patrons to send a text message for questions to a specific text address associated with the Library.

b. Library staff should be able to receive the text messages on a Library workstation and respond to the question. Proposers should include any software necessary to support this function.

c. Patrons should be able to subscribe/unsubscribe to a text messaging service that will include Library circulation or programming information.

d. This service should allow the Library to send a message notifying the patron of items to be picked up or to be overdue within a set amount of days, as well as other types of information.

2.5.1.12.5 Bulk E-mail Services

a. The Library would also like to be able to send bulk e-mails at selected times to various groups associated with the Library.

b. These e-mails may be announcements, PDFs, Library newsletters or other information.

c. The System should allow patrons to subscribe/unsubscribe to these services through the Library's web portal.

d. The System should provide administrative tools for Library staff to manage scheduling, e-mail lists, and content.

2.5.1.13 Collection Agency/Delinquent Account Tracking

The Library currently uses SirsiDynix Debt Collect software for selecting delinquent patron accounts to be sent to Unique Management Services, Inc. for collection. The software allows tracking of subsequent activity on those accounts. The Library is looking to replace the functionalilty of Debt Collect so that the Library can maintain the relationship with Unique Management Services, Inc. Proposers are encouraged to partner with Unique Management Services to ensure that this can be accomplished. The software, that replaces Debt Collect, should allow the Library to define patron type and amount due thresholds.

2.5.2 INTEROPERABILITY WITH EXISTING APPLICATIONS

The System should be able to interface seamlessly with the following applications using standard protocols such as SIP, SIP II, or NCIP. As patrons use these applications, their records should reflect this use so that records of patrons who do not check out materials do not get purged when the Library purges inactive cards.

2.5.2.1 3M Self-Check

The Library utilizes 3M Self-Check V-Series versions 3.50.118 and 3.51.133. The Library currently has a total of 130 3M V Series machines with an option to implement up to 200 machines. Most branches have 2 to 6 machines installed (see Appendix O: Self-Check Machines). The self-check machines are either hardwired or connected wirelessly to the Library's network.

a. The proposed System should be able to work seamlessly with the 3M machines on the current and any future versions of the proposed ILS and 3M Self-Check software.

b. Use of the 3M Self-Check machines should be reflected in the patron record.

c. The proposed System needs to be able to pass messages without any loss of functionality. The following messages are currently being used:

Block Patron	End Patron Session
Checkin	Fee Paid
Checkout	Patron Information
Item Information Request	Renew All
Patron Status Request	Send Again
Renew Request	SC Status

d. The Library is interested in any additional messages that could be sent through the proposed System, ex: alert patrons before their Library cards expire.

e. It is highly desirable that the System be able to provide statistics on the usage (checkout, renewal, checkin) of these machines and that this report be obtained centrally without having to query each machine separately and without a staff person needing to be present to run the report. Proposers are encouraged to work with 3M to ensure that this can be accomplished. The statistics report should provide usage

statistics by location hourly, daily, weekly, monthly and by fiscal year as set by the Library. These should be able to be run on demand or on a scheduled basis.

f. Currently the Library is not utilizing the checkin feature. However, the new System should operate with checkin if the Library chooses to initiate this function.

g. The Proposal should include all necessary SIP licenses required for the 3M Self-Check V-Series machines to operate and communicate with the System.

h. The Library is in the process of working with 3M to utilize their Fines and Fees Module so that patrons can pay monies owed to the Library via credit card. This Module should integrate with the County's Payment Manager. The proposed System should operate with this new 3M functionality when available.

i. In addition to working with 3M, the Proposer may also provide any alternative self-check solution that is centrally managed and provides statistics for each location centrally so that staff do not need to touch every machine physically or remotely. This would be an option that may or may not be purchased by the Library during the course of any contract that is a result of this RFP and will not be included in the price scoring used by the Evaluation/Selection Committee.

2.5.2.2 Envisionware - PC Reservation, Time and Print Management

The Library utilizes Envisionware Software for computer reservations, time and print management, which is deployed via a customized SIP II Protocol. The software and the hardware for Envisionware are listed in Appendix P: Envisionware Software and Hardware. The current solution provides a direct link to the Library's ILS borrower database. This eliminates the need for the Library to maintain a secondary or separate borrower database.

a. The proposed System should be able to work with this software both on machines that are hardwired and on machines that are connected wirelessly

b. The Library is currently working with SirsiDynix to install Envisionware's Fines and Fees Module using the County's Payment Manager for credit card processing. Envisionware hardware, software, and services were purchased as part of the SirsiDynix contract. The Vendor should work with Envisionware in order to support the Library's requirements for

PC Reservation, Time and Print Management and Fines and Fees. It is critical that the Vendor be able to provide maintenance services for the Envisionware hardware and software, as the Library has no contract with Envisionware.

c. The Library prefers to leverage existing investments in Jamex Coin/Bill Acceptors model numbers 609-5XX and 6557JPC. The Library's print cost management solution relies on an Envisionware Authentication and Accounting Module (AAM) to create a repository of fund accounts linked to the patrons' barcodes. The user accounts reside in the AAM database, and currency is accepted at any one of the Library's Coin/Bill Acceptors attached to a Print Release Station. The selected Vendor should provide maintenance support on all current and future coin boxes utilized by the Library and be able to sell additional Coin/Bill Acceptors that work with Envisionware.

2.5.2.3 Digital Media and E-Books

The Library currently offers downloadable audiobooks, videos, and e-books from OverDrive and Recorded Books.

a. The System should offer a method, such as SIP II, or user authentication, that will allow these companies to validate a patron's full library card number, preventing blocked patrons from using these products.

b. The System should include bibliographic records for titles, with links to the checkout site and icons to indicate electronic format. A desired feature would be to have search capabilities for these services as part of a federated search.

2.5.2.4 Digital Archiving

The Library owns a collection of over 17,000 photographs by photojournalist Gleason Waite Romer depicting South Florida from 1925 to the 1950's. Over a thousand of these photographs have been scanned and cataloged and there is an on-going project to digitize the entire historical archive.

The Library maintains a special collection of over 2,200 works of art. This collection includes works on paper, photographs, artists' books, and small sculptures, with a focus on African-American, Latino, and Miami artists. Additionally, the Vasari Project is an archive that documents the development of the visual arts in Miami-Dade County since 1945. It contains correspondence, press clippings, photographs, oral histories and other materials. The

public may access all of these collections for research and reference.

a. The Library prefers a Vendor who offers products and services aimed at assisting libraries in creating, managing, storing and accessing digital content. The Library is looking for products that offer seamless access and full-text searching for these digital archives through the Library's online catalog and the web.

b. To support the digital collections, the solution should offer a variety of standardized metadata.

2.5.2.5 Evanced Solutions- Calendar, Room Reservation, and Summer Reading Program

The Library is in the process of installing Evanced Solutions Events Calendar, for patrons and staff to register for programs and training sessions; Room Reservation Module, for managing meeting rooms at all branches; and the Summer Reading Program Module. These software packages and maintenance were purchased through the SirsiDynix contract. The Library has no contract with Evanced Solutions. The Vendor should be able to provide maintenance services for these products. Proposers are encouraged to partner with Evanced Solutions to accomplish this.

2.5.2.6 <u>NextReads from EBSCO</u>

NextReads is a service for sending monthly newsletters with book selections via e-mail. Book selections in the newsletters contain links to the Library's catalog.

a. The proposed ILS should allow NextReads (or any other service) to create direct links to the catalog for all books featured in the monthly newsletters.

2.5.3 ADDITIONAL FUNCTIONALITY/SERVICES

2.5.3.1 Electronic Payment Requirements

a. The Proposer should interface with Miami-Dade County's Payment Gateway for all payment processing, including Point of Sale (POS) systems.

b. For E-commerce applications that include checks and/or credit card transactions, the selected Vendor should be able to agree to be bound by the requirements and terms of the rules of all

applicable Card Associations, as amended from time to time, and be solely responsible for securing and maintaining confidentiality of card transactions processed by means of electronic commerce.

c. The selected Vendor should be in compliance with the requisites of the Payment Card Industry Data Security Standard and provide written attestation of compliance annually.

d. Miami-Dade County will provide two types of interfaces: a web service WSDL or an XML API, to facilitate interaction with the County's Payment Gateway. The Library prefers a System that has credit card authorization, debit card authorization and an integrated electronic payment feature. Credit cards are validated on entry to ensure the number entered is a valid credit card number. Electronic Payment Requirements need to meet the requirements in Appendix L: Electronic Payment Requirements.

e. The successful Proposer should have a flexible payment process in order to send payment transactions to the County's Custom Payment Gateway. See Appendix L: Electronic Payment Requirements for a sample of the web service WSDL code that will be utilized by the proposed System and the Payment Gateway.

f. The proposed System should send payment transaction information such as name, address, credit card information etc, via HTTPS to this web service.

g. The proposed System's Patron Payment service should collect payment information from the patron via the proposed System's web GUI and interface with the County's Payment Gateway in order to process the payment.

h. The proposed System should also be able to handle associated processing and error codes that are returned from the County's Payment Gateway. This is necessary in order to ensure that all transactions are handled correctly upon successful processing by the County's Custom Payment Gateway and posted to the proposed System's database.

i. The proposed System should manage all transactions that are returned by the web service as an error by prompting the patron to correct the errors or notifying the patron that an irrecoverable error has taken place and that he/she should contact support. Such errors may range from incorrect zip code and address to network problems that have prevented the transaction from successfully processing.

2.5.3.2 Cash Register/Point of Sale

Depending on cost, this functionality will be phased in, being installed first in those Branches with the highest money intake.

The average branch weekly money intake is listed in Appendix Q: Average Weekly Money.

a. It is highly desirable that the proposed System include full cash register/point of sale functionality integrated in real-time with the ILS so that monetary transactions only need to be entered once.
b. The System needs the ability to track both ILS monetary transactions and non-ILS transactions, such as photocopy money, sale of local pictures, etc.
c. The System should provide audits of money collection activity by operator, by workstation, by date, and by Branch.
d. The cash register should accept payment, with immediate validation, by credit cards, debit cards and checks.
e. The System should require authorized staff ID and password for all financial transactions.
f. On Form B-2: Hardware Price Proposal, Proposers should use a quantity of 30 cash registers.

2.5.3.3 Financial Integration

The Library is seeking a Vendor who is willing to work with the County to provide customization to export invoice data for integration with the County's general ledger application.

2.5.3.4 Disaster Recovery

Because the Library is located in a hurricane-prone area, the Library would like to have an automation disaster recovery plan in place. Currently, the Library stores backup data tapes at a secure offsite County facility. However, there is no plan in place for recovery of servers or telecommunications hardware.

a. The Library is looking for a cost-effective strategy that will allow the Library to recover from any disaster and provisions that will provide for full restoration of the entire ILS to include hardware, software and telecommunications. The Library will consider hot, warm, and cold site recovery plans. The Warm Site Recovery Plan, this could be Vendor-hosted, should be included on Form

B-8: Disaster Recovery Price Proposal and the costs of other disaster recovery plans should be included on Form B-11: Optional Software, Hardware, and Services. The optional plans will not be included in the price scoring used by the Evaluation/Selection Committee.

2.5.3.5 Handheld Circulation/Catalog/Inventory

The Library is interested in acquiring certified handheld devices that work with the ILS. The Library intends to use these handheld devices primarily for circulation, catalog searching, and conducting inventory; however, the devices should also be capable of accessing the Internet. The Library prefers that the handheld devices communicate wirelessly. The devices should be capable of storing enough data locally to provide offline services.

2.5.3.6 Secure Socket Layer

The Library prefers a System that is able to handle sensitive data such as patron information, patron authentication and credit card information through a Secure Socket Layer (SSL); however, non-sensitive information should not be secured. The Library prefers the Vendor to provide the Security Certificate that supports up to 128-bit encryption. The Library prefers that the Vendor offer training and support in managing security on the application.

2.5.3.7 Remote Patron Authentication (RPA)

a. The Library seeks a Remote Patron Authentication Module that will verify library card and PIN to authenticate users, both inside and outside the Library, before allowing access to the paid subscription databases to which the Library subscribes. (See Appendix R: Subscription Databases).
b. RPA should authenticate against the patron database, applying any Library-defined criteria, to allow access to authorized users and to indicate usage on the patron record.
c. RPA should provide statistics on the use of each database.

2.5.3.8 OpenURL Link Resolver/Electronic Research Management (ERM)

The Library subscribes to the databases listed in Appendix R: Subscription Databases, and receives many Government Documents in electronic serials format as well. The Library does not currently utilize OpenURL link resolver tools or an ERM

product. These functions are not a priority for the Library at this time, but they may become so during the life of any contract that results from this RFP. Costs for these items will not be included in the Evaluation/Selection Committee's price scoring.

2.5.3.9 URL Checker

The System should provide a tool for Library staff to use to check for broken or missing links in the bibliographic records and Library web pages. The links should be automatically updated, if possible, and a report generated that describes the updated and invalid links. The URL Checker should run on an automated schedule or when initiated by staff.

2.5.3.10 Bookmobiles/Kiosk

The Library currently operates four bookmobiles which provide service to 40 locations per vehicle per week.

a. Ideally, statistics for Bookmobiles should be available by stop and patrons could request holds for pickup at individual stops. However, because bookmobiles have a centrally stored collection from which they rotate materials on and off the vehicles, when an item from the bookmobile collection is checked in at a bookmobile stop, it should not go into "transit". Therefore, the Library prefers that each stop not be considered a location in the System.
b. Bookmobiles should operate in a live environment using a secure wireless VPN connection to communicate with the central site.
c. The same type of access used by the bookmobiles might also be used as a backup connection when, for a new branch, a permanent local area connection has not been established, or, in the case of an existing branch when the local area connection is experiencing an extended outage.
d. This type of connection might also be used for future kiosks.

2.5.3.11 Interlibrary Loan (ILL)

a. The ideal Interlibrary Loan (ILL) Module should be able to integrate both borrowing and lending functions within the MDPLS operations.

b. It should be user friendly and self-explanatory, enabling the Library to select resource sharing options while managing all the transactions from one Module.

c. It should have the ability to interact with OCLC and its products FirstSearch and WorldCat, and needs to support OCLC's direct-to-review and direct-to-profile options by enabling a connection to OCLC that is compliant with the standards of the International Organization of Standardization (ISO).

d. It should also allow communication with other libraries regardless of their size or database type.

e. Both regular patrons for whom the Library is borrowing and outside institutions to which the Library is lending, should be authenticated.

f. Local patrons should be able to place mediated or unmediated ILL requests, both from library locations or home.

g. The System should also check local circulation status and bypass borrowers if the item is available anywhere in MDPLS.

h. The ILL Module should be able to add temporary bibliographical records to the Library's System for the borrowed item.

i. These records should not display in the OPAC, but should be viewable from a staff computer.

j. When an item arrives, the System should be able to place a hold on the item and notify patrons through the various notification methods**.**

k. The ideal product should also be able to print a variety of notices and labels.

l. It should keep track of statistical and financial transactions, such as borrowing, lending, filled requests, unfilled requests, loans, copies and invoices, and create essential reports.

2.5.3.12 Other

The Library is interested in hearing about any other features, products, and services that would enhance our System. Costs for these should be included on Form B-11: Optional Hardware, Software and Services and will not be considered in the price scoring done by The Evaluation/Selection Committee.

2.5.4 TECHNICAL/CONFIGURATION REQUIREMENTS

2.5.4.1 System Architecture

a. The Library is looking for a technical environment, as well as a Vendor, with a proven record of handling the size and volume of transactions of the Library.

b. It is important that the proposed System be scalable to accommodate future growth of the Library.

c. The Library prefers browser based access to both patron and staff information.

d. Staff browser-based access is important because it will allow staff to search from home without having to use special remote access to their desktop.

e. The Library prefers a System that employs dynamic 3-tiered client/server architecture with workstations accessing the central database through software on the server. However, other architectural solutions will be considered if the Proposer provides justification as to why it would work better for the Library.

f. The Library prefers a fully integrated System, allowing for seamless movement between records and functions as needed, regardless of their location within the System. The only limitation should be security settings for individual users and different access levels.

g. The Library prefers a System that places no limits on record size other than any limits imposed by the MARC21 standard. A System that allows the Library to define, create and update indexes on an ongoing basis using any MARC21 fields, without additional charges, is preferred unless there is a Proposal that justifies why another approach would be better.

h. The System should work with the Library's wired and wireless networks as described in Section 2.1.1 - Current Technical Environment of this RFP.

2.5.4.2 Licensing

The Library prefers Enterprise Licensing for all software, including third-party products, whenever economically feasible. On Form B-4: Software Price Proposal, the Proposer should provide specific costs for the number of licenses needed to run the System, and the cost of Enterprise Licenses. The lower cost will be used in calculating total cost. Licensing options provided by the Vendor need to be for perpetual use for a fixed fee without additional royalties or service fees, except for ongoing Software maintenance. Regardless of the factors that the licensing scheme is based upon, the prices listed on Form B-4: Software Price Proposal need to

remain constant for the life of the Contract. For example, the Library would not expect an increase in licensing fees if circulation increased. Because of the Library's growth plan, a concurrent user license scheme does not fit the Library's needs. The Vendor needs to acquire all third-party licensing, on the Library's behalf, though the Library should own the licenses. All licenses, whether from the Vendor or from third parties, should be turned over to the Library upon Final Acceptance of the System. The Library prefers to leverage government and educational pricing for licenses when offered; for example, Microsoft educational discount. In order to ensure database stability, security, future growth, and support, the Library prefers a non-proprietary database such as: Oracle, Microsoft Structured Query Language (SQL), Sybase or DB2.

The Library prefers a database license scheme that allows access to the data by Library Automation Staff for reporting, extracting and, when necessary, updating of any fields, including user-defined fields added to the database. The Library may, at some future time, work with other companies or the County ETSD to develop and/or interface with other systems and the proposed System. This may require that the database be added to or updated. The Library prefers a licensing scheme that supports this ability.

The Library needs to provide access to 625 fulltime and 270 part-time staff with 7% growth rate each year over a 5-year period. Each user needs to have a unique user ID and password. Appropriate licensing needs to be provided to accomplish this. Many of the Library's book/material jobbers catalog and process materials for the Library; therefore, the System needs to accommodate 20 licenses for jobbers.

Proposers should include unlimited licensing for web OPAC and Z39.50 users connecting from workstations within the Library's branches and remotely.

2.5.4.3 Third-Party Licensed Software

The Library recognizes that Proposers may utilize third-party software as part of their Proposal. All proposed software licenses should be purchased by the Vendor and provided to the Library.

2.5.4.4 System Capacity Requirements

a. The proposed System should initially accommodate, via the Library's LAN/WAN, the following:

i. Staff Workstations: 546
ii. Public Access Workstations: 1,058
iii. Public Access Laptops: 468
iv. Number of Servers: 96
v. Number of Dedicated OPACs: 154
vi. Number of Self Check-out Stations: 130

b. The proposed System needs to be able to handle the expected increase in transactions due to the additional number of facilities based on the Capital Plan, as well as increases in the number of PCs and laptops at each facility. Expected growth is shown in Appendix S: Current Expected Growth Statistics.

2.5.4.5 Backup and Redundancy

a. The Library prefers an ILS technical environment that provides sufficient redundancy to ensure high reliability of library services such that failures of the System do not significantly impact Library operations.

b. The System should operate in a normal operating environment with a performance reliability level of at least 99.9% Reliability shall be determined by deducting downtime from the total number of hours that County operates the System. Downtime is defined as that period of time when it is not possible to perform scheduled activities due to an equipment or software malfunction or the System is being released to contractor for remedial maintenance. Downtime shall be calculated to the nearest one-tenth (1/10) of an hour and calculated as a percentage of a 24-hour day.

c. The System should provide continuous backup so all transactions can be recovered to the last point of failure.

d. All costs associated with providing redundancy should be listed on Form B-11: Optional Software, Hardware, and Services.

2.5.4.6 Hardware

The Library already has a significant investment in hardware which is detailed in Appendices A through I. It is to the Library's advantage to reuse as much of this equipment as possible in order to keep costs down, but not to the detriment of any future growth plans for the System. Proposers should submit a hardware configuration to meet the Library's current and future needs as specified in Appendix S: Current/Expected Growth Statistics and should specify costs on Form B-2: Hardware Price Proposal. Proposers should indicate any trade-in value for hardware that

cannot be reused on Form B-3: Reusable Existing Hardware and on Form B-2: Hardware Price Proposal.

2.5.4.7 Security

a. The System should provide a security hierarchy scheme that allows Automated Services staff to access the operating system, database, and applications software for maintenance and other routine activities.

b. The System should accommodate network security protocols to prevent unauthorized access from outside. The Library currently utilizes EIGRP, TCP/IP, UDP network protocols.

c. The Library prefers a System that can alert Automated Services staff to any security and/or network problems. The alerts should cover unauthorized intrusion, loss of services, and loss of network connectivity to a required service. The parameters for alerts should be definable and modifiable by the Library.

d. The Library would like each individual staff member to have a unique ID and password, allowing user authentication and authorization to be provided on an individual basis, based on network login IDs and passwords. The proposed System should interface with the Library's Microsoft Active Directory using Lightweight Directory Access Protocol (LDAP) providing single sign-on authentication.

e. The System should allow authorizations and passwords to be administered according to a pre-defined profile or user-role that determines which tables, screens, and processes a person is permitted to access.

f. The System should check each user's access privileges at login and automatically disable or enable client functions based on the user's profile.

g. The Library should be able to set up profiles at an individual or group level.

h. The Library prefers to assign permissions at a very granular level, ex: public service staff can link but not have access to other cataloging functions.

2.5.4.8 Additional Desired Security

Proposers should indicate their capability of fulfilling each *DESIRED* security request below. Those answers will be prioritized and compared to the capabilities of each of the vendor responses, in order to determine the best solution for Miami-Dade County.

Details of desired security are presented in questionnaire format to facilitate direct responses and establish accountability regarding delivery of services. In order to respond to each security desire, the Proposer is requested to enter a code in the space provided that best corresponds to the intended response for the requests listed.

The acceptable codes are as follows:

Y - "Yes" – The Proposer can fully meet the request as documented with the current application or proposed solution. In the Proposal response, please include documentation showing how the Proposer will fulfill the request, including any alliances with other suppliers.

N - "No" – The Proposer cannot meet the request and has no firm plans to be in the position to meet this request within twelve months. A blank or N/A in any box will be interpreted as an "N". **This will not automatically disqualify the Proposer's response.**

F - " Future" – The Proposer will be able to fully meet this request in the near (not longer than twelve months from contract signing) future. In the Proposal response, please provide a proposed start date, completion date, and any additional costs associated with the development of the request. Cross-reference any attached documentation in the response.

In a few instances, we have posed some open-ended questions in situations where the answer will not be yes or no response. Please provide an answer to allow Miami-Dade County to properly evaluate the Proposal. Miami-Dade County requests that all cross-referenced attachments to the Proposal follow the order of the requests.

A Proposer awarded a contract as a result of this, agrees to comply with all County requests relating to the verification of compliance to Section 2.0.

Security Requests Proposer Should:			
Req. No.	**Requests Description**	**Response (Y, N, F)**	**Response Description**
1	Provide the ability for each user to be uniquely identified by ID.		
2	Provide basic authentication through use of passwords.		
3	Provide the ability to enforce password expiration.		
4	Provide the ability to require automatic password expirations when initially assigned or reset.		
5	Provide ability to configure password parameters such as password lengths, user access to expiration settings and other behaviors, enabling alphanumeric characters, etc.		
6	Provide the ability to encrypt transmitted data and authentication information over internal and external networks.		
7	Provide support for Secure Socket Layer (SSL) 128 bit and 256 bit encryption.		
8	Provide a password database encrypted in storage.		

Security Requests Proposer Should:			
Req. No.	**Requests Description**	**Response (Y, N, F)**	**Response Description**
9	Provide ability to protect audit logs from unauthorized access.		
10	Provide ability to log activities performed by specific user ID and IP address and to time-date stamp all activities.		
11	Provide ability to identify and log all subsequent access points to ensure accountability is maintained throughout session.		
12	Provide ability to limit concurrent sessions.		
13	Provide ability to log changes to administrative functions.		
14	Provide ability to automatically archive audit logs.		
15	Provide ability to set an unsuccessful access attempt limit and suspend IDs after reaching the unsuccessful access threshold.		
16	Provide ability to send alerts to administrators for unauthorized access attempts.		
17	Enable automatic logoff of ID after a defined period of session inactivity, and perform subsequent re-log-on password authentication.		

Security Requests Proposer Should:			
Req. No.	**Requests Description**	**Response (Y, N, F)**	**Response Description**
18	Provide ability to lock out user or group ID by date or time.		
19	Provide centralized administration, user authorization, registration and termination.		
20	Provide integration with single sign-on systems and provide the ability to share an existing or migrate to a future Single Sign-on (SSO) user store.		
21	Provide strong authentication via digital certificates.		
22	Provide authentication via hardware tokens or machine ID.		
23	Provide support for, or have a plan in the product roadmap to support, authentication via biometrics and/or smart cards.		
24	Provide the ability to synchronize passwords throughout a network.		
25	Provide support for electronic signatures.		
26	Support or integrate with Public Key Infrastructure (PKI) solutions for certificate management.		
27	Provide ability to log changes to the product's security configurations or administrative functions.		

Security Requests Proposer Should:			
Req. No.	**Requests Description**	**Response (Y, N, F)**	**Response Description**
28	Provide the ability for password resets to be done by the user on the Portal by answering specific questions.		
29	Provide the ability for user accounts to be created that are not part of an Lightweight Directory Access Protocol (LDAP) or Active Directory.		
30	Provide the ability to use multiple LDAPs.		
31	Provide the ability to use multiple LDAPs and Active Directories simultaneously.		
32	Provide the ability to use multiple LDAPs located in different domains.		

2.5.4.9 Bandwidth Requirements and Response Time

Staff Clients should utilize low bandwidth on the network to maximize response. Response time should be no greater than two seconds on an unloaded network System an no greater than five seconds on the fully functioning Library Computer Network.

2.5.4.10 Network and Transaction Load Test

The Vendor should conduct a Network and Transaction Load Test, which simulates the volume of transactions, across multiple sites, for a library the size of MDPLS, after contract signing at the beginning of the Project in order to assess the ability of the Library's Computer Network to support the System and the ability of the System to handle the Library's transaction load. The specifics of the test will be mutually agreed upon by the Library and the Vendor before contract signing and will be included in the Contract. The results of this Load Test should be considered a

deliverable and should be adequately documented. The Vendor is expected to either stipulate that the network is adequate to support the System or identify, and provide costs to remediate, any deficiencies in the network. The Vendor should show that the System can handle the transaction load. Should there be deficiencies in the network, the Library has the option of upgrading the network or withdrawing from the contract and negotiating with the second highest ranked bidder.

2.5.4.11 APIs

The Library prefers a System that provides Application Programming Interfaces (APIs) for functional modification, reporting or enhancement of the System. The API functionality should include, but not be limited to, query and update capabilities of the System's database. The APIs need to be well documented. The Proposer should include API training and support. The software should have the ability to easily create export files in multiple formats, which include comma delimited and ASCII, for use to other applications.

2.5.4.12 Standards

The Library prefers the System to be fully compliant with the typical national and international standards and standards related to the technical structure, coding and labeling of data that is needed for the exchange of information between computers, such as, but not limited to:

1. MARC 21
2. US MARC
3. Dublin Core
4. ANSI/NISO
5. CODABAR
6. OCR
7. UPC
8. EDIFACT and Enhanced EDIFACT
9. X12
10. Unicode support to use standard Microsoft Windows input devices
11. SIP/ SIP II/NCIP
12. XML
13. JAVA
14. Metadata Standards

2.5.4.13 Computer Room

It is recommended that Proposers attend the site visit, immediately preceding the recommended pre-bid conference so that they can provide a plan for incorporating the hardware required to support their ILS into the existing space. The Library prefers a Vendor that can provide the most efficient use of available rack space. The Library will be starting the planning process to relocate the computer room to another facility within MDPLS.

During the life of this contract, the Library may consider relocating its computer room to one of its other facilities, possibly one of the new facilities being built. The Library prefers a Vendor willing to provide or sub-contract consulting services to assist the Library in planning the design of the new computer room and the relocation of the computer equipment.

2.5.5 SYSTEM IMPLEMENTATION, MIGRATION, AND INTEGRATION

a. The Vendor should finalize a mutually agreed upon plan and calendar of implementation with the Library within 30 days after execution of the contract.
b. The plan should list the tasks of both the Vendor and the Library.
c. The Vendor is also expected to provide project management. A Project Manager should be assigned immediately following contract signing.
d. The Project Manager's role should continue to exist after implementation for the life of the contract.
e. The Project Manager's responsibilities will include, but not be limited to:

    i. Preparing of all status reports, implementation and testing including detailed project plans;

    ii. Managing the Vendor's portion of the implementation starting from contract signing to post-implementation support;

    iii. Providing advice on all options and parameters the Library has available for use in the software. Providing assistance in setting all parameters;

    iv. Providing recommendations on the logistics of receiving and swapping out of the old hardware in the computer room;

v. Providing on-site support during GoLive phase;

vi. Providing information and guidance on issues of database integrity and security,

vii. Scheduling all aspects of the implementation;

viii. Holding weekly status meetings with the Library to review any open items, resolutions, and future plans for the Library.

f. The Vendor should be responsible for migrating (extracting, loading, and indexing), including but not limited to, all of the data listed below, and any records necessary for the continuity of the Library's business processes, from the current SirsiDynix Horizon and HIP to the new System:

i. Bibliographic Records (Titles), MARC and non-MARC records;

ii. Items (Copies);

iii. Authority Records;

iv. Circulation Transactions (Charges, Fines, Fees, Holds, Messages). Existing circulation transactions should maintain the original dates, not be reset to the date of the data load;

v. Acquisitions (Vendors, Orders, Funds). Existing acquisition transactions should maintain the original dates, not be reset to the data of the data load.

vi. Serials Control (Checkin, Chronology, Publication Patterns)

vii. Patron Records (Personal Information, Blocks, History);

viii. Homebound Records – (Customer Records, Reading Logs/Histories, and Customer Ratings);

ix. Statistical Records

g. The Vendor should be responsible for working out all migration issues with SirsiDynix.

h. Proposers should explain what arrangements have been made with SirsiDynix to accomplish this process.

i. The Vendor should be capable of migrating both MARC and non-MARC records. The Vendor is expected to maintain all custom cataloging.

j. During migration, downtime should be kept to a minimum.

k. The proposed back-up Circulation or the Store/Forward on 3M Self-Check Machines should be able to be used for checkout during the downtime.

l. The Vendor should be responsible for providing integration of the ILS with 3M, Envisionware, Unique Management, Evanced Solutions, and any other third-party software or services proposed.

2.6 ACCEPTANCE TESTING

a. The Vendor should agree to work with the Library to create a mutually agreed upon Acceptance Plan that will become part of the contract. The Plan will include: Hardware Functionality, Data Load, Module Functionality, Third-Party Integration, Reliability and Response Time Tests.

b. Final Acceptance will be dependent upon a fully functioning System as specified in Section 2.0: Scope of Services of this RFP.

2.7 CUSTOMER SUPPORT – WARRANTY/MAINTENANCE – SERVICE LEVEL AGREEMENT

a. The Proposer should provide an all-inclusive, full parts and labor, one (1) year warranty on software, hardware and components offered as part of the Proposal, including third-party products or services.

b. The warranty period should commence on the day that the County confirms Final Acceptance of the System after the GoLive Date.

c. Proposer should offer a maintenance/service agreement on the hardware, software and components to begin at the conclusion of the warranty period and be available on an annual renewable basis for the life of the contract.

d. The Library should be entitled to all software fixes to major or minor software problems, patches for defective version releases and updates and upgrades when released, at no additional charge, as long as the Library is paying for software maintenance.

e. As part of the Maintenance Agreement, the Proposer should provide (in addition to the usual logging, calling, and/or e-mailing of issues) weekly conference calls facilitated by a staff member of the Vendor with authorization to bring in appropriate staff to discuss with Library staff the resolution of all open issues.

f. The Library prefers a Vendor who offers a System that can be upgraded centrally over the network. The System should allow new software releases or interim patches to be installed and configured remotely. Upon user login, the staff client should display a message, such as “new release is available,” and provide prompts for staff with the necessary steps to proceed with the

upgrade or new release patch. Due to the limited number of technicians on staff, any System that requires a technician to physically touch every workstation would have extremely negative impact on staff workflow.

g. The Library prefers that the Vendor provide a list of approved patches and bug fixes on a regular, minimally quarterly, basis for operating systems, databases and applications. Security patches should be made available for review and testing prior to implementation. Release Notes should also be made available for review by Library staff prior to implementation.

h. The Library prefers that the Vendor provide a System capable of retaining custom programming. Such custom programming should not get lost or be overwritten when the System is upgraded with a new release or patch. The Library should not be charged to retain this custom programming when upgrading or applying patches and bug fixes.

i. The Library should be able to extract its data at anytime at no cost to the Library.

j. The preferred maintenance agreement should provide:

   i. Live support, via a toll-free telephone number, for any issue available 8:00 a.m. – 9:00 p.m., Monday through Friday, Eastern Time;

   ii. Live support, via a toll-free telephone number, for critical issues available 24 hours a day, 7 days a week.

   iii. 24-hour -a- day incident reporting and tracking available online or by e-mail;

   iv. Standard escalation procedures with the following severity levels and response time:

Severity	Definition	Response Time	Resolution Time	Status Frequency Update
1=Critical	A major component of the System, whether hardware or software, is in a non-responsive state and severely affects library productivity or operations. A high impact problem which affects the entire Library System.	One (1) Hour	Four (4) Hours	One (1) Hour
2=Urgent	Any component failure or loss of functionality, not covered in Severity 1, that is hindering operations, such as, but not limited to: excessively slow response time; functionality degradation; error messages; backup problems; or issues affecting the use of a module or the data.	Two (2) Hours	Eight (8) Hours	Two (2) Hours
3=Important	Lesser issues, questions, or items that minimally impact the work flow or require a work around.	12 hours	One (1) Week for an acceptable work around until final resolution	Weekly Status Call
4=Minor	Issues, questions, or items that don't impact the work flow. Issues that can easily be scheduled such as an upgrade or patch.	24 hours	One (1) Month for an acceptable work around until final resolution	Weekly Status Call

k. The Vendor should be able to remotely access either by VPN, encrypted connection, or dedicated IP addresses.

l. Preventive maintenance on databases should be scheduled on a quarterly basis to ensure that the System is running at optimal performance.

m. The Vendor should also be responsible for providing maintenance for Envisionware, including Jamex Coin Bill Acceptors, and Evanced Solutions

and for all the third-party products and subscriptions being proposed for the System.

2.8 TRAINING/DOCUMENTATION

The Library is looking for guidance from Proposers on the amount of training needed, and the best approach, in order to ensure that staff are proficient in the System by GoLive. The Library has two computer labs, with 18 workstations in each lab, which are available for training purposes. The Library would also consider WebEx training as an option. The WebEx sessions offered should be dedicated for Miami-Dade Library staff.

a. Proposers should present a Training Plan that includes:

   i. Pre-installation planning and System configuration, for a group of up to 15 staff, which will include an overview of the System's capabilities and requirements, migration/conversion considerations and options, and parameter/policy setting considerations and options.

   ii. Training on all software modules for those staff responsible for using the software on a day-to-day basis. Since 900 staff members need training, the Library is willing to accept a train-the-trainer approach, as long as at least 15 staff are trained for each Module.

   iii. Technical training for 20 Automation staff which incorporates:

      a. Start up and shut down of the System;
      b. Daily operation, including backups and data recovery from backups;
      c. Troubleshooting and solving System problems;
      d. Loading software enhancements;
      e. Loading and extracting data records;
      f. Performing recommended System maintenance and security measures;
      g. Performing recommended database administration;
      h. Configuring and customizing the System;
      i. Generating reports;
      j. Utilizing APIs;
      k. Other issues necessary for the operation of the System.

iv. In addition:

a. Library Automation staff are trained on Unix. Proposers offering any solutions other than Unix should include appropriate training for Automation staff to gain the knowledge required to effectively and efficiently operate and manage the System.

b. Library Automation staff are trained on SQL. Proposers offering any solutions other than SQL should include appropriate training for Automation staff to gain the knowledge required to effectively and efficiently operate and manage the System.

c. The Library would like follow-up training via WebEx within three months of implementation to answer any questions and address any issues that have been identified by staff.

b. The Vendor should provide five print copies of all User Manuals and Administrative and Technical documentation for the System and one electronic copy, giving the Library the right to post the electronic copy on the Library's internal network and the right to reproduce the paper copies as needed.

c. All training should be conducted on a Training Database created from a complete copy of the Library's patron and bibliographic databases and set up with the Library's parameters/policies.

2.9 ESCROW

The following is required in the event that the Source Code Escrow Agreement is not provided to the County by the User's Group.

Concurrently with the execution of this Agreement, Licensor shall place the source code for all Software licensed under this Agreement into an escrow account with a reputable, financially sound, industry recognized third party consented to by Licensee to act as the escrow agent ("Escrow Agent") under the terms of a mutually acceptable escrow agreement (the "Escrow Agreement"). A fully executed copy of the Escrow Agreement, together with a receipt from the Escrow Agent acknowledging receipt of the source code, shall be delivered to Licensee within thirty (30) days after execution of the Escrow Agreement. In addition to the initial delivery of source code, Licensor shall deliver to the Escrow Agent (i) within thirty (30) days following general availability, the source code of all new version releases, updates, upgrades, enhancements, modifications, corrections, patches and improvements of the Software, and (ii) by January 5th of each year during the term of this Agreement, the source code as it exists on January 1st of each year during the term of this Agreement, and shall provide Licensee with receipts of such additional deposits, executed by the Escrow

Agent. The Escrow Agreement shall contain customary terms and conditions, including, without limitation, a provision providing as follows:

In the event that Licensor (a) becomes insolvent or ceases to carry on business, and the business of Licensor is not carried on as a debtor in possession or by a receiver or trustee or assignee; or (b) Licensor discontinues or fails, in a manner that adversely affects Licensee, to provide the Software or support or maintenance of the Software and such failure is not cured, then Licensee shall have the right to acquire a copy of the source code for the purpose of developing, maintaining, modifying and marketing the Software so long as Licensee continues to pay any applicable fees due to Licensor.

Regardless of whether one of the release conditions occurs, County shall have the right, at County's sole expense, to request the Escrow Agent to verify the relevance, completeness, currency, accuracy, and functionality of the deposited Source Code by, among other things, compiling the Source Code and performing test runs for comparison with the applicable Software. In the event such testing demonstrates the Source Code does not correspond to the applicable Software, Contractor shall rereimburse County for all costs and fees incurred in the testing and immediately deposit the correct Source Code with the Escrow Agent.

Upon the occurrence of a release condition, County will upon payment of the duplication cost and other handling charges of the Escrow Agent, be entitled to obtain a copy of such Source Code from the Escrow Agent. County shall be entitled to use the Source Code as needed to remedy the event of release and mitigate damages arising from such event, provided that mitigation of damages shall not include the sale or sublicense of the Source Code. Such use will include, but is not limited to County's right to perform its own support and maintenance, alter or modify the Source Code and/or obtain the benefits sought under this Agreement.

SECTION 3.0 - PROPOSAL FORMAT

3.1. INSTRUCTIONS TO PROPOSERS

Proposers should carefully follow the format and instructions outlined below, observing format requirements where indicated. Proposals must be submitted on 8 1/2" X 11" paper, neatly typed on one side only, with normal margins, and spacing along with a correlating CD. The original document package must not be bound and the document package copies should be individually bound. **A printed, unbound one-sided original, twenty (20) printed, bound copies and twenty (20) electronic copies on individual flash drives in Excel, Microsoft Word or PDF format (a total of 41)** of the **complete** proposal must be received by **the deadline for receipt of Proposal specified in this RFP Timetable (see Section 1.2).** The originals and all copies of the Proposal, must be submitted in a sealed envelope or container stating on the outside the Proposer's name, address, telephone number, the RFP number, RFP title, and deadline for Proposal submission. Proposals that do not include the required documents may be deemed non-responsive and may not be considered for contract award.

3.2. CONTENTS OF PROPOSAL

The Proposal must consist of a fully descriptive submission to include all technical aspects and all pricing options. The Proposal should be written in sufficient detail to permit the County to conduct a meaningful evaluation of the proposed services. The Proposal should include the following information:

3.2.1. COVER PAGE

The attached **Form A-1** is to be used as the cover page for the Technical Proposal. This form must be fully completed and signed by an authorized officer of the Proposer submitting the Proposal.

3.2.2. TABLE OF CONTENTS

The Table of Contents should outline in sequential order the major areas of the Proposal. All pages of the Proposal, including the enclosures, must be clearly and consecutively numbered and correspond to the Table of Contents.

3.2.3 VENDOR/SYSTEM INFORMATION

3.2.3.1 Executive Summary

Provide a brief history and description of the company, and parent company if applicable, including:

(a) Date of origin and/or incorporation.

(b) Reorganizations, acquisitions, mergers; explain if the company is currently for sale or involved in any transactions to expand or be acquired by another entity.

(c) Name(s) of owner(s) and/or principal officers.

(d) Name, address, and telephone number(s) of the person(s) authorized to represent the firm during contracting if awarded the bid.

(e) Provide information regarding the financial/organizational stability of the company such as latest copy of Proposer's certified financial reports or annual report if publicly traded.

3.2.3.2 Proposed System Overview

(a) Provide a narrative overview of the System being proposed. Describe the Proposer's project plan, methodology and recommended solutions in performing the services described in the Scope of Services (see Section 2.0), and describe Proposer's specific policies, plans, procedures, or techniques to be used in providing the services to be performed. The Proposer should describe its approach to project organization and management, and responsibilities of Proposer's management and staff personnel that will perform work on this project.

(b) Provide a detailed Project Schedule (starting with time of award of the contract through delivery, installation, GoLive, and Final Acceptance) identifying key events and activities. Describe major responsibilities of the Library and the Proposer to accomplish the key events and activities. Proposer should include proposed project staffing levels, position titles and descriptions, and person hours for each project member by project phase. Specify the projected County project staffing levels that drive the Proposer's staffing levels and project time lines.

3.2.3.3 Experience

Provide information about the company's experience that includes:

(a) Experience in providing similar services to those requested in this RFP; length of time in the library automation field; length of time supporting the product being proposed; company position in the ILS industry and the primary market served.

(b) Furnish a statement explaining what distinguishes the Proposer from other vendors in the marketplace.

(c) Describe the experience providing library automation services to large multi-branch public libraries.

(d) How many different ILS products does the company maintain? Which are still in development? Which are legacy products that are being maintained but not developed?

(e) List all contracts which the Proposer has performed for Miami-Dade County. The County will review all contracts the Proposer has performed for the County in accordance with County Ordinance No. 98-42, which requires that "a Bidder's or Proposer's past performance on County Contracts be considered in the selection of Consultants and Contractors for future County Contracts." As such the Proposer should list and describe all work performed for Miami-Dade County and include for each project: (i) name of the County Department which administers or administered the contract; (ii) contact person on the contract and phone number; (iii) dates covering the term of the contract; and, (iv) dollar value of the contract(s).

3.2.3.4 Key Personnel and Subcontractors Performing Services

Provide the following information regarding Key personnel and Subcontractors:

(a) Number of FTE's who work for the company; what percentage are sales, research and development, support, other? What percentage of total FTE's are devoted to the product being proposed? What percentage of the FTE's have Masters in Library Science degrees? What percentage of the FTEs have Masters in Information Systems (MIS)

Degrees? Please provide any information to indicate the company has sufficiently trained staff to handle all aspects of this Proposal.

(b) Provide an organization chart showing all individuals, including their titles, to be assigned to this project. This chart should clearly identify the Proposer's employees and those of the subcontractors or subconsultants.

(c) List the names and addresses of all major first-tier subcontractors or subconsultants, and describe the extent of work to be performed by each first tier subcontractor or subconsultant.

(d) Describe the experience, qualifications and other vital information, including relevant experience on previous similar projects, of all key individuals, including those subcontractors or subconsultants who will be assigned to this project. This information should include the functions to be performed by the key individuals and the subcontractors or subconsultants. All key personnel include all partners, managers, seniors and other professional staff that will perform work and/or services on this project.

(e) Provide resumes with job descriptions and other detailed qualification information on all key personnel who will be assigned to this project, including any subcontractors or subconsultants.

Note: After Proposal submission, but prior to the award of any contract issued as a result of this Solicitation, the Proposer has a continuing obligation to advise the County of any changes, intended or otherwise, to the key personnel identified in this proposal.

3.2.3.5 Products and Customers

(a) Please provide a list of contracted customers who are currently running the production (not experimental or test) version of the product being bid in this Proposal?

i. Please identify which customers are public libraries and indicate how many branches are part of these libraries.

ii. Please indicate the date each library contracted with Proposer for the version of the product being bid.

(b) Please provide a list of customers (libraries) that have migrated away from Proposer's product over the last five years.

(c) Proposer should submit contact information (on Form: L-1: Customer References) for the three largest multi-branch public libraries currently running the production version of the product being bid in this Proposal; two ILS customers using 3M V-Series machines; two ILS customers using Envisionware; and two ILS customers for whom Proposer has migrated data from Horizon 7.3.4.

(d) Describe any user groups for the product. How often does it meet? What are their functions? To what degree do they influence the course of software development? Please provide examples of User Group requests that have been implemented in the last two years. What is the time frame from request to implementation?

3.2.3.6 Future Development of the System

(a) Describe the development plans for the next five years for the System proposed.

3.2.3.7 Other Information

(a) Please provide any other information you deem relevant for the Library to make a determination as to how suitable the System is for its needs.

3.2.4 EXISTING APPLICATION SOFTWARE (Replaces existing Horizon/HIP software)

Provide a narrative describing the functionality for each of the following Modules, explaining how closely the product matches the Library's ideal functionality as stated in Section 2.5.1: Existing Application Software of this RFP. Explain how it differs or has alternative means of accomplishing the same goal. Please highlight the strengths of the System for each type of functionality and explain what distinguishes it from the products of your competitors. Please incorporate answers to all of the questions below in the response for each Module. For functionality that is not currently available, please indicate if it is being planned and the time frame for release.

3.2.4.1 Overall appearance and ease of use

(a) Describe how the System complies with the Americans with Disabilities Act (ADA). What ADA features does the System have and how does it operate with assistive software or devices such as large print, voice-activated input, alternative keyboard or pointer interfaces, etc?

(b) Explain or list the keyboard or command equivalents/shortcuts available for all editing and processing functions and describe how the user is made aware of them. Describe any touch screen or stylus functionality.

(c) What type of Windows functions does the System support? Describe in detail, using screen prints when appropriate, what methods the System employs across Modules to ensure data entry accuracy and consistency, ex: drop down lists, input masks, calendars, etc. How does the System provide assisted data entry to improve consistency and increase speed?

(d) Explain the extent the System allows for adaptability of screen display, visual attributes and fields displayed for both individual users and at the Administrative level. Can these adaptations be saved for future use?

(e) How does the Library define unique or required fields in the System?

(f) How does authorized staff create dropdown/code lookup lists?

(g) Does the System support Zip+4 fields? Is there a resident program to provide the extra four digits? Will Proposer be willing to do custom programming to interface with ETSD's address verification process?

(h) Explain how the System handles creating and updating complex, or simple, PINs for staff and customers. Use step-by-step instructions and screen prints.

(i) How does the System restrict access to accounts as needed?

(j) Does the System allow for the creation of work-forms, and are they password protected? If yes, describe the process of

creating a work-form, saving it and establishing a password to use it.

(k) Describe how the System handles designing, creating and printing assorted labels.

(l) Describe the context-sensitive help function of the System. Which Modules include context-sensitive help? Describe any other help features.

(m) Describe, using step-by-step instructions, what staff need to do to “travel” between Modules, ex: moving from Cataloging to Circulation to see the customer record on an item that is checked out

(n) Describe any instances when bibliographic, item, or patron records are not updated in real time across all Modules.

(o) Can the System, by default, record all transactions based on the physical location of the computer at which the transaction is performed? If no, explain what the default is and how it can be changed. Is the System able to let staff change the location of the computer to other than the physical location as necessary? Explain how this is done.

(p) How does the Library view which staff person has performed specific transactions? Is this available in every Module? Is this available on individual patron, bibliographic or item records or does a report need to be run? Please provide screen prints.

(q) Describe the System’s ability to allow advance searching by combining multiple fields from different tables. Is this available in all modules?

(r) Describe what would need to be done to add a free form note field of at least 1,024 characters to a customer record? A bibliographic record?

(s) How does the System allow batch changing by authorized staff? What fields can be changed? What kind of criteria can be used in selecting items for a “change list”? Can this same method be used for batch deleting items? The Library prefers that Cataloging staff have the ability to batch delete files; however public service staff should be limited to creating the list to be deleted by entering barcodes.

(t) Does the System always ignore leading articles and their foreign equivalents in titles when sorting? If no, explain.

3.2.4.2 OPAC/Portal (English, Spanish, and French):

(a) Please describe the Online Public Access Catalog (OPAC). Describe in detail how the OPAC is prepared to support emerging technologies and features, ex: Web 2.0 functions, relevancy ranking, faceted navigation, etc. If these emerging technologies are not currently in your OPAC, explain future development plans or an overlay product that would provide these features.

(b) What patron empowerment tools does the OPAC provide?

(c) The Library users access the OPAC both from branches and from remote locations, ex: home, office, etc. List all web browsers and their versions that are supported. Are there any browsers that are known not to work with the OPAC? Are there any “plug-ins” or other software required for using the product by remote users? Is any specific display resolution or other hardware or software configuration required?

(d) Describe how the OPAC synchronizes with all other Modules of the System and explain any instances where information retrieved through the OPAC would not be in real-time. Describe in detail how the OPAC is updated if it is not in real-time.

(e) How does the OPAC allow users to refine their search results, including limiting by branch and format? What are the options for sorting the results?

(f) Provide screen prints of the OPAC display showing search results that clearly denote item format using graphical icons. Does the Library have the ability to adapt the graphical icons and does the OPAC offer different icons to choose from?

(g) Does the OPAC search across multiple indexes and allow simultaneous broadcast searching of web content or licensed databases in addition to the library catalog? Describe the OPAC’s metasearching capabilities, and describe how the results are ranked.

(h) Specify the availability of relevancy ranking for search results and describe the factors used to determine ranking. Does the Library have control over the criteria for relevancy ranking?

(i) Does the OPAC retain on the screen the term or terms used in the search string for the inquiry until the patron goes to another search? Are search terms highlighted? Describe search history and save search features.

(j) Describe how the OPAC responds to unsuccessful searches, ex: “Harry Poter” rather than “Harry Potter.”

(k) Using screen captures, demonstrate all of the steps needed to do a search with the phrases “Civil War” AND “United States”. What prompts are available and how do patrons get feedback on search progress? What types of pre-search filters are available?

(l) How does the OPAC handle the retrieval of multiple records of the same title? How are these records displayed? Does the OPAC cluster together like titles, ex: multiple editions of the same title or multiple formats? Please provide screen prints.

(m) How does the OPAC offer basic and advanced Boolean searching of the catalog?

(n) How does the OPAC provide graphics, help screens, icons, symbols, home screens, and introductory screens that are appropriate for different users? Does the System have a separate interface/overlay for children? In what ways can the Library adapt the interface? Please provide screen prints.

(o) Describe how the OPAC supports multiple language interfaces for both screen display and help screens. Does the System allow users to toggle between languages without losing their searches or search results? Help screens and other menus should be provided in the selected languages. Describe any areas where help screens are not provided in the selected languages. How can the Library adapt the language interfaces?

(p) The Library should be able to define how search indexes and search results pages display, including which elements of the MARC record display at both the brief and full

bibliographic level. The Library should also be able to easily define all record displays to suit its needs and preferences, including the selection, order and caption of displayed fields. Describe how the OPAC handles this.

(q) How can the Library set the display so that items from the Branch where the search is taking place occur first?

(r) How does the OPAC allow for the display of detailed serials holdings? Does the Library have the ability to adapt how serials holdings are displayed? Provide screen prints.

(s) How does the OPAC display search results that contain enriched content for all media types, including cover art, excerpts, and reviews? Please provide screen prints.

(t) Does the OPAC provide an easy method to display newly acquired/best seller materials as a list for patrons to access? Please describe how this is achieved in the System. How is the Library able to adapt what lists are available and how they are displayed?

(u) Describe how patrons can access their accounts through the OPAC. How does the OPAC allow:

- online patron registration?
- patrons to renew items? What limitations apply?
- patrons to cancel, place, or edit holds on any circulating items and to select any Library branch, including mail delivery, as their pick-up location?
- patrons to update e-mail addresses, phone numbers, etc.? Can the Library restrict certain patron information from being updated by the patron?

(v) What options do patrons have to adapt and personalize their OPAC views?

(w) Describe the capability for patrons to create, edit, and sort bibliographies and the methods used for saving/exporting them. Can holds be placed on items that are saved to a list? Does the OPAC allow patrons to save specific searches or a search history?

(x) How does the OPAC support patron alert profiles, ex: enabling patrons to indicate fields of interest? How does the OPAC notify patrons when it acquires new items that match the interest profile? Does the System support RSS feeds for users to subscribe? Please describe in detail how this is accomplished and what choices users have when using RSS, ex: subscribing to receive updates on Library programs or updates on new items added to the catalog?

(y) Describe any equipment certified to work with the System, such as PDAs, cellular phones, tablet PCs, and other non-traditional devices. Is there a PDA/cellular version of the software?

(z) Describe any OPAC web-based payment options available to the Library. Include screen prints.

3.2.4.3 Staff Searching

(a) Does staff searching have all the features and functions available in OPAC? If not, explain which are not available. Describe any additional features and functions available to staff.

(b) Describe options for staff to personalize and adapt views.

(c) How does the System allow staff to view supplementary information not available in the OPAC, ex: holdings of closed branches, bibliographic records with no holdings, and item history? What item history details are provided, ex: transaction dates, location, current and previous borrowers, etc.? Please provide screen prints.

(d) How does the System allow staff to select from a variety of individual record and summary display formats, ex: brief, long or MARC? Please provide screen prints.

(e) Users need to be able to view and interpret a variety of information about materials in the collection. How does the Staff Searching Module display search results to staff? How does the Staff Searching Module display item records to staff? Does the Staff Searching Module allow staff to print information from the item record? How does the Staff Searching Module identify e-books or other electronic resources in the staff results? Please provide screen prints of all of the above.

(f) How does the Staff Searching Module display status history detail for a given copy? Please provide screen prints.

3.2.4.4 Circulation and Back-up System

(a) The Library has certain policies that regulate the circulation of materials (see Appendix M: Circulation Policy). Please explain how the System allows staff to set parameters to support existing policy without assistance from the Vendor. Please provide sample screen prints of where the parameters are set and sample documentation that shows staff what the various parameter options mean.

(b) How does the System alert staff to items that need attention such as those belonging to another location, having a hold, checked out "on-the-fly", etc.?

(c) The Library is accustomed to calling issues relating to a patron's record "blocks." Please describe any automatic System "blocks." Also explain how the System handles the issues below. In each case, show how staff is made aware of the issue and how it is cleared or deleted. Include screen prints.

- Financial: overdue fines, charges for unreturned material, other fees the Library may automatically charge, charges created by staff, refunds, and other credits. Can the Library create new types of "blocks" – either for fees or notes, such as a returned check fee? Describe how "blocks" are manually created. If an item that is being billed to a patron has no price in the item record, how does the System determine the amount to bill (default value)?

- Item specific: Overdue, Lost, Claims Returned, and Claims Not Checked Out. Please describe how checked out items can be changed to Lost or Claims Returned/Not Checked Out.

- Requests/Holds: Requests that have been cancelled, either manually or automatically; items being held for pickup; and held items that were not picked up on time. What information does the System make available to staff when a request/hold is cancelled/deleted/expired?

- Internal Notes: Information entered by staff for the use of other staff, ex: Do not waive fines, Told of fines, etc. These are not viewable by patrons. Can the Library create standard blocks to convey frequently used messages? How large is the text field? Does the entire message display?

- Patron Messages: Information entered by staff for the patron and viewable in the OPAC. Can the Library create standard blocks to convey frequently used messages? How large is the text field? Does the entire message display?

(d) Please provide screen prints that show how the System provides a clear path through all the transactions pertaining to a particular item so that they can explain to patrons why they are being charged or not receiving full refunds. How is the information grouped?

(e) Once blocks have been resolved, are they kept in a "history file"? Please explain the criteria for retaining information in this file. How can the Library adapt it?

(f) Please explain and provide screen prints of how fines, fees, and other charges are handled by the System. Discuss full payment, partial payment, and paying by item. How are overpayments handled? Can staff or the patron choose whether to get a refund or apply the credit to future financial obligations?

(g) Does the System maintain a "financial history" file, separate from the "history file," that lists all payments, waives, and refunds that have actually been made on a patron's record? Describe how staff accesses this data? How can old financial data be archived and retrieved after archiving?

(h) Please describe how the System manages patron information. Please discuss the following issues:

- What is the unique field for patron records? Does the System use a generated record number or something else?

- Describe the ability for the Library to set some fields as required and/or unique.

- How does the System handle multiple addresses (different residential and mailing) and multiple phone numbers for one patron?

- Please give a step-by-step description of creating a patron record with relevant screen prints. If the patron record includes a photograph, how are photos imported, linked, and stored?

- How does the System help prevent the creation of duplicate records or help detect them if they do occur? Can records be merged if one or both have transactions?

- How are lost cards indicated on the record? How are they replaced? What happens if a patron presents a lost card at checkout?

- Can the System automatically roll juvenile records over to adult privileges and remove the guardian's name on the child's 17th birthday?

- When a patron name search results in multiple matches, ex: 20 patrons named "Smith, John," how does the System allow staff to look at details of the records and determine which is the needed record without having to reenter the search criteria again or keep track of which ones have been checked?

- Explain the step-by-step process for purging inactive patron records.

- Which uses of a library card will affect the patron record's "last use" information? The Library prefers that non-circulation transactions, such as access to online resources, digital downloads, and use of public access computers, be included.

- Please describe any family or group card functionality.

(i) How can the Library purge patrons' records that have not been used for a Library specified period of time?

(j) Please provide a detailed explanation of the holds process from the placing of the request (either by staff or patron) until

the filling of the request. Explain and provide samples of the reports that are available to manage the process. Please cover these specific issues:

- How does the System provide for load balancing among branches when copies of a requested title are available at several branches?

- The Library prefers that requests for pickup at the checkin location have priority. How does the System allow the Library to define the order in which patrons receive items that are discharged?

- Can requests be moved from one bibliographic record to another? Can they be moved individually, as a complete list, or both? Please explain the process and show screen prints.

- After a request is placed, but before the item is available, can patrons and staff suspend requests temporarily? Change pickup locations? Can a pickup location be changed once the item is on the hold shelf? If so, how are staff alerted to follow through on the changed location?

(k) In general, library materials circulate for 28 days. However, when the number of requests/holds to copies available (circulating copies actually in the collection – not lost or missing) is 5:1, the existing Horizon ILS shortens the loan period to 7 days, for future checkouts. Does the System have a method to automatically shorten the loan period based upon a request/hold ratio?

(l) Please explain the step-by-step process, and provide screen prints, of three items being checked out to a patron from entering the patron barcode to printing the receipt. What triggers the checkout receipt? How is the Library able to adapt the receipt? What information can be included on the receipt? Explain how the System handles the following situations:

- an item that is being checked out would be due after the patron's registration expires. The Library prefers to allow the standard loan period.

- an item that is being checked out has not been discharged from another patron's record. The Library prefers to allow checkout with an automatic exempt fine checkin for the previous patron.

- an item that is being checked out is not linked to a bibliographic record (often known as "on-the-fly"). Please provide screen prints and explain the options.

(m) Please explain each of the options for checkin or discharge of items. Please address the following issues:

- Items that are damaged or incomplete when returned. The Library prefers a non-staff-intensive method for charging patrons for damages.

- Items with a Claims Return or Claims Not Checked Out status. The Library prefers to have the option of charging applicable overdue fines for items found in the book drop, but not charging for items found on a shelf.

- Items for which a patron has been billed. The Library prefers to have the option of charging applicable overdue fines for items found in the book drop but not charging for items found on a shelf.

- Items for which a patron has been billed and has paid. The Library prefers to have a refund automatically created with any applicable overdue fines deducted.

(n) Please describe the steps involved in linking items to a bibliographic record. Can linking be done without having access to the entire Cataloging Module? Can existing item records be copied with selected fields, ex: price and location automatically entered?

(o) Describe the staff view of offline Circulation. Please provide a screen print of the checkout screen and a copy of the "exceptions report" of transactions that would not have occurred online, ex: patron fines over the limit, items with requests. Does the System force these transactions or do they need to be manually entered and "stops" overridden? If checkin is available, how does the System account for the return of items that have requests?

3.2.4.5 Cataloging/Authority Control

(a) Describe how the System supports all current and future applicable bibliographic standards, ex: Dublin Core, Metadata Encoding and Transmission Standard (METS), Encoded Archival Description (EAD), Functional Requirements for Bibliographic Records (FRBR), Resource Description and Access (RDA), and XISBN from OCLC.

(b) Describe how the System supports local or custom formats and tags.

(c) Describe any limitations to the record lengths, the number of fields, the length of the fields, or the number of iterations of repeatable fields in the bibliographic records.

(d) Describe how the System handles FRBR. How will the Library be able to consolidate multiple versions (formats and/or editions) into one bibliographic record, merge separate records for related manifestations at the global level, and consolidate them for display at the local level?

(e) Describe how the System supports digitized audio and image collections.

(f) What indexes are standard with the System? Describe the process necessary to create new indexes. Can the Library create these indexes or must the Vendor create them? Are there any additional charges to the Library?

(g) Explain how the System allows the Library to define indexing of MARC records, ex: 10- and 13- digit ISBN and Boolean indexing-specified titles.

(h) Does the System support ALA character sets and non-Roman alphabets? Does the System convert these characters to Unicode?

(i) Explain how the System reads and displays Library-defined MARC-like records and accepts future records. Provide screen prints.

(j) Describe how the System supports Library-defined MARC tags.

(k) Describe how the System allows fields within a tag group to be re-ordered in an individual bibliographic record and to retain the user-defined display order when the record is displayed. Provide screen prints.

(l) Describe how the System provides editing history of a record including the staff ID and dates. Provide screen prints.

(m) Describe how the System inputs and displays diacritics and special characters. Describe how the System displays and indexes vernacular characters embedded in MARC records.

(n) The Library is accustomed to using workforms/templates for manual input of MARC records. What types of workforms/ templates does the System provide? Describe how the System supports tag menus, links to authority records, error checking, and description of the error.

(o) Describe how the System manages Serials title changes, merges, and splits. Explain the links between related titles with their publication patterns and checkin records, etc.

(p) Explain how the System supports local and genre/form authority headings.

(q) Describe how the System supports multiple thesauri.

(r) How does the System import authority files? How does the System prevent incorrect record matching, including all diacritics and special characters, when downloading authority? How does it match new authority files with existing bibliographic records? What types of error reports does the System generate? Provide screen prints.

(s) When an authority heading is changed, it should also change the heading if it is used as a “see also” reference (5xx) and/or “see” reference (4xx) in another authority record. Describe how the System processes authority headings when it changes both “see” and “see also” references. Provide screen prints.

(t) If one authority source changes a heading that others have used, the Module should change headings only on bibliographic records that use that authority source. How does the System handle such functionality? Provide screen prints.

(u) The Library's importing process is based on matching algorithm formulas, which allows the overlay of bibliographic and authority records. Currently, the Library has the ability to adapt these algorithm formulas when necessary. Describe the proposed System's standard algorithm formulas. What process can be used by the Library in creating adaptd algorithm formulas?

(v) Describe how the System imports records. Include ways the Library can adapt the load process, ex: excluding specific tasks, including tags with holdings information, etc.

(w) Explain how the System handles automated merges and overlays. Discuss how the System allows staff to undo mergers in case of error. What manual commands are available for staff to use in merging duplicate records?

(x) Describe how the System creates the option to load records directly into the database or a separate file for further editing. Describe how the System provides a printable file of records failing validation, including the reason for failure. Provide screen prints.

(y) Describe how the System allows exporting of files of bibliographic records.

(z) How does the System search and display foreign languages with initial articles in the title? Explain how the System handles the filing indicators of the bibliographic record.

(aa) How does the System allow the Library to convert the non-MARC, including Metadata, format to MARC and vice versa?

(bb) Does the System work with 14-digit Codabar barcodes?

(cc) Describe how the System handles item records for volume and copy-specific materials.

(dd) Describe how the System handles the transfer of holding information from one bibliographic record to another.

(ee) How does the System allow for searches for different types of call numbers, ex: Dewey, LC, SuDoc, and local? Describe call number searches and whether they are based on bibliographic or item levels.

(ff) Explain how the System supports URLs. Describe any plans for supporting future technologies as they are developed, ex: URNs and URIs.

(gg) Describe the different types of spine labels the System can produce.

(hh) The Library has a large number of bibliographic records containing hypertext links in the MARC 856 tag which displays in the OPAC and navigates to the web. How does your system activate this tag? Describe how your System recognizes multiple hypertext links in a single bibliographic record. Will your System display and search all web links? Describe how the System provides icons in the OPAC for these sources.

(ii) Explain how the System provides the ability to add collections of licensed electronic resources, ex: Gale's Biography Resource Center, Newsbank, etc., or MARC records for individual titles from aggregate databases of electronic resources, ex: Pro Quest, etc.

(jj) Describe in detail how the System provides descriptive menus and editing tools, ex: spell checker, full screen editing, diacritics, etc. Provide screen prints.

(kk) Describe in detail how the System supports the staff's ability to perform database maintenance, ex: full-screen editing and the ability to view or edit multiple records at one time.

3.2.4.6 Acquisitions

(a) Describe any maximum limits in the System on acquisitions-related functions and transactions – fund accounts, selection lists, orders, invoices, claims, and Vendor records and accounts.

(b) In order to track fund accounts, the Library groups them by types of materials, age groups, and locations. How does the System group and display fund accounts showing encumbrances, expenditures, and balances remaining? Please include a screen print of a typical display.

(c) The Library has more than 1,000 fund accounts. Currently, at the end of each fiscal year, accounts and hierarchies are duplicated, and open orders and encumbrances transferred

into the new fiscal year's accounts. How does the System handle these year-end transactions? How does the Library define the fiscal year in the System? How does the System allow for multiple fiscal years to be open and active at the same time?

(d) How does the System track changes to fund accounts, including the date of change, ID of the individual staff member who made the change, and any explanatory notes?

(e) The Library uses a decentralized method for selecting materials, in which the Library centrally creates selection lists using imported and/or existing bibliographic records. Multiple users at multiple locations are able to select titles without being able to edit the lists. It is critical that each user is limited to his/her own location(s) and fund account(s). In addition, Collection Development staff is able to view the entire selection list and make adjustments regardless of location or fund account. How would the System accommodate this selection method?

(f) How does the System import bibliographic records into selection lists and purchase orders, controlling whether or not existing records are overlaid? The Library also imports MARC records with attached 9xx tags, which include quantity, location, and fund information. How does the System allow the Library to set up import profiles which allow or block individual MARC tags?

(g) The Library would prefer to transmit orders electronically whenever possible. Please include specific information about how the System handles electronic data interchange (EDI). What EDI ordering formats does the System support? What information, such as vendor name and account, title, author, ISBN, call number, price, quantity, location, item type, collection code, and unique bibliographic record and item record numbers, is included in electronic orders transmitted to vendors? Does the System also allow electronic confirmation of orders, claiming, and invoicing? What information is included in these transmissions? What means does the System provide to alert staff of any discrepancies or errors? Please provide a list of library vendors with which the System can interface.

(h) The Library would like to be able to search for selection lists, purchase orders, and invoices in a variety of ways, such as

by selection list name, purchase order, invoice number, invoice approval date, vendor, order date, creation date, ISBN, author, call number, title, and bibliographic record number. We would also like to apply limits, such as order date or vendor name, to an order search. By which criteria are selection lists, purchase orders, and invoices searchable in the System? What limits can be applied to narrow search results?

(i) The Library's purchase orders frequently contain hundreds of titles. The Library would like to be able to see a listing of titles in a purchase order, with price and quantities ordered, cancelled, received and invoiced for each, without having to check each title individually. How does the System display purchase orders? Is there a summary screen showing all this information? Please include a screen print of a typical display.

(j) The Library cannot pay vendor invoices for books and materials unless all items on an invoice have been received. It is critical that the Library knows which items have been received in all locations when invoices are entered for payment. Since many items are cataloged, processed, linked and drop-shipped by vendors directly to the branch locations, the Library relies upon the System as a means to determine that all materials on an invoice have been received and the invoices can be paid. Due to the number of orders, titles, and invoices, each title should not have to be individually searched to determine if it has been received. The Library strongly prefers not to give non-acquisitions staff access to purchase orders—currently when an item is checked in using Circulation, it is automatically marked received in the purchase order. How will the System enable the Library to know the materials have been received and the invoices can be paid? Are you willing to provide custom programming, if needed, so that when an item is checked in using Circulation its receipt is automatically reflected in Acquisitions?

(k) How does the System generate claims for items not received within a Library-defined time frame? What claiming options are available for staff? How does the System support electronic transmission of claims to library Vendors?

(l) Describe how the System handles different types of invoices, such as those for titles on purchase orders;

invoices not associated with purchase orders, such as subscriptions or processing charges; and credit memos. How does the System handle pro-rating of extra charges among different fund accounts? How does it ensure that entries are correct before approval for payment?

(m) Currently, the Library has a single vendor record for each company but with multiple accounts for each. These accounts allow for differences in discounts, material types, processing specifications, and shipping information. This method enables the Library to gather statistics and information about the vendors' overall performance. How does the System organize vendor records and accounts? How does the System show information about vendor performance, such as average receipt period, average discount received, number of copies claimed or cancelled, and total amounts ordered or paid?

3.2.4.7 Serials

(a) Describe any maximum limits in the System of serials-related functions and transactions – serials records, subscriptions, issues, holdings, and formats.

(b) What formats of serials, including, but not limited to: periodicals, newspapers, annuals and irregulars, indexes and abstracts, supplements, special issues, loose-leaf materials, cumulated versions, microforms, and electronic journals, does the System support?

(c) Describe the way the System creates publication patterns for prediction of serials, and whether patterns can be imported from other sources. Describe any databases available for retrieval of these patterns, preferably for specific titles or ISSNs, and the use of 891 tags if applicable. How are publication changes handled? Please include screen prints to demonstrate.

(d) Library staff in branches and departments should have access to only their own subscriptions, while central serials staff should have the ability to set up subscription records and edit serials information for the entire Library. How does the System control staff access to serials functions? How are changes and other transactions tracked to individual staff?

(e) How does the System check in issues of periodicals? What search methods are available for locating the serials, ex: UPC? Can scanners connected to the System be programmed to accept both UPC and Codabar? Include information about ways to undo any actions or make changes in enumeration or chronology as needed, and about any options controlling item creation or barcoding of individual issues.

(f) How are future expected issues advanced and displayed? The Library prefers that only authorized staff have the ability to manually advance future expected issues.

(g) How does the System display serials for the staff and the public? How are location, formats and holdings displayed? What note fields are available for display and internal use? Please include a screen print of a typical publication and its holdings at multiple locations.

(h) The System should provide a field for entering and displaying retention information, i.e. the length of time a branch wishes to keep issues of a subscription, both to staff and to the public. Ideally, settings for retention periods of individual subscriptions should generate lists of issues to remove, and automatically update holdings summaries. If this feature is not available, staff should be able to easily edit holdings summaries as issues are withdrawn manually. How does the System use and display retention information? Please include screen prints to demonstrate.

(i) Describe the System's claiming methods. How does the System identify serials issues that have not been received? How are claims reviewed, edited and generated? How can claims be sent or transmitted? If the System supports electronic claims, can it also support electronic responses? How does the System follow up on claims or retain claim history?

(j) Describe the System's ability to export serials MARC holdings and locations records with no loss of data integrity, ex: to consortia union lists or OCLC.

(k) The System should allow the user to easily determine the location and holdings of a serial. It should be possible, when viewing a serial record that is linked to other serial records by way of 76X-78X fields, to easily retrieve and move among

related records. How is the location and holding information on serials displayed? Describe how the System allows staff to move between linked serial records. Please provide a screen print of both.

3.2.4.8 Homebound/Borrow-by-Mail

3.2.4.8.1 Homebound

(a) Describe how the Homebound Module synchronizes with all other Modules of the System and explain any instances where information retrieved would not be in real time.

(b) Explain how the Module assists staff in making Readers' Advisory selections for customers and place requests for them. In the response please include a description and screen prints of the profile of customer preferences and any other customer-specified selection criteria and how they are created and updated when necessary. Give examples of how the System handles complex profiles with requests for multiple formats, languages, exclusions, genres, etc.

(c) Explain how the System displays a list of patrons who previously borrowed a particular copy or title and those currently on the waiting list. Provide screen prints.

(d) Explain how the System handles checkout to Homebound customers; alerts staff if item is already on reading history or log and gives staff option to continue or abort item checkout; and generates date due slips. Include a sample date due slip in regular print and large print.

(e) Explain how the System will maintain a reading history or log for each customer; how staff access and view, or print the log; how staff may sort the log; and how customer ratings are recorded and edited by staff if necessary.

(f) Explain how the System generates and prints mailing labels. Include a sample label. Is there a place for patrons to enter ratings?

(g) Explain the criteria the System uses to determine which customers need service and the step-by-step process to retrieve this information. Include samples of related reports or screen prints.

(h) Explain the System's step-by-step process used to check in, enter customer ratings/comments, and edit ratings/comments. Include screen prints.

(i) Please provide a list of all "canned" reports from the System that are used in Homebound and provide sample copies of each.

3.2.4.8.2 Borrow-By-Mail

(a) Describe your Borrow-By-Mail Module. Is it centralized or decentralized? Can it limit access based on customer type? Explain if and how the fee amount can be changed.

(b) Describe the step-by-step process a customer follows to initiate a borrow-by-mail request and suspend or cancel requests if needed.

(c) Describe how the System handles requests placed by customers whose accounts are "not in good standing" and what alerts it provides them.

(d) Describe the account information customers are able to see on the System regarding Borrow-By-Mail requests such as: status, date checked out, date mailed if different and delivery confirmation tracking number. Include screen prints.

(e) Explain what options customers who placed Borrow-By-Mail requests have to be notified about status changes regarding their requests.

(f) What options will be available to Borrow-By-Mail customers to pay their account balances? Will they be able to pay in advance and have a credit balance on their account?

(g) Describe how the Borrow-By-Mail Module operates in relation to the Circulation Module: identifying an item for mailing to the staff; enabling staff to record

delivery confirmation tracking number; automatically entering fee block or charge; and generating mailing label and date due slip.

(h) Describe how the System will automatically notify customers of their delivery confirmation tracking number(s) and any status changes.

(i) Describe in detail how the System handles items that cannot be issued to the customer for various reasons, ex: due to financial or address blocks.

(j) Provide a list of all Management reports or displays available for Borrow-By-Mail and the process to create custom reports. Include screen prints and samples.

3.2.4.9 Media Scheduling

(a) Please explain how the Media Scheduling Module works. Provide a step-by-step description of a request for a film to be delivered from the Main Library to a branch. Start with accessing the Module and placing the request, and finish with the item being received back at the Main Library. Please provide screen prints. The Library is specifically interested in these issues:

- Ease of searching for an item to request;
- Ability to track the status of a request;
- Statistics/reports that are produced;
- How the System controls what material types are available through media scheduling;
- How transit time is built into the program;

(b) What limits can be placed on editing a request? The Library would prefer that only staff at the requesting branch or at the fill location have the ability to edit.

3.2.4.10 Inventory

(a) Please provide the steps of an inventory from beginning to end, include screen prints. How would the Library be able to break up large collections into manageable sections, ex: split

nonfiction into groups of Dewey numbers? Be sure to explain how the System handles the following issues and/or alerts staff to the need for action:

- An item belonging to another branch;
- An item belonging to another collection within the same branch;
- An item that has been “claims returned” or “claims not checked out” (not checked in and still listed on a patron’s record);
- An item that is lost (not checked in and still billed to patron);
- An item that is still checked out to a patron;
- An item that is marked “trace” or “missing” (was not found on the shelf before and is now on a search list);
- An item that has a request/hold;
- An item that has a status or other indication that it is “damaged” and should not be available to the public.

(b) Are discrepancies corrected automatically without staff intervention, when appropriate, and are staff alerted to any items needing further handling? Please include samples of workslips, screen prints of alerts, and “exception reports.”

3.2.4.11 Statistics Gathering/Report Writing

(a) Please describe the standard reports that are part of the System. Include sample reports. Explain how these reports can be created, modified, and generated by non-automated services staff. Please provide a list of reports from all Modules.

(b) Explain how staff can access real-time data using dynamic views and what limitations are set for these types of views.

(c) What custom report-writing tool, such as Standard SQL, Crystal Reports, or the Vendor’s proprietary report writer, is available with the System? Describe this tool, its capabilities, and reports available.

(d) Describe how the Library can:

- Save report parameters;
- Print;
- Export and save to Microsoft Excel, Word, Powerpoint or Adobe PDF;
- Save as a webpage;
- E-mail to a select set of staff;
- Export through the use of delimited files;
- Run at a specific time or on a specific schedule;
- Pre-program and schedule report(s) to run and be e-mailed.

(e) Please provide screen prints of reports similar to those in Appendix N: Reports. Please indicate where the user ID shows.

3.2.4.12 Patron and Other Notification

(a) Describe patron and other notification methods in the System. Please include data mailers, e-mail, IVR, text messaging, and bulk e-mail. How does staff set the parameters?

(b) Describe how the IVR notifies patrons by outbound phone lines of holds, fines, and overdue items. How does the System handle the detection of an answering machine on outbound calls? Can a patron renew items and cancel requests by calling the IVR phone number? Which languages does the System support? Describe how the Library can customize the inbound and outbound messages. Describe the types of statistics that are available and any reporting functions. Describe how Library staff is notified of errors in the System.

3.2.4.13 Collection Agency/Delinquent Account Tracking

(a) Briefly describe the System's method of selecting overdue accounts for further attention (collection agency or in-house follow-up). How are accounts selected? How are payments and returned materials tracked so that the account is kept up-to-date? What are the methods for sending the

information to a collection agency? Please provide screen prints of the process and sample reports.

(b) Explain Proposer's relationship with Unique Management and how it will allow for the System to interface with them.

3.2.5 INTEROPERABILITY WITH EXISTING APPLICATIONS

The Library's ILS is the backbone of an evolving suite of library technology features. It is critical that the proposed System interface with the existing components listed below. Provide a narrative describing the System's ability to interface with the products below. Provide contact information for two locations, preferably of a similar size and number of transactions, utilizing 3M Self-Check with the proposed ILS. Provide contact information for two locations, preferably of a similar size and number of transactions, utilizing Envisionware with the proposed ILS.

3.2.5.1 3M Self-check

(a) Please describe how the System interfaces with 3M Self-Check machines. Is the System able to interface through both the wired and wireless network, without any speed degradation? Explain how the System supports checkout, checkin, and fines and fees.

(b) Is the System able to produce statistical reports for the Self-Check machines that provide hourly, daily, weekly, monthly, and/or yearly (fiscal year) usage statistics for all checkout/checkin transactions? How are these reports retrieved? The Library strongly prefers for Automated Services staff to centrally retrieve a report of statistics from all the machines at every branch without having to touch each machine either physically or remotely. The System should allow reports to be scheduled to run automatically without staff present.

(c) Please describe the messages that can be sent via SIP.

(d) Describe the proposed alternative self-check solution. Explain how it is managed and upgraded centrally and how statistics are retrieved remotely.

3.2.5.2 Envisionware – PC Reservation, Time and Print Management

(a) Please describe how the System interfaces with Envisionware, including SIP servers.

(b) Explain Proposer's relationship with Envisionware and how it will allow for ongoing maintenance of Envisionware software and existing Jamex Coin/Bill Acceptors.

3.2.5.3 Digital Media and E-Books

(a) How does this System support downloadable audiobooks, videos, and e-books?

(b) What mechanism does the System use to validate the full patron barcode number and account status?

(c) How does the System stamp the patron's record to indicate usage?

(d) To what extent are digital media and e-books searched by the federated search tool.

3.2.5.4 Digital Archiving

(a) Describe which digital archiving products and solutions the Proposer offers. How is digital content created, managed, stored and accessed via the product?

(b) What type of electronic formats can the digital archiving products work with?

(c) Do the digital archiving products offer optical character recognition for scanned documents? How are scanning errors dealt with?

(d) What full-text or metadata searching options does the digital archiving products offer? Which metadata standards does the product support?

3.2.5.5 Evanced Solutions – Calendar, Room Reservation and Summer Reading

(a) Explain your relationship with Evanced Solutions and how it will allow for ongoing maintenance of their products which are currently being used by the Library.

3.2.5.6 NextReads from EBSCO

(a) Will the proposed System support NextReads? Is your company supporting NextReads for other libraries?

3.2.6 ADDITIONAL FUNCTIONALITY/SERVICES

3.2.6.1 Electronic Payment Requirements

(a) Is the payment option PCI compliant and will the Proposer be able to provide written attestation should the Proposer be offered a contract as a result of this RFP.

(b) Describe how the System extracts and provides views, fines, and fees owed by the patron. Please provide screen prints.

(c) What type of SIP is utilized in the fines and fees process? Please list all of the types of data that are processed, including the level of detail on patron "blocks."

3.2.6.2 Cash Register/Point of Sale

(a) Does the System have a Cash Register/Point of Sale Module or use a third-party product to integrate the cash register in real time with the ILS? Explain how the Module/Product works. Please provide screen prints.

(b) Does it process credit/debit card validation and check validation in real time? If no, please explain.

(c) Describe and provide sample reports.

3.2.6.3 Financial Integration

(a) Is the System capable of exporting invoice data to a comma delimited file? Describe how the Library can schedule this export to occur on a set schedule.

(b) Will the Proposer be willing to do custom programming to interface with the County's general ledger application?

3.2.6.4 Disaster Recovery

(a) Please propose a Warm Site Disaster Recovery Plan for the Library, specifying all needed hardware, software, telecommunications equipment and procedures. The Warm Site Plan should be the Plan used on Form B-8: Disaster Recovery Plan Proposal.

(b) Please describe any Vendor-hosted or other solutions available for the Library to use during emergencies. Costs for other disaster recovery plans should be specified on Form B-11: Optional Software, Hardware, and Services. Describe how the site will be kept up-to-date with any upgrades on the hardware and software.

3.2.6.5 Handheld Circulation/Catalog Searching/Inventories

(a) Describe any devices that will support handheld circulation, catalog searching, and inventory. Describe the hardware and software capabilities.

3.2.6.6 Secure Socket Layer

(a) Describe how the SSL works and how data, web pages or complete sites are marked as secured?

(b) Can the Library select certain web pages on the site to be secured?

(c) Describe how the System has been implemented in previous locations using SSL to protect patron authentication and sensitive information pages.

(d) Describe how the certificate is typically installed in the System to provide security.

(e) What responsibilities will the Library have in keeping the Security Certificate up-to-date?

(f) Will the Certificate used be issued by the Vendor or will it be issued by a Third-Party vendor?

(g) Does the Vendor offer any other methods to secure patron authentication and sensitive information?

(h) What kind of training will be provided to manage secure pages and non-secure pages in the System?

(i) What type of support does the Vendor provide to manage secure and non-secure pages in the System?

3.2.6.7 Remote Patron Authentication (RPA)

(a) Describe how RPA will authenticate the patrons and also update the patron record with the date and type of access the patron last utilized.

(b) What statistics does RPA offer?

3.2.6.8 OpenURL Link Resolver/ERM

(a) Describe how your System includes or supports OpenURL link resolver tools. Are these tools integrated within the System or supported as a third-party product? Describe how the OpenURL link resolver would improve the Library's service to the public or streamline internal Library processes.

(b) Describe how your System includes or supports ERM functions. Is the ERM integrated within the System or supported as a third-party product? What features does the ERM provide, and how would it improve the Library's service to the public or streamline internal Library processes?

3.2.6.9 URL Checker

(a) Describe how the URL checker works.

3.2.6.10 Bookmobile/Kiosk

(a) Describe how bookmobile service is supported in the System. Is it a live environment using a secure VPN?

(b) How does the Library collect statistics on activities at each bookmobile stop.

(c) How would the System handle collecting statistics without sending each item into transit when it is checked in?

(d) How can patrons request pickup of holds at specific bookmobile stops?

3.2.6.11 Interlibrary Loan

(a) Describe how the System allows a patron to place an online request.

(b) Does the System provide libraries with the option of creating profiles of potential lending libraries and document suppliers, or groups of lending libraries, in priority order, to which request records are routed automatically?

(c) Describe how the System supports requests for materials in electronic format?

(d) Describe the extent to which the System communicates with other ILL software applications.

(e) Does the System create temporary bibliographic records for ILL items received from other institutions? What information is displayed in these records—e.g., title, author, lending library, etc.? Are the records masked from display in the OPAC? Does the System read/recognize barcodes from other institutions?

(f) Describe how patrons are notified when an ILL item is ready for pick up.

(g) Describe how the System can automate other clerical aspects of Interlibrary Loan lending and borrowing. Can the System, for example, print bookstraps and mailing labels?

(h) What ILL statistics does the System record—e.g., copyright compliance, number of filled and unfilled requests, number of loans, copies, etc.?

(i) Describe what reports the System can produce specific to ILL management—e.g., reports for overdue items, customized invoices, etc.

(j) Describe how changes to a request made by staff within WorldCat's Resource Sharing Module are updated within the ILS's ILL Module.

(k) Many records are simultaneously processed as a batch in WorldCat's Resource Sharing Module. Will an update to the status of a batch processed record be reflected in the ILS' individual record?

3.2.6.12 Other

(a) Please describe any other features, products and services available to the Library.

3.2.7 TECHNICAL/CONFIGURATION REQUIREMENTS

(a) Provide an overview of the system architecture being proposed. Describe the hardware/operating system configuration recommended for the Library taking into account the Library's desire to reuse as much present equipment as possible. Include diagrams that illustrate the major hardware and software components. Indicate any third-party hardware or software. Please indicate on Form B-2: Hardware Price Proposal, all hardware that will need to be purchased by the Library. Please indicate on Form B-3: Reusable Existing Hardware, which of the items in Appendices A-I can be utilized and supported by the proposed System. Include manufacturer, model, size, and operating system version for all hardware proposed. Describe the server environment necessary to run the proposed System as a true multi-user, multi-tasking system. Describe the number, purpose, and configuration of servers for the production and test environments and for all functionality requested in this RFP. Provide the necessary hardware specifications, including rack space required, heat output and electrical needs for all equipment.

(b) What platform, database, operating system, and programming language does the Proposer recommend for the Library and why are these preferred? Include an application architecture diagram.

(c) What is the maximum uptime you will contract for and how can you assure that amount of uptime? See Section 2.5.4.5: Backup and Redundancy Subsection b for a detailed explanation.

(d) Provide expected minimum, average, and maximum response time metrics for a Library the size of MDPLS when the System is running at full load during Library peak hours of operation at all locations.

(e) Describe additional equipment recommended for the Library to have full redundancy of the System. This equipment will not be included in the price scoring used by the Evaluation/Selection Committee.

(f) Explain the scalability of the proposed System. Describe the software's expandability and portability to accommodate the Library's future growth over a five year span, with no System degradation or response time issues.

(g) Describe the minimum and recommended configurations for client workstations for staff and the public. Please indicate on Form B-3: Reusable Existing Hardware which of the items in Appendices A-I

can be utilized and supported by the proposed System. What software and drivers are needed for the staff and public clients in order to communicate with the servers? Do you offer a web based client? Please describe.

(h) Specify all licenses required for use of the proposed System, including third-party licenses. Include both the production and test environment. What is the recommended number of licenses for the Library should an enterprise license be too costly? Describe all licensing options. If Licensing options differ by product, provide specific details such as number of seats per license, any distinctions between onsite and remote users if applicable, and if the licensing options are per server or per seat? If proposing embedded licenses, describe how staff can extract and update data fields. Please provide copies of all proposed licensing agreements.

(i) Describe the System's security capabilities and levels, including password management. Describe any other mechanisms proposed to fully protect and secure the System. Explain how the System provides security at the database, workstation, and individual operator levels. Explain how security level and permissions are set for individuals and for groups. Does the System provide specific database ports to ensure a more highly secured environment? Describe and provide any and all ports that allow access to the System database and application.

(j) Describe what mechanisms are available for the System to alert the Library Automated Services staff of any System security, database or network problems. Describe the System's parameters for alerts and if they are definable and modifiable by the library. Describe in detail security features the System provides to protect from unauthorized intrusions.

(k) Describe how the System authenticates both staff and Library customers. Explain how the System provides audit trails, ex: information on which employee has added, edited or deleted a record. Which Modules provide the audit trails and in what areas? Please give details about when and where the information is logged and how it is retrieved.

(l) Describe how the System supports and protects the integrity of the data. How does the System protect against unintentional loss of data and programs? What tools are provided to check the data for validity and consistency and to correct data problems? What

mechanisms are available for full data recovery should it be necessary?

(m) Describe how the backup procedures capture the entire System environment, including database(s), operating system, system configurations, preferences, and all directly configured third-party products that provide services. What types of backups are available for the Library, such as full System backups, incremental backups and differential backups? What hardware is necessary to support the backup function? Are log files available? Describe the frequency and process to schedule and run the backups automatically. Describe the process the Library would follow if there was a need to perform a full restore of the entire System. Does the System backup method include all stand-alone products that are directly configured with the System.

(n) Describe the capability for Automated Services staff to perform System administration functions remotely and the security provisions in place to support these functions.

(o) Describe the minimum and maximum bandwidth requirements for both the staff clients and web clients.

(p) On occasion, the Library or an individual branch may be closed unexpectedly. How does the System accommodate these situations? What action needs to be taken to handle issues such as: items due and holds that will expire during the closed period?

(q) Describe the availability and features for any Application Programming Interface (API). Describe what documentation, training and support on use of APIs are provided.

(r) Please indicate any of the standards in Section 2.5.4.12: Standards which are not supported by the System and what impact this has on overall functionality. Describe plans to adopt the standard.

(s) Please provide a plan for incorporating additional/replacement hardware required to support the System into the existing Computer Room.

(t) Explain Proposer's experience in providing services for Computer Room design. Provide an estimate of the staff hours needed to assess and provide information on designing the room in a new and/or existing facility.

3.2.8 SYSTEM MIGRATION AND IMPLEMENTATION

(a) Please provide a detailed description of the plans for data migration (extracting, loading and indexing) with time frame. The Library expects the following data to be migrated:

- Bibliographic Records (Titles), MARC and Non-MARC records
- Items (Copies)
- Authority Records
- Circulation Transactions (Charges, Fines, Fees, Bills, Holds, Messages). Existing circulation transactions should maintain the original dates, not be reset to the date of the data load.
- Acquisitions (Vendors, Orders, Funds). Existing acquisition transactions should maintain the original dates, not be reset to the date of the data load.
- Serials Control (Checkin, Chronology, Publication Patterns)
- Patron Records (Personal Information, Blocks, History);
- Homebound Records – (Customer Records, Reading Logs/Histories, and Customer Ratings);
- Statistical Records

(b) Specify any library data that will not automatically be migrated and present a strategy so that the data can be handled without manual reentry. Provide suggestions for database clean-up prior to migration. How can you best assure that the Library will not lose data during the migration process?

(c) Describe the full migration plan, including time frames and any parallel running of Systems. Specify the order in which files will be migrated and tested and the length of time for each phase of the migration. What is the rate of records per hour that can be converted? How much downtime should the Library expect to experience. Describe the plan to minimize downtime. List the responsibilities of the Proposer and the Library.

(d) Describe any experience the company has had migrating data from Horizon 7.3.4 to the proposed System. On Form L-1: Customer

References, provide the contact information of two libraries for whom the company has migrated data from Horizon 7.3.4.

3.2.9 ACCEPTANCE TESTING

(a) Please provide a proposed Acceptance Testing Plan.

3.2.10 CUSTOMER SUPPORT – WARRANTY/MAINTENANCE – SERVICE LEVEL AGREEMENT

(a) Please specify the warranty period for all software/hardware that is part of the Proposal; this should be for a minimum of one year.

(b) Please provide detailed information on hardware/software service and maintenance. What is the trouble reporting procedure and guaranteed response times for both hardware and software related problems? What is the escalation procedure? Describe how reported problems are handled by the support team including response time, classification of problems, follow through, and turn around time.

(c) Please explain Proposer's plan to provide support during the hours requested by the Library in Section 2.7: Customer Support – Warranty/Maintenance – Service Level Agreement of this RFP. Describe plans for emergency maintenance. Please provide costs on Form B-10: Hardware/Software Maintenance Price Proposal. Describe Proposer's role in providing Maintenance for proposed third-party products. Will Proposer be able to provide maintenance for the Envisionware hardware/software listed in Appendix P: Envisionware Software and Hardware of this RFP?

(d) Please provide the price on Form B-10: Hardware/Software Maintenance Price Proposal, for the maintenance described in Section 2.7: Customer Support – Warranty/Maintenance – Service Level Agreement of this RFP.

(e) Please provide a copy of the standard Service Level Agreement including any optional add-ons.

(f) What method does Proposer use to remotely access the System? Describe plans for preventive maintenance of the database.

(g) How can the Proposer ensure that any custom programming performed for the Library will be retained when the System is upgraded with a new release or patch?

3.2.11 TRAINING/DOCUMENTATION

(a) Describe the recommended training plan for a multi-branch library the size of Miami-Dade Public Library System. How much training is typically needed for each major application? What different types of training are offered, ex: face-to-face, WebEx, videotape, tutorials, etc. How do you ensure that those who take the training courses receive the desired level of proficiency before GoLive.

(b) Provide an outline of the training to be provided including the number of days and hours for each session. Provide a recommended time schedule for the Library to be able to train all staff. Provide a brief description of all training courses. Please provide samples of the training materials used at training sessions. It is highly desirable for training materials to include screen prints.

(c) Provide a description of the complete documentation package available with the System.

(d) Describe the online help functions for both staff and the public.

(e) Describe plans to develop a Training Database using the Library's patron and bibliographic databases and set up with the Library's parameters/policies.

3.2.12 PRICING

The Proposer's price shall be submitted on **Form B-1 "Price Proposal Schedule"**, and in the manner required on said attachment form; there are no exceptions allowed to this requirement. If the Proposer wishes to submit an alternate pricing, the Proposer must first submit pricing in accordance with the **Form B-1**, and then include a separate alternate pricing labeled "ALTERNATE PRICE PROPOSAL". Proposers who do not submit pricing in accordance with **Form B-1** will not receive evaluation points for the Price/Cost portion. The alternate pricing will not be scored for evaluation purposes, but may be considered by the County if the Proposer is selected for negotiations. Price will be evaluated based on the following criteria:

1. Total Price that includes all costs associated with providing all requirements of the RFP solicitation.
2. Detailed pricing information illustrating the price charged per phase of the project.
3. Projection of Proposer's operational or maintenance costs of this project for each year.

3.2.13 AFFIDVITS/ACKNOWLEDGEMENTS

The Proposer must complete, sign as required, and submit the following documents as part of its Proposal:

Form A-2 Affidavit of Miami-Dade County Lobbyist Registration for Oral Presentations **(see Section 1.17)**

Form A-3 Acknowledgement of Addenda **(see Section 1.8)**

Form A-4 Local Business Preference **(see Section 1.22)**

Form A-5 Subcontractor/Supplier Listing **(see Section 1.29)**

Form A-6 Fair Subcontracting Policies **(see Section 1.30)**

3.2.14 PROPOSAL PREPARATION REQUIREMENTS

Proposers must follow instructions of Section 1.4 “Proposal Submission”. The proposal must consist of a) Technical Proposal, and b) Price Proposal, and the original and all copies must be submitted in a sealed envelope or container that should be addressed as follows:

Proposer’s Name Proposer’s Address Proposer’s Telephone Number	
	Clerk of the Board Stephen P. Clark Center 111 NW 1st Street, 17th Floor, Suite 202 Miami, FL 33128-1983
RFP No.: 603 RFP Title: Integrated Library System Proposal Due Date: October 22, 2008	

3.2.15 ESCROW

Proposer is required to provide a copy of the Escrow Agreement, and a detailed explanation that addresses the Proposer’s ability to meet the County’s requirements as specified in Section 2.9. You must provide detailed explanation of your cost to the County if any, and the cost should be specified in the attached **Form B-4**, Software Price Proposal.

SECTION 4.0 - EVALUATION/SELECTION PROCESS

4.1 INTRODUCTION

Following the opening of the Proposal packages, the Proposals will be evaluated by an Evaluation/ Selection Committee (ES Committee) appointed by the County Manager. The Committee will be comprised of appropriate County personnel from multiple departments and members of the community, as deemed necessary, with the appropriate experience and/or knowledge, striving to ensure that the Committee is balanced with regard to both ethnicity and gender.

Contract award will be based on an evaluation of all items in Section 3.0. Scoring Proposals is based on point totals and not a percentage factor.

Proposers are asked to fully respond to all specifications in the RFP, providing enough narrative description to permit the ES Committee to understand how the System works and how the Proposer's plan meets the needs of the Library.

4.2 TECHNICAL PROPOSAL EVALUATION

To assist the ES Committee in the evaluation process, a Technical Review Committee (TR Committee) will be appointed by the Chair of the ES Committee to review responses and make written and oral reports to the ES Committee.

The TR Committee shall consist of County and Library staff, including, but not limited to:

- Library Automated Services staff
- ETSD staff
- Library Technical Services Manager
- Library Collection Management Librarian
- Library Acquisitions Librarian
- Library Branch Administrator
- Library Branch Manager
- Library Main Department Manager
- Library Main Administrator
- Library Connections Manager

The TR Committee will read each written Proposal and submit a report to the ES Committee. The report will describe the strengths, weaknesses and deficiencies of each Module and will describe each Module as:

Highly Acceptable: The Proposal contains a means of accomplishing most of the Library's desired features. The proposed Module provides enhanced capabilities for the Library and has

additional desired features which are being planned and/or the Proposer will work with the Library to achieve these features within a reasonable time frame.

Acceptable: The Module is usable by the Library.

Marginal: The Module contains weaknesses and/or deficiencies which will result in additional labor on the part of the Library.

Unsatisfactory: The Module does not meet the Library's needs and would have a negative impact on operations if used.

The ES Committee will first evaluate and rank responsive Proposals on the criteria listed below. The criteria are itemized with their respective weights for a maximum total of one hundred (100) points per each ES Committee member, for all criteria. A Proposer may receive the maximum points or a portion of this score depending on the merit of its Proposal, as judged by the Evaluation/Selection Committee in accordance with:

	Criteria	Points
•	Overall assessment of Vendor's Proposal to meet the present and future needs of the Library as outlined in the RFP	25
•	Basic application software Functions and capabilities	25
•	Integration with existing services/additional services	10
•	Proposer's qualifications, experience and performance in library automation projects of similar scope and size, and financial stability	10
•	Proposer's implementation service and support capabilities (including warranty, maintenance, training, data migration, implementation, documentation)	20
•	Price	10
	Total	100

4.3 APPLICATION OF SELECTION FACTOR

A selection factor will be added in accordance with Section 1.7, Contract Measures, and the SBE Program Participation Provisions after review of the Proposal. A Proposer entitled to a selection factor shall receive an additional ten

percent (10%) of the technical section evaluation points on the technical portion of such Proposer's Proposal.

4.4 PROPOSAL PRESENTATION AND PANEL INTERVIEW

The Evaluation/Selection Committee will evaluate and score all submitted written Proposals from responsive and responsible Proposers. The Evaluation/Selection Committee will then rank and select firms that best meet the requirements of the Solicitation in an effort to "short-list" the originally submitted Proposals for final consideration. The short-listed firms may be invited to individually make an oral presentation of their Proposal and participate in a panel interview. The oral presentations will be chaired by the contracting officer facilitating this Solicitation. The Evaluation/Selection Committee will conduct the interview of the Proposer under consideration.

The oral presentation will consist of an overview of the Proposal, standard questions asked of each of the short-listed Proposers, and specific questions regarding the individual items specific to the Proposal being reviewed that may require further clarification. Any additional information that the Proposer provides during these presentations will be considered to final consideration for recommendation to award this contract.

Following the oral presentations, the TR Committee will draft a report on how well each Proposer meets the technical, operational and maintenance requirements of the County as specified in this RFP. The TR Committee will report its findings, in writing and orally, to the ES Committee to assist in the re-evaluation, re-rating and re-ranking based upon the written documents combined with the oral presentation.

4.5 BEST AND FINAL OFFER

Following the oral presentations, the Evaluation/Selection Committee may solicit a Best and Final Offer (BAFO) from the short-listed Proposers by the issuance of a written request for BAFO. A BAFO shall be solicited when, in the sole discretion of the Evaluation/Selection Committee: (a) a clarification of the original RFP is in the best interest of Miami-Dade County, (b) the County may receive better value, including quality or price as a result of the BAFO or (c) the use of the BAFO is required or encouraged by the ultimate funding source for the goods or services solicited. Proposers shall adhere to all of the requirements set forth in the request for BAFO including but not limited to the deadline for submission. In no event shall a BAFO be considered which in the sole discretion of the County: (a) changes materially the scope of the original Proposal; (b) increases the price for the goods or services offered; or (c) reduces the quantity, quality or suitability of the goods or services for the intended purpose. In the event that a Proposer fails or refuses to provide a response to the BAFO in accordance with the terms of this Section or in accordance with the request for BAFO, the Proposers initial

response may, in the County's sole discretion, be considered the Proposer's best offer in response to this solicitation.

Following the receipt of BAFO's, the Evaluation/Selection Committee may, but shall not be required to, conduct additional oral presentations to clarify the responses.

4.6 OVERALL RANKING

Overall ranking shall be determined following oral presentations, or conclusion of evaluation of the BAFO, if any. The Evaluation/Selection Committee will then reconvene to evaluate the revised Proposals submitted by the short-listed Proposers. The Proposals will then be scored and re-ranked based on the technical Proposal, price Proposal, oral presentation, the clarifications made in the oral presentations and the BAFO with incorporated clarifications. A final evaluation, in light of any additional information arising from the presentation and interview, will be conducted in order to select the top contender(s) to recommend for award of the contract.

The Proposer(s) recommended for negotiations shall provide to the County:

a) Its most recently audited financial statements as of a date not earlier than the end of the Proposer's preceding official tax accounting period, together with a statement in writing, signed by a duly authorized representative, stating that the present financial condition is materially the same as that shown on the balance sheet and income statement submitted, or with an explanation for a material change in the financial condition. A copy of the most recent business income tax return will be accepted if certified financial statements are unavailable.

b) Information concerning any prior or pending litigation, either civil or criminal, involving a governmental agency or which may affect the performance of the services to be rendered herein, in which the Proposer, any of its employees or subcontractors or sub consultants is or has been involved within the last three (3) years.

4.7 NEGOTIATIONS

The County may award a contract on the basis of initial offers received, without discussions. Therefore, each initial offer should contain the Proposer's best terms from a monetary and technical standpoint.

The Evaluation/Selection Committee will evaluate, score and rank proposals, and submit the results of their evaluation to the County Manager with their recommendation. The County Manager or designee will determine with which Proposer(s) the County shall negotiate, if any, taking into consideration the Local

Preference Section above. In his sole discretion, the County Manager or designee may direct negotiations with the highest ranked Proposer, negotiations with multiple Proposers, or may request best and final offers.

Notwithstanding the foregoing, if the County and said Proposer(s) cannot reach agreement on a contract, the County reserves the right to terminate negotiations and may, at the County Manager's or designee's discretion, begin negotiations with the next highest ranked Proposer(s). This process may continue until a contract acceptable to the County has been executed or all proposals are rejected. No Proposer shall have any rights against the County arising from such negotiations or termination thereof.

Any Proposer recommended for negotiations may be required to provide to the County:

a) Its most recent certified business financial statements as of a date not earlier than the end of the Proposer's preceding official tax accounting period, together with a statement in writing, signed by a duly authorized representative, stating that the present financial condition is materially the same as that shown on the balance sheet and income statement submitted, or with an explanation for a material change in the financial condition. A copy of the most recent business income tax return will be accepted if certified financial statements are unavailable.

b) Information concerning any prior or pending litigation, either civil or criminal, involving a governmental agency or which may affect the performance of the services to be rendered herein, in which the Proposer, any of its employees or subcontractors is or has been involved within the last three years.

4.8 BEST AND FINAL OFFER (BAFO) PREPARATION REQUIREMENTS

Proposers must follow the instructions noted on Section 1.4: Proposal Submission. The BAFO must include the clarification document and be submitted in a sealed envelope or container that shall be addressed as follows. In the event that the Proposer wishes to maintain the initial offer, he/she must submit this communication in writing.

Proposer's Name
Proposer's Address
Proposer's Telephone Number

Clerk of the Board
Stephen P. Clark Center
111 NW 1st Street, 17th Floor, Suite 202
Miami, FL 33128-1983

RFP No.: 603 - BAFO
EPP RFP Title: Integrated Library System
BAFO Due Date: January 7, 2009
(See Section 1.4 for location)

4.9 LOCAL PREFERENCE

Local Preference may be taken into consideration in accordance with Section 1.22: Local Preference. If, following the completion of final rankings by the Evaluation/Selection Committee, a non-local Proposer is the highest ranked responsive and responsible Proposer, and the ranking of a responsive and responsible local Proposer is within 5% of the ranking obtained by said non-local Proposer, then the Evaluation/Selection Committee will recommend to the County Manager or designee that a contract be negotiated with said local Proposer(s).

5.0 CONTRACT AWARD

Any negotiated contract, as a result of the RFP, will be submitted to County Manager or designee for approval and may be submitted to the Board of County Commissioners for their approval. **All Proposers will be notified in writing when the County Manager or designee makes an award recommendation.** The Contract award, if any, shall be made to the Proposer whose Proposal shall be deemed by the County to be in the best interest of the County. The County's' decision of whether to make the award and which Proposal is in the best interest of the County shall be final.

(This is the form of Agreement the County anticipates awarding to the selected Proposer.)

Section 5.0

Contract No. RFP No. 603

THIS AGREEMENT made and entered into as of this _____ day of _____ by and between _____ , a corporation organized and existing under the laws of the State of _____, having its principal office at _____ (hereinafter referred to as the "Contractor"), and Miami-Dade County, a political subdivision of the State of Florida, having its principal office at 111 N.W. 1st Street, Miami, Florida 33128 (hereinafter referred to as the "County"),

WITNESSETH:

WHEREAS, the Contractor has offered to provide, furnish, install, customize, upgrade and maintain and train staff for system hardware and software for an Integrated Library System (ILS) (collectively known as the System) that shall conform to the Scope of Services (Appendix A); Miami-Dade County's Request for Proposals (RFP) No. and all associated addenda and attachments, incorporated herein by reference; and the requirements of this Agreement; and,

WHEREAS, the Contractor has submitted a written proposal dated _____, hereinafter referred to as the "Contractor's Proposal" which is incorporated herein by reference; and,

WHEREAS, the County desires to procure from the Contractor such _____ for the County, in accordance with the terms and conditions of this Agreement;

NOW, THEREFORE, in consideration of the mutual covenants and agreements herein contained, the parties hereto agree as follows:

ARTICLE 1. DEFINITIONS

The following words and expressions used in this Agreement shall be construed as follows, except when it is clear from the context that another meaning is intended:

a) The word "Application Software" to mean the programs that will be used to perform the tasks specified in the Scope of Services.

b) The words "Change Order" or "Extra Work" or "Additional Work" to mean work resulting in additions or deletions or modifications to the amount, type or value of the Work and Services as required in this Contract, as directed and/or approved by the County.

c) The words "Contract" or "Contract Documents" or "Agreement" to mean collectively these terms and conditions, the Scope of Services (Appendix A), RFP No. and all associated addenda and attachments, the Contractor's Proposal, and all other attachments hereto and all amendments issued hereto.

d) The words "Contract Date" to mean the date on which this Agreement is effective.

e) The words "Contract Manager" to mean Miami-Dade County's Director, Department of Procurement Management, or the duly authorized representative designated to manage the Contract.

f) The words "Contractor" or "Consultant" or "Vendor" to mean _____ and its permitted successors and assigns.

g) The word "County" to mean Miami-Dade County, a political subdivision of the State of Florida.

h) The word "Days" to mean Calendar Days.

i) The word "Deliverables" to mean all documentation and any items of any nature submitted by the Contractor to the County's Project Manager for review and approval pursuant to the terms of this Agreement.

j) The words "directed", "required", "permitted", "ordered", "designated", "selected", "prescribed" or words of like import to mean respectively, the direction, requirement, permission, order, designation, selection or prescription of the County's Project Manager; and similarly the words "approved", acceptable", "satisfactory", "equal", "necessary", or words of like import to mean respectively, approved by, or acceptable or satisfactory to, equal or necessary in the opinion of the County's Project Manager.

k) The word "Enterprise License" to mean licensing covering all Miami-Dade Public Library System facilities and staff.

l) The word "Enterprise Technology Services Department" to mean Miami-Dade County's central information technology department.

m) The word "Evaluation/Selection Committee" to mean the group of individuals who will be reviewing the submitted proposals and eventually recommending Proposer(s) for award.

n) The word "Final Acceptance" to mean the successful completion of the Hardware Functionality, Data Load, Module Functionality, System Reliability and Response Time tests which demonstrate that all System functions are operational and perform as required by this Agreement and Appendix A, "Scope of Services."

o) The word "Go Live" or "Go Live Date" to mean the date on which the delivered System is used in a production environment.

p) The word "Library" or "MDPLS" to mean Miami-Dade Public Library System.

q) The word "Maintenance" to mean keeping the software and/or hardware in a condition so that it operates as set forth in the documentation and in conformity to this Agreement and Appendix A, "Scope of Services."

r) The word "Module" to mean a distinct component of the integrated software such as OPAC,

Circulation, Cataloging, Acquisitions, etc.

s) The words “Patron,” “Customer,” or “Borrower” to refer to people using the Library.

t) The words "Project Manager" to mean the County Manager or the duly authorized representative designated to manage the Project.

u) The words "Scope of Services" or “Scope of Work” to mean Section 2.0 of RFP ___, which is incorporated herein as Appendix A, “Scope of Services” and details the work to be performed by the Contractor or Subcontractor.

v) The word “Services” to mean all actions performed or to be performed by the Contractor or its Subcontractors as required by Appendix A, “Scope of Services.”

w) The word "subcontractor" or “subconsultant” to mean any person, entity, firm or corporation, other than the employees of the Contractor, who furnishes labor and/or materials, in connection with the Work, whether directly or indirectly, on behalf and/or under the direction of the Contractor and whether or not in privity of Contract with the Contractor.

x) The word “System” to mean the total complement of hardware, software, goods and services, peripherals and all other items tangible and intangible designed to operate as an integrated group.

y) The word “Third-Party” to mean any company or subcontractor, other that the Contractor, who will provide software, hardware, and/or services in order to fulfill the terms and conditions of this Agreement and Appendix A, “Scope of Services.

z) The word “User” to mean anyone accessing the System, including both staff and patrons.

aa) The words "Work", "Services", "Program", or "Project" to mean all matters and things required to be done by the Contractor in accordance with the provisions of this Contract.

bb) The words “Work Order” to mean a document that defines and describes the parameters of individual projects assigned or awarded by the County to the Contractor in accordance to the terms of the Agreement and Appendix A, “Scope of Services.”

ARTICLE 2. <u>ORDER OF PRECEDENCE</u>

If there is a conflict between or among the provisions of this Agreement, the order of precedence is as follows: 1) these terms and conditions, 2) the Scope of Services (Appendix A), 3) the Miami-Dade County's RFP No. and any associated addenda and attachments thereof, and 4) the Contractor's Proposal.

ARTICLE 3. <u>RULES OF INTERPRETATION</u>

a) References to a specified Article, section or schedule shall be construed as reference to that specified Article, or section of, or schedule to this Agreement unless otherwise indicated.

b) Reference to any agreement or other instrument shall be deemed to include such agreement or other instrument as such agreement or other instrument may, from time to time, be modified, amended, supplemented, or restated in accordance with its terms.

c) The terms "hereof", "herein", "hereinafter", "hereby", "herewith", "hereto", and "hereunder" shall be deemed to refer to this Agreement.

d) The titles, headings, captions and arrangements used in these Terms and Conditions are for convenience only and shall not be deemed to limit, amplify or modify the terms of this Contract, nor affect the meaning thereof.

ARTICLE 4. NATURE OF THE AGREEMENT

a) This Agreement incorporates and includes all prior negotiations, correspondence, conversations, agreements, and understandings applicable to the matters contained in this Agreement. The parties agree that there are no commitments, agreements, or understandings concerning the subject matter of this Agreement that are not contained in this Agreement, and that this Agreement contains the entire agreement between the parties as to all matters contained herein. Accordingly, it is agreed that no deviation from the terms hereof shall be predicated upon any prior representations or agreements, whether oral or written. It is further agreed that any oral representations or modifications concerning this Agreement shall be of no force or effect, and that this Agreement may be modified, altered or amended only by a written amendment duly executed by both parties hereto or their authorized representatives.

b) The Contractor shall provide the services set forth in the Scope of Services, and render full and prompt cooperation with the County in all aspects of the Services performed hereunder.

c) The Contractor acknowledges that this Agreement requires the performance of all things necessary for or incidental to the effective and complete performance of all Work and Services under this Contract. All things not expressly mentioned in this Agreement but necessary to carrying out its intent are required by this Agreement, and the Contractor shall perform the same as though they were specifically mentioned, described and delineated.

d) The Contractor shall furnish all labor, materials, tools, supplies, and other items required to perform the Work and Services that are necessary for the completion of this Contract. All Work and Services shall be accomplished at the direction of and to the satisfaction of the County's Project Manager.

e) The Contractor acknowledges that the County shall be responsible for making all policy decisions regarding the Scope of Services. The Contractor agrees to provide input on policy issues in the form of recommendations. The Contractor agrees to implement any and all changes in providing Services hereunder as a result of a policy change implemented by the County. The Contractor agrees to act in an expeditious and fiscally sound manner in providing the County with input regarding the time and cost to implement said changes and in executing the activities required to implement said changes.

ARTICLE 5. CONTRACT TERM

The Contract shall become effective on _____ and shall be for the duration of five (5) years. The County, at its sole discretion, reserves the right to exercise the option to renew this Contract for a period of life options to renew for five (5) year renewal periods each time. The County reserves the right to exercise its option to extend this Contract for up to one hundred-eighty (180) calendar days beyond the current Contract period and will notify the Contractor in writing of the extension. This Contract may be extended beyond the initial one hundred-eighty (180) calendar day extension period by mutual agreement between the County and the Contractor, upon approval by the Board of County Commissioners.

ARTICLE 6. CONSORTIA CLAUSE

Under the license, the County, in the event it enters into consortia or similar arrangements, with other libraries, shall have the right to use this System or share use of the System with other libraries in the

consortia. Additional costs, if any, to the County for shared use shall be based on the addition of hardware, database conversion services, software set-up fees and installation services as needed.

ARTICLE 7. NOTICE REQUIREMENTS

All notices required or permitted under this Agreement shall be in writing and shall be deemed sufficiently served if delivered by Registered or Certified Mail, with return receipt requested; or delivered personally; or delivered via fax or e-mail (if provided below) and followed with delivery of hard copy; and in any case addressed as follows:

(1) to the County

a) to the Project Manager:

Miami-Dade County
Attention: Georgina Del Valle
Phone: 305-375-3660
Fax: 305-372-6381
E-mail: delvalleg@mdpls.org

and,

b) to the Contract Manager:

Miami-Dade County
Department of Procurement Management
111 N.W. 1st Street, Suite 1375
Miami, FL 33128-1974
Attention: Julian R. Manduley
Phone: (305) 375-5548
Fax: (305) 375-2316
E-mail: jmandul@miamidade.gov

(2) To the Contractor

Attention:
Phone:
Fax:
E-mail:

Either party may at any time designate a different address and/or contact person by giving notice as provided above to the other party. Such notices shall be deemed given upon receipt by the addressee.

ARTICLE 8. PAYMENT FOR SERVICES/AMOUNT OBLIGATED

The Contractor warrants that it has reviewed the County's requirements and has asked such questions and conducted such other inquiries as the Contractor deemed necessary in order to determine the price the Contractor will charge to provide the Work and Services to be performed under this Contract. The compensation for all Work and Services performed under this Contract, including all costs associated with such Work and Services, shall be in the total amount of _____ ($_____). The County shall have no obligation to pay the Contractor any additional sum in excess of this amount, except for a change and/or modification to the Contract, which is approved and executed in writing by the County and the Contractor.

All Services undertaken by the Contractor before County's approval of this Contract shall be at the Contractor's risk and expense.

In the event that the County elects to contract in a manner that requires the travel expenses to be itemized, with respect to travel costs and travel related expenses, the Contractor agrees to adhere to Section 112.061 of the Florida Statutes as they pertain to out-of-pocket expenses including employee lodging, transportation, per diem, and all miscellaneous cost-and fees. The County shall not be liable for any such expenses that have not been approved in advance, in writing, by the County.

ARTICLE 9. PRICING

Prices shall remain firm and fixed for the term of the Contract, including any option or extension periods; however, the Contractor may offer incentive discounts to the County at any time during the Contract term, including any renewal or extension thereof.

ARTICLE 10. METHOD AND TIMES OF PAYMENT

The Contractor agrees that under the provisions of this Agreement, as reimbursement for those actual, reasonable and necessary costs incurred by the Contractor, which are directly attributable or properly allocable to the Services, the Contractor may bill the County periodically, but not more than once per month, upon invoices certified by the Contractor pursuant to Appendix B – Price Schedule. All invoices shall be taken from the books of account kept by the Contractor, shall be supported by copies of payroll distribution, receipt bills or other documents reasonably required by the County, shall show the County's contract number, and shall have a unique invoice number assigned by the Contractor. It is the policy of Miami-Dade County that payment for all purchases by County agencies and the Public Health Trust shall be made in a timely manner and that interest payments be made on late payments. In accordance with Florida Statutes, Section 218.74 and Section 2-8.1.4 of the Miami-Dade County Code, the time at which payment shall be due from the County or the Public Health Trust shall be forty-five days from receipt of a proper invoice. The time at which payment shall be due to small businesses shall be thirty (30) days from receipt of a proper invoice. All payments due from the County or the Public Health Trust, and not made within the time specified by this section shall bear interest from thirty (30) days after the due date at the rate of one percent (1%) per month on the unpaid balance. Further, proceedings to resolve disputes for payment of obligations shall be concluded by final written decision of the County Manager, or his or her designee(s), not later that sixty (60) days after the date on which the proper invoice was received by the County or the Public Health Trust.

Invoices and associated back-up documentation shall be submitted in duplicate by the Contractor to the County as follows:

Miami-Dade County
Public Library System
101 West Flagler
Miami, FL 33130
Attention: Accounts Payable, Business Office

The County may at any time designate a different address and/or contact person by giving written notice to the other party.

The Library plans to pay the selected Proposer based on the payment schedule listed below:

	Payment Milestones	Percent
1	Delivery of the Software	10%
2	Successful completion of the Hardware Functionality and Data Load Tests	10%
3	Successful completion of the Module Functionality Tests	30%
4	Successful completion of the Third-Party Integration Test	25%
5	Final acceptance, which occurs at the successful completion of the tests above and the System Reliability and Response Time Tests	25%

ARTICLE 11. PURCHASE OF OTHER ITEMS NOT LISTED BASED ON PRICE QUOTES

While the County has listed all major items on the solicitation which are utilized by Miami-Dade Public Library System in conjunction with its operations, there may be ancillary items that must be purchased by the Library during the term of this contract. Under these circumstances, a Library representative will contact the primary vendor to obtain a price quote for the ancillary items. The County reserves the right to award these ancillary items to the primary contract vendor, another contract vendor based on the lowest price quote or to bid the items through a separate solicitation.

ARTICLE 12. INDEMNIFICATION AND INSURANCE

Contractor shall indemnify and hold harmless the County and its officers, employees, agents and instrumentalities from any and all liability, losses or damages, including attorneys' fees and costs of defense, which the County or its officers, employees, agents or instrumentalities may incur as a result of claims, demands, suits, causes of actions or proceedings of any kind or nature arising out of, relating to or resulting from the performance of this Agreement by the Contractor or its employees, agents, servants, partners principals or subcontractors. Contractor shall pay all claims and losses in connection therewith and shall investigate and defend all claims, suits or actions of any kind or nature in the name of the County, where applicable, including appellate proceedings, and shall pay all costs, judgments, and attorney's fees which may issue thereon. Contractor expressly understands and agrees that any insurance protection required by this Agreement or otherwise provided by Contractor shall in no way limit the responsibility to indemnify, keep and save harmless and defend the County or its officers, employees, agents and instrumentalities as herein provided.

The Contractor shall furnish to the Vendor Assistance Section, Department of Procurement Management, Administration Division, 111 NW 1st Street, Suite 1300, Miami, Florida 33128, Certificate(s) of Insurance which indicate that insurance coverage has been obtained which meets the requirements as outlined below:

A. Worker's Compensation Insurance for all employees of the Contractor as required by Florida Statute 440.

B. Commercial General Liability Insurance on a comprehensive basis in an amount not less than $300,000 combined single limit per occurrence for bodily injury and property damage. **Miami-Dade County must be shown as an additional insured with respect to this coverage.**

C. Automobile Liability Insurance covering all owned, non-owned and hired vehicles used in connection with the work, in an amount not less than $300,000 combined single limit per occurrence for bodily injury and property damage.

D. Professional Liability Insurance in an amount not less than $1,000,000.

All insurance policies required above shall be issued by companies authorized to do business under the laws of the State of Florida, with the following qualifications:

The company must be rated no less than "B" as to management, and no less than "Class V" as to financial strength, by the latest edition of Best's Insurance Guide, published by A.M. Best Company, Oldwick, New Jersey, or its equivalent, subject to the approval of the County Risk Management Division.

or

The company must hold a valid Florida Certificate of Authority as shown in the latest "List of All Insurance Companies Authorized or Approved to Do Business in Florida" issued by the State of Florida Department of Insurance and are members of the Florida Guaranty Fund.

Certificates will indicate no modification or change in insurance shall be made without thirty (30) days in advance notice to the certificate holder.

NOTE: DADE COUNTY RFP NUMBER AND TITLE OF RFP MUST APPEAR ON EACH CERTIFICATE.

CERTIFICATE HOLDER MUST READ: **MIAMI-DADE COUNTY**
111 NW 1st STREET
SUITE 2340
MIAMI, FL 33128

Compliance with the foregoing requirements shall not relieve the vendor of his liability and obligation under this section or under any other section of this agreement.

ARTICLE 13. MANNER OF PERFORMANCE

a) The Contractor shall provide the Services described herein in a competent and professional manner satisfactory to the County in accordance with the terms and conditions of this Agreement. The County shall be entitled to a satisfactory performance of all Services described herein and to full and prompt cooperation by the Contractor in all aspects of the Services. At the request of the County the Contractor shall promptly remove from the project any Contractor's employee, subcontractor, or any other person performing Services hereunder. The Contractor agrees that such removal of any of its employees does not require the termination or demotion of any employee by the Contractor.

b) The Contractor agrees to defend, hold harmless and indemnify the County and shall be liable and responsible for any and all claims, suits, actions, damages and costs (including attorney's fees and court costs) made against the County, occurring on account of, arising from or in connection with the removal and replacement of any Contractor's personnel performing services hereunder at the behest of the County. Removal and replacement of any Contractor's personnel as used in this Article shall not require the termination and or demotion of such Contractor's personnel.

c) The Contractor agrees that at all times it will employ, maintain and assign to the performance of the Services a sufficient number of competent and qualified professionals and other personnel to

meet the requirements to which reference is hereinafter made. The Contractor agrees to adjust its personnel staffing levels or to replace any of its personnel if so directed upon reasonable request from the County, should the County make a determination, in its sole discretion, that said personnel staffing is inappropriate or that any individual is not performing in a manner consistent with the requirements for such a position.

d) The Contractor warrants and represents that its personnel have the proper skill, training, background, knowledge, experience, rights, authorizations, integrity, character and licenses as necessary to perform the Services described herein, in a competent and professional manner.

e) The Contractor shall at all times cooperate with the County and coordinate its respective work efforts to most effectively and efficiently maintain the progress in performing the Services.

f) The Contractor shall comply with all provisions of all federal, state and local laws, statutes, ordinances, and regulations that are applicable to the performance of this Agreement.

ARTICLE 14. EMPLOYEES ARE THE RESPONSIBILITY OF THE CONTRACTOR

All employees of the Contractor shall be considered to be, at all times, employees of the Contractor under its sole direction and not employees or agents of the County. The Contractor shall supply competent employees. Miami-Dade County may require the Contractor to remove an employee it deems careless, incompetent, insubordinate or otherwise objectionable and whose continued employment on County property is not in the best interest of the County. Each employee shall have and wear proper identification.

ARTICLE 15. INDEPENDENT CONTRACTOR RELATIONSHIP

The Contractor is, and shall be, in the performance of all work services and activities under this Agreement, an independent contractor, and not an employee, agent or servant of the County. All persons engaged in any of the work or services performed pursuant to this Agreement shall at all times, and in all places, be subject to the Contractor's sole direction, supervision and control. The Contractor shall exercise control over the means and manner in which it and its employees perform the work, and in all respects the Contractor's relationship and the relationship of its employees to the County shall be that of an independent contractor and not as employees and agents of the County.

The Contractor does not have the power or authority to bind the County in any promise, agreement or representation other than specifically provided for in this Agreement.

ARTICLE 16. AUTHORITY OF THE COUNTY'S PROJECT MANAGER

a) The Contractor hereby acknowledges that the County's Project Manager will determine in the first instance all questions of any nature whatsoever arising out of, under, or in connection with, or in any way related to or on account of, this Agreement including without limitations: questions as to the value, acceptability and fitness of the Services; questions as to either party's fulfillment of its obligations under the Contract; negligence, fraud or misrepresentation before or subsequent to acceptance of the Proposal; questions as to the interpretation of the Scope of Services; and claims for damages, compensation and losses.

b) The Contractor shall be bound by all determinations or orders and shall promptly obey and follow every order of the Project Manager, including the withdrawal or modification of any previous order and regardless of whether the Contractor agrees with the Project Manager's determination or order. Where orders are given orally, they will be issued in writing by the Project Manager as soon thereafter as is practicable.

c) The Contractor must, in the final instance, seek to resolve every difference concerning the

Agreement with the Project Manager. In the event that the Contractor and the Project Manager are unable to resolve their difference, the Contractor may initiate a dispute in accordance with the procedures set forth in this Article. Exhaustion of these procedures shall be a condition precedent to any lawsuit permitted hereunder.

d) In the event of such dispute, the parties to this Agreement authorize the County Manager or designee, who may not be the Project Manager or anyone associated with this Project, acting personally, to decide all questions arising out of, under, or in connection with, or in any way related to or on account of the Agreement (including but not limited to claims in the nature of breach of contract, fraud or misrepresentation arising either before or subsequent to execution hereof) and the decision of each with respect to matters within the County Manager's purview as set forth above shall be conclusive, final and binding on parties. Any such dispute shall be brought, if at all, before the County Manager within 10 days of the occurrence, event or act out of which the dispute arises.

e) The County Manager may base this decision on such assistance as may be desirable, including advice of experts, but in any event shall base the decision on an independent and objective determination of whether Contractor's performance or any Deliverable meets the requirements of this Agreement and any specifications with respect thereto set forth herein. The effect of any decision shall not be impaired or waived by any negotiations or settlements or offers made in connection with the dispute, whether or not the County Manager participated therein, or by any prior decision of others, which prior decision shall be deemed subject to review, or by any termination or cancellation of the Agreement. All such disputes shall be submitted in writing by the Contractor to the County Manager for a decision, together with all evidence and other pertinent information in regard to such questions, in order that a fair and impartial decision may be made. Whenever the County Manager is entitled to exercise discretion or judgment or to make a determination or form an opinion pursuant to the provisions of this Article, such action shall be fair and impartial when exercised or taken. The County Manager, as appropriate, shall render a decision in writing and deliver a copy of the same to the Contractor. Except as such remedies may be limited or waived elsewhere in the Agreement, Contractor reserves the right to pursue any remedies available under law after exhausting the provisions of this Article.

ARTICLE 17. <u>MUTUAL OBLIGATIONS</u>

a) This Agreement, including attachments and Appendices to the Agreement, shall constitute the entire Agreement between the parties with respect hereto and supersedes all previous communications and representations or agreements, whether written or oral, with respect to the subject matter hereto unless acknowledged in writing by the duly authorized representatives of both parties.

b) Nothing in this Agreement shall be construed for the benefit, intended or otherwise, of any third-party that is not a parent or subsidiary of a party or otherwise related (by virtue of ownership control or statutory control) to a party.

c) In those situations where this Agreement imposes an indemnity obligation on the Contractor, the County may, at its expense, elect to participate in the defense if the County should so choose. Furthermore, the County may at its own expense defend or settle any such claims if the Contractor fails to diligently defend such claims, and thereafter seek indemnity for costs from the Contractor.

ARTICLE 18. DELIVERY AND INSTALLATION

(a) All Software, Hardware, and/or Deliverables the County ordered shall be delivered F.O.B. inside delivery destination, freight, prepaid and allowed.

(b) If the Contractor fails to make delivery within the time specified in the applicable Work Order, or if the Software and/or Deliverable delivered fails to conform to the requirements hereof in quality, number or otherwise or are found to be defective in material or workmanship, then the County may reject the delivered Software and/or Deliverable or may accept any item of Software and/or Deliverable and reject the balance of the delivered Software and/or Deliverable. The County shall notify Contractor of such rejection in writing and specify in such notice, the reasons for such rejection. Contractor agrees to deliver replacement Software and/or Deliverables for such items of rejected Deliverables and/or Software within fifteen (15) Days of Contractor's receipt of the County's rejection notice.

(c) The County may delay delivery of ordered Software, and/or Deliverables or any portion thereof, for up to sixty (60) days at no additional cost to the County, by giving written notice to the Contractor of its desire to delay delivery at least ten (10) days prior to the Scheduled Delivery Date set forth in the Order. In the event of such delay, the County will provide the Contractor with a new delivery date for such Software and/or Deliverables or portion thereof as soon as reasonably possible, but in no event later than ten (10) Days following the notice of the County's desire to delay delivery.

(d) The Contractor shall deliver all ordered Software and/or Deliverables no later than thirty (30) days from the order date.

(e) The Contractor shall bear the risk of loss or damage to delivered Software and/or Deliverables until the time the Project Manager certifies that the System(s) has successfully completed the System Acceptance Tests, whether such loss or damage arises from acts or omissions (whether negligent or not) of the Contractor or the County or from any other cause whatsoever, except loss or damage arising solely from the negligence or willful acts of the County.

(f) All installation work will be performed during normal business hours. Contractor shall diligently pursue and complete such installation without interruption and in accordance with the Implementation Schedule, so that such Software is in good working order and ready for use by the Installation Date set forth in Implementation Schedules.

i. Contractor agrees to do all things necessary for proper installation and to perform its installation obligations hereunder in an orderly, skillful and expeditious manner, with sufficient labor and materials to ensure efficient and timely completion of such obligations. If applicable, Contractor shall coordinate with the Project Manager all work with all other Contractors and/or County personnel performing work at the Site(s) to complete Software installation. The County shall be responsible for resolving all disputes relating to Site access between Contractor and other contractors. Contractor shall provide all materials necessary to proper installation of the Software. The County shall attempt to provide reasonable working and secure storage space for the performance by Contractor of the installation services described herein. Contractor agrees that all installation work will be performed neatly and at all times Contractor shall keep Site(s) free from waste materials and rubbish resulting from the services being performed by Contractor.

ii. Unless otherwise agreed to by the County, Contractor agrees as part of the installation process, to perform installation services, including, but not limited to, the following: (a) receipt and inventorying of materials; (b) unloading and uncrating of all Equipment and Software; (c) running of cables; (d) installation and testing of batteries, chargers and

power boards; (e) running of power cables; (f) cooperating with all other vendors supplying peripheral or ancillary equipment that will interface with the System; and (g) any additional services necessary to ensure Contractor's compliance with this Article 18 "Delivery and Installation."

iii. All cabling provided by Contractor shall be neatly laced, as applicable, dressed, sheathed and adequately supported. When required by local codes, Contractor agrees to provide cables with a flame resistant sheath. All cabling outside any room in which Equipment is located shall be connected in conduits, raceways or runways unless otherwise agreed to in writing by the County. If required by any applicable federal, state or local laws or codes, Contractor shall ensure that all items of Equipment are firmly held in place in a manner so as to protect such Equipment from seismic shock. In this regard, Contractor agrees to provide fastenings and supports adequate to support Equipment loads with an ample safety margin.

(g) Installation testing shall consist of the tests described in Article 34, "Tests" of this Agreement and Appendix A, "Scope of Services." The purpose of these tests is to demonstrate the complete operability of the System in conformance with the requirements of this Agreement and Appendix A, "Scope of Services." This will include an actual demonstration of all required Software features. All tests shall be in accordance with test plans and procedures prepared by Contractor and previously approved by the County. In the event of any outstanding deficiencies at the conclusion of installation testing, as determined by the County, Contractor shall be responsible for instituting necessary corrective measures, and for subsequently satisfactorily demonstrating and/or re-demonstrating System performance.

ARTICLE 19. <u>REVIEWING DELIVERABLES</u>

(a) The Contractor agrees to submit all deliverables required to be submitted for review and approval by the County in accordance with the specific requirements in Appendix A, "Scope of Services" and as specified herein. The Contractor understands that the County shall have the final approval on all deliverables.

(b) In reviewing the Deliverables, the Contractor understands that the County will provide the Contractor with either:

i. a written notification of the County's approval,

ii. a written notification that each Deliverable is approved subject to the Contractor providing prompt correction of a minor deficiency, or,

iii. in the case of a Deliverable that does not meet the requirements of the Agreement, a written notification of the County's disapproval. The County's disapproval notification will state with reasonable detail to sufficiently advise the Contractor of the basis on which the Deliverable was determined to be unacceptable.

The Contractor understands that failure by the County to provide a notice of approval does not constitute approval.

(c) Furthermore:

i. For each Deliverable made hereunder, the County shall have twenty (20) business days, commencing on the first business day after receipt by the County of the Deliverable, to determine whether the Deliverable is approved as submitted, is approved subject to the correction by the Contractor of minor discrepancies, or whether it is unacceptable and

therefore disapproved.

ii. Unless an extension of time has been granted by the County pursuant to Article 37, "Extension of Time" within ten business days after receipt of the County's notification of "disapproval," the Contractor shall deliver to the County the necessary revisions and/or modifications for a second review by the County.

iii. If after the second review period, the Deliverable remains unacceptable for the County's approval, the County may direct the Contractor to either:

a. Proceed with the Work subject to the correction of all outstanding deficiencies which led to the County's determination that a Deliverable was not acceptable for approval on or before a specific date established by the County for correcting such deficiency or deficiencies; or,

b. Suspend all Work being performed in regard to the execution of the Agreement, except those services necessary for the correction of outstanding deficiencies, until such time that all outstanding deficiencies have been corrected by the Contractor and resubmitted to the County for approval.

(d) The County shall have the right to approve or accept part of any deliverable. Any such approval shall be regarded as partial and conditional upon the County's approval or acceptance of all aspects of the Deliverable. The Contractor must correct any deficiencies within the time the County specifies for such correction in the County's notice concerning a partial approval (including approvals subject to a correction of minor deficiencies) or, if no time is given, promptly. If the County does not subsequently approve or accept all aspects of the Deliverable, the earlier conditional acceptance or approval may, in the sole absolute discretion of the County, be regarded as void and of no effect.

ARTICLE 20. QUALITY ASSURANCE/QUALITY ASSURANCE RECORD KEEPING

The Contractor shall maintain, and shall require that its subcontractors and suppliers maintain, complete and accurate records to substantiate compliance with the requirements set forth in the Scope of Services. The Contractor and its subcontractors and suppliers, shall retain such records, and all other documents relevant to the Services furnished under this Agreement for a period of three (3) years from the expiration date of this Agreement and any extension thereof.

ARTICLE 21. AUDITS

The County, or its duly authorized representatives or governmental agencies shall, until the expiration of three (3) years after the expiration of this Agreement and any extension thereof, have access to and the right to examine and reproduce any of the Contractor's books, documents, papers and records and of its subcontractors and suppliers which apply to all matters of the County. Such records shall subsequently conform to Generally Accepted Accounting Principles requirements, as applicable, and shall only address those transactions related to this Agreement.

Pursuant to County Ordinance No. 03-2, the Contractor will grant access to the Commission Auditor to all financial and performance related records, property, and equipment purchased in whole or in part with government funds. The Contractor agrees to maintain an accounting system that provides accounting records that are supported with adequate documentation, and adequate procedures for determining the allowability and allocability of costs.

ARTICLE 22. SUBSTITUTION OF PERSONNEL

In the event the Contractor wishes to substitute personnel for the key personnel identified by the Contractor's Proposal, the Contractor must notify the County in writing and request written approval for the substitution at least ten (10) business days prior to effecting such substitution.

ARTICLE 23. CONSENT OF THE COUNTY REQUIRED FOR ASSIGNMENT

The Contractor shall not assign, transfer, convey or otherwise dispose of this Agreement, including its rights, title or interest in or to the same or any part thereof without the prior written consent of the County.

ARTICLE 24. SUBCONTRACTUAL RELATIONS

a) If the Contractor will cause any part of this Agreement to be performed by a Subcontractor, the provisions of this Contract will apply to such Subcontractor and its officers, agents and employees in all respects as if it and they were employees of the Contractor; and the Contractor will not be in any manner thereby discharged from its obligations and liabilities hereunder, but will be liable hereunder for all acts and negligence of the Subcontractor, its officers, agents, and employees, as if they were employees of the Contractor. The services performed by the Subcontractor will be subject to the provisions hereof as if performed directly by the Contractor.

b) The Contractor, before making any subcontract for any portion of the services, will state in writing to the County the name of the proposed Subcontractor, the portion of the Services which the Subcontractor is to do, the place of business of such Subcontractor, and such other information as the County may require. The County will have the right to require the Contractor not to award any subcontract to a person, firm or corporation disapproved by the County.

c) Before entering into any subcontract hereunder, the Contractor will inform the Subcontractor fully and completely of all provisions and requirements of this Agreement relating either directly or indirectly to the Services to be performed. Such Services performed by such Subcontractor will strictly comply with the requirements of this Contract.

d) In order to qualify as a Subcontractor satisfactory to the County, in addition to the other requirements herein provided, the Subcontractor must be prepared to prove to the satisfaction of the County that it has the necessary facilities, skill and experience, and ample financial resources to perform the Services in a satisfactory manner. To be considered skilled and experienced, the Subcontractor must show to the satisfaction of the County that it has satisfactorily performed services of the same general type which is required to be performed under this Agreement.

e) The County shall have the right to withdraw its consent to a subcontract if it appears to the County that the subcontract will delay, prevent, or otherwise impair the performance of the Contractor's obligations under this Agreement. All Subcontractors are required to protect the confidentiality of the County's and County's proprietary and confidential information. Contractor shall furnish to the County copies of all subcontracts between Contractor and Subcontractors and suppliers hereunder. Within each such subcontract, there shall be a clause for the benefit of the County permitting the County to request completion of performance by the Subcontractor of its obligations under the subcontract, in the event the County finds the Contractor in breach of its obligations, the option to pay the Subcontractor directly for the performance by such subcontractor. Notwithstanding, the foregoing shall neither convey nor imply any obligation or liability on the part of the County to any subcontractor hereunder as more fully described herein.

ARTICLE 25. SOFTWARE

The Contractor shall provide the County with documentation, satisfactory to the County, confirming that the Contractor has acquired on the County's behalf all software licenses required hereunder.

(a) In the event the County purchases a license for Licensed Software, the Contractor shall provide to the County the computer programs (the "Programs"), other materials related thereto (the "Documentation") with the Programs.

(b) The Contractor shall, at its own expense, secure and administer for the County, in the County's name, any and all necessary sublicenses or direct licenses for the third-party software, which shall be perpetual and irrevocable. The Contractor shall secure such sublicenses and direct licenses upon the same terms and conditions as the license between the Contractor and the County contained herein and additional terms and conditions that, in the County's sole discretion, are acceptable to the County. The terms and conditions of such sublicense agreements, at a minimum, shall include, but not be limited to the right of the County: (i) to make multiple copies of the third-party software; (ii) to use the third-party software on multiple processors utilized by the County or entities affiliated with the County, at no additional licensing fee; and, (iii) to maintain and modify the third-party software without restriction.

ARTICLE 26. SOFTWARE LICENSE

(a) For so long as the County purchases software maintenance, the Contractor shall furnish to the County, at no additional cost to the County, and provided that the County elects to install same, all Software replacements, substitutions, upgrades, enhancements, new releases or new versions (including all debugging codes for the Software offered to its customers generally). These Software replacements, subscriptions, upgrades, enhancements, new releases or new versions shall be furnished at no additional cost to the County unless they contain only functions that are wholly outside of the System's functionality, performance, capacity or response time as described in Appendix A, "Scope of Services." The County understands that all releases must be installed separately and that new enhancements, and some bug fixes, are not made available without accepting such releases.

(b) The Contractor hereby grants to the County, and/or its agents, suppliers and vendors, a perpetual, non-exclusive, irrevocable license to use, the Contractor's Licensed Software, if purchased by the County, in both source and object code for any purpose not expressly forbidden by the terms hereof and as more fully described in Article 27, "Scope of License" and Article 30, "Software Revisions." Such license shall include but not be limited to the unrestricted right of the County to provide Licensed Software, including the source code and object code forms thereto, the Documentation and Programs therefore, to any other person(s) or entity(ies) for their use in connection with providing goods and/or services to the County.

(c) The Contractor shall require that its subcontractors and suppliers also grant to the County, and/or its agents, suppliers and vendors, perpetual, non-exclusive, irrevocable licenses to use the third-party software, in both source and object code form for any purpose not expressly forbidden by the terms hereof. Such licenses shall also include, but not be limited to, the unrestricted right of the County to provide the third-party software, including the source and object code forms thereof and the Documentation and Programs therefore, to any other person(s) or entity(ies) for their use in connection with providing goods and/or services to the County.

(d) As used above, "irrevocable" shall include, but not limited to, the right of the County to continue using the Contractor's Licensed Software or third-party software irrespective of any breach or default pursuant to the terms hereof.

ARTICLE 27. SCOPE OF LICENSE

The County may use the Licensed Software on any and all equipment configurations of whatever make, manufacture and/or model, owned, controlled or contracted for, by the County or entities controlling, controlled by, under common control with, or affiliated with the County, or organizations which may hereafter be formed by or become affiliated with the County or which may assume the responsibilities of the County or any successors of the County. Irrespective of the number of equipment configuration(s) controlled by the County upon which the Licensed Software is used, the County shall pay only one license fee, which license fee is set forth herein, provided however that the County orders such Licensed Software.

ARTICLE 28. SOFTWARE RELATED DOCUMENTATION

The Licensed Software-related Documentation ("Documentation") will consist of the source code for all Licensed Software for which source code is a Deliverable hereunder, any and all operator's and user's manuals, training materials, guides, listings, design documents, specifications, flow charts, data flow diagrams, commentary, and other materials and documents that explain the performance, function or operation of individual programs and the interaction of programs within the system; control file and scripts used to compile, link, load and/or make the applications and systems; test scripts, test plans and test data and other materials for use in conjunction with the applicable software. The Documentation will in all cases be fully applicable to the use of the Programs with the Equipment, and will identify and reflect any particular features of the Equipment which may affect the normal use and operation of the Programs. The Contractor shall deliver to the County five (5) print copies of said Documentation and one (1) electronic copy. The County will have the right, as part of the license granted herein, to make as many additional copies of the Documentation as it may deem necessary and to post the documentation on its Intranet.

ARTICLE 29. OPERATING ENVIRONMENT FOR INFORMATION SYSTEMS

The Programs, and each Module or component and function thereof, will be capable of operating fully and correctly in the operating environment identified in Appendix A, “Scope of Services.” The Contractor hereby warrants and represents that each Program will be fully compatible and will interface completely with each other Program provided hereunder with the Software, and with the County's Equipment, such that the Equipment, Software, Licensed Software and Deliverables combined will perform and continuously attain the standards identified in the applicable section of this Agreement, including but not limited to the performance standards set forth in Appendix A, “Scope of Services” and Contractor's Proposal. The addition or connection of other computer equipment to the County's Equipment will not adversely affect performance of the System.

ARTICLE 30. SOFTWARE REVISIONS

The County will have the right, in its own discretion, to independently modify any Licensed Software through the services of its employees, agents, contractors or subcontractors and, for such purposes, may disclose the Licensed Software, or any portion thereof, to such employees, agents, contractors or subcontractors. As between the County and the Contractor, such modifications shall become the property of the County. Notwithstanding the foregoing, performance of any such modifications shall not compromise the Contractor's warranty obligations as set forth in Article 33, “Warranties.”

ARTICLE 31. SOFTWARE ENHANCEMENTS/MODIFICATIONS

The Contractor understands the County may require changes to the Licensed Software that are outside the specification of the existing Licensed Software. When requested by the County, the Contractor shall provide the requested System enhancements/modifications including all relevant source code. Upon the County's request for such enhancements/modifications the County shall prepare a scope of work and the Contractor shall submit a cost proposal including all costs pertaining to furnishing the County with the enhancements/modifications.

Thereafter the County and the Contractor shall agree to a not-to-exceed number of hours for the requested modification/enhancement or a flat rate amount. In no event shall the Contractor perform any Services on the task unless the County issues a written notice to the Contractor to proceed with the task. The Contractor shall not be reimbursed for the preparation of proposals.

When the source code is completed, tested and accepted by the County, the Contractor shall deliver said source code to the County. The County may revise and modify this source code. The Contractor shall, upon the County's request, install the enhancement/modification and shall provide the County with such services as required, at no additional cost, to enable the County to continue the County's intended use of the Licensed Software. Following the County's enhancements/modification acceptance of all enhancements/modification, such enhancements/modification shall thereafter be considered a part of the Licensed Software for all purposes under this Agreement. The Contractor shall provide the County, if so requested with written confirmation of the date the enhancements/modification was applied to the Licensed Software, and any and all Documentation relating to the Licensed Software and or enhancements/modification thereto.

If any such enhancements/modification is not acceptable to the County, the County may refuse to accept same, and, in such event, the Contractor agrees to maintain the Licensed Software in the form in effect on the date the Contractor requested the County to accept such update.

ARTICLE 32. OWNERSHIP OF LICENSED SOFTWARE

The Contractor hereby warrants and represents that the Contractor possesses all rights to and interests in the Licensed Software, and all portions thereof, or otherwise have the right to grant to the County the licenses provided in Articles 25, 26, 27 and 28 “Software,” “Software License,” “Scope of License,” and “Software Related Documentation” hereof, without violating any rights of any third party, and there are currently no actual or threatened suits by any such third parties based on an alleged violation of such rights by the Contractor. The Contractor further represents and warrants that the County has the right to modify the Licensed Software as defined in Article 25, “Software,” hereof, for the County's use. The Contractor shall require that all suppliers of third-party software hereunder furnish to the County the foregoing warranties of ownership with respect to the third-party software.

ARTICLE 33. WARRANTIES

The Contractor warrants that (i) all Licensed Software provided by the Contractor will be of a compiled high level language that is commercially available and for which software tools are available; (ii) the Licensed Software shall be capable of being copied by the County; (iii) the Licensed Software shall not contain viruses or pre-programmed devices which will cause any software utilized by the County to be erased or become inoperable of processing accurately and in accordance with the warranties specified herein and Appendix A, “Scope of Services;” and (iv) the Licensed Software and each module and

function thereof shall be capable of operating fully and correctly on the combination of the Equipment and Software furnished by the County or the Contractor.

(a) The Contractor warrants that the Contractor has the right to license the Licensed Software and to sell to the County the hardware and software, and other products which are described in this Agreement and Appendix A, "Scope of Services."

(b) The Contractor warrants that the Licensed Software delivered will perform the functions defined by the User Manual and in accordance to the requirements set forth in this Agreement and Appendix A, "Scope of Services."

(c) The Contractor warrants that all of the Hardware described in Appendix A, "Scope of Services" will be delivered new and not as "used" equipment unless the fact that the equipment is "used" has been disclosed to and approved by the County.

(d) The Contractor warrants that the Licensed Software Modules and all Hardware shall be maintained by the Contractor at the Contractor's expense from installation through a period of one (1) year after Final Acceptance.

(e) The Contractor warrants that at the time of Final Acceptance, the System will function as a fully compatible and integrated unit. The System includes, but is not limited to, all Third-Party software, hardware, and services provided as part of this Agreement.

(f) The Contractor warrants that at the time of Final Acceptance and during the warranty period and the period for which the County is paying maintenance, all individual components of the System, as well as the System as an integrated unit, will function as proposed by the Contractor free of errors and with uninterrupted compatibility and operate together. The Contractor shall pass through to the County all warranties provided to the Contractor by all suppliers providing components for the System. The Software shall (i) be free from defects in material and workmanship under normal use and remain in good working order; (ii) function properly and in conformity with the warranties in this Agreement, (iii) meet all of the performance standards set forth in Appendix A, "Scope of Services" and Contractor's Proposal.

(g) In the event the Software does not satisfy the conditions of performance set forth in this Agreement, Appendix A, "Scope of Services" and Contractor's Proposal, the Contractor's obligation is to provide a Fix or a Work Around at the Contractor's cost and expense, or to provide different equipment, software and services required to attain the performance requirements set forth in this Agreement, Appendix A, "Scope of Services" and Contractor's Proposal, in the sole discretion of the County. Failure by the Contractor to comply with warranty provisions hereof may be deemed by the County as a breach of the Contractor's obligations hereof in the event the Contractor's software is not operational within the specified timeframes.

(h) The Contractor warrants that it holds title and/or copyright to all Licensed Software and its associated Modules licensed and delivered pursuant to this Agreement.

ARTICLE 34. <u>TESTS</u>

(a) **Network and Transaction Load Test:**

Contractor shall conduct a mutually agreed upon Network and Transaction Load Test, which simulates the volume of transactions across multiple sites for a library the size of Miami-Dade Public Library System, within thirty (30) days of the signing of this Agreement in order to assess the ability of the Library's Computer Network to support the System and the ability of the System to handle the Library's Transaction Load. The results of this Network and Transaction Load Test

shall be documented and delivered to the County within ten (10) days following the test. Contractor will either stipulate that the Library Computer Network is adequate to support the System or identify, and provide costs to remediate, any deficiencies in the network. Should there be deficiencies in the Library Computer Network, the County has the option of upgrading the network or withdrawing from the contract at no expense to the County. In addition, Contractor will either stipulate that the System can handle the Library's current and five-year projected transaction load or the County may, at its sole discretion, offer the Contractor an opportunity to correct the System and retest or withdraw from the Contract at no expense to the County.

(b) **Final Acceptance:**

Prior to Final Acceptance, the System must pass the following mutually agreed upon Tests: Hardware Functionality, Data Load, Module Functionality, Third-Party Integration, Reliability and Response Time Tests. Final Acceptance will be dependent upon a fully functioning System as specified in this Agreement and Appendix A, "Scope of Services."

ARTICLE 35. <u>ASSUMPTION, PARAMETERS, PROJECTIONS, ESTIMATES AND EXPLANATIONS</u>

The Contractor understands and agrees that any assumptions, parameters, projections, estimates and explanations presented by the County were provided to the Contractor for evaluation purposes only. However, since these assumptions, parameters, projections, estimates and explanations represent predictions of future events the County makes no representations or guarantees; and the County shall not be responsible for the accuracy of the assumptions presented; and the County shall not be responsible for conclusions to be drawn therefrom; and any assumptions, parameters, projections, estimates and explanations shall not form the basis of any claim by the Contractor. The Contractor accepts all risk associated with using this information.

ARTICLE 36. <u>EXTENSION OF TIME</u>

(a) If the Contractor is delayed at any time hereunder due to any of the following then the affected schedule or the required performance of Work may be extended by the County in the reasonable exercise of its discretion for such reasonable time as the County may determine, subject to the following conditions:

i. The cause of the delay is beyond the Contractor's control and arises without its fault or negligence, and arises after the execution hereof and neither was nor could have been anticipated by the Contractor by reasonable investigation; and

ii. The completion of the Work will be actually and necessarily delayed by the causes set forth in "i" above; and

iii. The effect of such cause cannot be avoided or mitigated by the exercise of all reasonable precautions, efforts and measures whether before or after the occurrence of the cause of the delay; and

iv. The Contractor has provided a written request and other information to the County, as described in subsection (d) below, within ten (10) days after the time the Contractor knows or reasonably should have known of any cause which might result in a delay for which the Contractor may request an extension of time. The Contractor shall specifically state in such notice that an extension is or may be requested and identify the cause of the delay, describing the nature and its effect on the completion of the affected portions of the Work identified in the notice. If the Contractor shall fail to give the foregoing notice, the right to request an extension for such cause shall be waived. All of the conditions of this subsection (a) must be met in order to be deemed an Excusable Delay.

(b) All references in this Article to the Contractor shall be deemed to include subcontractors and third-party suppliers, all of whom shall be considered as agents of the Contractor.

(c) The period of any extension of time shall be only that which is necessary to make up the time actually lost. The County reserves the right to rescind or shorten any extension previously granted if the County subsequently determines that any information provided by the Contractor in support of its request for an extension of time was erroneous or that there has been a material change in the facts stated.

(d) The County may require the Contractor to furnish such additional information or documentation as the County shall reasonably deem necessary or helpful in considering an extension request. The Contractor understands an extension of time will not be granted unless the Contractor affirmatively demonstrates to the County's reasonable satisfaction that the circumstances shown justify such extension.

(e) Within thirty (30) days of receipt of all information and documentation as may be required by the County, the County shall advise the Contractor of its decision on such requested extension. Notwithstanding the foregoing, where it is not reasonably practicable for the County to render its decision within such thirty (30) day period, it shall, prior to the expiration of such period, advise the Contractor that it will require additional time and the approximate date upon which it expects to render such decision.

(f) Since the granting of an extension of time many materially alter the scheduling of plans and other actions of the County and since, with sufficient notice, the County might, if it should so elect, attempt to mitigate the effect of the delay for which an extension of time might be claimed, and since mere oral notice may cause a dispute as to the existence or substance thereof, the giving of written notice as required in subsection (a) (iv.) above shall be a condition precedent to the Contractor's rights hereunder.

(g) Should any person seek a restraining order, preliminary injunction or an injunction, of which the Contractor becomes aware, which may delay the Services, the Contractor shall promptly give the County a copy of all legal papers received or prepared by the Contractor in connection with such action or proceeding.

(h) Neither permitting the Contractor to proceed with the Work subsequent to any missed schedule or performance of any Work (as such date may have been extended pursuant to Article 37, "Extension of Time Not Cumulative" nor the making of any payments to the Contractor shall comprise the County's contractual right to assess liquidated damages or to declare the Contractor in default.

ARTICLE 37. <u>EXTENSION OF TIME NOT CUMULATIVE</u>

In the event the Contractor shall be delayed concurrently by two or more of the causes identified in Article 36, "Extension of Time" above, the Contractor shall be entitled to a separate extension of time for each one of the causes but only one time period of extension shall be granted for the delay. In addition, the Contractor shall not be entitled, by reason of a delay, to an extension of time for the completion of the overall Work unless the overall Work is necessarily affected by the delay. Accordingly, in the event of a delay, the Contractor shall proceed continuously and diligently with the performance of the unaffected portions of the Work.

ARTICLE 38. SEVERABILITY

If this Agreement contains any provision found to be unlawful, the same shall be deemed to be of no effect and shall be deemed stricken from this Agreement without affecting the binding force of this Agreement as it shall remain after omitting such provision.

ARTICLE 39. TERMINATION FOR CONVENIENCE AND SUSPENSION OF WORK

a) The County may terminate this Agreement if an individual or corporation or other entity attempts to meet its contractual obligation with the County through fraud, misrepresentation or material misstatement.

b) The County may, as a further sanction, terminate or cancel any other contract(s) that such individual or corporation or other entity has with the County and that such individual, corporation or other entity shall be responsible for all direct and indirect costs associated with such termination or cancellation, including attorney's fees.

c) The foregoing notwithstanding, any individual, corporation or other entity which attempts to meet its contractual obligations with the County through fraud, misrepresentation or material misstatement may be debarred from County contracting for up to five (5) years in accordance with the County debarment procedures. The Contractor may be subject to debarment for failure to perform and all other reasons set forth in Section 10-38 of the County Code.

In addition to cancellation or termination as otherwise provided in this Agreement, the County may at any time, in its sole discretion, with or without cause, terminate this Agreement by written notice to the Contractor and in such event, the Contractor shall, upon receipt of such notice, unless otherwise directed by the County:

i. stop work on the date specified in the notice ("the Effective Termination Date");

ii. take such action as may be necessary for the protection and preservation of the County's materials and property;

iii. cancel orders;

iv. assign to the County and deliver to any location designated by the County any noncancelable orders for Deliverables that are not capable of use except in the performance of this Agreement and has been specifically developed for the sole purpose of this Agreement and not incorporated in the Services:

v. take no action which will increase the amounts payable by the County under this Agreement; and

d) In the event that the County exercises its right to terminate this Agreement pursuant to this Article the Contractor will be compensated as stated in the payment Articles, herein, for the:

i. portion of the Services completed in accordance with the Agreement up to the Effective Termination Date; and

ii. noncancelable Deliverables that are not capable of use except in the performance of this Agreement and has been specifically developed for the sole purpose of this Agreement but not incorporated in the Services.

e) All compensation pursuant to this Article are subject to audit.

ARTICLE 40. EVENT OF DEFAULT

a) An Event of Default shall mean a breach of this Agreement by the Contractor. Without limiting the generality of the foregoing and in addition to those instances referred to herein as a breach, an Event of Default, shall include the following:

i. the Contractor has not delivered Deliverables on a timely basis.

ii. the Contractor has refused or failed, except in case for which an extension of time is provided, to supply enough properly skilled Staff Personnel;

iii. the Contractor has failed to make prompt payment to subcontractors or suppliers for any Services;

iv. the Contractor has become insolvent (other than as interdicted by the bankruptcy laws), or has assigned the proceeds received for the benefit of the Contractor's creditors, or the Contractor has taken advantage of any insolvency statute or debtor/creditor law or if the Contractor's affairs have been put in the hands of a receiver;

v. the Contractor has failed to obtain the approval of the County where required by this Agreement;

vi. the Contractor has failed to provide "adequate assurances" as required under subsection "b" below;

vii. the Contractor has failed in the representation of any warranties stated herein.

b) When, in the opinion of the County, reasonable grounds for uncertainty exist with respect to the Contractor's ability to perform the Services or any portion thereof, the County may request that the Contractor, within the time frame set forth in the County's request, provide adequate assurances to the County, in writing, of the Contractor's ability to perform in accordance with terms of this Agreement. Until the County receives such assurances the County may request an adjustment to the compensation received by the Contractor for portions of the Services which the Contractor has not performed. In the event that the Contractor fails to provide to the County the requested assurances within the prescribed time frame, the County may:

i. treat such failure as a repudiation of this Agreement;

ii. resort to any remedy for breach provided herein or at law, including but not limited to, taking over the performance of the Services or any part thereof either by itself or through others.

c) In the event the County shall terminate this Agreement for default, the County or its designated representatives, may immediately take possession of all applicable equipment, materials, products, documentation, reports and data.

ARTICLE 41. NOTICE OF DEFAULT - OPPORTUNITY TO CURE /TERMINATION

If an Event of Default occurs, in the determination of the County, the County may so notify the Contractor ("Default Notice"), specifying the basis for such default, and advising the Contractor that such default must be cured immediately or this Agreement with the County may be terminated. Notwithstanding, the County may, in its sole discretion, allow the Contractor to rectify the default to the County's reasonable satisfaction within a thirty (30) day period. The County may grant an additional period of such duration as the County shall deem appropriate without waiver of any of the County’s rights hereunder, so long as the

Contractor has commenced curing such default and is effectuating a cure with diligence and continuity during such thirty (30) day period or any other period which the County prescribes. The default notice shall specify the date the Contractor shall discontinue the Services upon the Termination Date.

ARTICLE 42. REMEDIES IN THE EVENT OF DEFAULT

Upon the Contractor's default, the County shall have the right to complete the Work with its own forces and/or with other contractors. The County, as part of its right to complete the Work, may take possession of and use any or all of the materials, supplies, and property of every kind to which it obtains title under this Agreement, provided, purchased, maintained, leased, owned, rented by the Contractor including but not limited to third-parties, and/or procure other materials, plant, tools, equipment, supplies, and property for the completion of the Work.

If an Event of Default occurs, the Contractor shall be liable for all damages resulting from the default, including but not limited to:

a) lost revenues;

b) the difference between the cost associated with procuring Services hereunder and the amount actually expended by the County for reprocurement of Services, including procurement and administrative costs; and,

c) such other direct damages.

The Contractor shall also remain liable for any liabilities and claims related to the Contractor's default. The County may also bring any suit or proceeding for specific performance or for an injunction.

ARTICLE 43. THE COUNTY MAY AVAIL ITSELF OF ALL REMEDIES

The County may avail itself of each and every remedy herein specifically given to it now existing at law or in equity, and each and every such remedy shall be in addition to every other remedy so specifically given or otherwise so existing and may be exercised from time to time and as often and in such order as may be deemed expedient by the County, and the exercise, or the beginning of the exercise, of one remedy shall not be deemed to be a waiver of the right to exercise , at the same time or thereafter, any other remedy. The County's rights and remedies as set forth in this Agreement are not exclusive and are in addition to any other rights and remedies available to it in law or in equity.

ARTICLE 44. NO DEFAULT

The Contractor represents and warrants that the Contractor is not in arrears to the County and is not a defaulter as a surety or otherwise upon any obligation to the County. In addition, the Contractor warrants that the Contractor has not been declared "not responsible" or "disqualified" by or debarred from doing business with any state or local governmental entity in the State of Florida, or a public authority in the State of Florida, the Federal Government or any state/local governmental entity in the United States of America, nor is there any proceeding pending pertaining to the Contractor's responsibility or qualification to receive public agreements. The Contractor considers this warranty as stated in this Article to be a continual obligation and shall inform the County of any change during the term of this Agreement.

ARTICLE 45. NO THIRD-PARTY LIABILITY

Unless otherwise noted herein, nothing provided herein shall create any rights in any third-party as provided in this Agreement or any obligation on the part of the County to any third-party.

ARTICLE 46. AGREEMENT LIMITING TIME IN WHICH TO BRING AN ACTION AGAINST THE COUNTY

In the event that the Contractor may be deemed to have cause of action against the County, no action shall lie or be maintained by the Contractor against the County upon any claim arising out of or based upon this Contract or by reason of any act or omission of requirement of the County or its agents, unless such action shall be commenced within six (6) months after the date of issuance of the Final Payment, (or if the Final Payment has not been issued, within six months of substantial completion of the Work) or upon any claim relating to monies required to be retained for any period after the issuance of said certificate, unless such action is commenced within six (6) months after such monies become due and payable under the terms of this Agreement, or if this Agreement is terminated or declared abandoned under the provisions of this Agreement unless such action is commenced within six (6) months after the date of such termination or declaration of abandonment by the County.

ARTICLE 47. DEFENSE OF CLAIMS

Should any claim be made or any legal action brought in any way relating hereto or to the Services hereunder, except as expressly provided herein, the Contractor shall diligently render to the County, after additional compensation is mutually agreed upon, any and all assistance which the County may require of the Contractor.

ARTICLE 48. PATENT AND COPYRIGHT INDEMNIFICATION

a) The Contractor warrants that all Deliverables furnished hereunder, including but not limited to: equipment programs, documentation, software, analyses, applications, methods, ways, processes, and the like, do not infringe upon or violate any patent, copyrights, service marks, trade secret, or any other third-party proprietary rights.

b) The Contractor shall be liable and responsible for any and all claims made against the County for infringement of patents, copyrights, service marks, trade secrets or any other third-party proprietary rights, by the use or supplying of any programs, documentation, software, analyses, applications, methods, ways, processes, and the like, in the course of performance or completion of, or in any way connected with, the Work, or the County's continued use of the Deliverables furnished hereunder. Accordingly, the Contractor at its own expense, including the payment of attorney's fees, shall indemnify, and hold harmless the County and defend any action brought against the County with respect to any claim, demand, cause of action, debt, or liability.

c) In the event any Deliverable or anything provided to the County hereunder, or portion thereof is held to constitute an infringement and its use is or may be enjoined, the Contractor shall have the obligation to, at the County's option to (i) modify, or require that the applicable subcontractor or supplier modify, the alleged infringing item(s) at its own expense, without impairing in any respect the functionality or performance of the item(s), or (ii) procure for the County, at the Contractor's expense, the rights provided under this Agreement to use the item(s).

d) The Contractor shall be solely responsible for determining and informing the County whether a prospective supplier or subcontractor is a party to any litigation involving patent or copyright infringement, service mark, trademark, violation, or proprietary rights claims or is subject to any injunction which may prohibit it from providing any Deliverable hereunder. The Contractor shall enter into agreements with all suppliers and subcontractors at the Contractor's own risk. The County may reject any Deliverable that it believes to be the subject of any such litigation or injunction, or if, in the County's judgment, use thereof would delay the Work or be unlawful.

e) The Contractor shall not infringe any copyright, trademark, service mark, trade secrets, patent rights, or other intellectual property rights in the performance of the Work.

ARTICLE 49. CONFIDENTIALITY

a) All Developed Works and other materials, data, transactions of all forms, financial information, documentation, inventions, designs and methods obtained from the County in connection with the Services performed under this Agreement, made or developed by the Contractor or its subcontractors in the course of the performance of such Services, or the results of such Services, or which the County holds the proprietary rights, constitute Confidential Information and may not, without the prior written consent of the County, be used by the Contractor or its employees, agents, subcontractors or suppliers for any purpose other than for the benefit of the County, unless required by law. In addition to the foregoing, all County employee information and County financial information shall be considered confidential information and shall be subject to all the requirements stated herein. Neither the Contractor nor its employees, agents, subcontractors or suppliers may sell, transfer, publish, disclose, display, license or otherwise make available to others any part of such Confidential Information without the prior written consent of the County. Additionally, the Contractor expressly agrees to be bound by and to defend, indemnify and hold harmless the County, and their officers and employees from the breach of any federal, state or local law in regard to the privacy of individuals.

b) The Contractor shall advise each of its employees, agents, subcontractors and suppliers who may be exposed to such Confidential Information of their obligation to keep such information confidential and shall promptly advise the County in writing if it learns of any unauthorized use or disclosure of the Confidential Information by any of its employees or agents, or subcontractor's or supplier's employees, present or former. In addition, the Contractor agrees to cooperate fully and provide any assistance necessary to ensure the confidentiality of the Confidential Information.

c) It is understood and agreed that in the event of a breach of this Article damages may not be an adequate remedy and the County shall be entitled to injunctive relief to restrain any such breach or threatened breach. Unless otherwise requested by the County, upon the completion of the Services performed hereunder, the Contractor shall immediately turn over to the County all such Confidential Information existing in tangible form, and no copies thereof shall be retained by the Contractor or its employees, agents, subcontractors or suppliers without the prior written consent of the County. A certificate evidencing compliance with this provision and signed by an officer of the Contractor shall accompany such materials.

ARTICLE 50. PROPRIETARY INFORMATION

As a political subdivision of the State of Florida, Miami-Dade County is subject to the stipulations of Florida's Public Records Law.

The Contractor acknowledge that all computer software in the County's possession may constitute or contain information or materials which the County has agreed to protect as proprietary information from disclosure or unauthorized use and may also constitute or contain information or materials which the County has developed at its own expense, the disclosure of which could harm the County's proprietary interest therein.

During the term of the contract, the Contractor will not use directly or indirectly for itself or for others, or publish or disclose to any third-party, or remove from the County's property, any computer programs, data compilations, or other software which the County has developed, has used or is using, is holding for use, or which are otherwise in the possession of the County (hereinafter “Computer Software”). All third-party license agreements must also be honored by the contractors and their employees, except as authorized by the County and, if the Computer Software has been leased or purchased by the County, all hired party license agreements must also be honored by the contractors’ employees with the approval of the lessor or Contractors thereof. This includes mainframe, minis, telecommunications, personal computers and any and all information technology software.

The Contractor will report to the County any information discovered or which is disclosed to the Contractor which may relate to the improper use, publication, disclosure or removal from the County's property of any information technology software and hardware and will take such steps as are within the Contractor's authority to prevent improper use, disclosure or removal.

ARTICLE 51. PROPRIETARY RIGHTS

a) The Contractor hereby acknowledges and agrees that the County retains all rights, title and interests in and to all materials, data, documentation and copies thereof furnished by the County to the Contractor hereunder or furnished by the Contractor to the County and/or created by the Contractor for delivery to the County, even if unfinished or in process, as a result of the Services the Contractor performs in connection with this Agreement, including all copyright and other proprietary rights therein, which the Contractor as well as its employees, agents, subcontractors and suppliers may use only in connection of the performance of Services under this Agreement. The Contractor shall not, without the prior written consent of the County, use such documentation on any other project in which the Contractor or its employees, agents, subcontractors or suppliers are or may become engaged. Submission or distribution by the Contractor to meet official regulatory requirements or for other purposes in connection with the performance of Services under this Agreement shall not be construed as publication in derogation of the County's copyrights or other proprietary rights.

b) All rights, title and interest in and to certain inventions, ideas, designs and methods, specifications and other documentation related thereto developed by the Contractor and its subcontractors specifically for the County, hereinafter referred to as "Developed Works" shall become the property of the County.

c) Accordingly, neither the Contractor nor its employees, agents, subcontractors or suppliers shall have any proprietary interest in such Developed Works. The Developed Works may not be utilized, reproduced or distributed by or on behalf of the Contractor, or any employee, agent, subcontractor or supplier thereof, without the prior written consent of the County, except as required for the Contractor's performance hereunder.

d) Except as otherwise provided in subsections a, b, and c above, or elsewhere herein, the Contractor and its subcontractors and suppliers hereunder shall retain all proprietary rights in and to all Licensed Software provided hereunder, that have not been adaptd to satisfy the performance criteria set forth in the Scope of Services. Notwithstanding the foregoing, the Contractor hereby grants, and shall require that its subcontractors and suppliers grant, if the County so desires, a perpetual, irrevocable and unrestricted right and license to use, duplicate, disclose and/or permit any other person(s) or entity(ies) to use all such Licensed Software and the associated specifications, technical data and other Documentation for the operations of the County or entities controlling, controlled by, under common control with, or affiliated with the County, or organizations which may hereafter be formed by or become affiliated with the County. Such license specifically includes, but is not limited to, the right of the County to use and/or disclose, in whole or in part, the technical documentation and Licensed Software, including source code provided hereunder, to any person or entity outside the County for such person's or entity's use in furnishing any and/or all of the Deliverables provided hereunder exclusively for the County or entities controlling, controlled by, under common control with, or affiliated with the County, or organizations which may hereafter be formed by or become affiliated with the County. No such License Software, specifications, data, documentation or related information shall be deemed to have been given in confidence and any statement or legend to the contrary shall be void and of no effect.

ARTICLE 52. BUSINESS APPLICATION AND FORMS

Business Application The Contractor shall be a registered vendor with the County – Department of Procurement Management, for the duration of this Agreement. It is the responsibility of the Contractor to

file the appropriate Vendor Application and to update the Application file for any changes for the duration of this Agreement, including any option years.

Section 2-11.1(d) of Miami-Dade County Code as amended by Ordinance 00-1, requires any county employee or any member of the employee's immediate family who has a controlling financial interest, direct or indirect, with Miami-Dade County or any person or agency acting for Miami-Dade County from competing or applying for any such contract as it pertains to this solicitation, must first request a conflict of interest opinion from the County's Ethic Commission prior to their or their immediate family member's entering into any contract or transacting any business through a firm, corporation, partnership or business entity in which the employee or any member of the employee's immediate family has a controlling financial interest, direct or indirect, with Miami-Dade County or any person or agency acting for Miami-Dade County and that any such contract, agreement or business engagement entered in violation of this subsection, as amended, shall render this Agreement voidable. For additional information, please contact the Ethics Commission hotline at (305) 579-2593.

ARTICLE 53. INSPECTOR GENERAL REVIEWS

Independent Private Sector Inspector General Reviews

Pursuant to Miami-Dade County Administrative Order 3-20, the County has the right to retain the services of an Independent Private Sector Inspector General (hereinafter "IPSIG"), whenever the County deems it appropriate to do so. Upon written notice from the County, the Contractor shall make available to the IPSIG retained by the County, all requested records and documentation pertaining to this Agreement for inspection and reproduction. The County shall be responsible for the payment of these IPSIG services, and under no circumstance shall the Contractor's prices and any changes thereto approved by the County, be inclusive of any charges relating to these IPSIG services. The terms of this provision herein, apply to the Contractor, its officers, agents, employees, subcontractors and assignees. Nothing contained in this provision shall impair any independent right of the County to conduct an audit or investigate the operations, activities and performance of the Contractor in connection with this Agreement. The terms of this Article shall not impose any liability on the County by the Contractor or any third-party.

Miami-Dade County Inspector General Review

According to Section 2-1076 of the Code of Miami-Dade County, as amended by Ordinance No. 99-63, Miami-Dade County has established the Office of the Inspector General which may, on a random basis, perform audits on all County contracts, throughout the duration of said contracts, except as otherwise provided below. The cost of the audit for this Contract shall be one quarter (1/4) of one (1) percent of the total contract amount which cost shall be included in the total contract amount. The audit cost will be deducted by the County from progress payments to the Contractor. The audit cost shall also be included in all change orders and all contract renewals and extensions.

Exception: The above application of one quarter (1/4) of one percent fee assessment shall not apply to the following contracts: (a) IPSIG contracts; (b) contracts for legal services; (c) contracts for financial advisory services; (d) auditing contracts; (e) facility rentals and lease agreements; (f) concessions and other rental agreements; (g) insurance contracts; (h) revenue-generating contracts; (I) contracts where an IPSIG is assigned at the time the contract is approved by the Commission; (j) professional service agreements under $1,000; (k) management agreements; (l) small purchase orders as defined in Miami-Dade County Administrative Order 3-2; (m) federal, state and local government-funded grants; and (n) interlocal agreements. **Notwithstanding the foregoing, the Miami-Dade County Board of County Commissioners may authorize the inclusion of the fee assessment of one quarter (1/4) of one percent in any exempted contract at the time of award.**

Nothing contained above shall in any way limit the powers of the Inspector General to perform audits on all County contracts including, but not limited to, those contracts specifically exempted above. The Miami-Dade County Inspector General is authorized and empowered to review past, present and proposed

County and Public Health Trust contracts, transactions, accounts, records and programs. In addition, the Inspector General has the power to subpoena witnesses, administer oaths, require the production of records and monitor existing projects and programs. Monitoring of an existing project or program may include a report concerning whether the project is on time, within budget and in conformance with plans, specifications and applicable law. The Inspector General is empowered to analyze the necessity of and reasonableness of proposed change orders to the Contract. The Inspector General is empowered to retain the services of independent private sector inspectors general (IPSIG) to audit, investigate, monitor, oversee, inspect and review operations, activities, performance and procurement process, including but not limited to project design, specifications, proposal submittals, activities of the Contractor, its officers, agents and employees, lobbyists, County staff and elected officials to ensure compliance with contract specifications and to detect fraud and corruption.

Upon written notice to the Contractor from the Inspector General or IPSIG retained by the Inspector General, the Contractor shall make all requested records and documents available to the Inspector General or IPSIG for inspection and copying. The Inspector General and IPSIG shall have the right to inspect and copy all documents and records in the Contractor's possession, custody or control which, in the Inspector General's or IPSIG's sole judgment, pertain to performance of the contract, including, but not limited to original estimate files, change order estimate files, worksheets, proposals and agreements form and which successful and unsuccessful subcontractors and suppliers, all project-related correspondence, memoranda, instructions, financial documents, construction documents, proposal and contract documents, back-charge documents, all documents and records which involve cash, trade or volume discounts, insurance proceeds, rebates, or dividends received, payroll and personnel records, and supporting documentation for the aforesaid documents and records.

ARTICLE 54. LOCAL, STATE, AND FEDERAL COMPLIANCE REQUIREMENTS

Contractor agrees to comply, subject to applicable professional standards, with the provisions of any and all applicable Federal, State and the County orders, statutes, ordinances, rules and regulations which may pertain to the Services required under this Agreement, including but not limited to:

a) Equal Employment Opportunity (EEO), in compliance with Executive Order 11246 as amended and applicable to this Contract.

b) Miami-Dade County Florida, Department of Small Business Development Participation Provisions, as applicable to this Contract.

c) Environmental Protection Agency (EPA), as applicable to this Contract.

d) Miami-Dade County Code, Chapter 11A, Article 3. All contractors and subcontractors performing work in connection with this Contract shall provide equal opportunity for employment because of race, religion, color, age, sex, national origin, sexual preference, disability or marital status. The aforesaid provision shall include, but not be limited to, the following: employment, upgrading, demotion or transfer, recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship. The Contractor agrees to post in conspicuous place available for employees and applicants for employment, such notices as may be required by the Dade County Fair Housing and Employment Commission, or other authority having jurisdiction over the work setting forth the provisions of the nondiscrimination law.

e) "Conflicts of Interest" Section 2-11 of the County Code, and Ordinance 01-199.

f) Miami-Dade County Code Section 10-38 “Debarment”.

g) Miami-Dade County Ordinance 99-5, codified at 11A-60 et. seq. of Miami-Dade Code pertaining to complying with the County’s Domestic Leave Ordinance.

h) Miami-Dade County Ordinance 99-152, prohibiting the presentation, maintenance, or prosecution of false or fraudulent claims against Miami-Dade County.

Notwithstanding any other provision of this Agreement, Contractor shall not be required pursuant to this Agreement to take any action or abstain from taking any action if such action or abstention would, in the good faith determination of the Contractor, constitute a violation of any law or regulation to which Contractor is subject, including but not limited to laws and regulations requiring that Contractor conduct its operations in a safe and sound manner.

ARTICLE 55. NONDISCRIMINATION

During the performance of this Contract, Contractor agrees to: not discriminate against any employee or applicant for employment because of race, religion, color, sex, handicap, marital status, age or national origin, and will take affirmative action to ensure that they are afforded equal employment opportunities without discrimination. Such action shall be taken with reference to, but not limited to: recruitment, employment, termination, rates of pay or other forms of compensation, and selection for training or retraining, including apprenticeship and on the job training.

By entering into this Contract with the County, the Contractor attests that it is not in violation of the Americans with Disabilities Act of 1990 (and related Acts) or Miami-Dade County Resolution No. R-385-95. If the Contractor or any owner, subsidiary or other firm affiliated with or related to the Contractor is found by the responsible enforcement agency or the County to be in violation of the Act or the Resolution, such violation shall render this Contract void. This Contract shall be void if the Contractor submits a false affidavit pursuant to this Resolution or the Contractor violates the Act or the Resolution during the term of this Contract, even if the Contractor was not in violation at the time it submitted its affidavit.

ARTICLE 56. CONFLICT OF INTEREST

The Contractor represents that:

a) No officer, director, employee, agent, or other consultant of the County or a member of the immediate family or household of the aforesaid has directly or indirectly received or been promised any form of benefit, payment or compensation, whether tangible or intangible, in connection with the grant of this Agreement.

b) There are no undisclosed persons or entities interested with the Contractor in this Agreement. This Agreement is entered into by the Contractor without any connection with any other entity or person making a proposal for the same purpose, and without collusion, fraud or conflict of interest. No elected or appointed officer or official, director, employee, agent or other consultant of the County, or of the State of Florida (including elected and appointed members of the legislative and executive branches of government), or a member of the immediate family or household of any of the aforesaid:

   i) is interested on behalf of or through the Contractor directly or indirectly in any manner whatsoever in the execution or the performance of this Agreement, or in the services, supplies or work, to which this Agreement relates or in any portion of the revenues; or

   ii) is an employee, agent, advisor, or consultant to the Contractor or to the best of the Contractor's knowledge any subcontractor or supplier to the Contractor.

c) Neither the Contractor nor any officer, director, employee, agency, parent, subsidiary, or affiliate of the Contractor shall have an interest which is in conflict with the Contractor's faithful performance of its obligation under this Agreement; provided that the County, in its sole discretion, may consent in writing to such a relationship, provided the Contractor provides the County with a written notice, in advance, which identifies all the individuals and entities involved and sets forth in

detail the nature of the relationship and why it is in the County's best interest to consent to such relationship.

d) The provisions of this Article are supplemental to, not in lieu of, all applicable laws with respect to conflict of interest. In the event there is a difference between the standards applicable under this Agreement and those provided by statute, the stricter standard shall apply.

e) In the event Contractor has no prior knowledge of a conflict of interest as set forth above and acquires information which may indicate that there may be an actual or apparent violation of any of the above, Contractor shall promptly bring such information to the attention of the County's Project Manager. Contractor shall thereafter cooperate with the County's review and investigation of such information, and comply with the instructions Contractor receives from the Project Manager in regard to remedying the situation.

ARTICLE 57. PRESS RELEASE OR OTHER PUBLIC COMMUNICATION

Under no circumstances shall the Contractor without the express written consent of the County:

a) Issue or permit to be issued any press release, advertisement or literature of any kind which refers to the County, or the Work being performed hereunder, unless the Contractor first obtains the written approval of the County. Such approval may be withheld if for any reason the County believes that the publication of such information would be harmful to the public interest or is in any way undesirable; and

b) Communicate in any way with any contractor, department, board, agency, commission or other organization or any person whether governmental or private in connection with the Services to be performed hereunder except upon prior written approval and instruction of the County; and

c) Except as may be required by law, the Contractor and its employees, agents, subcontractors and suppliers will not represent, directly or indirectly, that any product or service provided by the Contractor or such parties has been approved or endorsed by the County.

ARTICLE 58. BANKRUPTCY

The County reserves the right to terminate this contract, if, during the term of any contract the Contractor has with the County, the Contractor becomes involved as a debtor in a bankruptcy proceeding, or becomes involved in a reorganization, dissolution, or liquidation proceeding, or if a trustee or receiver is appointed over all or a substantial portion of the property of the Contractor under federal bankruptcy law or any state insolvency law.

ARTICLE 59. GOVERNING LAW

This Contract, including Appendices, and all matters relating to this Contract (whether in contract, statute, tort (such as negligence), or otherwise) shall be governed by, and construed in accordance with, the laws of the State of Florida.

ARTICLE 60. INDIVIDUALLY IDENTIFIABLE HEALTH INFORMATION and/or PROTECTED HEALTH INFORMATION

Any person or entity that performs or assists Miami-Dade County with a function or activity involving the use or disclosure of “Individually Identifiable Health Information (IIHI) and/or Protected Health Information (PHI) shall comply with the Health Insurance Portability and Accountability Act (HIPAA) of 1996 and the

Miami-Dade County Privacy Standards Administrative Order. HIPAA mandates for privacy, security and electronic transfer standards, include but are not limited to:

1. Use of information only for performing services required by the contract or as required by law;
2. Use of appropriate safeguards to prevent non-permitted disclosures;
3. Reporting to Miami-Dade County of any non-permitted use or disclosure;
4. Assurances that any agents and subcontractors agree to the same restrictions and conditions that apply to the Contractor and reasonable assurances that IIHI/PHI will be held confidential;
5. Making Protected Health Information (PHI) available to the customer;
6. Making PHI available to the customer for review and amendment; and incorporating any amendments requested by the customer;
7. Making PHI available to Miami-Dade County for an accounting of disclosures; and
8. Making internal practices, books and records related to PHI available to Miami-Dade County for compliance audits.

PHI shall maintain its protected status regardless of the form and method of transmission (paper records, and/or electronic transfer of data). The Contractor must give its customers written notice of its privacy information practices including specifically, a description of the types of uses and disclosures that would be made with protected health information.

ARTICLE 61. COUNTY USER ACCESS PROGRAM (UAP)

A. User Access Fee

Pursuant to Miami-Dade County Budget Ordinance No. 03-192, this Contract is subject to a user access fee under the County User Access Program (UAP) in the amount of two percent (2%). All sales resulting from this Contract, or any contract resulting from this solicitation and the utilization of the County contract price and the terms and conditions identified herein, are subject to the two percent (2%) UAP. This fee applies to all contract usage whether by County Departments or by any other governmental, quasi-governmental or not-for-profit entity.

The Contractor providing goods or services under this Contract shall invoice the contract price and shall accept as payment thereof the contract price less the 2% UAP as full and complete payment for the goods and/or services specified on the invoice. The County shall retain the 2% UAP for use by the County to help defray the cost of the procurement program. Vendor participation in this invoice reduction portion of the UAP is mandatory.

B. Joint Purchase

Only those entities that have been approved by the County for participation in the County's Joint Purchase and Entity Revenue Sharing Agreement are eligible to utilize or receive County contract pricing and terms and conditions. The County will provide to approved entities a UAP Participant Validation Number. The Contractor must obtain the participation number from the entity prior to filling any order placed pursuant to this section. Contractor participation in this joint purchase portion of the UAP, however, is voluntary. The Contractor shall notify the ordering entity, in writing, within 3 work days of receipt of an order, of a decision to decline the order.

For all ordering entities located outside the geographical boundaries of Miami-Dade County, the Contractor shall be entitled to ship goods on an "FOB Destination, Prepaid and Charged Back" basis. This allowance shall only be made when expressly authorized by a representative of the ordering entity prior to shipping the goods.

The County shall have no liability to the Contractor for the cost of any purchase made by an ordering entity under the UAP and shall not be deemed to be a party thereto. All orders shall be placed directly by the ordering entity with the Contractor and shall be paid by the ordering entity less the 2% UAP.

C. Contractor Compliance

If a Contractor fails to comply with this Article, that Contractor may be considered in default by the County in accordance with Article 40 of this Contract.

ARTICLE 62. SURVIVAL

The parties acknowledge that any of the obligations in this Agreement will survive the term, termination and cancellation hereof. Accordingly, the respective obligations of the Contractor and the County under this Agreement, which by nature would continue beyond the termination, cancellation or expiration thereof, shall survive termination, cancellation or expiration hereof.

IN WITNESS WHEREOF, the parties have executed this Agreement effective as of the contract date herein above set forth.

Contractor	Miami-Dade County
By: _____	By: _____
Name: _____	Name: _____
Title: _____	Title: _____
Date: _____	Date: _____
Attest: _____ Corporate Secretary/Notary Public	Attest: _____ Clerk of the Board
Corporate Seal/Notary Seal	Approved as to form and legal sufficiency _____ Assistant County Attorney

ATTACHMENTS

Form A-1

PROPOSER'S NAME (Name of firm, entity or organization):

FEDERAL EMPLOYER IDENTIFICATION NUMBER:

NAME AND TITLE OF PROPOSER'S CONTACT PERSON:

Name: Title:

MAILING ADDRESS:

Street Address: _____

City, State, Zip: _____

TELEPHONE:	***FAX:***	***E-MAIL ADDRESS:***
(_____) _____	(_____) _____	_____

PROPOSER'S ORGANIZATIONAL STRUCTURE:

____ Corporation ____Partnership ____Proprietorship ____Joint Venture

____ Other (Explain): _____

IF CORPORATION,
Date Incorporated/Organized: _____

State Incorporated/Organized: _____

States registered in as foreign corporation: _____

PROPOSER'S SERVICE OR BUSINESS ACTIVITIES OTHER THAN WHAT THIS SOLICITATION REQUESTS FOR:

LIST NAMES OF PROPOSER'S SUBCONTRACTORS OR SUBCONSULTANTS FOR THIS PROJECT:

CRIMINAL CONVICTION DISCLOSURE:
Pursuant to Miami-Dade County Ordinance No. 94-34, any individual who has been convicted of a felony during the past ten years and any corporation, partnership, joint venture or other legal entity having an officer, director, or executive who has been convicted of a felony during the past ten years shall disclose this information prior to entering into a contract with or receiving funding from the County.

☐ Place a checkmark here only if Proposer has such conviction to disclose to comply with this requirement.

PROPOSER'S AUTHORIZED SIGNATURE
The undersigned hereby certified that this proposal is submitted in response to this solicitation.

Signed By: _____ Date: _____

Print Name: _____ Title: _____

A-1 Rev. 1/23/07

Form A-2
AFFIDAVIT OF MIAMI-DADE COUNTY
LOBBYIST REGISTRATION FOR ORAL PRESENTATION

(1) ProjectTitle:_____Project No.:_____
(2) Department: _____
(3) Proposer's Name: _____
Address: _____Zip: _____
Business Telephone: (_____) _____

(4) **List All Members of the Presentation Team Who Will Be Participating in the Oral Presentation:**

NAME	TITLE	EMPLOYED BY	TEL. NO.

(ATTACH ADDITIONAL SHEET IF NECESSARY)

The individuals named above are Registered and the Registration Fee is <u>not</u> required for the Oral Presentation ONLY.

Any person who appears as a representative for an individual or firm for an oral presentation before a County certification, evaluation, selection, technical review or similar committee must be listed on an affidavit provided by the County. The affidavit shall be filed with the Clerk of the Board at the time the response is submitted. The individual or firm must submit a revised affidavit for additional team members added after submittal of the proposal with the Clerk of the Board at least two days prior to the oral presentation. Any person not listed on the affidavit or revised affidavit may not participate in the oral presentation.

Other than for the oral presentation, Proposers who wish to address the county commission, county board or county committee concerning any actions, decisions or recommendations of County personnel regarding this solicitation in accordance with Section 2-11.1(s) of the Code of Miami-Dade County MUST register with the Clerk of the Board and pay all applicable fees.

I do solemnly swear that all the foregoing facts are true and correct and I have read or am familiar with the provisions of Section 2-11.1(s) of the Code of Miami-Dade County as amended.

Signature of Authorized Representative: _____ Title: _____
STATE OF _____
COUNTY OF _____

The foregoing instrument was acknowledged before me this _____, by_____, a _____, who is personally known
(Individual, Officer, Partner or Agent) (Sole Proprietor, Corporation or Partnership)
to me or who has produced _____ as identification and who did/did not take an oath.

_____
(Signature of person taking acknowledgement)
_____
(Name of Acknowledger typed, printed or stamped)
_____ _____
(Title or Rank) (Serial Number, if any)

Revised 2/7/05

Form A-3

ACKNOWLEDGEMENT OF ADDENDA

Instructions: Complete Part I or Part II, whichever is applicable.

PART I: Listed below are the dates of issue for each Addendum received in connection with this solicitation.

Addendum #1, Dated _____, 200___

Addendum #2, Dated _____, 200___

Addendum #3, Dated _____, 200___

Addendum #4, Dated _____, 200___

Addendum #5, Dated _____, 200___

Addendum #6, Dated _____, 200___

Addendum #7, Dated _____, 200___

Addendum #8, Dated _____, 200___

Addendum #9, Dated _____, 200___

PART II:

____ No Addendum was received in connection with this solicitation.

Authorized Signature:_____ Date: _____

Print Name: _____ Title: _____

Firm Name: _____

Form A-4

LOCAL BUSINESS PREFERENCE

The evaluation of competitive solicitations is subject to Section 2-8.5 of the Miami-Dade County Code, which, except where contrary to federal or state law, or any other funding source requirements, provides that preference be given to local businesses. A local business, for the purposes of receiving the aforementioned preference above, shall be defined as a Proposer which meets all of the following.

1. Proposer has a valid Local Business Tax Receipt (formerly know as an Occupational License), issued by Miami-Dade County at least one year prior to proposal submission, that is appropriate for the goods, services or construction to be purchased.

   Proposer shall attach a copy of said Miami-Dade County Local Business Tax Receipt hereto. (Note: Current and past year receipts, or occupational licenses, as may be applicable, may need to be submitted as proof that it was issued at least one year prior to the proposal due date.)

2. Proposer has a physical business address located within the limits of Miami-Dade County from which the Proposer operates or performs business. (Post Office Boxes are not verifiable and shall not be used for the purpose of establishing said physical address.)

   Proposer shall state its Miami-Dade County (or Broward County if applicable, see note below) physical business address _____

3. Proposer contributes to the economic development and well-being of Miami-Dade County in a verifiable and measurable way. This may include but not be limited to the retention and expansion of employment opportunities and the support and increase in the County's tax base. To satisfy this requirement, the Proposer shall affirm in writing its compliance with any of the following objective criteria as of the proposal submission date:

   Check box, if applicable:

   □ a) Proposer has at least ten (10) permanent full time employees, or part time employees equivalent to 10 FTE ("full-time equivalent" employees working 40 hours per week) that live in Miami-Dade County, or at least 25% of its employees that live in Miami-Dade County.

   □ b) Proposer contributes to the County's tax base by paying either real property taxes or tangible personal property taxes to Miami-Dade County.

   □ c) Proposer contributes to the economic development and well-being of Miami-Dade County by some other verifiable and measurable contribution by
   _____
   _____
   _____
   _____
   _____
   _____
   _____
   _____

   Proposer shall check the box if applicable and, if checking item "c", shall provide a written statement, above, defining how Proposer meets that criteria.

By signing below, Proposer affirms that it meets the above criteria to qualify for Local Preference and has submitted the requested documents.

Note: At this time, there is an interlocal agreement in effect between Miami-Dade and Broward Counties until September 30, 2009. Therefore, a Proposer which meets the requirements of (1), (2) and (3) above for Broward County shall be considered a local business for the purposes outlined herein.

Federal Employer Identification Number: _____

RFP 643

Firm Name: _____

Address: _____

City/State/Zip:_____

I hereby certify that to the best of my knowledge and belief all the foregoing facts are true and correct.

Signature of Authorized Representative: _____

Print Name: _____ Title: _____

Date: _____

STATE OF _____
COUNTY OF _____

SUBSCRIBED AND SWORN TO (or affirmed) before me on _____,
(Date)
by _____. He/She is personally known to me or has
(Affiant)
presented _____ as identification.
(Type of Identification)

_____ _____
(Signature of Notary) (Serial Number)

_____ _____
(Print or Stamp Name of Notary) (Expiration Date)

Notary Public _____ Notary Seal
(State)

Form A-4 Rev. 1/12/05

FORM A-5

SUBCONTRACTOR/SUPPLIER LISTING

(Ordinance 97-104)

Name of Proposer _____

This form, or a comparable listing meeting the requirements of Ordinance No. 97-104, **MUST** be completed by all bidders and proposers on County contracts for purchase of supplies, materials or services, including professional services which involve expenditures of $100,000 or more, and all bidders and proposers on County or Public Health Trust construction contracts which involve expenditures of $100,000 or more. **This form, or a comparable listing meeting the requirements of Ordinance No. 97-104, must be completed and submitted even though the bidder or proposer will not utilize subcontractors or suppliers on the contract. The bidder or proposer should enter the word "NONE" under the appropriate heading of Form A-7.1 in those instances where no subcontractors or suppliers will be used on the contract.** A bidder or proposer who is awarded the contract shall not change or substitute first tier subcontractors or direct suppliers or the portions of the contract work to be performed or materials to be supplied from those identified except upon written approval of the County.

Business Name and Address of First Tier Subcontractor/Subconsultant	Principal Owner	**Scope of Work to be Performed by Subcontractor/Subconsultant**	**(Principal Owner)** GENDER	RACE

Business Name and Address of Direct Supplier	Principal Owner	**Supplies/Materials/Services to be Provided by Supplier**	**(Principal Owner)** GENDER	RACE

I certify that the representations contained in this Subcontractor/Supplier Listing are to the best of my knowledge true and accurate.

_____

Signature of Proposer's

Print Name
Print Title
Date

Authorized Representative

(Duplicate if additional space is needed)

Form A-5(new 5/7/99)

Form A-6

FAIR SUBCONTRACTING POLICIES
(Ordinance 97-35)

FAIR SUBCONTRACTING PRACTICES

In compliance with Miami-Dade County Ordinance 97-35, the Proposer submits the following detailed statement of its policies and procedures for awarding subcontracts:

_____

I hereby certify that the foregoing information is true, correct and complete.

Signature of Authorized Representative: _____

Title: _____ Date: _____

Firm Name: _____

Form A-6 Rev. 2/13/01

Form B-1
Price Proposal Schedule

Form B-1

Price Proposal Schedule

The Proposer's price shall be submitted on this Form B-1 "Price Proposal Schedule." There is no exception allowed to this requirement. Proposer is requested to fill in the applicable blanks on this form and to make no other marks. Each area of this form should be broken down further on the specific forms, **Form B-2 – B-11.**

One-Time Prices

Item	Number of Units	Unit Price	Total Price
A. Hardware (Form B-2)			
B. Software (Form B-4)			
C. Planning/Implementation (Form B-5)			
D. Training (Form B-6)			
E. Custom Programming (Form B-7)			
F. Disaster Recovery (Form B-8)			
G. Other Items (Form B-9)			
Total			

Maintenance Price Proposal

Item	Year 2 Price	Year 3 Price	Year 4 Price	Year 5 Price	TOTAL Year 2-5 Maintenance Price
H. Hardware Maintenance (Form B-10)					
H. Software Maintenance (Form B-10)					
Total					

Item	Price
Total One-Time Price	
Total Maintenance Price	
GRAND TOTAL	

Form B-2
Hardware Price Proposal

Form B-2

Hardware Price Proposal
Item A of Form B-1

The Proposer should itemize all hardware that will need to be purchased by the Library to make the proposed System operate according to the specifications in Section 2.0: Scope of Services of this RFP. Please provide manufacturer and model numbers for all hardware. Please do not include on Form B-2 any existing hardware that can be reutilized in the new System (Please use form B-3 for that purpose). However, if there is a trade-in price for existing Library hardware, please include it in this Form. Include all necessary cables. Put $0 for any hardware that is either not needed or for which the Library can reuse existing hardware.

Hardware Price Proposal

Hardware	Number of Units	Manufacturer (Including CPU Size and Operating System Version, if Applicable)	Model #	Unit Price	Total for new units	Unit trade-in price for Library's Hardware	Total trade-in price for Library's Hardware	Total for new units minus total trade-in price
Central Site								
Production Database server								
Production Application Server								
Training/Test Server								
E-mail Server								
SIP Server								
Web Portal Server								
Networking Equipment								
Report Writing Server								
Electronic Payment Server								
Z39.50 Server								
Interactive Voice Notification								
Bluecoat Appliances for Filtering								
Terminal Servers								
Backup/Recovery								
Other (Please specify)								
Total								
Other Hardware/ Peripheral Devices Very Likely to be Purchased as part of this RFP								
Impact (Multi-part form) printer								
Label printer								
Barcode Scanners								
Handheld Scanners								
Flatbed scanners								
Handheld Circ/OPAC PDAs, tablets, etc.								
Barcode Cloners								
Cash Register/Pt of Sale	Use quantity 30							
E-Commerce Equipment								

Hardware	Number of Units	Manufacturer (Including CPU Size and Operating System Version, if Applicable)	Model #	Unit Price	Total for new units	Unit trade-in price for Library's Hardware	Total trade-in price for Library's Hardware	Total for new units minus total trade-in price
Cameras (for patrons photos)	Use quantity 50							
Jamex Coin/Bill Acceptors								
Other (please specify)								
Total								
Other Hardware/ Peripheral Devices that may or may not be purchased as part of this RFP but will count in the Cost Proposal if existing hardware cannot be reused								
Desktop computers								
Laptop Computers								
Inkjet Printers								
Receipt Printers								
Laser Printers-Black/White								
Laser Printer-Color								
Other (Please specify)								
Total								
GRAND TOTAL								

Form B-3
Reusable Existing Hardware

Form B-3

Reusable Existing Hardware

The Proposer should itemize all existing hardware that will be reused by the Library to make the proposed System operate according to the specifications in Section 2.0: Scope of Services of this RFP. If an item needs to be replaced for the new System, please indicate the trade-in value.

Hardware	Manufacturer	Model Number and Operating System Versions, if Applicable	Hardware Configuration	Number of Units	Proposer to enter: Y=reuse N=can not reuse; replacement equipment in Form B-2 N/A=not needed for proposed system	Unit trade-in price	Total trade-in price
Production/ Training Application Database server	Sun Microsystems Enterprise	• X4600 Server • Red Hat Enterprise Linux 4.0 OS • Sybase SQL 12.5	• 8 x 2.8 GHz 8220 SE Dual Core AMD Opteron Processor(s) • 64000 MB DDR SDRAM Memory • 2 x 73 GB 10K Hot Swappable Disk(s) • A3510 FC Disk Array W/HW RAID dual CNTRL • 12 x 146 GB 15K Disk(s) • Media: DVD-ROM • StorageTek LT0 3 Tape Drive • 17 LCD Display Console	1			
E-mail Server	Dell	• PowerEdge 6850 • Windows Server 2003 R2 • Microsoft Exchange 2003	• Intel 3.0GHz/8MB Cache, Xeon, Quad Processors • 32GB DDR2 400MHZ • Two Hard Drives 73GB each • Dual On-Board NICS • Dual Power Supply, 208 Volt	1			
E-mail Server	Dell	• PE2850 • Windows Server 2003 R2 • Microsoft Exchange 2005	• Intel Xeon 2.80Ghz • 8GB RAM • 1 Gigabit Ethernet 136 GB HDD	1			
Envisionware SIP II Server	Dell	• PE1950 • Windows 2003 R2 • PC Reservation Management (Server) software 3.2 F	• Intel Xeon 1.86GHZ • 4GB RAM • 1 Gigabit Ethernet • 73GB Disk Space	1			
Envisionware SIP II Server	Dell	• PE1950 • Windows 2003 R2 • PC Reservation (KIOSK) Software 3.2.51	• Intel Xeon 1.86GHZ • 4GB RAM • 1 Gigabit Ethernet • 73GB Disk Space	1			

Production Web Portal Server	Delta	• PE2850 • Windows Server 2003 R2	• Intel Xeon 2.80GHZ • 8GB RAM • 1 Gigabit Ethernet • 136GB Disk space	2			
Training Web Portal Server	Dell	• PE2850 • Windows Server 2003 R2	• Intel Xeon 2.80GHZ • 8GB RAM • 1 Gigabit Ethernet • 136GB Disk space	1			
Report Writing Primary Server	Dell	• PE2850 • Windows Server 2003 R2 • MicroStrategy 8.0	• Intel Xeon 2.80GHZ • 8GB RAM	1			
Report Writing Secondary Server	Dell	• PE2850 • Windows Server 2003 R2 • MicroStrategy 8.0	• Intel Xeon 2.80GHZ • 8GB RAM	1			
3M Self-Check Primary SIP II Server	Dell	• PE1950 • Windows Server 2003 R2 • 3M Software 3.50.118	• Intel Xeon 1.86GHZ • 4GB RAM	4			
3M Self-Check Secondary SIP II Server	Dell	• PE1950 • Windows Server 2003 R2 • 3M Software 3.50.118	• Intel Xeon 1.86GHZ • 4GB RAM	4			
Overdrive Inc. Digital E-Books SIP II Server	Dell	• Optiplex GX280 • Windows Server 2000 SP4	• Intel P4 3.00GHZ • 1GB RAM • 1 Gigabit Ethernet • 40GB Disk Space	1			
Telecirc II Interactive Voice Response Server	Dell	• Optiplex GX260 • Windows 2000 Pro SP3 • Edify 8.5	• Intel P4 2.00GHZ • 1GB RAM • 1 Gigabit Ethernet • 40GB Disk Space • T1 Voice 12 lines Dial-In & Dial-Out	2			
PC Reliance 2.1 (Offline Circulation Server) / Z39.50 Server	Gateway	• ALR 7200	• Intel PIII 500MHZ • 512MB RAM • 100MB Ethernet • 18GB Disk Space	1			

Backup/ Recovery	Dell	• ML6020 Control Module	• LTO-3 14U • 6 Drives, Native Fiber ChannelLTO-3 • Redundant Power for ML6020 Control Module • Tape Media for LTO3, 400/800GB100 Pack	1			
UPS	Liebert	• NPower 65kVA		1			
Impact (Multi-part form) printer	Tally	• T6212 Line Matrix System Printer for (Data Mailers)	• Line Impact Dot Matrix Printer • Print Speed Draft: 1200 LPM • Graphics: 150 IPM • FourPlexLANPlex I/O: Ethernet (10Base-T/100Base-T), Serial and Parallel, IPDS for LANPlex	1			
Barcode Scanners	Voyager	• CG Model MS9540	• PS2 and USB	242			
Barcode Scanners	PSC	• PowerWedge 20 FD-000-20	• PS2 with light pen	30			
Barcode Scanners	Percon	• 16-DN1-00 Control box • LS-2000MX-1221A E266179 Gun	• PS2	20			
Flatbed scanners	HP	• Scanjet 4070		43			
Coin/Bill Acceptors	Envisionware	• 609-50xx		8			
Coin/Bill Acceptors	Jamex	• 6557-JPC		45			
Desktop computer	Dell	• OptiPlex GX260	• 80532, 1.8G, 512K, 400FSB • 40GB Hard Drive • Dual in-line memory module 128, 266M (2 each)	126			
Desktop computer	Dell	• OptiPlex GX270	• 80532, 2.6G, 512, 800FSB • 40GB Hard Drive • Dual in-line memory module 256, 333M (2 each)	262			
Desktop computer	Dell	• OptiPlex GX280	• 80547, Pentium 4 Prescott DT, 3.0GHZ, 1 MEGB, 800FSB • 40GB Serial ATA Hard Drive • Dual in-line memory module 512, 400M (2 each)	217			
Desktop computer	Dell	• OptiPlex 210L	• 80547, Pentium 4 Prescott DT, 3.0GHZ, 1 MEGB, 800FSB • 80GB Hard Drive • Dual in-line memory module 1G, 533M (2 each)	294			

Desktop computer	Dell	• OptiPlex 745	• 945, 3.4, 2X2MB, PENTIUM D PRESLER • 80GB Hard Drive • Dual in-line memory module 1G 512, 533M (2 each)	883			
Desktop computer	Dell	• Precision WorkStation 330	• 80528, 1.8GHZ, OK, 400 • 40GB Hard Drive • Rambus inline memory module 128, 400M (2 each)	171			
Desktop computer	Dell	• Precision WorkStation 470		5			
Laptop Computer	Dell	• Latitude D505 • Windows XP SP2	• 80536, Pentium M Dothan, 1.6GHZ, 2 MEGB, 400FSB • 30GB Hard Drive • Dual in-line memory module 256, 333M (2 each)	410			
Laptop Computer	Dell	• Latitude D620 • Windows XP SP2	• T5600, 1.83, 2MB • 60GB, Serial ATA Hard Drive • Dual in-line memory module 512, 333M (2 each)	171			
Self-Check Workstations	3M	• HP rp5000 • HP rp5700 • Windows XP PRO SP3 • 3M Software 3.51.133	• 2.0GHZ Intel P4 512MB RAM • 1.80GHZ Intel P4 2GB RAM • Intel Pro/100 NIC, 40 GB Disk Space • Broadcom Net Extreme Gigabit Ethernet, 80 GB Disk Space • Intel Pro /100 NIC • 40GB Hard drive	130			
Receipt Printers	Epson	• TM-T88IIIP	• Thermal Printer with Auto Cutter and Tear Bar • Thermal, 5.9 ips, Parallel interface • Used Colors: white or black	219			
Network Laser Printers-Black/White	HP	• 4050 Series		76			
Network Laser Printer-Color	HP	• 3500N		52			
Personal Printers	HP	• 1320		99			
Other (please specify)							

Form B-4
Software Price Proposal

Form B-4

Software Price Proposal
Item B of Form B-1

The Proposer should itemize all software, including third-party software, that will need to be implemented by the Library to make the proposed System operate according to the specifications in Section 2.0: Scope of Services of this RFP. Proposers should provide specific costs for the number of licenses needed to run the System, and the cost of Enterprise Licenses. The lower cost will be used in calculating total cost. **Please do not use concurrent users as a licensing scheme.**

Software	Name	Version	Column A Type of License (server, seat, etc.)	Column B Number of Licenses	Column C Unit License Price	Column D Total License Price (Column B x Column C)	Column E Enterprise License Price	Column F Lower of Column D Or Column E
Replacement or Enhancement of Existing Software								
Operating System Software								
Database Software								
OPAC Portal								
Spanish OPAC Portal								
Canadian-French OPAC Portal								
OPAC Overlay								
Z39.50								
Enhanced Data Content								
RSS Feed Software								
MetaSearching Software								
Circulation								
Backup Circulation								
Cataloging/Authority								
Acquisitions								
Serials								
Homebound								
Borrow-By-Mail								
Media Scheduling								
Inventory Control								
Statistics Gathering/ Report Writing								
API Software								
Interactive Voice Notification								
E-mail Notification								
Data Mailer Software								

Software	Name	Version	Column A Type of License (server, seat, etc.)	Column B Number of Licenses	Column C Unit License Price	Column D Total License Price (Column B x Column C)	Column E Enterprise License Price	Column F Lower of Column D Or Column E
Other Messaging Mechanisms								
Collection Agency/ Delinquent Account Tracking								
3M Self-check Interface								
Envisionware Interface								
Digital Media and E-Book Interface								
Evanced Solutions Interface								
NextReads Interface								
Other (Please specify)								
Total								
Software for Additional Functionality Services								
Cash Register/Point of Sale Interface								
Electronic Payment Requirements								
PDA Interface for Circ								
PDA Interface for OPAC								
Remote Patron Authentication								
Digital Media Archive								
URL Checker								
Bookmobile								
Interlibrary Loan								
Text Messaging								
Bulk E-mail								
Security Alert								
Secure Socket Layer								
Other (Please specify)								
Total								
Escrow								
Escrow								
GRAND TOTAL								

Form B-5
Planning/Implementation
Price Proposal

Form B-5

Planning/Implementation Price Proposal
Item C of Form B-1

The Proposer should provide the costs for planning and implementation of the entire System, as specified in Section 2.0: Scope of Services of this RFP.

Planning/Implementation	% of Data to be Migrated	Price
Planning		
Preparation and loading of database		
Data Migration		
Documentation		
Configuration, staging and implementation of all hardware/software (including reconfiguring, staging and implementing software on existing hardware)		
Other (Please specify)		
GRAND TOTAL		

Form B-6
Training Price Proposal

Form B-6

Training Price Proposal
Item D of Form B-1

The Proposer should provide the costs for the proposed training as specified in Section 2.0: Scope of Services of this RFP. Base cost on the number of training days recommended in your Proposal to fully prepare 15 staff per Module and 20 Automation staff.

Training	Number of Days	Price Per Day	Total Price
Non-Automation Staff Training			
OPAC Portal			
OPAC Overlay			
Circulation			
Backup Circulation			
Cataloging/Authority			
Acquisitions			
Serials			
Homebound			
Borrow-By-Mail			
Media Scheduling			
Inventory Control			
Bookmobile			
Interlibrary Loan			
Statistics Gathering/Report Writing			
Cash Register/Point of Sale Interface			
Digital Media Archive			
Report Writing			
Other (Please specify)			
Total			
Automation Staff Training			
System Administration			
Interactive Voice Notification			
Other Messaging Mechanisms			
Collection Agency/Delinquent Account Tracking			
Self-check Interface			
E-mail Notification			
RSS Feed Software			
PDA Interface for Circ			
PDA Interface for OPAC			
Envisionware Interface			
Evanced Solutions Interface			
Digital media and E-book Interface			
NextReads Interface			
Integration with IBM Payment Manager			
MetaSearching Software			
Remote Patron Authentication			
URL Checker			
API Software			
Operating System Software			
Database Software			
Report Writing			
Other (Please specify)			
Total			
GRAND TOTAL			

Form B-7
Custom Programming
Price Proposal

Form B-7
Custom Programming Price Proposal
Item E of Form B-1

Please itemize any Custom Programming provided in your Proposal to provide any feature, function or service requested in Section 2.0: Scope of Services of this RFP. The Vendor will be expected to commit in the contract to have the feature, function or service available no later than 120 days after the contract has been signed.

Custom Programming Purpose	Estimated Number of Hours	Price per Hour	Total Price
Highly Desirable Features (if not already in System)			
To make items checked in using Circulation automatically received in Acquisitions			
To allow for patron ratings in Homebound			
Interface with the County Payment Manager			
To interface with ETSD address verification process			
Automatically charge fee for Borrow-By-Mail			
Total			
Other Vendor Proposed Customization			
Total			
GRAND TOTAL			

Hourly Rate for Future Custom Programming	

Form B-8
Disaster Recovery
Price Proposal

Form B-8
Disaster Recovery Price Proposal
Item F of Form B-1

Please itemize any hardware, software, and telecommunication costs to provide warm disaster recovery as requested in Section 2.0: Scope of Services of this RFP.

Disaster Recovery Hardware/Software	H = Hardware S = Software T = Telecommunications	Manufacturer if Hardware, Name if Software	Model # for Hardware, Version for Software	Number of Units/Licenses	Unit Price/Type of License	Setup Price	Yearly Recurring Costs	Total Recurring Costs Years 2-5
					Total			
						GRAND TOTAL (Sum of Setup + Total Recurring Costs Years 2-5)		

Form B-9
Other Items
Price Proposal

Form B-9
Other Items Price Proposal
Item G of Form B-1

Please provide details on anything else needed for the proposed System. If necessary, put number of units/licenses and total price.

Other Items	Details	Number of Units/Licenses	Unit Price	Total Price
		GRAND TOTAL		

Form B-10
Hardware/Software
Maintenance
Price Proposal

Form B-10
Hardware/Software Maintenance Price Proposal
Item G of Form B-1

Item	Year 2 Price	Year 3 Price	Year 4 Price	Year 5 Price	Total Maintenance Year 2 through 5
Central Site Hardware					
Production Database server					
Application Server					
Training/Test Server					
E-mail Server					
SIP Server					
Web Portal Server					
Networking Equipment					
Report Writing Server					
E-Commerce Server					
Z39.50 Server					
Equipment for ILS Redundancy					
Interactive Voice Notification					
Bluecoat Appliances for Filtering					
Terminal Servers					
Backup/Recovery					
Other (Please specify)					
Total					
Other Hardware/Peripheral Devices Very Likely to be Purchased as part of this RFP					
Impact (Multi-part form) printer					
Label printer					
Barcode Scanners					
Handheld Scanners					
Flatbed scanners					
Handheld Circ/OPAC PDAs, tablets, etc.					
Barcode Cloners					
Cash Register/Pt of Sale	Use quantity 30				
Electronic Payment Equipment					
Cameras (for patrons photos)	Use quantity 50				
Jamex Coin/Bill Acceptors					
Other (please specify)					
Total					

Item	Year 2 Price	Year 3 Price	Year 4 Price	Year 5 Price	Total Maintenance Year 2 through 5
Other Hardware/Peripheral Devices that may or may not be purchased as part of this RFP but will count in the Cost Proposal if existing hardware cannot be reused					
Desktop computers					
Laptop Computers					
Inkjet Printers					
Receipt Printers					
Laser Printers- Black/White					
Laser Printer-Color					
Other (Please specify)					
Total					
Replacement or Enhancement of Existing Software					
Operating System Software					
Database Software					
OPAC Portal					
Spanish OPAC Portal					
Canadian-French OPAC Portal					
OPAC Overlay					
Enhanced Data Content					
RSS Feed Software					
MetaSearching Software					
Circulation					
Backup Circulation					
Cataloging/Authority					
Acquisitions					
Serials					
Homebound					
Borrow-By-Mail					
Media Scheduling					
Inventory Control					
Statistics Gathering/ Report Writing					
API Software					
Interactive Voice Notification					
E-mail Notification					
Data Mailers Software					
Other Messaging Mechanisms					
Collection Agency/ Delinquent Account Tracking					
3M Self-check Interface					

Item	Year 2 Price	Year 3 Price	Year 4 Price	Year 5 Price	Total Maintenance Year 2 through 5
Envisionware Interface					
Digital media and E-book Interface					
Evanced Solutions Interface					
NextReads Interface					
Other (Please specify)					
Total					
Software for Additional Functionality Services					
Cash Register/Point of Sale Interface					
Electronic Payment Requirements					
Integration with County Payment Manager					
Integration with FAMIS					
Remote Patron Authentication					
Digital Media Archive					
URL Checker					
Bookmobile					
Interlibrary Loan					
Text Messaging					
Bulk E-mail					
Security Alert					
Other (Please specify)					
Total					
GRAND TOTAL					

Form B-11
Optional Hardware, Software and Services

Form B-11
Optional Hardware, Software and Services

The items on this Cost Proposal will not be considered in the price scoring done by the Evaluation/Selection Committee.

Hardware	Number of Units	Manufacturer	Model #	Unit Price	Total for new units	Unit trade-in price	Total trade-in price	Total for new units minus total trade-in price
Self-Check								
Redundancy								
Open URL Link Resolver								
ERM								
Other (Please specify)								
Total								
Software								
Self-Check								
Redundancy								
Open URL Link Resolver								
ERM								
Other (Please specify)								
Total								
Maintenance								
Self-Check								
Redundancy								
Open URL Link Resolver								
ERM								
Other (Please specify)								
Total								
Services								
Consulting for computer room redesign								
Other Consulting								
Other (please specify)								
Total								
GRAND TOTAL								

FORM L-1
CUSTOMER REFERENCES

FORM L-1:
CUSTOMER REFERENCES

Customer Name and Address	Number of Branches	Date of Installation/Migration	Contact Person Name and Title	Telephone Number/E-mail for Contact Person
LARGEST ILS CUSTOMERS:				
ILS CUSTOMERS USING 3M:				
ILS CUSTOMERS USING ENVISIONWARE:				
ILS CUSTOMERS THAT PROPOSER MIGRATED DATA FROM HORIZON 7.3.4:				

Appendix A
Library ILS Hardware

Appendix A – Library ILS Hardware

Sun Mircosystems Enterprise X4600 Server (ILS)
1 – 8way (2.8 GHz 8220 SE) Dual Core AMD Opteron Processor(s)
64000 MB DDR SDRAM Memory
2 x 73 GB 10K Hot Swappable Disk(s)
A3510 FC Disk Array W/HW RAID dual CNTRL
12 x 146 GB 15K Disk(s)
A3510 FC Disk Array W/HW RAID dual CNTRL
12 x 146 GB 15K Disk(s)
Media: DVD-ROM
StorageTek LT0 3 Tape Drive
4 – Gigabit Ethernet ports
17 LCD Display Console
Horizon (ILS) software 7.34
Sybase SQL 12.5
Red Hat Enterprise Linux 4.0
Horizon (Production Database)
Training (Training Database)
1200 seats (licensed for server)
Horizon Information Portal A, B, C Servers
Windows 2003 R2 Servers
1 - (Production Database)
1 - (Training Database)
1 - (Test Server)
Dell PE2850 Intel Xeon 2.80GHZ 8GB RAM
Gigabit Ethernet teaming – 136GB Disk Space

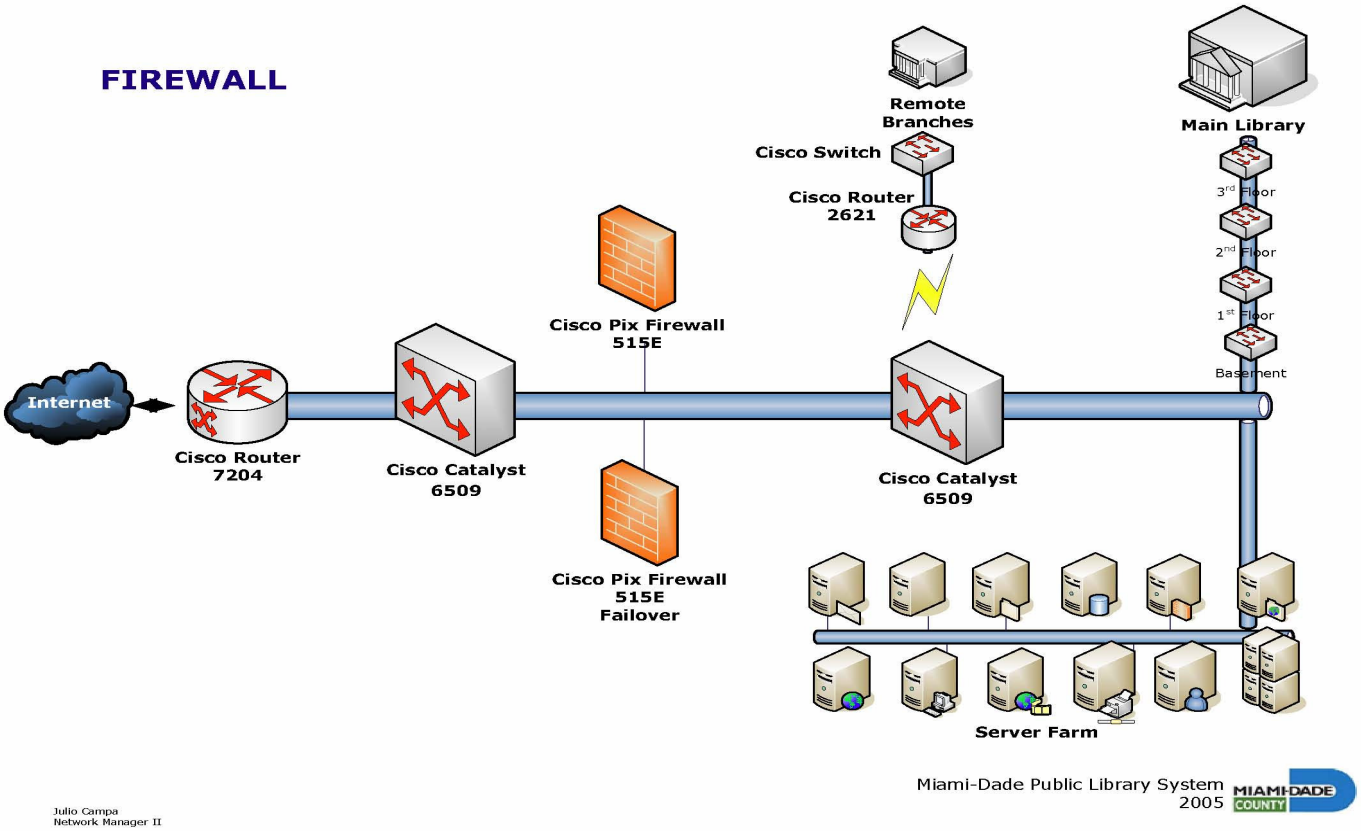
MicroStrategy 8.0, Web Reporter 1.4 Servers
1 - Windows 2003 R2 Server Primary Server
1 - Windows 2003 R2 Server Secondary Server
Dell PE2850 Intel Xeon 2.80GHZ 8GB RAM
Gigabit Ethernet teaming – 136GB Disk Space
Telecirc II, Edify 8.5 (Voice Notification Server)
1 - Windows 2000 Pro SP3
Dell Optiplex GX260 Intel P4 2.00GHZ 1GB RAM
T1 Voice 12 lines Dial-In & Dial-Out
Gigabit Ethernet – 40GB Disk Space
Overdrive Inc. Digital E-books SIP II Servers
1 - Windows 2003 R2 Server Primary Server
1 - Windows 2003 R2 Server Secondary Server
Dell PE1950 Intel Xeon 5120 Dual Core 1.86GHZ 4GB RAM
Gigabit Ethernet teaming – 73GB Disk Space
Envisionware SIP II Servers
SIP Servers - PC Reservation Management (Server) software 3.2 F
SIP Servers - PC Reservation (KIOSK) Software 3.2.51
2 - Windows 2003 R2 Server Primary Servers
2 - Windows 2003 R2 Server Secondary Servers
Dell PE1950 Intel Xeon L5420 Quad Core 2.5GHZ 4GB RAM
Gigabit Ethernet teaming – 73GB Disk Space

3M Self Checkout SIP II Servers
Windows 2003 R2 Servers - 3M Software 3.51.133
4 - Windows 2003 R2 Server Primary Servers
4 - Windows 2003 R2 Server Secondary Servers
Dell PE1950 Intel Xeon 5120 Dual Core 1.86GHZ 4GB RAM
Gigabit Ethernet teaming – 73GB Disk Space
Book Mobile SIP II Servers
1 - Windows 2003 R2 Server Primary Server
1 - Windows 2003 R2 Server Secondary Server
Dell PE1950 Intel Xeon L5420 Quad Core 2.5GHZ 4GB RAM
Gigabit Ethernet teaming – 73GB Disk Space
Pc Reliance 2.1 (Offline Circulation Server)
1 - Windows 2003 R2 Server
Gateway ALR 7200 Intel PIII 500MHZ 512MB RAM
100MB Ethernet – 18GB Disk Space
Horizon Email Server .net
Microsoft Exchange Server 2005
1 - Windows 2003 R2 Server Primary Server
Dell PE2850 Intel Xeon 2.80GHZ 8GB RAM
Gigabit Ethernet teaming – 136GB Disk Space
3M Self Checkout Workstations
Both HP Models on Windows XP PRO SP3
HP rp5700 1.80GHZ Intel P4 2GB RAM
HP rp5000 2.0GHZ Intel P4 512MB RAM

rp5000 - Intel Pro /100 NIC, 40GB Disk Space
rp5700 - Broadcom Net Extreme Gigabit Ethernet, 80GB Disk Space
3M Software Release 3.51.133
Tally T6212 Line Matrix System Printer for (Data Mailers)
Line Impact Dot Matrix Printer
Print Speed Draft: 1200 LPM, Graphics: 150 IPM
FourPlexLANPlex I/O: Ethernet (10Base-T/100Base-T), Serial and Parallel, IPDS for LANPlex
Print Media Up to 6-part forms, forms thickness maximum .025", weight: 15-100 lbs
Epson TM-T88IIIP (ILS Compact Receipt Printers)
Epson TM-T88IIIP is a Thermal Printer with Auto Cutter and Tear Bar
Epson TM-T88IIIP, Thermal, 5.9 ips, Parallel interface
Used Colors: white or black

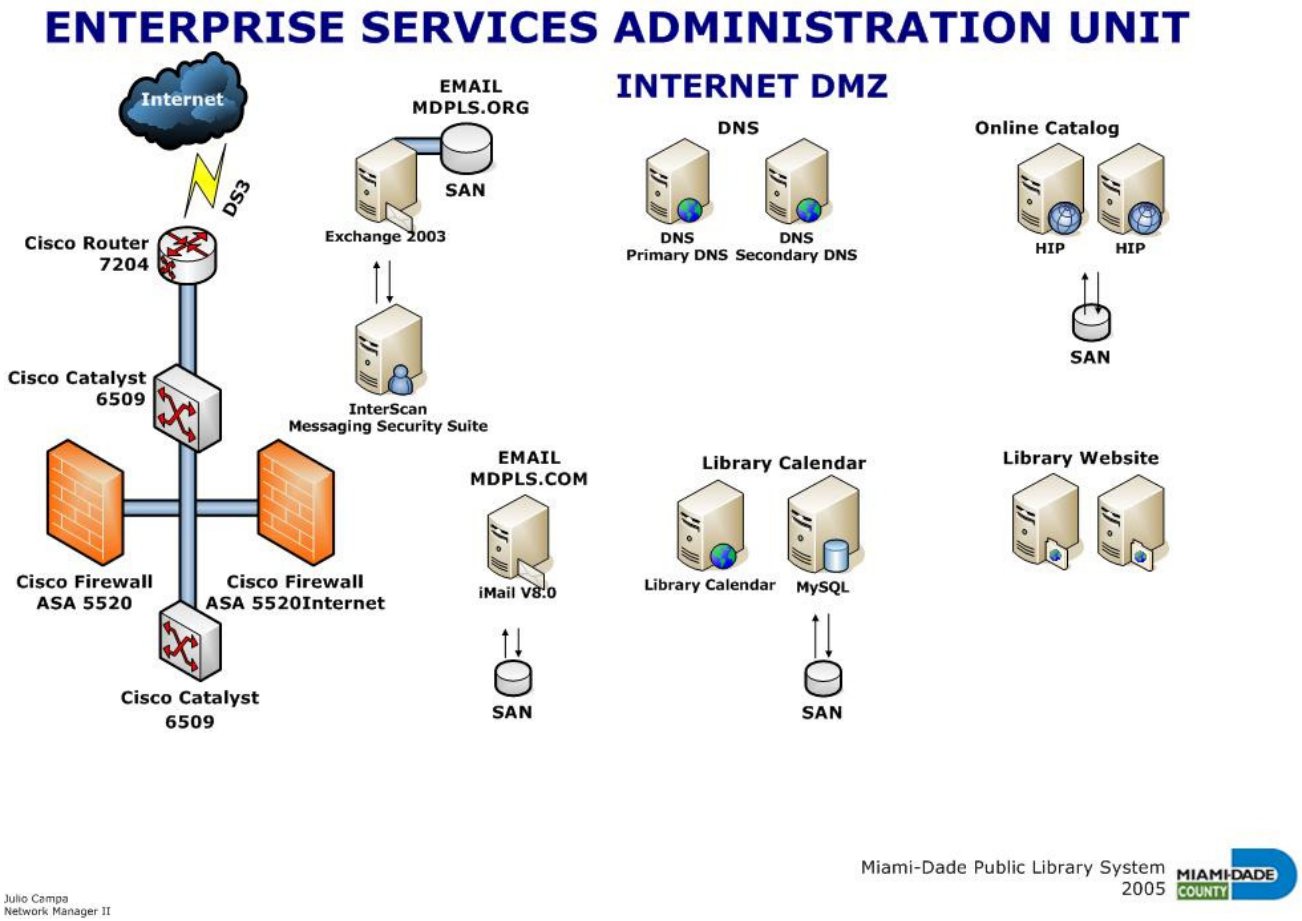
Appendix B
Firewall Landscape

Appendix B – Firewall Landscape



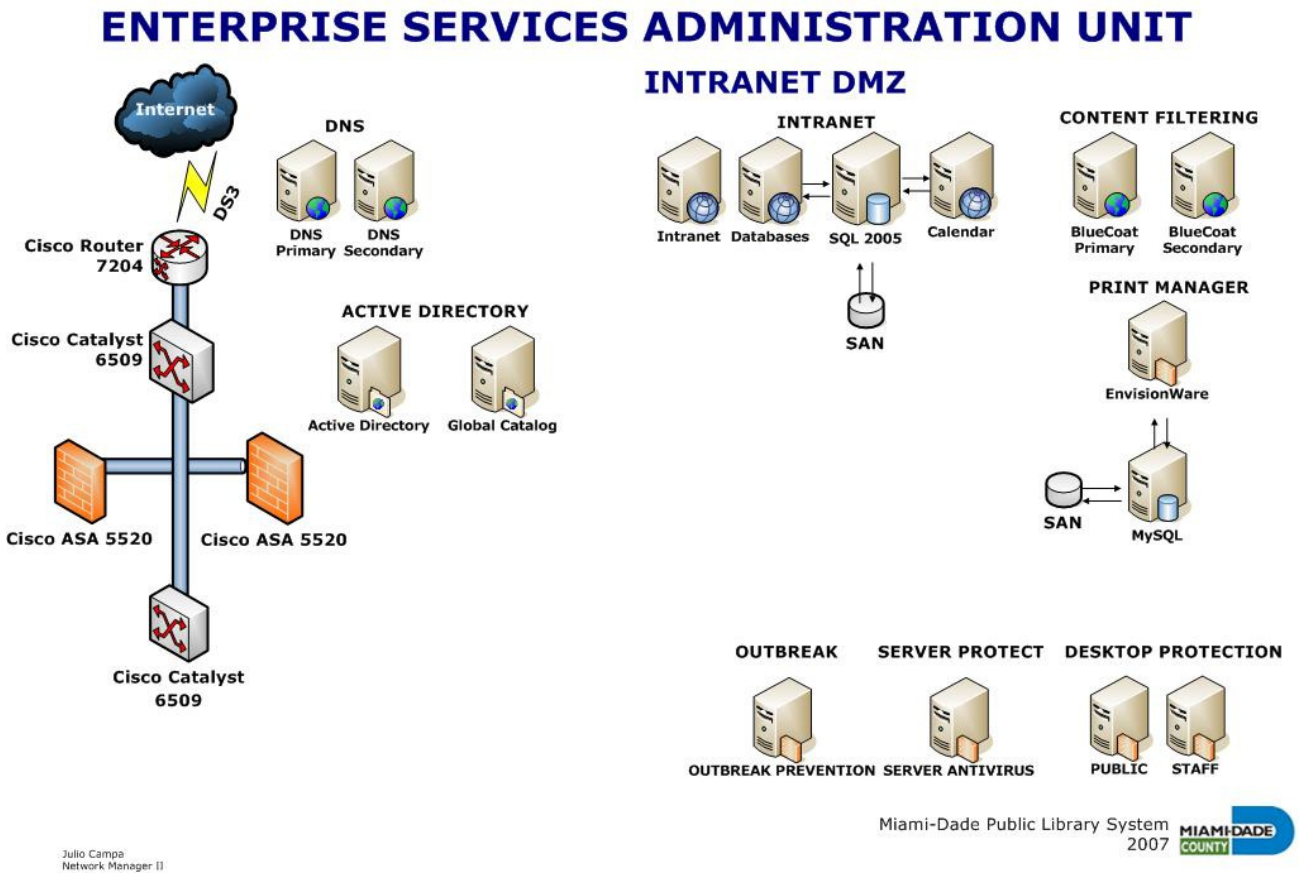
Appendix C
Internet DMZ Landscape

Appendix C – Internet DMZ Landscape



Appendix D
Intranet DMZ Landscape

Appendix D – Intranet DMZ Landscape



Appendix E
Current Workstation Statistics

Appendix E – Current Workstation Statistics

As of June 17, 2008:

Number of Staff Workstations: **546**

Number of Public Access Workstations: **1,058**

Number of Public Access Laptops: **468**

Number of Servers: **96**

Number of dedicated OPACs: **154**

Number of Self-Check stations: **130**

Appendix F
Current Workstation and Software Landscape

Appendix F – Current Workstation and Software Landscape: Software

Catalogs (OPAC)

PC Model: Gateway E-4200 PIII
Windows NT 4.0
Trend Micro Office Scan
Numara TrackIt agent
Internet Explorer 6.0
Gates Public Access Computing toolkit

PC Models: Dell Opti-plex GX260, GX270, GX280 and Precision 360 P IV
Windows 2000
Trend Micro Office Scan
Numara TrackIt agent
Internet Explorer 6.0
Gates Public Access Computing toolkit

Staff Workstations

PC Models: Dell Opti-plex 210L, GX260, GX270, GX280, 745 and Precision 360 P IV
Windows 2000
Windows XP SP2
Internet Explorer 6.0
Internet Explorer 7.0
Microsoft Office 2000
Microsoft Office XP
Microsoft Office Professional 2003
Horizon 7.3.4
Win VNC 3.5/4.0
Envisionware print management and PC reservation software
Klas 5
Win VNC 3.5/4.0
ScreenPrint32
Trend Micro Office Scan
Numara TrackIt, NeTerm

RFP 643

Adobe Reader 8
Pc Reliance
LitPro
Alpha G Delivery CKO
OCLC
HP Scanning software
Cerulean Studios Trillian
Kodak Easyshare

Appendix F – Current Workstation and Software Landscape: Software

Patron Workstations

PC Models: Dell Opti-plex 210L, GX260, GX270, GX280, 745 and Precision 360
P IV
Windows 2000
Win XP SP2
Internet Explorer 6.0
Internet Explorer 7.0
Microsoft Office Professional 2003
Envisionware print management and PC reservation software
Adobe Reader 8
Trend Micro Office Scan
ZoomText LEVEL2_705
ScreenPrint32
HP Scanning software
Gates Public Access Computing toolkit
Numara TrackIt Agent
Microsoft Shared Computing Toolkit
Barney Under the Sea
Barney Goes to the Circus
Encarta Encyclopedia Deluxe 2004
Encarta Reference Library 2003
Fun on the Farm with Barney
How the Leopard Got His Spots
KOI and the KOLA NUTS
Magic School Bus Dinosaurs
Magic School Bus Earth
Magic School Bus Rainforest
Microsoft Streets & Trips
Microsoft Mouse Tutor
Paul Bunyan
Encarta Dictionary

Appendix F – Current Workstation and Software Landscape: Hardware

Laptops: Patron/Staff

PC Models: Dell latitude D505, Dell latitude D620 P IV
Windows XP SP2,
Internet Explorer 6.0,
Internet Explorer 7.0,
Microsoft Office Professional 2003,
Horizon 7.3.4, Win VNC 3.5/4.0,
Envisionware print management and PC reservation software,
Win VNC 3.5/4.0,
ScreenPrint32,
Trend Micro Office Scan,
Numara TrackIt,
Visions “Writers Companion,
Faronics Freeze,
Adobe Reader 8,
Cisco VPN,
Cingular Connection Manager,
Gates Public Access Computing toolkit.

Computer Labs

PC Model: Dell Precision 330 PIV
Windows 2000
Microsoft Office XP Professional
Internet Explorer 6.0
Symantec anti-virus
Adobe Reader 8
Pc Reliance
Horizon 7.3.4
Numara TrackIt Agent
Net Op School
Macromedia/Dreamweaver 4
Macromedia/Fireworks 4

Appendix F – Current Workstation and Software Landscape: Hardware

Macromedia/Flash 5
Macromedia/FreeHand 10
Macromedia/Generator 2
Adobe/GoLive 5.0_ENG
Acrobat 5.0
Adobe/GoLive 5.0_ENG
Adobe/Illustrator 9.0.1
Adobe/LiveMotion
Adobe/Photoshop 6.0
Encarta Encyclopedia Deluxe 2002
Encarta Africana Third Edition
Microsoft Front Page

OptiPlex GX260

PROCESSOR..., 80532, 1.8G, 512K, 400FSB,
HARD DRIVE..., 40G
DUAL IN-LINE MEMORY MODULE..., 128, 266M …..2 each

OptiPlex GX270

PROCESSOR..., 80532, 2.6G, 512, 800FSB
HARD DRIVE..., 40GB
DUAL IN-LINE MEMORY MODULE..., 256, 333M …..2 each

OptiPlex GX280

PROCESSOR..., 80547, Pentium 4 Prescott DT, 3.0GHZ, 1 MEGB, 800FSB
HARD DRIVE..., 40GB, Serial ATA
DUAL IN-LINE MEMORY MODULE..., 512, 400M…..2 each

OptiPlex 210L

PROCESSOR..., 80547, PENTIUM 4 PRESCOTT DT..., 630, 3.0
HARD DRIVE..., 80G

DUAL IN-LINE MEMORY MODULE..., 1G, 533M…..2 each

OptiPlex 745

PROCESSOR..., 945, 3.4, 2X2MB, PENTIUM D PRESLER
HARD DRIVE..., 80GB
DUAL IN-LINE MEMORY MODULE..., 512, 533M…..2 each

Dell Precision WorkStation 330

PROCESSOR..., 80528, 1.8GHZ, OK, 400
HARD DRIVE..., 40GB
RAMBUS INLINE MEMORY MODULE..., 128, 400M…..2 each

Latitude D505 Laptop

PROCESSOR..., 80536, Pentium M Dothan, 1.6GHZ, 2 MEGB, 400FSB
HARD DRIVE..., 30G
DUAL IN-LINE MEMORY MODULE..., 256, 333…..2 each

Latitude D620 Laptop

PROCESSOR..., T5600, 1.83, 2MB
HARD DRIVE..., 60G, Serial ATA
DUAL IN-LINE MEMORY MODULE..., 512MB, 533…..2 each

Appendix G
Current Horizon Server Landscape

Appendix G – Current Horizon Server Landscape

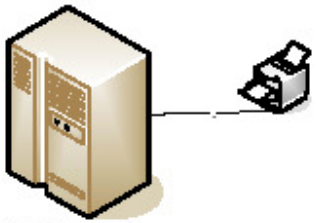
Current Horizon Server Landscape

Horizon Information Portal A, B, C
3 - Windows 2003 R2 Servers
Dell PE2850 Intel Xeon 2.80GHZ 8GB RAM
1 Gigabit Ethernet – 136GB Disk Space

MicroStrategy 8.0, Web Reporter 1.4
1- Windows 2003 R2 Server Primary Server
1- Windows 2003 R2 Server Secondary Server
Dell PE2850 Intel Xeon 2.80GHZ 8GB RAM
1 Gigabit Ethernet – 136GB Disk Space

Pc Reliance 2.1 (Offline Circulation Server)
Windows 2003 R2 Server
Gateway ALR 7200 Intel PIII 500MHZ 512MB RAM
100MB Ethernet – 18GB Disk Space

Telecirc II, Edify 8.5 (Voice Notification Server)
T1 Voice 12 lines Dial-In & Dial-Out
Windows 2000 Pro SP3
Dell Optiplex GX260 Intel P4 2.00GHZ 1GB RAM
1 Gigabit Ethernet – 40GB Disk Space



(ILS) System
Printer
Tally T6212

(ILS) System
Sun Enterprise X4600 Server
Red Hat Enterprise Linux 4.0
Sybase 12.5
Horizon 7.34

Envisionware SIP II Servers, Windows 2003 R2 server
2- SIP Servers - PC Reservation Management (Server) software 3.2 F
Primary Server & Secondary Server
2 - SIP Servers - PC Reservation (KIOSK) Software 3.2.51
Primary Server & 1- Secondary Server
Dell PE1950 Intel Xeon 2.5GHZ 4GB RAM
1 Gigabit Ethernet – 73GB Disk Space

Overdrive Inc. Digital E-books SIP II Server
1- Windows 2003 R2 Server Primary Server
1- Windows 2003 R2 Server Secondary Server
Dell PE1950 Intel Xeon 1.86GHZ 4GB RAM
1 Gigabit Ethernet – 73GB Disk Space

Horizon Email Server .net
Microsoft Exchange Server 2005
Dell PE2850 Intel Xeon 2.80GHZ 8GB RAM
1 Gigabit Ethernet – 136GB Disk Space

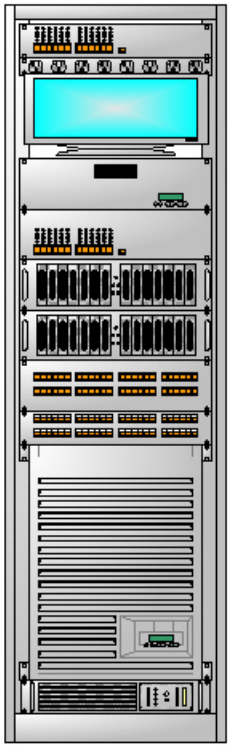
3M Self Checkout Primary SIP II Servers
Windows 2003 R2 Servers - 3M Software 3.51.133
4- Windows 2003 R2 Server Primary Servers
4- Windows 2003 R2 Server Secondary Servers
Dell PE1950 Intel Xeon 1.86GHZ 4GB RAM
1 Gigabit Ethernet – 73GB Disk Space

Book Mobile (Terminal Services Servers)
1- Windows 2003 R2 Server Primary Server
1- Windows 2003 R2 Server Secondary Server
Dell PE1950 Intel Xeon 2.5GHZ 4GB RAM
1 Gigabit Ethernet – 73GB Disk Space

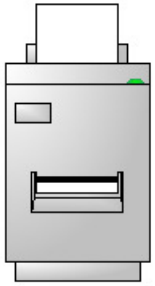
Appendix H
Current Horizon Software Landscape and Integrated Software Landscape

Appendix H – Current Horizon Software Landscape and Integrated Software Landscape

Current (ILS) Integrated Library System Hardware



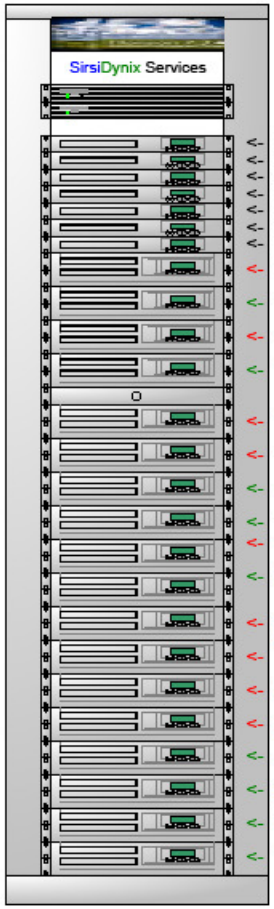
Sun Mircosystems Enterprise X4600 Server
8 x 2.8 GHz 8220 SE Dual Core AMD Opteron Processor(s)
64000 MB DDR SDRAM Memory
2 x 73 GB 10K Hot Swappable Disk(s)
A3510 FC Disk Array W/HW RAID dual CNTRL
12 x 146 GB 15K Disk(s)
A3510 FC Disk Array W/HW RAID dual CNTRL
12 x 146 GB 15K Disk(s)
Media: DVD-ROM
StorageTek LT0 3 Tape Drive
4 – Gigabit Ethernet ports
17 LCD Display Console
Red Hat Enterprise Linux 4.0
Sybase SQL 12.5
Horizon (ILS) software 7.34
Horizon (Production Database)
Training (Training Database)
1200 seats (licensed for server)



Tally T6210 System Printer

Appendix H – Current Horizon Server Software and Integrated Software Landscape

Continuation



<- 25) FUTURE USE SYMANTEC ANTIVIRUS SERVER
<- 24) FUTURE USE OPERATIONS BACKUP SERVER
<- 23) FUTURE USE OPERATIONS SERVER
<- 22) FUTURE USE Z3950 BACKUP SERVER
<- 21) FUTURE USE Z3950 SERVER
<- 20) FUTURE USE PC RELIANCE BACKUP SERVER
<- 19) FUTURE USE PC RELIANCE SERVER
<- 18) BOOK MOBILE BACKUP SERVER
<- 17) BOOK MOBILE SERVER
<- 16) WEBRPT2BACKUP SERVER
<- 15) WEBREPORTER2 SERVER
<- 14) ENVISIONWKISOK BACKUP SERVER
<- 13) ENVISIONWARE BACKUP SIP SERVER
<- 12) ENVISIONWKISOK SERVER
<- 11) ENVISIONWARE SIP SERVER
<- 10) OVERDRIVE BACKUP SIP SERVER
<- 9) OVERDRIVE SIP SERVER
<- 8) 3MSIPREG4BACKUP SIP SERVER REG4
<- 7) 3MSIPREG3BACKUP SIP SERVER REG3
<- 6) 3MSIPREG2BACKUP SIP SERVER REG2
<- 5) 3MSIPREG1BACKUP SIP SERVER REG1
<- 4) 3MSIPREG4 SIP SERVER REG4
<- 3) 3MSIPREG3 SIP SERVER REG3
<- 2) 3MSIPREG2 SIP SERVER REG2
<- 1) 3MSIPREG1 SIP SERVER REG1

Green Servers Primary
Red Servers Secondary
Black Servers Future Purchase
All Servers are Windows 2003 R2
Dell's Power Edge Servers PE1950 & PE2850

Appendix H – Current Horizon Server Software and Integrated Software Landscape

Current Telecirc II System

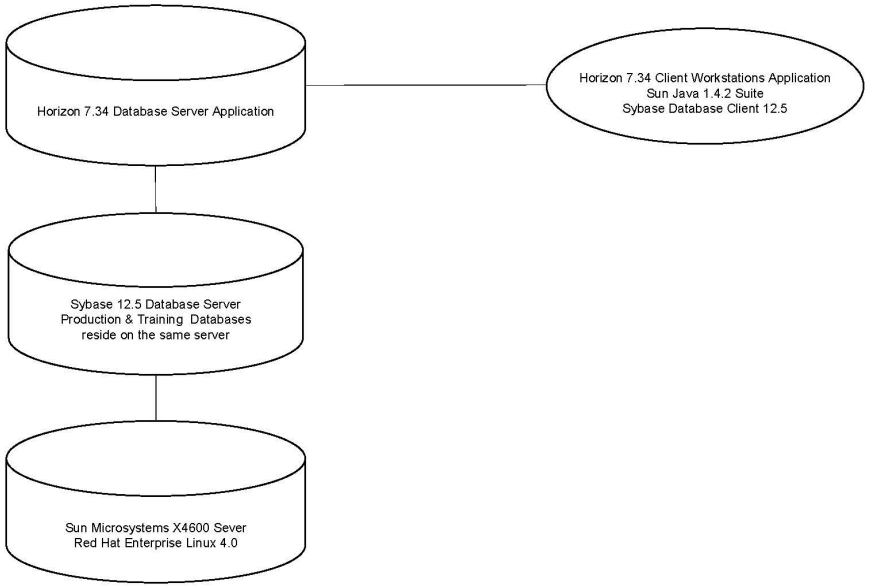
Horizon Telecirc II, Edify 8.5
Voice Notification System
Windows 2000 Pro SP3
Digital T1 Voice - 12 Lines Utilized
(4 - Dial-In Lines) & (8 - Dial Out lines)

NOT IN USE – FUTURE EXPANSION
Horizon Telecirc II
Voice Notification System
Windows 2000 Pro SP3
Digital T1 Voice

Appendix I
Current Horizon
Database Structure

Appendix I – Current Horizon Database Structure

Current Horizon Database Structure



Appendix J
Current Horizon Production & Training Database Processes

Appendix J – Current Horizon Production & Training Database Processes

DAILY TASKS:

Production Database:	**Training Database**:
- Verify that all DEP processes completed - Check to see that previous nights backup(s) completed successfully (if any errors – notify Horizon Support) - Unload DLT backup from tape drive & prepare for offsite storage (also 4mm Backup Tape for Dynix 191) - Load new DLT to tape drive to run nightly System backup - Check Back-up log to see that data successfully dumps to tape - Verify that all Horizon services and/or servers are UP PC Reliance, Telecirc, Envisionware, HIP, Book Mobile, 3M SelfCheck, OverDrive, Web Reporter - Run Past Due and Hold Notifications for all branches (hard copy and email generated) - Run SQL Script to select patrons with incorrect email formats (when email notices produce errors) - Print Data-mailers, (past due and hold notices) - Run Past Due Notices for CN separately & output to MS Image Writer format Email CN notices to Audrey and/or Debra - Save overdue notices in Horizon to Excel spreadsheet format to maintain daily count of Data-mailers generated to both hardcopy and e-mail - Create/update Horizon user IDs - Create/maintain SLM access in Horizon - Using SQL Advantage, monitor Transaction Log for Disk Usage and clear transaction log when System	- Maintain Training database availability - Maintain System logs - Verify that all DEP processes have completed - Schedule Day End Processing (DEP) to run manually

indicates SQL dump error message - Using SQL Advantage, monitor and unlock Horizon ports when branches report Horizon sessions freezing - Schedule Day End Processing (DEP)	

Appendix J – Current Horizon Production & Training Database Processes

WEEKLY TASKS:

Production Database:	**Training Database**:
- Maintain availability and Backup Dynix 191 - Backup TeleCirc II - Run Friday Reports for Alice Dupuis using SQL Bibliographic records with Requests but No Copies Select and remove requests that have expired or been cancelled but the item status is not expired Clear the reactivation date on requests which are now active again in HIP - Backlink – correct borrower's name search - Guardianship (lospatron) changes btype from Juvenile to Adult - Hardware Maintenance Clean printer, change ribbons, etc - Weekly Server Maintenance: Envisionware SIP Server, Telecirc II, 3M SIP Servers, OverDrive, Bookmobile, Web Reporter , PC Reliance - Purge weekly overdue notices from Horizon - Append daily overdue notice counts from Horizon each week to obtain monthly cumulative report	- Modify System Table Modify DEP Menu Modify Wordindex Modify Matham Table Verify and Purge, when needed, Day-End Activity Logs Data Load Error Log - Reset Disabled User Accounts in Training Database

Appendix J – Current Horizon Production & Training Database Processes

MONTHLY TASKS (as needed):

Production Database:	**Training Database**:
- Create new location as a closed location to prepare for branch opening(s) - Modify agency parameters after the location has been opened in Horizon (pickup location sort, make new branch as primary, remove staff only limitations, etc) - Modify Horizon System table and parameters Modify Horizon Calendar as needed (regular & exception calendar) Change due date for items when library closings were unplanned or due to an emergency situations i.e. hurricanes - PC Reliance Upload Upload records into Horizon from each branch folder Delete information in branch folder after upload is complete - Configure display settings and toolbars for Horizon Client staff users - Configure Horizon Payment log settings - Reset Pulls List - SQL Script (resets parameters to allow branch to run their Pull list again) - Block Edit – remove blocks that should be cleared from borrower's record (per Track-It work order requests) - Create/maintain Web Reporter Users - Create/maintain Web Reporter folders and reports	

Appendix J – Current Horizon Production & Training Database Processes

YEARLY TASKS:

Production Database:	**Training Database**:
- Rollover Budgets - System Administrator Password Change - Modify and add Calendar Holidays, Exceptions and branch Hours - Add new Fiscal Year to Horizon - Replace Auto Loader Cleaning Tapes - Replace Backup Tapes with new tape sets	

Appendix K
Current and Future Peak Network Utilization per Branch

Appendix K – Current and Future Peak Network Utilization per Branch

Branch Name	Circuit Bandwidth	Bandwidth Usage	FUTURE Bandwidth	FUTURE Usage
ALLAPATTAH	Single T1 1.536 Mbps	Peak 98.5%	Metro-Ethernet 10 Mbps	Peak 65%
BOOKMOBILE	**ATT & T Wireless**	Peak 65%	Not Committed yet	Peak 65%
CALIFORNIA CLUB	Single T1 1.536 Mbps	Peak 98.5%	Metro-Ethernet 10 Mbps	Peak 65%
CIVIC CENTER	Single T1 1.536 Mbps	Peak 60.5%	Metro-VPN 1.536 Mbps	Peak 65%
COCONUT GROVE	Single T1 1.536 Mbps	Peak 97.3%	Metro-Ethernet 10 Mbps	Peak 65%
CONCORD	Single T1 1.536 Mbps	Peak 97.9%	Metro-Ethernet 10 Mbps	Peak 65%
CORAL GABLES	Multiple T1 3.0 Mbps	Peak 70.8%	Metro-Ethernet 10 Mbps	Peak 65%
CORAL REEF	Single T1 1.536 Mbps	Peak 99.5%	Metro-Ethernet 10 Mbps	Peak 65%
COUNTRY WALK	Single T1 1.536 Mbps	Peak 77.9%	Metro-VPN 1.536 Mbps	Peak 78%
CULMER/OVERTOWN	Single T1 1.536 Mbps	Peak 97.4%	Metro-Ethernet 10 Mbps	Peak 65%
DORAL	Single T1 1.536 Mbps	Peak 97.9%	Metro-Ethernet 10 Mbps	Peak 65%
EDISON	Single T1 1.536 Mbps	Peak 98.4%	Metro-Ethernet 10 Mbps	Peak 65%
FAIRLAWN	Single T1 1.536 Mbps	Peak 98.6%	Metro-Ethernet 10 Mbps	Peak 65%
GOLDEN GLADES	Single T1 1.536 Mbps	Peak 98.6%	Metro-Ethernet 10 Mbps	Peak 65%
HIALEAH GARDENS	Single T1 1.536 Mbps	Peak 98.4%	Metro-Ethernet 10 Mbps	Peak 65%
HISPANIC	Single T1 1.536 Mbps	Peak 81.9%	Metro-Ethernet 10 Mbps	Peak 65%
HOMESTEAD	Single T1 1.536 Mbps	Peak 99.4%	Metro-Ethernet 10 Mbps	Peak 65%
KENDALL	Single T1 1.536 Mbps	Peak 97.9%	Metro-Ethernet 10 Mbps	Peak 65%
KEY BISCAYNE	Single T1 1.536 Mbps	Peak 97.3%	Metro-Ethernet 10 Mbps	Peak 65%
LAKES OF THE MEADOWS	Single T1 1.536 Mbps	Peak 98.4%	Metro-Ethernet 10 Mbps	Peak 65%
LEMON CITY	Single T1 1.536 Mbps	Peak 98.7%	Metro-Ethernet 10 Mbps	Peak 65%
LITTLE RIVER	Single T1 1.536 Mbps	Peak 97.7%	Metro-Ethernet 10 Mbps	Peak 65%
MAIN LIBRARY (Main Hub)	Dual T3 88.368 Mbps	Peak 96.5%	Metro E/V 520 Mbps	Peak 65%
MAIN LIBRARY (Internet access)	Dual T3 88.368 Mbps	Peak 98.5%	Not Committed yet	Peak 65%
MAIN LIBRARY LSTA	Single T1 1.536 Mbps	Peak 97.9%	Metro-Ethernet 10 Mbps	
MIAMI BEACH	Multiple T1 6.0 Mbps	Peak 96.1%	Metro-E 10 Mbps burstable	Peak 65%
MIAMI LAKES	Single T1 1.536 Mbps	Peak 98.7%	Metro-Ethernet 10 Mbps	Peak 65%
MIAMI SPRINGS	Single T1 1.536 Mbps	Peak 86.9%	Metro-Ethernet 10 Mbps	Peak 65%
MODEL CITY	Single T1 1.536 Mbps	Peak 98.6%	Metro-Ethernet 10 Mbps	Peak 65%
NARANJA	Single T1 1.536 Mbps	Peak 96.3%	Metro-Ethernet 10 Mbps	Peak 65%
NORTH CENTRAL	Single T1 1.536 Mbps	Peak 98.7%	Metro-Ethernet 10 Mbps	Peak 65%
NORTH DADE REGIONAL	70.BDXN.500021	Peak 99.5%	Metro-E 10 Mbps burstable	Peak 65%

Branch Name	Circuit Bandwidth	Bandwidth Usage	FUTURE Bandwidth	FUTURE Usage
NORTH SHORE	Single T1 1.536 Mbps	Peak 98.7%	Metro-Ethernet 10 Mbps	Peak 65%
OPA-LOCKA	Single T1 1.536 Mbps	Peak 97.5%	Metro-Ethernet 10 Mbps	Peak 65%
NORTHEAST (Aventura/Country Club)	Single T1 1.536 Mbps	Peak 77.8%	Metro-VPN 1.536 Mbps	Peak 65%
PALM SPRINGS NORTH	Single T1 1.536 Mbps	Peak 98.7%	Metro-Ethernet 10 Mbps	Peak 65%
SHENANDOAH	Single T1 1.536 Mbps	Peak 97.6%	Metro-Ethernet 10 Mbps	Peak 65%
SOUTH DADE REGIONAL	70.BDXN.500024	Peak 98.3%	Metro-VPN T3 12 Mbps	Peak 65%
SOUTH MIAMI	Single T1 1.536 Mbps	Peak 98.4%	Metro-Ethernet 10 Mbps	Peak 65%
SOUTH SHORE	Single T1 1.536 Mbps	Peak 98.9%	Metro-Ethernet 10 Mbps	Peak 65%
SUNSET	Single T1 1.536 Mbps	Peak 78.4%	Metro-Ethernet 10 Mbps	Peak 65%
SUNNY ISLES BEACH	Single T1 1.536 Mbps	Peak 98.5%	Metro-Ethernet 10 Mbps	Peak 65%
TAMIAMI	Single T1 1.536 Mbps	Peak 95.5%	Metro-Ethernet 10 Mbps	Peak 65%
TRAINING CENTER NORTH	70.QGDA.503514	Peak 87.9%	Metro-VPN 1.536 Mbps	Peak 65%
TRAINING CENTER SOUTH	70.QGDA.503513	Peak 67.9%	Metro-VPN 1.536 Mbps	Peak 65%
WEST DADE REGIONAL	70.BDXN.500023	Peak 98.7%	Metro-E 10 Mbps burstable	Peak 65%
WEST FLAGLER	Single T1 1.536 Mbps	Peak 98.5%	Metro-Ethernet 10 Mbps	Peak 65%
WEST KENDALL REGIONAL	70.BDXN.500025	Peak 98.9%	Metro-E 10 Mbps burstable	Peak 65%

APPENDIX L – ELECTRONIC PAYMENT REQUIREMENTS

Appendix L – Electronic Payment Requirements

The following is a sample of the WSDL code that is used by the County's Custom Payment Gateway:

```
<?xml version="1.0" encoding="UTF-8"?>
<wsdl:definitions
   name="PaymentEntry"
   targetNamespace="wwww.myserver.com/myapplication/test?wsdl"
   xmlns:pay="http://wwww.myserver.com/myapplication/ESPaymentRequest.xsd"
   xmlns:receipt="http://wwww.myserver.com/myapplication/ESPaymentReceipt.xsd"
   xmlns:soap="http://schemas.xmlsoap.org/wsdl/soap/"
   xmlns:pgw="http://wwww.myserver.com/myapplication/test?wsdl"
   xmlns:void="http://wwww.myserver.com/myapplication/ESVoidRequest.xsd"
   xmlns:refund="http://wwww.myserver.com/myapplication/ESRefundRequest.xsd"
   xmlns:wsdl="http://schemas.xmlsoap.org/wsdl/"
   xmlns:xsd="http://www.w3.org/2001/XMLSchema">
   <wsdl:documentation xmlns:wsdl="http://schemas.xmlsoap.org/wsdl/"></wsdl:documentation>
   <wsdl:types>
      <xsd:schema
         targetNamespace="http://wwww.myserver.com/myapplication/ESPaymentReceipt.xsd"
         xmlns:SOAP-ENC="http://schemas.xmlsoap.org/soap/encoding/"
         xmlns:receipt="http://wwww.myserver.com/myapplication/ESPaymentReceipt.xsd"
         xmlns:xsd="http://www.w3.org/2001/XMLSchema">
         <xsd:element name="ESPaymentReceipt">
            <xsd:complexType>
               <xsd:sequence>
                  <xsd:element ref="receipt:header"/>
                  <xsd:element ref="receipt:transactionData"/>
               </xsd:sequence>
            </xsd:complexType>
         </xsd:element>
         <xsd:element name="header">
            <xsd:complexType>
               <xsd:sequence>
                  <xsd:element ref="receipt:pgw"/>
               </xsd:sequence>
            </xsd:complexType>
         </xsd:element>
         <xsd:element name="invoicenumber" type="xsd:string"/>
         <xsd:element name="authorization" type="xsd:string"/>
         <xsd:element name="pgw">
            <xsd:complexType>
               <xsd:attribute name="version" use="required">
                  <xsd:simpleType>
                     <xsd:restriction base="xsd:string">
                        <xsd:enumeration value="ALPHA"/>
                     </xsd:restriction>
                  </xsd:simpleType>
               </xsd:attribute>
               <xsd:attribute name="release" use="required">
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                        <xsd:enumeration value="01032002"/>
                     </xsd:restriction>
                  </xsd:simpleType>
               </xsd:attribute>
            </xsd:complexType>
         </xsd:element>
```

```
        <xsd:element name="referenceNumber" type="xsd:string"/>
        <xsd:element name="reasonCode" type="xsd:string"/>
        <xsd:element name="resultCode" type="xsd:string"/>
        <xsd:element name="answerCode">
          <xsd:complexType>
            <xsd:sequence>
              <xsd:element ref="receipt:resultCode"/>
              <xsd:element ref="receipt:reasonCode"/>
            </xsd:sequence>
          </xsd:complexType>
        </xsd:element>
        <xsd:element name="timestamp" type="xsd:string"/>
        <xsd:element name="transactionData">
          <xsd:complexType>
            <xsd:sequence>
              <xsd:element ref="receipt:invoicenumber"/>
              <xsd:element ref="receipt:answerCode"/>
              <xsd:element ref="receipt:referenceNumber"/>
              <xsd:element ref="receipt:timestamp"/>
              <xsd:element ref="receipt:authorization"/>
            </xsd:sequence>
          </xsd:complexType>
        </xsd:element>
      </xsd:schema>
      <xsd:schema
        targetNamespace="http://wwww.myserver.com/myapplication/ESPaymentRequest.xsd"
        xmlns:SOAP-ENC="http://schemas.xmlsoap.org/soap/encoding/"
        xmlns:pay="http://wwww.myserver.com/myapplication/ESPaymentRequest.xsd"
        xmlns:xsd="http://www.w3.org/2001/XMLSchema">
        <xsd:element name="ESPaymentRequest">
          <xsd:complexType>
            <xsd:sequence>
              <xsd:element ref="pay:header"/>
              <xsd:element ref="pay:data"/>
            </xsd:sequence>
          </xsd:complexType>
        </xsd:element>
        <xsd:element name="header">
          <xsd:complexType>
            <xsd:sequence>
              <xsd:element ref="pay:pgw"/>
            </xsd:sequence>
          </xsd:complexType>
        </xsd:element>
        <xsd:element name="pgw">
          <xsd:complexType>
            <xsd:attribute name="version" use="required">
              <xsd:simpleType>
                <xsd:restriction base="xsd:string">
                  <xsd:enumeration value="ALPHA"/>
                </xsd:restriction>
              </xsd:simpleType>
            </xsd:attribute>
            <xsd:attribute name="release" use="required">
              <xsd:simpleType>
                <xsd:restriction base="xsd:string">
                  <xsd:enumeration value="01152002"/>
                </xsd:restriction>
              </xsd:simpleType>
```

```
            </xsd:attribute>
            <xsd:attribute name="type" use="required">
               <xsd:simpleType>
                  <xsd:restriction base="xsd:string">
                     <xsd:enumeration value="WCS51"/>
                     <xsd:enumeration value="Test"/>
                  </xsd:restriction>
               </xsd:simpleType>
            </xsd:attribute>
         </xsd:complexType>
      </xsd:element>
      <xsd:element name="data">
         <xsd:complexType>
            <xsd:sequence>
               <xsd:element ref="pay:merchant"/>
               <xsd:element ref="pay:financial"/>
               <xsd:element ref="pay:itemList"/>
            </xsd:sequence>
         </xsd:complexType>
      </xsd:element>
      <xsd:element name="merchant">
         <xsd:complexType>
            <xsd:sequence>
               <xsd:element ref="pay:merchantID"/>
               <xsd:element minOccurs="0" ref="pay:requestID"/>
               <xsd:element ref="pay:requestDate"/>
               <xsd:element minOccurs="0" ref="pay:opt1"/>
               <xsd:element minOccurs="0" ref="pay:opt2"/>
               <xsd:element minOccurs="0" ref="pay:opt3"/>
            </xsd:sequence>
         </xsd:complexType>
      </xsd:element>
      <xsd:element name="merchantID" type="xsd:string"/>
      <xsd:element name="requestID" type="xsd:string"/>
      <xsd:element name="requestDate" type="xsd:string"/>
      <xsd:element name="financial">
         <xsd:complexType>
            <xsd:sequence>
               <xsd:element ref="pay:paymentInfo"/>
            </xsd:sequence>
         </xsd:complexType>
      </xsd:element>
      <xsd:element name="paymentInfo">
         <xsd:complexType>
            <xsd:sequence>
               <xsd:choice>
                  <xsd:element ref="pay:creditCard"/>
                  <xsd:element ref="pay:echeck"/>
               </xsd:choice>
               <xsd:element ref="pay:billingAddress"/>
            </xsd:sequence>
         </xsd:complexType>
      </xsd:element>
      <xsd:element name="creditCard">
         <xsd:complexType>
            <xsd:sequence>
               <xsd:element ref="pay:creditCardNumber"/>
               <xsd:element ref="pay:expDate"/>
               <xsd:element ref="pay:brand"/>
```

```
            <xsd:element minOccurs="0" ref="pay:securityIndicator"/>
         </xsd:sequence>
      </xsd:complexType>
   </xsd:element>
   <xsd:element name="creditCardNumber" type="xsd:string"/>
   <xsd:element name="expDate" type="xsd:string"/>
   <xsd:element name="brand" type="xsd:string"/>
   <xsd:element name="securityIndicator" type="xsd:string"/>
   <xsd:element name="echeck">
      <xsd:complexType>
         <xsd:sequence>
            <xsd:element ref="pay:accountNumber"/>
            <xsd:element ref="pay:routingNumber"/>
         </xsd:sequence>
      </xsd:complexType>
   </xsd:element>
   <xsd:element name="accountNumber" type="xsd:string"/>
   <xsd:element name="routingNumber" type="xsd:string"/>
   <xsd:element name="billingAddress">
      <xsd:complexType>
         <xsd:sequence>
            <xsd:element ref="pay:firstName"/>
            <xsd:element minOccurs="0" ref="pay:middleName"/>
            <xsd:element ref="pay:lastName"/>
            <xsd:element ref="pay:address1"/>
            <xsd:element minOccurs="0" ref="pay:address2"/>
            <xsd:element ref="pay:city"/>
            <xsd:element ref="pay:state"/>
            <xsd:element ref="pay:zipCode"/>
            <xsd:element ref="pay:country"/>
            <xsd:element ref="pay:phone"/>
            <xsd:element ref="pay:email"/>
         </xsd:sequence>
      </xsd:complexType>
   </xsd:element>
   <xsd:element name="firstName" type="xsd:string"/>
   <xsd:element name="middleName" type="xsd:string"/>
   <xsd:element name="lastName" type="xsd:string"/>
   <xsd:element name="address1" type="xsd:string"/>
   <xsd:element name="address2" type="xsd:string"/>
   <xsd:element name="city" type="xsd:string"/>
   <xsd:element name="state" type="xsd:string"/>
   <xsd:element name="zipCode" type="xsd:string"/>
   <xsd:element name="country" type="xsd:string"/>
   <xsd:element name="phone" type="xsd:string"/>
   <xsd:element name="email" type="xsd:string"/>
   <xsd:element name="itemList">
      <xsd:complexType>
         <xsd:sequence>
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            <xsd:element ref="pay:total"/>
         </xsd:sequence>
      </xsd:complexType>
   </xsd:element>
   <xsd:element name="item">
      <xsd:complexType>
         <xsd:sequence>
            <xsd:element minOccurs="0" ref="pay:userKey"/>
            <xsd:element ref="pay:desc"/>
```

```
            <xsd:element ref="pay:unitPrice"/>
            <xsd:element ref="pay:quantity"/>
            <xsd:element minOccurs="0" ref="pay:indexCode"/>
            <xsd:element minOccurs="0" ref="pay:opt1"/>
            <xsd:element minOccurs="0" ref="pay:opt2"/>
            <xsd:element minOccurs="0" ref="pay:opt3"/>
          </xsd:sequence>
        </xsd:complexType>
      </xsd:element>
      <xsd:element name="userKey" type="xsd:string"/>
      <xsd:element name="desc" type="xsd:string"/>
      <xsd:element name="unitPrice" type="xsd:string"/>
      <xsd:element name="quantity" type="xsd:string"/>
      <xsd:element name="indexCode" type="xsd:string"/>
      <xsd:element name="opt1" type="xsd:string"/>
      <xsd:element name="opt2" type="xsd:string"/>
      <xsd:element name="opt3" type="xsd:string"/>
      <xsd:element name="total" type="xsd:string"/>
    </xsd:schema>
    <xsd:schema
      targetNamespace="http://wwww.myserver.com/myapplication/ESVoidRequest.xsd"
      xmlns:SOAP-ENC="http://schemas.xmlsoap.org/soap/encoding/"
      xmlns:void="http://wwww.myserver.com/myapplication/ESVoidRequest.xsd"
      xmlns:xsd="http://www.w3.org/2001/XMLSchema">
      <xsd:element name="ESVoidRequest">
        <xsd:complexType>
          <xsd:sequence>
            <xsd:element ref="void:header"/>
            <xsd:element ref="void:data"/>
          </xsd:sequence>
        </xsd:complexType>
      </xsd:element>
      <xsd:element name="header">
        <xsd:complexType>
          <xsd:sequence>
            <xsd:element ref="void:pgw"/>
          </xsd:sequence>
        </xsd:complexType>
      </xsd:element>
      <xsd:element name="pgw">
        <xsd:complexType>
          <xsd:attribute name="version" use="required">
            <xsd:simpleType>
              <xsd:restriction base="xsd:string">
                <xsd:enumeration value="ALPHA"/>
              </xsd:restriction>
            </xsd:simpleType>
          </xsd:attribute>
          <xsd:attribute name="release" use="required">
            <xsd:simpleType>
              <xsd:restriction base="xsd:string">
                <xsd:enumeration value="01152002"/>
              </xsd:restriction>
            </xsd:simpleType>
          </xsd:attribute>
          <xsd:attribute name="type" use="required">
            <xsd:simpleType>
              <xsd:restriction base="xsd:string">
                <xsd:enumeration value="WCS51-Void"/>
```

```
                <xsd:enumeration value="Test"/>
              </xsd:restriction>
            </xsd:simpleType>
          </xsd:attribute>
        </xsd:complexType>
      </xsd:element>
      <xsd:element name="data">
        <xsd:complexType>
          <xsd:sequence>
            <xsd:element ref="void:merchant"/>
            <xsd:element ref="void:invoice"/>
          </xsd:sequence>
        </xsd:complexType>
      </xsd:element>
      <xsd:element name="merchant">
        <xsd:complexType>
          <xsd:sequence>
            <xsd:element ref="void:merchantID"/>
            <xsd:element minOccurs="0" ref="void:requestID"/>
            <xsd:element ref="void:requestDate"/>
            <xsd:element ref="void:adminID"/>
            <xsd:element ref="void:password"/>
          </xsd:sequence>
        </xsd:complexType>
      </xsd:element>
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      <xsd:element name="requestID" type="xsd:string"/>
      <xsd:element name="requestDate" type="xsd:string"/>
      <xsd:element name="admin" type="xsd:string"/>
      <xsd:element name="password" type="xsd:string"/>
      <xsd:element name="invoice">
        <xsd:complexType>
          <xsd:sequence>
            <xsd:element ref="void:invoiceNumber"/>
          </xsd:sequence>
        </xsd:complexType>
      </xsd:element>
      <xsd:element name="invoiceNumber" type="xsd:string"/>
    </xsd:schema>
    <xsd:schema
      targetNamespace="http://wwww.myserver.com/myapplication/ESRefundRequest.xsd"
      xmlns:SOAP-ENC="http://schemas.xmlsoap.org/soap/encoding/"
      xmlns:refund="http://wwww.myserver.com/myapplication/ESRefundRequest.xsd"
      xmlns:xsd="http://www.w3.org/2001/XMLSchema">
      <xsd:element name="ESRefundRequest">
        <xsd:complexType>
          <xsd:sequence>
            <xsd:element ref="refund:header"/>
            <xsd:element ref="refund:data"/>
          </xsd:sequence>
        </xsd:complexType>
      </xsd:element>
      <xsd:element name="header">
        <xsd:complexType>
          <xsd:sequence>
            <xsd:element ref="refund:pgw"/>
          </xsd:sequence>
        </xsd:complexType>
      </xsd:element>
```

```
<xsd:element name="pgw">
   <xsd:complexType>
      <xsd:attribute name="version" use="required">
         <xsd:simpleType>
            <xsd:restriction base="xsd:string">
               <xsd:enumeration value="ALPHA"/>
            </xsd:restriction>
         </xsd:simpleType>
      </xsd:attribute>
      <xsd:attribute name="release" use="required">
         <xsd:simpleType>
            <xsd:restriction base="xsd:string">
               <xsd:enumeration value="01152002"/>
            </xsd:restriction>
         </xsd:simpleType>
      </xsd:attribute>
      <xsd:attribute name="type" use="required">
         <xsd:simpleType>
            <xsd:restriction base="xsd:string">
               <xsd:enumeration value="WCS51-Refund"/>
               <xsd:enumeration value="Test"/>
            </xsd:restriction>
         </xsd:simpleType>
      </xsd:attribute>
   </xsd:complexType>
</xsd:element>
<xsd:element name="data">
   <xsd:complexType>
      <xsd:sequence>
         <xsd:element ref="refund:merchant"/>
         <xsd:element ref="refund:invoice"/>
         <xsd:element ref="refund:refund"/>
      </xsd:sequence>
   </xsd:complexType>
</xsd:element>
<xsd:element name="merchant">
   <xsd:complexType>
      <xsd:sequence>
         <xsd:element ref="refund:merchantID"/>
         <xsd:element minOccurs="0" ref="refund:requestID"/>
         <xsd:element ref="refund:requestDate"/>
         <xsd:element ref="refund:admin"/>
         <xsd:element ref="refund:password"/>
      </xsd:sequence>
   </xsd:complexType>
</xsd:element>
<xsd:element name="merchantID" type="xsd:string"/>
<xsd:element name="requestID" type="xsd:string"/>
<xsd:element name="requestDate" type="xsd:string"/>
<xsd:element name="admin" type="xsd:string"/>
<xsd:element name="password" type="xsd:string"/>
<xsd:element name="invoice">
   <xsd:complexType>
      <xsd:sequence>
         <xsd:element ref="refund:invoiceNumber"/>
      </xsd:sequence>
   </xsd:complexType>
</xsd:element>
<xsd:element name="invoiceNumber" type="xsd:string"/>
```

```
        <xsd:element name="refund">
          <xsd:complexType>
            <xsd:sequence>
              <xsd:element ref="refund:refundAmount"/>
            </xsd:sequence>
          </xsd:complexType>
        </xsd:element>
        <xsd:element name="refundAmount" type="xsd:string"/>
      </xsd:schema>
    </wsdl:types>
    <wsdl:message name="PaymentEntryRequestMsg">
      <wsdl:part element="pay:ESPaymentRequest" name="body"/>
    </wsdl:message>
    <wsdl:message name="PaymentEntryVoidMsg">
      <wsdl:part element="void:ESVoidRequest" name="body"/>
    </wsdl:message>
    <wsdl:message name="PaymentEntryResponseMsg">
      <wsdl:part element="receipt:ESPaymentReceipt" name="body"/>
    </wsdl:message>
    <wsdl:message name="PaymentEntryRefundRequestMsg">
      <wsdl:part element="refund:ESRefundRequest" name="body"/>
    </wsdl:message>
    <wsdl:portType name="PaymentEntryPort">
      <wsdl:operation name="submitPayment">
        <wsdl:input message="pgw:PaymentEntryRequestMsg"/>
        <wsdl:output message="pgw:PaymentEntryResponseMsg"/>
      </wsdl:operation>
      <wsdl:operation name="voidPayment">
        <wsdl:input message="pgw:PaymentEntryVoidRequestMsg"/>
        <wsdl:output message="pgw:PaymentEntryResponseMsg"/>
      </wsdl:operation>
      <wsdl:operation name="refundPayment">
        <wsdl:input message="pgw:PaymentEntryRefundRequestMsg"/>
        <wsdl:output message="pgw:PaymentEntryResponseMsg"/>
      </wsdl:operation>
    </wsdl:portType>
    <wsdl:binding name="PaymentEntryBinding" type="pgw:PaymentEntryPort">
      <soap:binding style="document" transport="http://schemas.xmlsoap.org/soap/http"/>
      <wsdl:operation name="submitPayment">
        <soap:operation
          soapAction="submitPayment"/>
        <wsdl:input>
          <soap:body parts="body" use="literal"/>
        </wsdl:input>
        <wsdl:output>
          <soap:body parts="body" use="literal"/>
        </wsdl:output>
      </wsdl:operation>
      <wsdl:operation name="voidPayment">
        <soap:operation
          soapAction="voidPayment"/>
        <wsdl:input>
          <soap:body use="literal"/>
        </wsdl:input>
        <wsdl:output>
          <soap:body use="literal"/>
        </wsdl:output>
      </wsdl:operation>
      <wsdl:operation name="refundPayment">
```

```
        <soap:operation
           soapAction="refundPayment"/>
        <wsdl:input>
           <soap:body use="literal"/>
        </wsdl:input>
        <wsdl:output>
           <soap:body use="literal"/>
        </wsdl:output>
     </wsdl:operation>
  </wsdl:binding>
  <wsdl:service name="PaymentEntryService">
     <wsdl:port binding="pgw:PaymentEntryBinding" name="PaymentEntryPort">
        <soap:address location="http://wwww.myserver.com/myapplication/test/"/>
     </wsdl:port>
  </wsdl:service>
</wsdl:definitions>
```

APPENDIX M

CIRCULATION POLICY

Appendix M - CIRCULATION POLICY

LIBRARY CARDS

I. Types of cards

A. Resident
Patrons living in the Miami-Dade Public Library System Special Taxing District for at least 1 month. The taxing district is comprised of Miami- Dade County, with the exception of Bal Harbour, Bay Harbor Islands, Hialeah, Miami Shores, North Miami, North Miami Beach, and Surfside. These municipalities maintain their own libraries.
Btype = res
Statistical Class = res.

B. Reciprocal
Residents of Hialeah, North Miami and North Miami Beach. Reciprocal borrowing is a requirement for any library receiving State Aid
Btype = rec
Statistical Classes: Hialeah residents = rhia, North Miami = rnm, North Miami Beach = rnm

C. Non-Resident
Non-residents meeting any of the following conditions may obtain free cards. All others pay an annual fee. Residents of Miami-Dade County pay $50.00 per year. Non-county residents pay $100.00 per year.
Btype = non
Statistical Class (if fee paid) = fee

Property Owners within the taxing district. A tax bill in the applicant's name is required.
Statistical Class = prop

Employees of Miami-Dade County, Jackson Memorial Trust and Miami- Dade Water and Sewer regardless of residence. They must present employment ID. .This privilege does not extend to family members. Federal, state and municipal employees do not qualify. Eligibility for this type of card lapses when the cardholder leaves the employment of Metro Dade County, Jackson Memorial Trust or Miami- Dade Water and Sewer.
Statistical Class = gov

Teachers and other workers who are regularly employed in public and private schools or group programs within the taxing district. Proof of employment in a specific school or group facility in the taxing district is required. Those eligible for resident or property owner cards may not also have a teacher's card
Statistical Class = school

D. Non-Verifiable Address (NVA)
New registrants who would qualify for free cards but who do not have proof of current address are limited to two items. An NVA card is only valid for 7 days. The patron type is upgraded when they return the Address Verification Card or bring proof of address.
Statistical Class = the one that would apply if they had provided proof of address

E. Juvenile (under 17)
Children 16 years old or younger are issued Juvenile Cards. The child's parent or guardian must initial these cards. There are no differences in the child's ability to borrow or use Library materials. Because both

parent's and child's names are in the patron record, both have access to borrowing information. Children must meet the standards for resident status.

Btype = juv
Statistical Class = res

F. Juvenile/reciprocal (under 17)
Children 16 years old and younger who live in Hialeah, North Miami or North Miami Beach. These children must meet the requirements for both Juvenile card and Reciprocal Borrower.

Bytpe = recj
Statistical Classes: Hialeah residents = rhia, North Miami = rnm, North Miami Beach = rnm

G. Juvenile (no parental authorization)
Children 16 years old or younger who do not have a parent or guardian available to sign the library card when it is issued will be limited to two books. An authorization form will be sent to the parent along with the library card. When the library receives the signed authorization form from the parent (either mailed or from the child), the child's card will be updated to JUV. A JNP card is valid for 1 day. Children must meet the standards for resident status.

Btype = jnp
Statistical Class = res

H. Juvenile/Reciprocal (no parental authorization)
Children 16 years old and younger who live in Hialeah, North Miami or North Miami Beach, but do not have a parent or guardian available to sign the library card when it is issued will be limited to two books. An authorization form will be sent to the parent along with the library card. When the library receives the signed authorization form from the parent (either mailed or from the child), the child's card will be updated to RECJ. An RJN card is valid for 1 day.

Btype = rjn
Statistical Classes: Hialeah residents = rhia, North Miami = rnm, North Miami Beach = rnm

I. Home Service – Individual
Connections registers its patrons as Home Service. Patrons may use identification or they may have a library card to check out at a branch/bookmobile They must meet the same eligibility requirements as Resident, Fee or Property Owner patrons. Reciprocal borrowing privileges <u>do not</u> apply.

Btype = hsmail
Statistical Class = the one that would apply if they had registered at a branch.

J. Interlibrary Loan
Libraries that we lend to through Interlibrary Loan.

Btype = ill
Statistical Class = ill

K. Agency
Some outreach services have special needs. The Agency patron type allows them to meet these needs for their clients. It is used by Bookmobiles and Jumpstart only.

Btype = agn
Statistical class = res

L. Guest
"Guest" borrower type is for computer use only. This is for non-residents who wish to use the computers. They may not borrow any materials with this card. When registering, be sure to uncheck the "Approved" box at the end of the form.

Btype = gst
Statistical class= gst

M. Self
Borrowers who register online have a Btype of SELF and are not allowed to borrow materials until registration has been completed at the branch. Btype is automatically entered by the system.

II. Application for a library card

In order to obtain a library card, a person must prove both who they are and where they live. Children 16 years old or younger must have their applications authorized by a parent or guardian. All applicants, both child and adult, must be present when the application is made or online application is completed.

A. Personal identification is required to receive a library card. Personal identification is defined as photo identification from an official source (driver's license, employment, student or state ID, passport, etc.), voter's registration or, for students K-12, report card, textbook or school book with student's name. Florida Driver's License or ID number, if available, will be entered in the borrower record. A child who is accompanied to the library by a parent may obtain a library card based on the parent's personal identification. That identification must meet the criteria to obtain a library card.

Online registrants must present acceptable ID in order to have their records updated and approved for checkout.

The following are not considered personal identification: imprinted checkbook, rent receipt, mail or bills - they can be used as address verification in conjunction with personal ID.

B. Patrons who can provide personal ID and proof of current residential address are given full privileges immediately. Proof of address must show both name and address.

C. Patrons with personal ID who cannot prove address are entered as NVA (Non Verifiable Address) and are sent an address verification card. A "Verify Address" block is entered on their Block screen. NVA registration is valid for one week and must be upgraded to full privileges for the patron to continue to use the card. Full privileges are granted when they return to the library with the post card or other ID that verifies address. NVA patrons are limited to 2 items.

D. Police officers and firefighters may have their residential address omitted from the patron record at their request. They must still show proof of residency or eligibility for a card. A note stating "law enforcement, no home address shown" should be put in the record. A mailing address must be entered in the record

E. Children 16 years old and younger must have parental authorization to obtain a library card. A parent authorizes the child to have a card by signing the child's application or by returning a signed Parental Authorization Form by mail or with the child. If a parent is not available to sign the application, the child will be allowed to borrow two books and a Parental Authorization Form will be sent.

III. Patron responsibility. At the time of registration, the staff member issuing the card must inform each patron of the responsibility accepted with the possession of a library card.

A. The patron must notify the library of a lost or stolen card immediately to avoid unwarranted liability. A patron will not be held responsible for any books checked out on the card after it has been reported missing.

B. The responsibility for the material a minor checks out rests with the parent or guardian. Any restrictions placed on a minor's use of the library are the responsibility of the minor's parent or guardian. The library cannot be responsible for enforcing such restrictions.

C. Each patron should present his or her own library card in order to check out materials. The responsibility for all materials checked out and any financial obligation incurred for overdue materials rests with the patron whose card was used to check out the materials.

D. The patron is responsible for returning materials on time and in the same condition as when they were checked out.

E. The patron is responsible for returning materials to a branch of the Miami-Dade Public Library System. Materials are not considered to be returned until they have been checked in through our automated system.

F. Overdue notices are sent to patrons as a courtesy of the library. Failure to receive one does not exempt the patron from overdue fines, postage charges, and replacement costs of materials that are lost or damaged.

IV. Revocation of privileges. A STOP will be placed on a patron's card for:

A. Financial obligation in excess of $30.00;

B. More than 50 overdue items (NVA and children without parental authorization are allowed 2 overdues);

C. Returned mail on which the address matches the one in the patron's record. This includes datamailers, address verification cards, holds notices, etc.;

D. Theft or mutilation of library materials;

E. More than 10 items "claims returned."

V. Updating Borrower Records

A. Personal Identification, as defined in Sect II, "Applying for a Library Card", is required before opening a borrower record to change any information

B. Address checks and Renewing library cards

1. Residents and Mail patrons have their residential and mailing addresses verified annually.

2. Reciprocal borrowers and other non-residents must renew their cards annually. Do Not override an expiration.

3. NVA cards are good for one week only and must be upgraded by showing proof of address. Do not renew NVA cards; they must be upgraded.

4. Patrons must show identification and proof of address. If patron does not have identification showing current residential address, an address verification card will be sent.

5. Reciprocal borrowers must prove continued eligibility by showing proof of residential address in Hialeah, North Miami or North Miami Beach.

6. Non-residents who are eligible for free cards must prove continued eligibility (tax bill, employment ID, etc.)

7. Patrons who have stops on the card cannot renew their card until the problem is resolved.

D. Address Changes: if a patron has moved to a fee area, they must pay the annual fee to continue to receive privileges.

VI. Replacement cards

The first time a card is replaced there is no charge. The second time and every time thereafter, there is a $1.00 charge. Lost or stolen cards count as replacements.

VII. Lost or stolen cards

When a patron reports a card lost or stolen, that fact must be entered into the patron's record immediately and the card number made invalid to prevent future use.

Reports of lost or stolen cards may be taken over the phone or in person without the required identification because the intent is to protect the patron. However, no information from the patron's record can be given out because of confidentiality.

VIII Forgotten cards

Patrons, who forget their cards may check out books, provided they are listed in the computer and can show identification. Adult patrons must show ID with name and address. Children should show school ID if possible, otherwise a schoolbook or notebook with the child's name will do.

IX Returned Mail

When mail to a patron is returned to the library, a "verify address" block is entered in the patron's record with the comment "Mail returned". The zip code in the patron's record is changed to "00000" so that datamailers will not be sent to an invalid address.

XI. Confidentiality of patrons records

Florida Statute 257.261 ensures the confidentiality of library patron records.

<u>FLORIDA STATUTE 257.261 ON LIBRARY RECORDS</u>

1) All registration and circulation records of every public library, except statistical reports of registration and circulation, are confidential and exempt from the provisions of s. 119.17(1) and from s. 24(a) of Art. I of the State Constitution.

2) As used in this section, the term "registration records" includes any information that a library requires a patron to provide in order to become eligible to borrow books and other materials and the term "circulation records" includes all information that identifies the patrons who borrow particular books and other materials.

3) ***(A) Except in accordance with proper judicial order, a person may not make known in any manner any information contained in records made confidential and exempt by this section, except as otherwise provided in this section.***

(B)A library, or any business operating jointly with the library may, only for the purpose of collecting fines or recovering overdue books, documents, films, or other items or materials owned or otherwise belonging to the library, disclose information made confidential and exempt by this section to the following:

1 The library patron named in the records;

2 In the case of a library patron less that 16 years of age, the parent or guardian of the patron named in the records;

3 Any entity that collects fines on behalf of a library, unless the patron is less than 16 years of age, in which case only information identifying the patron's parent or guardian may be released;

4 Municipal or county law enforcement officials, unless the patron is 16 years of age, in which case only information identifying the patron's parent or guardian may be released; or

5 Judicial officials

4) Any person who violates this section commits misdemeanor of the second degree, punishable as provided in s. 775.082, or s. 775.083.

Information on patron records may be released under the following circumstances:

To the cardholder upon presentation of photo identification proving that he/she is requesting information from his/her own record. Patrons calling the library must give the library card number and the pin number. Staff should ask a few questions such as a name, telephone number, etc. to verify identification

To the parent or guardian of a child 16 years old or younger. The record must contain the requestor's name in the parent/guardian field. Official identification must be presented.

In the case of theft of library materials, the patron's name, address, phone number, and driver's license number may be given to the police for the purpose of recovering the materials. If the suspected patron is 16 or younger, the name of the parent/guardian is provided instead.

Law enforcement officials with the proper identification and a court order signed by a judge. Because of the delicate nature of these requests, only specific members of the Library administration are authorized to release the records.

The following administrative staff are authorized to release information from patron records: Main Library/Systemwide Circulation Administrator, Branch Administrators Assistant Directors, Director. If there is a request for information, the Main Library/Systemwide Circulation Administrator should be contacted first. If necessary, proceed down the list.

Procedures for processing request for patron records from a law enforcement official:

1. If a staff member is approached by a law enforcement official with a request for information about a patron, he/she will refer the official to the Branch Manager or Librarian-in-Charge.

2. The Branch Manager will

   a. Verify the official's identification

   b. Explain the library's policy on patron confidentiality and the documentation needed to release records.

   c. Ascertain whether the official has the necessary documentation. Court Orders come in two forms – subpoena and search warrants.

3. If the official does not have a court order, he/she will be told to contact the Main Library/Systemwide Circulation Administrator when the documentation is obtained.

4. If the official has the necessary documentation, the manager will telephone an administrator authorized to release patron information, starting with the Main Library/Systemwide Circulation Administrator. A copy of the document will be faxed to the administrator immediately.

5. When the documentation has been received, the administrator will decide on the course of action.

   a. If the court order is a subpoena, the administrator can authorize the manager to release the record or may decide to study the situation further.

   b. If the court order is a search warrant, the search of records may begin as soon as the authorizing administrator is served with the order. Upon receipt of the order, the administrator will inform the Branch Manager to cooperate.

   c. It is preferable for the manager to perform the actual search of the records to ensure that only the records identified in the warrant are produced and that no other patron's records are viewed or scanned.

   d. If the court order is a search warrant issued under the USA Patriot Act, the previous instructions apply. There is the added condition that neither the staff nor the library can disclose to anyone that the warrant has been served or any results of the search.

If the court order requires the removal of library equipment:

1. Be sure to obtain a written receipt of the items taken with an exact description and serial numbers, if applicable. Make sure the names of any law enforcement officials involved are included.

2. If computer equipment is involved, contact Automated Services as soon as you are aware of the possibility. We would prefer to have our own technician present to handle or oversee the removal.

MATERIAL CIRCULATION

I. Loan periods

- 028 days – books, audio cassettes, CD's, closed captioned video recorders
- 14 days – Jumpstart Kits
- 7 days – high demand items, video cassettes
- 75 minutes – laptops and laptop accessories
- SLP – special loan period - for Interlibrary Loan materials

II. Limits

- 50 items on a card.
- 10 each videos, DVD's or CD's
- 3 films
- 1 laptop
- 2 laptop accessories
- There are no limits by subject.
- Laptops/laptop accessories are not loaned to the following borrower types: NVA, JNP, RJN, or Self.

III. Returning materials

A. Books, audio cassettes, videos, CD's, and closed captioned video decoders may be returned to any branch.

B. Phonograph records must be returned to the lending branch.

C. Laptops and accessories must be returned to the desk at which they were borrowed. The item(s) must be inspected before checkin and any fees for damages assessed. Returned Item Receipts will be given.

D. Materials damaged beyond use will be billed for replacement. This must be determined before the material is checked in.

E. Material returned with barcodes missing will incur a $ .50 processing fee.

F. Reciprocal borrowers must return material to the owning system. An item will not be considered "returned" until it is checked in by the owning system. Overdue fines may accrue.

IV. Renewals

A. Items with requests cannot be renewed.

B. Laptops cannot be renewed.

C. Interlibrary Loan renewal requests can be made by calling ILL (305-375-4068).

D. All other items including closed-captioned decoders may be renewed 6 times for the original loan period.

E. Patrons can renew items at the Branch, by phone or on-line. The material does not have to be present to be renewed with the exception of items with a status of lost or claimed returned. They must be present to be renewed.

F. Returned items receipt

If a patron asks for a receipt for returned items, a receipt can be printed by the computer if it is requested before checkin is started or use the Returned Items Receipt form (#FO-083).

Patrons returning laptops will be given Returned Items Receipts.

OVERDUES

A complete list of fines is found on page c-13. Default replacement costs are listed on page 14.

I. Notices:

- Patrons with material overdue are notified by phone at 14 and 21 days past the due date
- Overdue notices are mailed out 28 days and 60 days after the due date.
- Bills are sent out when a patron's financial obligation reaches $30.00

II. Lost or Damaged Items

A. Items overdue 50 days are deemed lost and the replacement or default cost is charged to the patron.

B. Patrons are charged list price for lost or damaged items. If the actual price of an item is not given in the bibliographic record or available from a standard bibliographic source (i. e. Amazon.com), the default prices are used.

C. Audiobook parts, both in cassette and CD format, are relatively easily replaced. Patrons returning incomplete audiobooks with be charged $5.00 for each missing cassette and $8.00 for each missing CD.

D. Patrons may discharge their obligation for unreturned materials by either paying the bill for replacement or bringing in new a duplicate of the unreturned item, i. e. hard cover for hard cover.

III. Payments

A. Patrons paying for lost or overdue materials will receive a receipt through the computer system detailing the purpose of the payment and the item(s) involved.

B. Checks are made payable to MIAMI-DADE PUBLIC LIBRARY

- ID is required - preferably a valid Florida driver's license.
- Checks should be imprinted with the patron's name.
- The driver's license number of the person writing the check and library card or Dynix number of the patron whose record is affected (they may not be the same person) are written on the check.

C. Returned checks.

- In the borrower's record, create a fee block for the total amount (amount on check plus any fees attached), the comment is "returned check". Enter the number of the returned check.
- Notify the patron of the returned check, the amount due and the action taken.

IV. Refunds - Lost and Paid

When a patron finds an item for which he/she has already paid, the patron is entitled to a refund minus any overdue fines.

- Checkin the item. The system will create a refund after deducting the overdue fine.
- Credit the refund money against any other financial obligations
- Give the patron the refund for the balance.
- Refund the block in the computer and place the receipt in the cash drawer.

V. Claims Returned

If a patron claims to have either returned or not checked out an item on his/her record, enter the claims return into the patron's record. The branch in which the patron initiates the claim, regardless of any other branches that may have been involved in the transaction, does this.

A Claims Returned Report should be printed weekly. Any items on the list that are found are discharged, thus clearing the patron's record.

Patrons are allowed up to 10 unresolved items claims returned. Anything over that number can be entered as claims returned but the patron will not be able to check out anything.

OVERDUE FINES BY TYPE			
Item Type	**Description**	**Minimum Fine**	**Max. Fine Amount**
artcol	Permanent Art Collection	1.00	8.00
audbk	Audiobook - any format	0.10	8.00
bag	Connections mailing bag	0.15	8.00
best	Best Seller	0.10	8.00
bk	Adult Books	0.10	8.00
bkj	Children's Book	0.05	4.00
bksft	Adult Book with Software	0.10	8.00
bky	Young Adult Book	0.05	4.00
brl	Braille Material	0.05	4.00
cas	Adult Audio cassette	0.10	8.00
casj	Children's Audio cassette	0.05	4.00
cd	Adult CD	0.10	8.00
cdj	Children's CD	0.05	4.00
cdrom	Cd-Rom	0.10	8.00
cnkit	Connections program kit	0.15	8.00
decode	Close Captioned Decoder	0.15	99.99
dvd	Adult DVD	0.50	20.00
dvdj	Children's DVD	0.50	20.00

OVERDUE FINES BY TYPE			
Item Type	**Description**	**Minimum Fine**	**Max. Fine Amount**
dvdr	Reference DVD	1.00	20.00
dvdy	Young Adult DVD	0.50	20.00
fa	Fast Add	0.10	8.00
feddoc	Federal Document	1.00	8.00
flm	16 mm Film	0.50	99.99
ill	Inter Library Loan	0.15	8.00
jskit	Jump Start Kit	0.15	8.00
kit	Multimedia Multipart Kit	0.10	8.00
lapac	Laptop Accessories CD/DVD/Headphones	35.00	35.00
lapt	Laptop	35.00/75 minutes	2000.00
liflrn	Lifelong Learner	0.10	8.00
lse	Leased Books	0.10	8.00
mart	Framed Art (Media)	0.15	8.00
pb	Adult Paperback	0.10	8.00
pbj	Children's Paperbacks	0.05	4.00
pby	Young Adult Paperback	0.05	4.00
per	Periodical - Circulating	0.10	8.00
perr	Periodicals Reference	1.00	8.00
pic	Picture - Graphic	0.15	8.00
prof	Professional Collection	1.00	8.00
ratio	7 Day by Ratio	0.15	8.00
ref	Reference	1.00	8.00
sco	Score	0.10	8.00
vf	Vertical Files	0.10	8.00
vhs	Adult Video	0.50	20.00
vhsj	Children's Video	0.50	20.00
vhsr	Video - Reference	1.00	20.00
vhsy	Young Adult Video	0.50	20.00

REPLACEMENT COST BASED ON COLLECTION CODE		
Collection	**Descr.**	**Replacement Cost**
asl	Adult American Sign Language Materials	25.00
abcas, abcd, ablcas, ablcd, newab	Adult Audiobooks	100.00
bio, blkbio, blkfic, blknon, bsnon, cubio, cufic, cunon, fic, ficm, fics, ficw, flbio, flfic, flnew, flnon, gay, genon, habio, hafic, hanon, hd, lngnon, lpbio, lpfic, lpficm, lpfics, lpficw, lpnon, newbio, newfic, newlp, newlse, newnon, non, ocbio, ocfic, ocnon, ofbio, offic, oflp, ofnon, ogbio, obfic, ognon, ohbio, ohfic, ohnon, oibio, oific, oinon, oinv, olbio, olfic, olnon, opbio, opfic, opnon, orbio, orfic, ornon, osbio, osfic, oslp, osnon, oybio, oyfic, oynon, sea, smbus, ssnon, uanon, wstore, xcls, xpool, xpoollp	Adult books (except Fine Arts Books and Oversize Books)	30.00
bsnonov, fanonov, nonov, osover, ssnonov	Adult Nonfiction Oversize Books	50.00
cas, jcas	Audiocassettes	15.00
bsrom, flrom, gerom, ssrom,	CD-ROM's	60.00
cd, jcd	CD's	20.00
jxflau	Children's - Florida Authors Collection	40.00
jasl	Children's - American Sign Language Materials	20.00
jenlace	Children's - Enlace Program	30.00
jabcas, jabcd, jablcas, jablcd	Children's Audiobooks on Cassette and CD	50.00
jbio, jboard, jeasy, jfic, jinv, jlp, jnon, jofbio, jofeasy, joffic, jofnon, jolbio, joleasy, jolfic, jolnon, josbio, joseasy, josfic, josnon, josread, jread, jstory, jxaward, jxfolk, jxhol, jxsci, xjcls, xpoolj	Children's Books	20.00
jvdvd, jvdvdl, jvhs, jvhsl	Children's DVD's and VJS	20.00
jli	Children's Language Instruction	25.00
jxlit	Children's Literature Collection	40.00
jkit	Children's Multimedia Kit	25.00

REPLACEMENT COST BASED ON COLLECTION CODE		
Collection	**Descr.**	**Replacement Cost**
jofref, jolref, josref, jref, jrefof, jrefr	Children's Reference Books	40.00
dec	Closed Captioned Decoders	218.00
zkit	Elderly Resources Kit, Connections	300.00
FA	Fast Add	30.00
bsdoc, doc, docdvd, docmap, docmfch, docmflm, docoff, docrom, docv, docvhs, fadoc, fldoc, fldocb, gedoc, jdoc, lngdoc, permnd, ssdoc, ssdocr, uadoc, yadoc	Federal Document - all formats	100.00
film, filmj	Films - 16 mm films - reel to reel	300.00
fanon, fanonov	Fine Arts - non fiction	75.00
float	Floating	30.00
flxau	Florida Authors	300.00
found	Foundation Collection	75.00
ill	Inter Library Loan Materials	100.00
jump	Jump Start (Special Loan)	150.00
li	Language Instruction	40.00
lapac	Laptop - Accesories CD/DVD/Headphones - Rental	150.00
laptop	Laptop - Rental	2000.00
lib	Librettos	7.00
ll	Lifelong Learning Material	12.00
litcrit	Literary Criticism	75.00
zbag	Mailing Bag	8.00
flmap, map, ssmap	Maps	5.00
farefv, flrefv, gerefv, ssrefv	Materials in Main Vault	300.00
flmcd, flmfch, gemfch, mfch, ssfch	Microcards and Microfiche	50.00
flmflm, mflm, gemflm,	Microfilm	100.00
blkpb, jpb, olpb, pb, yclas, ypb, ypop	Paperbacks	7.00
jxprt	Parenting Collection	30.00
olper, per(location code)	Periodicals	7.00
art	Permanent Art Collection	1000.00
jrec, rec	Phonograph Records	15.00
plays	Plays	7.00
pro	Professional Collection	75.00

REPLACEMENT COST BASED ON COLLECTION CODE		
Collection	**Descr.**	**Replacement Cost**
blkref, blkrefr, bsref, bsrefov, bsrefr, cuoff, curef, faref, farefof, farefov, farefr, flref, flrefov, flrefr, geref, gerefr, lngref, lngrefr, ofref, ofrefr, ogref, ohref, oiref, olref, opref, orref, osref, osrefof, osrefr, oyref, ref, refadv, refoff, refover, refr, ssref, ssrefov, ssrefr, uaref, uarefd, uarefr	Reference	75.00
score, scorer	Score	30.00
bsvf, favf, flvf, gevf, jvf, lngvf, olvf, ssvf, uavf, vf, yvf	Vertical File	5.00
ybio, ycol, ynon	Young Adult Books	25.00
ycolref, yref, yrefr	Young Adult Reference	50.00
zyouth	Youth Resources Center	30.00

REQUESTS/HOLDS

I. Placing Requests

A. Any patron with a valid library card may place a hold on any item in the system's collection except reference items, laptops/laptop accessories, and uncataloged materials.

B. Patrons are encouraged to place their own requests online.

C. Patrons are limited to 30 active requests.

D. A request can be placed at any branch for pick-up at any branch. The choice of pick-up location should be made when the hold is requested.

E. Patrons can select to have holds mailed to them for a charge of $2 per item by selecting Borrow-by-Mail as a pick-up location. See Section III below for details of this service.

F. Each item being held is patron specific and can only be charged out on that patron's library card.

A patron may pick up materials on hold for another patron if the person visiting the library has the other person's card. However, in accordance with the patron confidentiality statement (see **Section XI**, page C-5), no information about the patron record may be disclosed.

G. Reciprocal borrowing partner libraries have agreed to the following mediated referral and request procedures:

1. Look up materials in each other's catalogs if available online.
2. Call the appropriate library to verify that the item is available and ask the staff to hold the item.

3. Explain to the patron where to go to get a reciprocal borrowing card and pick up the item.
4. The library that has been called will hold the book
   a. under the patron's name if s/he has a reciprocal borrowing card with the owning library system, or
   b. under the calling library system's name, on a temporary basis, until the patron arrives and gets a reciprocal borrowing card

II. Processing requests

A. The computer system will automatically route a request to a branch library listing the title as "in library," or, if all copies are out, will place the request on a list.

B. Branches will run a Request Pull List each day for requests to be searched. If a title is not found and is not checked out, it must be marked "trace."

C. If a patron requests an item that is "in library", staff should check the shelves and the retention areas. If the item is not found, change the status to "trace" and process the request.

D. All materials that are placed in transit when checked in, must be sent to the branch that is indicated. Be sure to use the Red rush slip secured with two rubber bands.

III. Borrow-by-Mail

Borrow-by –Mail is a service that will send material to patrons' addresses for a $2/item fee. The patron must be in good standing. The service will not check out to patrons whose privileges have been revoked (see Library Cards, Section IV). It also will not check out to NVA patrons, those with expired cards, or those needing address checks.

Because of the time frame involved, we will only mail to addresses in Miami-Dade, Broward and Monroe Counties. Due dates are extended to account for shipping time.

IV. Holds Loan Period

When the ratio of holds to copies of an item reaches 2:1, the item's loan period becomes 7 days. This will be indicated by an itype of "ratio". This does not affect items currently checked out.

V. Requests for items not in the computer or with no copies linked.

A. If a patron requests an item that is over 1 year old, refer the patron to Interlibrary Loan. (Policy is in Section I of Library Policy and Procedures Manual)

B. If a title is more recent and not in the computer, fill out a Request for Item Not Owned by Library (Form FO-065). Include the ISBN and any other pertinent information. Send the request to Collection Development at Main. This can also be done online by the patron

C. Replacement orders should be sent to Acquisitions.

V. Filling requests by telephone

A. If a patron needs an item in less than one week, staff should call locations having the item "in library". Patrons should be encouraged to pick up the material at the owning branch. The library cannot guarantee a delivery date if the material must be transferred from one branch to another. Main Library departments should be called directly, rather than the Switchboard or Information Desk.

B. All locations are expected to handle these call-in requests as they would any other reserve request received directly from a patron.

C. When sending materials to a branch or holding materials for a patron in response to a call, place a copy specific request for the patron to pick up at the branch of their choice.

D. Check in the item to place it in transit and send to the branch or to hold it at the owning branch for pickup.

OTHER LIBRARIES' BOOKS

When patrons return books that do not belong to the Miami-Dade Public Library System, break them down into the following categories:

I. Elementary and High School books

A. Dade County Pubic Schools

- Collect all public school books in a box.
- Seal the box and attach the label below (available from Main Children's Room).
- Send Boxes to Main Library with the regular shipment.
- Main delivery staff will take the boxes to Dade County Public Schools on the 15th of each month.

B. Private Schools

Private school books are placed in an envelope, addressed to the school, sealed, and sent daily to Main Library MAIL ROOM.

Don't delay mailing these books, many schools will not release grades or allow students to graduate when there are overdue books and fines.

II. SEFLIN Libraries

Put the books in an envelope. Stick a pink SEFLIN label (available from ILL) to it and address it to the owning library. Place it in the branch delivery box to be sorted at Main.

SEFLIN Libraries are:

Art Institute of Fort Lauderdale	Lynn University
Barry University	Martin County Library System
Boynton Beach City Library	Miami-Dade College
Broward Community College	Miami Country Day School
Broward County Library	Miami-Dade Public Library System
Carlos Albizu University	Northwood University
DeVry University	Nova Southeastern University
Florida Atlantic University	Palm Beach County Library System
Florida International University	Palm Beach Atlantic University
Florida Memorial College	Palm Beach Community College
Florida Metropolitan University	School District of Palm Beach County
Johnson & Wales University – Miami	St. Thomas University
Keiser College	Trinity International University
Lake Park Public Library	West Palm Beach Public Library

III. All other libraries

A. If the address is available, put the book in a padded envelope and address it to the owning library. Place it in the delivery to be mailed out at Main.

Padded envelopes are available through the Business Office. Use #3 for standard books and #6 for large books.

*Independent Municipal libraries in Miami-Dade County are:

John F. Kennedy Library
190 W 49 St
Hialeah, FL 33012

Lafe Allen Memorial Library
1601 NE 164 St.
North Miami Beach, FL 33162

Brockway Memorial Library
10021 NE 2 Ave.
Miami Shores, FL 33138

Surf-Bal-Bay Library
9301 Collins Ave.
Surfside, FL 33154

North Miami Public Library
835 NE 132 St
North Miami, FL 33161

For other addresses, check the inside of the book, the American Library Directory, the phone book or search online.

B. If no address is available, send the item to Main Library/Circulation with a note of explanation.

Laptop Circulation Policy & Procedures

Laptop computers may be borrowed by library card holders in good standing, except those with borrower types **NVA** (non-verifiable address); **JNP** (Juvenile, no parental authorization); **RJN** (Juvenile reciprocal, no parental authorization). Horizon will prevent borrowers with the above Btypes from checking out laptops.

Patrons wishing to borrow laptops need to verify their identity. The preferred method is library card and photo ID. Patrons without photo ID, must state their PIN so we can verify. Patrons who do not have cards with them, can be looked up upon presentation of photo ID. All patrons will need to have PIN's in order to log on to the laptops via the print management system. Patrons who do not have PIN's must show acceptable ID to be given a PIN. (Acceptable ID is the same type of ID needed to obtain a library card.)

Patrons may check out one laptop at a time, no more than twice a day. Laptops are available on a first-come, first-served basis only. No requests or advance reservations are permitted. Guests may use regular pc's only; they may not use laptops.

Software:
The laptops have the standard software, Office 2003, plus one special new program not found on other equipment, *Writer's Companion*. It was selected by Project LEAD to help beginning readers learn the writing process (essays, etc). It can be used by anyone to help them through the writing process, and would be useful for middle and high school students. They run on Windows XP

The laptops do not have Zoom Text.

Filtering:
All laptops are filtered, and the filtering cannot be removed. Patrons who request unfiltered Internet access must use a hard-wired PC. This also applies to patrons using their own laptops.

Printing:
Prints are $.15 per page and may be picked up at the printing stations.

Fines and Fees:
Overdue Fines:

Laptops: $35 for each 15 minutes, or part thereof, late. Maximum fine is $2,000
Accessories: $35

Patrons will be billed for any items that are not returned or are returned damaged.

The replacement fees are:

Fully configured laptop/All parts & Labor:	$2,000
Earphone	20
DVD/CD RW Drive	150
3 ¼ Floppy Drive	50
Power Battery	150
Wireless Card	50

A bill for replacement will be generated if the laptop is not returned by the end of the day. Law enforcement officers may be notified if a laptop is removed from the library.

Security:

Laptops should not be left unattended or loaned to another person. The user is responsible for loss of a laptop which is checked out to him or her.

No food or drink should be in the vicinity of borrowed laptop computers.

Altering or abusing computer equipment and/or settings is prohibited. Doing so may result in suspension of borrowing privileges and fines.

Personal software may not be loaded onto the laptop.

Files may not be saved or downloaded to a laptop's hard drive. Files saved or downloaded to the laptop's hard drive will be deleted when the machine is returned.

Users need to be considerate and refrain from displaying materials that those around them might reasonably consider objectionable.

Accessories:

The following accessories are available for checkout:

1. **Earphones.** Each laptop comes with a set of earphones which may be given out on request.
2. **Drives.** There are two drives with each laptop: a 3 ¼ floppy and a DVD/CD drive. Check out laptops fitted with the floppy drive unless the patron specifically requests the DVD/CD drive. The DVD/CD drive only plays DVDs and CDs. It is not a RW drive and cannot be used for saving material. You may not give the patron both drives.

Spare batteries and chargers are kept at the checkout station during opening hours.

Store the following accessories:

1. **Carrying case**. Do not give out the cases. If a patron is physically unable to carry the laptop, bring it to the chosen location. The laptops are covered with a colorful replica of our library card and are easily identifiable as library property. The cases have no library identification on them.
2. **Cord/Converter.** Do not give these out to patrons. It is not necessary, because we are checking out the laptops with fully charged batteries.
3. **Surge protector.** Do not give these out to patrons. It is not necessary, because we are checking out the laptops with fully charged batteries.

Equipment manuals and documentation

For detailed documentation and manufacturer's manuals, visit the Dell website for Latitude laptops:

http://support.dell.com/support/edocs/systems/latd505/en/index.htm

Manuals may be downloaded and printed. Choose the manual carefully, as there are editions in many languages and the manuals are very long.

Laptop Checkout Procedures

*To **borrow** a laptop, patrons must produce one of the following types of identification: library card and photo ID, library card and PIN, photo ID. If they have no photo ID and no PIN number, they must provide other acceptable ID so that staff can create a PIN number for them before checking out a laptop. (Acceptable ID is the same type of ID needed to obtain a library card.)*

Checking out the laptop is the last step you will take in the checkout procedure.

*To **use** laptops, patrons must have their library card number and their PIN, which is needed for them to log in to the ENVSIONWARE system.*

1. Ask patron for library card and photo ID. If the patron has photo ID, wand the card and confirm that the borrower name matches the name on the ID.

   If the patron does not have a photo ID, ask for the library PIN number. Wand the card and go to the Edit Borrower screen to confirm that the PIN number given matches the one on the record. Ask additional information to verify identity, i.e. birthdate or phone number.

   If the patron does not have photo ID or PIN number, ask for other acceptable ID and create a PIN number. (Acceptable ID for updating a borrower record is the same type of ID needed to obtain a library card.)

2. Determine that the patron has borrowing privileges. Patrons with a "stops" on their cards may not borrow a laptop. Horizon will prevent laptop CKO to borrower b-types NVA, JNP, and RJN.

3. Give a copy of the "Laptop Checkout Program" handout and ask the patron to read it. These are the laptop rules and regulations.

4. Retrieve a laptop and turn it on to allow it to boot up before checking out.

5. If the patron agrees to the conditions, ask if s/he is familiar with laptops or would like a demonstration. As needed, give a brief demonstration:
   - how to open
   - how to start power
   - how to use the touch pad (mouse pad)
   - how to use the left and right mouse buttons (there is no separate mouse)
   - how to log in to ENVSIONWARE
   - how to move ENVSIONWARE clock

6. Tell the patron:
   - S/he will need to log on using their library card number and PIN to begin the one-hour session.
   - This session will be controlled by the print management system. Patrons are limited to two one-hour sessions daily.
   - The laptops will not work outside the building.
   - When finished, do not turn off the power on the computer; simply log off the ENVSIONWARE session, close the lid and bring it to the desk with the power still on.
   - *Laptops must be returned to the same desk where they were borrowed.*
   - *Laptops being returned may not be dropped off at a desk or left unattended at a service desk; the patron must remain at the desk for the checkin.*

6. If the patron requests a DVD drive, check out the DVD drive. Pull the floppy disk drive out of the laptop and install the DVD drive.

7. Proceed with the checkout: Be alert for any open bays on the bottom and sides of the laptop. Wand the laptop barcode, which is located on the bottom of the laptop. The following checkout note on the Horizon screen will appear as a reminder: ***Check for battery, drives & component doors.***

8. Checkout the laptop and print the receipt.

9. Clear the CKO screen.

10. On the Due Date receipt, highlight the time the laptop is due back at the desk. Point this out to patron when you hand over the receipt and laptop.

NOTE:

Checking out Laptops During the Last 1 ¾ hours Before the Branch Closes:

When checking out laptops during the last 1 ¾ hours before your branch closes, the due time and, possibly, the due date must be changed during checkout.

1. Check out the Laptop. Notice the due date and be sure it is the present day.**

2. Select the Item in CKO that you want to change (It should be the whatever is on the current CKO list).

3. Click on the button "Edit Item" at the bottom of the screen.

4. If the due date is the next day the library is open, change it to today. This will be necessary within the last 1 ¼ hour before closing.

5. Change the Due Time to ½ hour before closing. Be sure that the “PM” button is checked.

6. Save and close.

***You do not need to change the time in ENVSIONWARE, this will automatically end ½ hour before closing for all laptops in the ENVSIONWARE system.

Laptop Returns

Laptops must be returned to a staff member in the area of the library from which they were borrowed. They may not be dropped off at a desk and left unattended.

If a patron insists on returning a laptop to a different desk than the one from which it was borrowed, follow the laptop checkin procedures below and return it to the proper desk. Remind the patron that the laptop must be returned to the proper desk in future.

For all laptop checkins, the patron must be given a checkin receipt.

All laptops must be returned no later than thirty minutes before closing.

Inspection must be done before the laptop is checked in
so that the patron can be properly charged for any missing or damaged parts.

1. **While the patron is still present, *and before checking in the laptop*,** the staff will inspect the laptop:

   Make sure there are no open bays on the bottom and sides of the laptop.

   Check for any obvious signs of tampering.

   Open the laptop. It should be on. Confirm that is it working properly. If it is off, push the power button and see if it starts up properly.

   - If any of the components are missing/damaged, such as drives or Battery — BEFORE checking in the laptop, inform the patron that you are going to add a Fee for the missing/damaged component. Create a fee block using the attached price list as a reference.

     - Open the Patron's record.
     - Go to the Blocks drop-down menu.
     - Select Add Fee, then select Fee for the missing/damaged component.
     - Add the amount for the part (ex. 30.00) and in the Comment field explain what the fee is for (ex. RTN'D W/O BATTERY. LAPTOP 3/012341234 KW).
     - After you have told the patron about the Fee and created it, Check In the laptop in Standard Mode and give the patron the Checkin receipt.
     - Optional: If fees are charged for damaged or missing laptop componentsyou may wish to give the patron a copy of the block screen. Go to File/Print. Select the regular printer (not a receipt printer) to print a full page copy of the current block screen.

1. Check in any accessories that may have also been returned by the patron. If the laptop has a DVD drive, remove that and check it in. Be sure to put the floppy drive back in.

2. If everything is OK with the laptop, or after fees are assessed, clear the checkin screen of other returned items and check in the laptop. Press F11 to produce the checkin receipt. Give the receipt to the patron.

3. If the item is returned late, there will be an overdue charge. Inform the patron that a late fee is being charged. (NOTE: the overdue charge will go into effect when approved by the County Commission.).

4. Check the power level of the battery

- Press the Windows symbol (in the lower left-hand corner of keyboard next to the Ctrl and Alt keys).
- You will now see the Taskbar is available at the bottom of the screen.
- In the lower-right corner of the screen you will see an icon for the battery.
- Do not click on this icon...all you need to do is point your mouse on it and wait a second.
- A little window will show next to the battery icon that gives you the amount of time left on the battery and a percentage of power left. Ex. [90% 3:03]
- If the battery power is less than 50%, you will need to charge the battery and replace the laptop with a fully charged battery.
- Each battery should provide at least 2 sessions before it needs charging.

5. Turn off the laptop.

Appendix N
REPORTS

Appendix N: Reports

CIRCRpt 1: Monthly Statistics

CIRC Statistical Report - October 2007

Location	Stat Category	Subcategory	FY 2007 March October Total
al	Borrower Delta	Manually-added Borrowers	156
		Manually-deleted Borrowers	2
		Total	158
	Checkout	First Time Checkout	3,378
		Phone Renewal	72
		Other Renewal	227
		Opac Renewal	274
		Total	3,951
	Holds Resolved	Picked Up	266
		Total	266
	Requests Resolved	Cancelled	9
		Picked Up	908
		Total	917
	Total		5,292
AL	Requests Placed	Requests Placed	276
		Total	276
	Total		276
cc	Borrower Delta	Manually-added Borrowers	185
		Manually-deleted Borrowers	14
		Total	199
	Checkout	First Time Checkout	10,766
		Phone Renewal	1,241
		Other Renewal	206
		Opac Renewal	1,728
		Total	13,941
	Holds Resolved	Picked Up	1,683
		Total	1,683
	Requests Placed	Requests Placed	1,005
		Total	1,005
	Requests Resolved	Cancelled	35
		Picked Up	3,928
		Total	3,963
	Total		20,791
cd	Borrower Delta	Manually-added Borrowers	63
		Manually-deleted Borrowers	1
		Total	64
	Checkout	First Time Checkout	5,123
		Phone Renewal	1,062
		Other Renewal	124
		Opac Renewal	902
		Total	7,211
	Holds Resolved	Picked Up	922
		Total	922
	Requests Placed	Requests Placed	502
		Total	502
	Requests Resolved	Cancelled	119
		Picked Up	2,562
		Total	2,681
	Total		11,380

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Intrabranch lending activity – as needed

Oct

Intra-Branch Circulation - by month - Miami

CIRC Loc	Year ITEM Loc Metrics	2007 0 Cnt	al Cnt	cc Cnt	cd Cnt	CD Cnt	cg Cnt	CG Cnt	cn Cnt	CN Cnt	co Cnt	cr Cnt	CR Cnt	cu Cnt	CU Cnt
al		0	3,030	8	1	0	7	0	8	0	5	7	0	11	0
cc		4	20	9,192	23	0	29	0	14	0	25	52	0	26	0
cd		2	9	18	4,233	0	32	0	10	0	24	42	0	8	0
cg		0	22	71	35	0	20,447	0	27	0	141	237	0	17	0
cn		0	8	33	36	0	39	0	502	0	16	32	0	14	0
co		0	1	11	7	0	39	0	6	0	2,460	26	0	3	0
cr		1	21	63	34	0	171	0	28	0	114	19,419	0	20	0
cu		2	2	3	0	0	1	0	0	0	1	2	0	903	0
cv		1	3	23	15	0	46	0	0	9	48	65	0	7	0
cw		0	6	10	20	0	20	0	7	0	13	35	0	3	0
del		0	0	2	1	0	2	0	0	0	3	3	0	2	0
dr		2	4	22	51	0	29	0	10	0	20	62	0	3	0
ed		1	4	15	16	0	8	0	6	0	3	15	0	14	0
fr		0	0	9	30	0	15	0	9	0	11	23	0	3	0
gg		0	35	55	16	0	23	0	15	0	12	40	0	21	0
hd		0	0	0	0	0	0	0	0	0	0	0	0	0	0
hg		1	1	5	7	0	16	0	7	0	8	6	0	1	0
hm		6	7	36	46	0	52	0	29	0	26	88	0	11	0
hs		0	9	12	31	0	19	0	13	0	16	29	0	3	0
kb		0	1	19	5	0	72	0	8	0	48	69	0	5	0
kn		1	23	58	40	0	170	0	37	0	130	231	0	19	0
lc		0	4	25	3	0	15	0	3	0	8	12	0	6	0
lm		0	4	11	30	0	34	0	14	0	13	49	0	4	0
lr		1	8	11	2	0	8	0	6	0	10	9	0	6	0
mb		1	12	48	101	0	133	0	38	0	40	119	0	0	13
mc		0	8	15	6	0	3	0	11	0	6	13	0	8	0
ml		11	51	100	31	0	60	0	22	0	16	64	0	55	0
mn		1	15	55	29	0	198	0	40	0	68	157	0	17	0
ms		3	6	20	55	0	34	0	8	0	18	35	0	6	0

1/10

CIRCRpt 3: Payment Detail Report - daily

Pmnt Loc	Date	Time	Work station	User ID	Borr ID	Check #	Pmnt ID	Pmnt Block	Fee Block	Descr	Amt
Coral Gables Branch Library	12/05/07	9:32	cg27	floresce	191319		568367	payment	fine	Twelfth night	$0.50
							Total				**$0.50**
		10:09	cg25	desouzas	182331		568385	payment	fine	Louisa May Alcotts Little men	$0.50
										second time around	$0.30
										Treasure Island	$0.50
										Two little girls in blue	$0.30
							Total				**$1.60**
		10:30	CG26	floresce	839717		568394	payment	fine	Amelia Bedelia	$0.50
										CGAPaperback Children 17	$0.10
										Donkeys tale	$0.50
										Father Bear comes home	$0.50
										Hippo lemonade	$0.50
										Jess and the stinky cowboys	$0.50
										Mouse soup	$0.50
										Pancakes pancakes	$0.50
										Play ball Amelia Bedelia	$0.50
										Raggedy Anns tea party book	$0.50
										Time for bed the babysitter said	$0.50
										WDRPaperback Children 53	$0.50
										Zacks alligator	$0.50
							Total				**$6.10**
		10:52	cg25	orbegosoa g	603408		568404	payment	fine	Ysabel	$1.60
							Total				**$1.60**
		11:01	cg25	orbegosoa g	737078		568407	payment	fine	Sesame beginnings Make music together	$1.00
							568408	payment	fee	Lost case	$1.00
									fine	Fairytale adventure	$7.00

Pmnt Loc	Date	Time	Work station	User ID	Borr ID	Check #	Pmnt ID	Pmnt Block	Fee Block	Descr	Amt
Coral Gables Branch Library	12/05/07	18:16	cg27	montesi	167271		Total				$2.35
		18:39	cg27	montesi	2498		568802	payment	fine	28 weeks later	$0.50
										Bluffmaster	$0.50
										Kamikaze Kaito Vol 1 Jeanne	$0.05
										Orphen Vol 1	$0.05
										Orphen Vol 2	$0.05
										Orphen Vol 6	$0.05
										reaping	$0.50
										Tsubasa 2 Reservoir chronicle	$0.15
							Total				$1.85
		19:05	CG26	blancon	1079681		568819	payment	fine	Aladdin and the King of Thieves	$0.50
										Cinderella III A twist in time	$0.50
										D W thinks big	$0.50
							Total				$1.50
		19:14	cg25	harrigank	545407		568822	payment	fine	Hamlet	$0.20
										Honeymoon a novel	$1.30
										Lily White	$0.10
										Savannah breeze	$0.10
							Total				$1.70
		19:29	cg25	harrigank	1013318		568828	payment	fine	amants du Pont Neuf The lovers on the bridge	$1.50
							Total				$1.50
		19:37	cg25	harrigank	763998		568836	payment	fine	Frank Lloyd Wright	$3.20
							Total				$3.20
Total by Type								payment	Total b		$130.55
								refund	Total b		($8.50)
								waiver	Total b		$0.60
Grand Total:											$122.65

12/06/07 List: Request Pull List (Using Pull List Priority) Page No. 1

Collection/Title/Call No./Comment	Author	Pickup/Barcode/Copy/Specific/Imprint		
bsref 615.853 V694s Sauna; the Finnish bath	Viherjuuri, H. J. (Hillari Johannes), 1889-	West Flagler 39081012692971	bib	Brattleboro, Vt., S. Gr
osfic W1895c Sp El complot /	Wallace, Irving, 1916-	West Flagler 39081021146340	bib	Barcelona Grijalbo c1
osbio B G1949m Sp Indira Gandhi /	Masani, Zareer.	Hispanic Branch 39081013142372	bib	Barcelona : DOPESA
lpficm SAYERS Mystery Large print Unnatural death. RA-LK	Sayers, Dorothy L. (Dorothy Leigh), 1893-	Connections 39081006785518	bib	Boston : G. K. Hall, 1
xpoolp FOLLETT Large print The key to Rebecca.	Follett, Ken.	Key Biscayne 39081013550822	bib	Boston : G. K. Hall, c
osnon 910.41 V719e Sp Eh, Petrell : cuaderno de un navegante solitario /	Villar, Julio, 1943-	Hispanic Branch 39081013056978	bib	Barcelona : Editorial
rec MR-1S 8112-062 Christmas with Robert Shaw conducting the Atlanta Symphony		Homestead 39081013715359	bib	Turnabout 1976.
xcls B48667w Wildwoods and wishes /	Berencsi, Susan.	South Dade 39081007435568	bib	Garden City, N.Y. :
ssnon 820.8 H267v A view of my own : essays on literature and society.	Hardwick, Elizabeth.	South Shore 39081014385723	bib	New York : Ecco Pre
osnon 920 B615 Sp Biografias : religion, filosofia y psicologia, lengua y literatura, arte,		Hispanic Branch 39081006017722	bib	Madrid : Ediciones Rl
xpoolp S8138g Large print Going home RA-LK	Steel, Danielle.	Connections 39081014043272	bib	Boston, Mass. : G.K.
xpoolp H1515w Large print Wheels RA-LK	Hailey, Arthur.	Connections 39081013013664	bib	Leicester, Eng. :
osnon 615.832 S618s Sp La sauna : termoterapia ... /	Sintes Pros, Jorge.	West Flagler 39081013250076	bib	Barcelona : Editorial S
rec MR-1S 8312-148 Sviatoslav Richter plays Chopin scherzos	Chopin, Frederic, 1810-1849.	South Shore 39081023398865	bib	[S.l.] : Melodiya, c198
xpoolp G6884ci Large print A city of bells / BISCAYNE PARK	Goudge, Elizabeth, 1900-	Bookmobile 39081018877790	bib	Leicester, Eng. : Ulve
lpficm SAYERS Mystery Large print In the teeth of the evidence. RA-LK	Sayers, Dorothy L. (Dorothy Leigh), 1893-	Connections 39081010606011	bib	Bath, Eng. : Chivers I
xpoolp G6884i Large print Island magic BISCAYNE PARK	Goudge, Elizabeth, 1900-	Bookmobile 39081006802875	bib	Leicester, Eng. : Ulve
fanon 701.15 A746n New essays on the psychology of art /	Arnheim, Rudolf.	South Miami 39081042079017	bib	Berkeley : University

Holds Shelf List w/barcode (Miami)

Req ID	Name	Borrower Barcode	Tel Number	Notification	Title	Exp Date	Status
2497958	Anderson, Pamela Gibson	29081030693649	786-512-0284	phone	Deceptively delicious : simple secrets to get your kids eating good foods /	12/15/2007	Hold Shelf
2498096	Anderson, Pamela Gibson	29081030693649	786-512-0284	phone	The savvy sistahs /	12/11/2007	Hold Shelf
2617189	ARBESU, AIDA	29081018680584	000-000-000	phone	Naked and not ashamed : we've been afraid to reveal what God longs to heal /	12/11/2007	Hold Shelf
		29081018936614	000-000-000	phone	Naked and not ashamed : we've been afraid to reveal what God longs to heal /	12/11/2007	Hold Shelf
		29081021393514	000-000-000	phone	Naked and not ashamed : we've been afraid to reveal what God longs to heal /	12/11/2007	Hold Shelf
		29081028393731	000-000-000	phone	Naked and not ashamed : we've been afraid to reveal what God longs to heal /	12/11/2007	Hold Shelf
2630323	BAILEY, MICHAEL RICHARD	29081016131945		mail	The next best thing [videorecording] /	12/17/2007	Hold Shelf
2622599	BARCILON, DANIELLE RACHEL	29081009672400	305-445-2347	phone	E-myth mastery : the seven essential disciplines for building a world class comp	12/11/2007	Hold Shelf
		29081019842456	305-445-2347	phone	E-myth mastery : the seven essential disciplines for building a world class comp	12/11/2007	Hold Shelf
		29081025796761	305-445-2347	phone	E-myth mastery : the seven essential disciplines for building a world class comp	12/11/2007	Hold Shelf
		29081028190004	305-445-2347	phone	E-myth mastery : the seven essential disciplines for building a world class comp	12/11/2007	Hold Shelf
2637192	BARNARD, CHURCH E	29081010006069	305-445-0448	phone	Reach for the sky; the story of Douglas Bader, legless ace of the Battle of Brit	12/15/2007	Hold Shelf
		29081016541234	305-445-0448	phone	Reach for the sky; the story of Douglas Bader, legless ace of the Battle of Brit	12/15/2007	Hold Shelf
2628374	BERRY, STEPHANIE MARIE	29081031234724	612-616-5408	phone	Ancient splendors [videorecording].	12/11/2007	Hold Shelf
2626044	Breed, Edwin	29081028191127	305-793-5262	phone	The reconnection : heal others, heal yourself /	12/13/2007	Hold Shelf
2645188	BROPHY, RUTH V.	29081025027951	305-285-7147	phone	Gone [sound recording] /	12/17/2007	Hold Shelf

1

Hold Shelf Expired/Canceled (Miami)

Pickup Location	Status	Name	Borrower Barcode	Borr ID	Hold Exp Date	Title	Req ID
wk	Hold Can	Berto, Damiana	29081027697579	799827	12/14/2007	Catch the stars [videorecording] /	2635215
			29081030707530	799827	12/14/2007	Catch the stars [videorecording] /	2635215
	Hold Exp	DE PAZ, MIGUEL	29081013638124	21103	12/5/2007	Billboard top hits, 1984 [sound recording].	2618724
						Billboard top hits, 1986 [sound recording].	2618725
						Entertainment weekly. 1968 [sound recording].	2618722
						Entertainment weekly. 1988 [sound recording].	2618723
		DOMINGUEZ, NORA	29081016065028	301608	12/5/2007	Los huevos de Dora /	2608952
			29081025710507	301608	12/5/2007	Los huevos de Dora /	2608952
	Hold Can	Lodo, Linda	29081029220214	1075399	12/11/2007	Mezzo danger service agency. Shell three [videorecording] /	2625791
					12/10/2007	Mezzo, Danger Service Agency. Shell one [videorecording] /	2625794
	Hold Exp	MARTINEZ, CARIDAD ROSINA	29081018015682	718040	12/5/2007	El hombre, la hembra y el hambre /	2613381
			29081019105250	718040	12/5/2007	El hombre, la hembra y el hambre /	2613381
			29081023892794	718040	12/5/2007	El hombre, la hembra y el hambre /	2613381
	Hold Can	MORA, JUANA	29081022087537	11753	12/9/2007	Twilight /	2624510
			29081027328571	11753	12/9/2007	Twilight /	2624510

RFP 643

CIRCRpt 7: Outstanding requests paged by date. This report is used to determine older requests needing follow up - weekly

Outstanding Requests - Miami - Paged by Date

Title	BIB ID	Pickup Location	Request ID	Borrower Name	Borrower ID	Request Exp Date
Dragon Ball Z. Kid Buu-- The price of victory [videorecording] /	998769	al	1705001	BOLI-GBAGRA, DANIEL G	930976	12/20/2007

1

RFP 643

CIRCRpt 8: Outstanding requests paged by location. This report lists each pickup location's outstanding requests – weekly

Outstanding Requests w/barcode/id - Miami

Title	BIB ID	Borrower Name	Borrower Barcode	Borrower ID	Request Exp Date
Dragon Ball Z. Kid Buu-- The price of victory [videorecording] /	998769	BOLI-GBAGRA, DANIEL G	29081028971841	930976	12/20/2007
The life of Malcolm X.	6734	LATNER, NOAH LARIO	29081022527532	685495	1/27/2008
The life of Malcolm X.	6734	LATNER, NOAH LARIO	29081024336825	685495	1/27/2008
Home planners' most popular home designs : 360 of America's favorite houses.	305412	MAGA, RICARDO JESUS	29081016256973	548980	3/12/2008
Home planners' most popular home designs : 360 of America's favorite houses.	305412	MAGA, RICARDO JESUS	29081026012234	548980	3/12/2008
The three faces of Eve,	52552	BONACHEA-LIMA, SCARLETT	29081030027533	994096	3/18/2008
The Best home study guide for the CDL commercial driver license examination /	941071	JACKSON, TONYA LYVETTE	29081022972720	21999	4/10/2008
Paid in full [videorecording].	1008996	LIRIANO, RAFAEL EMILIO	29081018482882	85301	4/11/2008
Paid in full [videorecording].	1008996	LIRIANO, RAFAEL EMILIO	29081018835923	85301	4/11/2008
Paid in full [videorecording].	1008996	LIRIANO, RAFAEL EMILIO	29081028244173	85301	4/11/2008
How the foreign exchange market works /	407259	Head, Derrick	29081030029661	1007359	4/22/2008
The complete idiot's guide to drawing manga, illustrated /	1247836	FORBES, JENNY	29081025569473	752597	5/13/2008
Superman IV [videorecording] : the quest for peace /	1127698	MCDONALD, DEANA SHELLEEN	29081003991905	629886	5/22/2008
Miss Nelson is missing! /	159792	GUTIERREZ, PILAR	29081020251713	257764	6/8/2008
Miss Nelson is missing! /	159792	GUTIERREZ, PILAR	29081023682476	257764	6/8/2008
Miss Nelson is missing! /	159792	GUTIERREZ, PILAR	29081030026709	257764	6/8/2008
Beat the odds in Forex trading : how to identify and profit from high percentage	1215556	Head, Derrick	29081030029661	1007359	6/10/2008
Modern masters. Volume seven, John Byrne /	1216063	ORUE, JORGE	29081027295077	1011332	6/15/2008
I never promised you a rose garden, a novel	21497	RODRIGUEZ, JULIA YELISSA	29081025122521	763830	6/18/2008
I never promised you a rose garden, a novel	21497	RODRIGUEZ, JULIA YELISSA	29081028979695	763830	6/18/2008
Transforming a rape culture /	518761	MARRERO, AMBER	29081022742321	6800	7/4/2008

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RFP 643

CIRCRpt 9: Count of outstanding requests paged by [pickup location – this is used as a collection development tool] – as needed

cg

Requests by Location - Miami

BIB ID	Title	Metrics	Requests
1259424	World without end /		22
1261682	Playing for pizza /		21
1261686	Dark of the moon /		17
1261690	The choice /		17
1256394	The age of turbulence : adventures in a new world /		16
1266138	Ratatouille [videorecording].		15
1242844	Music and lyrics [videorecording] /		13
1234640	Blood diamond [videorecording] /		12
1262928	Stone cold /		11
335176	The pillars of the earth /		11
1234689	The Queen [videorecording] /		11
1266112	Knocked up [videorecording].		10
1266753	La suma de los dias /		10
1253050	Letters from Iwo Jima [videorecording] /		10
1260791	Run /		10
1257340	Shoot him if he runs /		10
1266182	Sicko [videorecording].		10
1266123	The namesake [videorecording].		10

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CIRCRpt 10: Express Hold list – this provided the coding necessary for the wrappers used for the Hold Shelf – daily

Print Hold Slips - Miami

name	Borrower Barcode	Hold Expiration Date	Borrower Number	itype	Hold time	Borrower Name
AMI	7999	Dec 17 2007	664913	bkj	1:08PM	AMIRA, NOEMI MIMI
					12:56PM	AMIRA, NOEMI MIMI
AND	8489	Dec 17 2007	979055	bk	12:50PM	Anderson, Angela Evans
ANR	5699	Dec 17 2007	680693	bk	1:07PM	ANRRICH, GRACIELA M
					1:13PM	ANRRICH, GRACIELA M
					1:34PM	ANRRICH, GRACIELA M
AYQ	5433	Dec 17 2007	455769	bk	12:38PM	AYQUIPA, LITA A
BAR	0004	Dec 17 2007	294972	bk	12:44PM	BARCILON, DANIELLE RACHEL
BAT	0276	Dec 17 2007	385897	bk	12:42PM	BATISTA, MARIA EUGENIA
BLA	3278	Dec 17 2007	647124	dvd	12:42PM	BLANCO, ARMANDO ANTONIO
BOT	9213	Dec 17 2007	675236	dvd	1:05PM	BOTRAN, HELEN CYBELE
BRA	4856	Dec 17 2007	586868	bk	10:58AM	BRADLEY, CAROLINE MARY
CAM	1557	Dec 17 2007	939873	kit	1:07PM	Campo, Anuar
	8037	Dec 17 2007	773400	bk	1:09PM	CAMACHO, MEAGHAN ELISE
CAR	1763	Dec 17 2007	1074136	bk	1:07PM	Carmona, Leticia Ileana
	4316	Dec 17 2007	369709	cd	1:13PM	CARRERAS, ROSELYN N
COB	7667	Dec 17 2007	882337	dvd	1:16PM	Cobos, Zorayda
COD	5435	Dec 17 2007	381721	bk	12:59PM	CODIAS, ELAINE K
DAW	8366	Dec 17 2007	118749	dvdj	1:01PM	DAWSON, KELLY ANNE
DOW	0214	Dec 17 2007	593988	bk	12:37PM	DOWDS, AINE
ELL	0645	Dec 17 2007	926478	bkj	12:51PM	Ellis, Carmen
ENN	3157	Dec 17 2007	613766	bk	9:45AM	ENNIS, CHERYL
	3567	Dec 17 2007	613766	bk	9:45AM	ENNIS, CHERYL
EZR	4332	Dec 17 2007	956810	bk	1:28PM	Ezra, Mirna Lisandra
FER	6608	Dec 17 2007	346216	dvd	1:02PM	FERNANDEZ-BARQUIN, VERONICA
					12:09PM	FERNANDEZ-BARQUIN, VERONICA
FOX	1689	Dec 17 2007	712014	bk	11:43AM	FOX, TERRI R
GAR	0717	Dec 17 2007	745184	bk	12:39PM	GARCIA, MARIBEL
GAS	8121	Dec 17 2007	120845	bk	1:07PM	GASCA, JENNIFER
GON	2821	Dec 17 2007	453898	vhs	1:06PM	GONZALEZ, VICTOR JOSE
	6366	Dec 17 2007	344939	bk	12:50PM	GONZALEZ, BLANCA MARGARITA
					12:54PM	GONZALEZ, BLANCA MARGARITA
	9047	Dec 17 2007	97356	bkj	1:03PM	GONZALEZ, MARIBEL
	9321	Dec 17 2007	1052263	bkj	12:54PM	Gonzalez, Patricio Nicolas
GRE	2920	Dec 17 2007	662693	bk	1:00PM	GREEN, CAROL LEWIS

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CIRCRpt 11: Item Status Report – staff can select location and status. Last 28 days dynamically selected – weekly

cg

Item Status Report (Miami)

Collection	Call Nbr	Title	iBarcode	Itype	Status	Status Date
abap		Pride and prejudice [sound recording] /	39081090642351	abap	Trace	11/29/2007
		The dead fathers club [sound recording] : a novel /	39081090638433	abap	Transit	12/5/2007
abcas	070.92 JOHN Audio book	Only son [sound recording] /	39081064432995	audbk	Trace	11/21/2007
	808.8 BOOK Audio book	The book of virtues [sound recording] /	39081054945303	audbk	Trace	11/16/2007
	BERNHAR Audio book	Dark justice [sound recording] /	39081062728402	audbk	Transit	12/5/2007
	RICE Audio book	The tale of the body thief [sound recording]	39081038457433	audbk	Trace	11/27/2007
	SPENCER Audio book	Bygones [sound recording] /	39081032211000	audbk	Trace	11/10/2007
	TROLLOP Audio book	Framley parsonage [sound recording] /	39081058983961	audbk	Transit	12/5/2007
abcd		A woman in charge [sound recording] : [the life of Hillary Rodham Clinton] /	39081082692919	audbk	Transit	12/5/2007
		Girls of Riyadh [sound recording] : [a novel] /	39081082695896	audbk	Trace	12/4/2007
		New England white [sound recording] /	39081082692794	audbk	Trace	11/17/2007
		Plum lovin' [sound recording] : a Stephanie Plum between-the-numbers novel /	39081079093592	audbk	Trace	11/27/2007
		Simply magic [sound recording] /	39081082687919	audbk	Trace	12/5/2007
		Wild fire [sound recording] /	39081082698262	audbk	Transit	12/5/2007
	613.7 MCGR CD book	The ultimate weight solution [sound recording] : the 7 keys to weight loss freed	39081064518306	audbk	Transit	12/4/2007
	658.85 ZIGL CD book	Sell your way to the top [sound recording] /	39081064474112	audbk	Trace	11/28/2007
	BALDACCI CD book	Hour game [sound recording] /	39081075902747	audbk	Transit	12/5/2007
	CANNELL CD book	Cold hit [sound recording] : a Shane Scully novel /	39081079066549	audbk	Transit	12/4/2007
	COBEN CD book	Gone for good [sound recording] /	39081085593536	audbk	Trace	11/27/2007
	DEMILLE CD book	Plum Island [sound recording] /	39081075905526	audbk	Trace	11/24/2007
	DUNNING CD book	The bookwoman's last fling [sound recording] /	39081087528407	audbk	Transit	12/4/2007
	ESQUIVEL CD book	Malinche [sound recording] /	39081087527938	audbk	Trace	11/24/2007
	EVANOVIC CD book	Eleven on top [sound recording] /	39081079063629	audbk	Trace	11/28/2007
	FOLLETT CD Book	Whiteout [sound recording] /	39081082646337	audbk	Transit	12/4/2007
	HILLERMA Mystery Audio book	The fallen man [sound recording] /	39081054950634	audbk	Trace	11/24/2007
	LANDVIK CD book	Angry housewives eating bon bons [sound recording] /	39081064479582	audbk	Trace	12/5/2007
	LAURENS CD book	The promise in a kiss [sound recording] /	39081064491462	audbk	Transit	11/13/2007
	ROWLING CD book	Harry Potter and the goblet of fire [sound recording] /	39081068845309	audbk	Trace	11/30/2007
	SLAUGHTE CD Book	Faithless [sound recording] /	39081075993233	audbk	Transit	12/5/2007
	SONTAG	The volcano lover : a romance /	39081039110569	audbk	Trace	11/14/2007
	WOODS CD book	Dirty work [sound recording] : a Stone Barrington novel /	39081072562759	audbk	Trace	11/27/2007
	WOODS CD Book	Dark Harbor [sound recording] : [a Stone Barrington novel] /	39081075987417	audbk	Trace	11/27/2007

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CIRCRpt 12: Dusty Cover: branch, collection and last use dates can be selected – as needed

mn

Dusty Cover Report - Miami

Collection	Call Nbr	Title	Item Barcode	Itype	Item Status	Date Added	Last CKO Date	M	Use Total
bio	306.8743 PIER	Because I'm the mother, that's why : mostly true confessions of modern motherhoo	39081036001746	bk	i	3/24/1997			2
	320.553 MICH	American terrorist : Timothy McVeigh & the Oklahoma City bombing /	39081062003657	bk	i	4/17/2001	4/17/2003		3
	780.91 MIDLER	Bette : an intimate biography of Bette Midler /	39081039182097	bk	i	3/24/1997	8/22/2000		
	814.5 DAVE	The geography of the imagination : forty essays /	39081030506211	bk	i	3/24/1997	4/18/2001		
	A2116Aa B	Charles Francis Adams, 1835-1915, an autobiography: with a memorial address deli	39081045100281	bk	i	3/24/1997	8/9/2003		
	B 0716L	The scandalous regent; a life of Philippe, Duc d'Orleans, 1674-1723 and of his f	39081052563256	bk	i	2/23/1999	3/16/1999		
	B A1325b	Lyman Abbott, Christian evolutionist; a study in religious liberalism,	39081007011898	bk	i	3/24/1997			
	B A1355h	The Sultan:the life of Abdul Hamid II.	39081007011856	bk	i	3/24/1997			
	B A1826Af	For Sylvia, an honest account /	39081020361874	bk	i	3/24/1997			

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CIRCRpt 13: Collection age – as needed

Collection Age - Miami

Item Location	Collection	Item Age	0-1 Years		2-5 Years		6-10 Years		11-15 Years		> 15	
		Metrics	Item Count	Collection %	Item Count	Collection %	Item Count	Collection %	Item Count	Collection %	Item Count	Collection %
Allapattah Branch Library	abcas	Adult Audiobk-Cas	0	0	21	35.59%	20	33.90%	13	22.03%	5	8.47%
	abcd	Adult Audiobk-CD	13	30.23%	25	58.14%	4	9.30%	0	0	1	2.33%
	ablcas	Adult Audiobk-Cas-Lang	0	0	6	50.00%	0	0	4	33.33%	2	16.67%
	ablcd	Adult Audiobk-CD-Lang	0	0	1	100.00%	0	0	0	0	0	0

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CIRCRpt 14: Collection count: select branch and collections – as needed

al Items by Collection (count) - Miami

Collection	Coll Descr	Number of Items
abcas	Adult Audiobk-Cas	59
abcd	Adult Audiobk-CD	45
ablcas	Adult Audiobk-Cas-Lang	12
ablcd	Adult Audiobk-CD-Lang	1
bio	Biography	80
blkbio	Black Culture - Biography	148
blkfic	Black Culture - Fiction	7
blknon	Black Culture - Nonfiction	160
blkpb	Black Culture - Paperbacks	96
blkref	Black Culture - Reference	31
bsnon	BS - Nonfiction	1
bsrefr	BS - Ready Reference	4
cas	Audiocassette	172
cd	CD	54
cunon	Cuban Collection - Nonfiction	1
doc	Federal Document - Basement	1
fic	Fiction	244
ficm	Fiction - Mysteries	49
fics	Fiction - Science Fiction	4
ficw	Fiction - Westerns	3
flbio	FL - Biographies	4
fldvd	FL - Video - DVD	1
flnon	FL - Nonfiction	138
float	Floating	43
flref	FL - Reference	21
flrom	FL - CD ROM	1
flths	Hispanic Floating	13
flvdvd	FL - Video - DVD	1
found	Foundation Collection	1
hd	High Demand Floating Collection	668
jabcas	Children's Audiobooks on Cassette	48
jabcd	Children's Audiobooks on CD	3

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CIRCRpt 15: Collection count with status – as needed

al

Items by Collection and Status

Collection	Item Count									
Item Status Descr	Checked out	In Library	Incomplete Audiobook	Item Being Held	Mending	Newly Acquired	On Order (Acq Use Only)	Transit	Transit Request	Total
abcas	1	45	0	2	0	0	0	4	3	55
abcd	3	25	1	0	1	2	6	4	1	43
ablcas	0	11	0	0	0	0	0	1	0	12
Total	4	81	1	2	1	2	6	9	4	110

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CATRpt 1: Bib records with no items and no filter – as needed

Bib Status	Bib ID	Title
	923798	'Miracle' health claims [computer file] : add a dose of skepticism /
	1157057	'Salem's lot [electronic resource] /
	993234	'Scoping : a teen's star guide to school, friends, and, of course, guys /
	287900	'Teen.
	709207	'The pill' may not mix well with other drugs /
	1116022	'TIL DEATH DO US PART. LARGE PRINT
	388378	
	391218	
	392869	
	393015	
	744757	
	1050846	
	1056589	
	1056593	
	1058160	
	1066691	
	1070804	
	1071349	
	1072933	
	1078378	
	1081209	
	1083722	
	1086343	
	1093382	
	1093385	
	1096363	
Cataloging Complete	1097945	
	1124308	
	1127714	
	1128331	
	1132055	
	1132745	
	1132938	
	1132939	
	1133489	
	1133990	
	1134255	
	1134580	
	1135969	
	1136447	
	1136526	
	1136536	
	1138209	
	1139075	
	1139573	
	1140271	
	1140278	
	1140280	
	1140281	
	1140282	
	1140283	
	1140291	

CATRpt 2: Bib records with no items – as needed

Bib Status	Bib ID	Title
Cataloging Complete	1555	On the sand /
	3106	Now we are six.
	4452	The purchasing power of money.
	7250	The lover. Tea party. The basement.
	7251	Fireflies.
	9031	Combat missileman,
	11009	A history of the modern world, 1815-1910.
	12517	A guide to aquarium fishes and plants.
	14902	Un beso antes de morir
	15499	The case of the beautiful beggar.
	15850	Recherches pour une semanalyse.
	16143	Smith and Jones.
	21920	Hitler's spies and saboteurs; based on the German secret service war diary of Ge
	23249	The Northwest Passage: from the Mathew to the Manhattan, 1497 to 1969.
	25351	Russia,
	25687	The Darien disaster.
	28020	The total woman.
	28411	Bold voyages and great explorers; a history of discovery and exploration from th
	28909	Pageant of the Renaissance.
	29194	Beggar to king; all the occupations of Biblical times.
	30011	Scott's guidebook to stamp collecting,
	31223	Vindications: essays on the historical basis of Christianity.
	32446	Our sun.
	32914	England speaks,
	33596	The short novels of Tolstoy,
	35311	The paper chase.
	36856	A plate of red herrings.
	37634	Paris was our mistress; memoirs of a lost & found generation ...
	38349	Sarah.
	38438	Britannia: rowing alone across the Atlantic; the record of an adventure.
	39179	Dogs of the world; in color.
	40806	The art of courageous living.
	41873	Estudio de las barriadas lime~nas; informe presentado a Naciones Unidas en dicie
	41986	Jackson Pollock,
	42209	The Travels of Marco Polo.
	43442	At Bertram's hotel
	43879	Nemesis
	44488	Carthage
	45571	Challenge of the seven seas
	46738	Paris on parade.
	47975	The witnesses.
	48186	Kentucky ancestors.
	50123	Classics and commercials: a literary chronicle of the forties.
	50556	Ecrits et discours politiques.
	51397	Pan Am's world guide: the encyclopedia of travel.
	51530	Unfamiliar territory.
	53389	Selected stories of Sholom Aleichem [pseud.] /
	54415	Clothing concepts; a social-psychological approach.
	55293	Haven't we met before somewhere? Germany from the inside and out
	55385	The Latin quarter, past and present,
	56009	... Home is the sailor : the whole truth concerning the redoubtful adventures of
	56023	The two deaths of Quincas Wateryell ... /

CATRpt 3: Bib records with zero copies/with OCLC# - quarterly

bib#	tag 001	title
100048	ocm01393500-	Freckle face
100056	ocm01632417-	imperio bizantino
100068	ocm01632486-	juicio de Paris
100074	ocm01632518-	Devoradores de hombres
100111	ocm01632891-	By what authority
100133	ocm01417599-	filly for Joan
100143	ocm01633232-	adorador de serpientes
100188	ocm01379268-	Fun time terrariums and aquariums
100229	ocm01633897-	chico del ascensor
100231	ocm01633911-	final hour
100241	ocm01629383-	Horizon stories
100257	ocm01634137-	Portraits in the making
100306	ocm01634399-	modern theatre a study of dramatists and the drama
100308	ocm01512870-	Home of nymphs and vampires the isles of Greece
100333	ocm01464223-	Down to the sea in ships
100350	ocm01634588-	Gordon the goat
100363	ocm01243283-	Mystery in the Square Tower
100367	ocm01292023-	Mystery of the diamond necklace
100373	ocm01634700-	world of Velazquez 1599 1660
100447	ocm01634983-	Odes and epodes
100476	ocm01433335-	Revised lapidary handbook
100490	ocm01635136-	Por siempre otono
100507	ocm01400641-	Voyage to Coromandel
100511	ocm01635231-	numero detective recursos y artimanas de la estadistica
100525	ocm01635289-	Vilnius the capital of Lithuania
100530	ocm01400672-	iron arm of Michael Glenn

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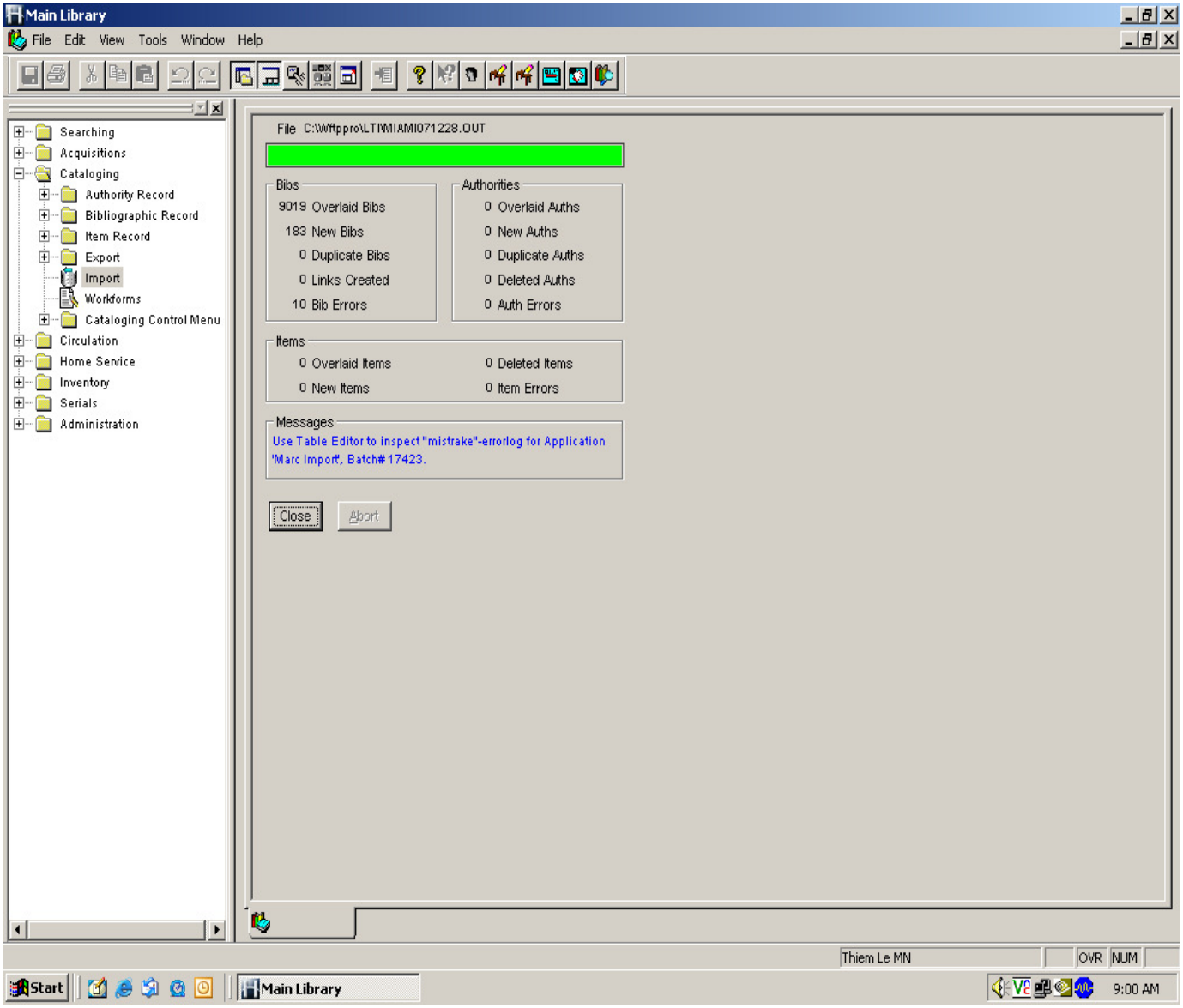
CATRpt 4: Bib Status report with Fast Adds - monthly

Choose the statuses you would like to include on the list. The status 'cataloging complete' is intentionally left off the list. This prompt requires at least one selection.

Available:	Selected:
IP:In Process	--- none ---
NS:No Status	
UC:Uncataloged	
UF:user fast added	
WD:Withdraw n	

CATRpt 5: Authority Control Error Batch Report – as needed




```
Application                     Batch No.                       Error No.
                                Date                            Time
                                Error                           Record
Marc Import                     17423                           1
                                12/28/07                        04:18PM
                                FilePos: 1024556.  Database Error| Directory contains non-
numeric data.
Marc Import                     17423                           2
                                12/28/07                        04:29PM
                                FilePos: 2202777.  Database Error| Directory contains non-
numeric data.
Marc Import                     17423                           3
                                12/28/07                        04:35PM
                                FilePos: 3661407.  Database Error| Directory contains non-
numeric data.
Marc Import                     17423                           4
                                12/28/07                        04:37PM
                                FilePos: 4070878.  Database Error| Directory contains non-
numeric data.
```

```
Marc Import                    17423                          5
                               12/28/07                       04:37PM
                               FilePos: 4093874.  Database Error| Directory contains non-
numeric data.
Marc Import                    17423                          6
                               12/28/07                       04:37PM
                               FilePos: 4175374.  Database Error| Directory contains non-
numeric data.
| Directory contains non-numeric data.
```

CATRpt 6: Technical Services Activity FY - annually

Category	Sub Category	Stat Transaction Location
	Metrics	Total
	Total	
	Month	Dec
	Total	
	Year	2007
	FY	2007
Auth Delta	Manually-added Auths	High Demand Collection
	1	1
Auth Delta	Manually-added Auths	Main Library
	23	23
Auth Delta	Manually-deleted Auths	Main Library
	42	42
Auth Delta	Batch-added Auths	Main Library
	255	255
Bib Delta	Manually-added Bibs	Allapattah Branch Library
	5	5
Bib Delta	Manually-added Bibs	Concord Branch Library
	1	1
Bib Delta	Manually-added Bibs	Coral Gables Branch Library
	16	16
Bib Delta	Manually-added Bibs	Coral Reef Branch Library
	1	1
Bib Delta	Manually-added Bibs	Country Walk Branch Library
	1	1
Bib Delta	Manually-added Bibs	Doral Branch Library
	2	2
Bib Delta	Manually-added Bibs	Edison Branch Library
	2	2
Bib Delta	Manually-added Bibs	Fairlawn Branch Library
	9	9
Bib Delta	Manually-added Bibs	Golden Glades Branch Library
	1	1
Bib Delta	Manually-added Bibs	High Demand Collection
	2	2
Bib Delta	Manually-added Bibs	Homestead Branch Library
	2	2
Bib Delta	Manually-added Bibs	Kendall Branch Library
	8	8
Bib Delta	Manually-added Bibs	Little River Branch Library
	6	6
Bib Delta	Manually-added Bibs	Miami Beach Regional Library
	4	4
Bib Delta	Manually-added Bibs	Main Library
	130	130
Bib Delta	Manually-added Bibs	Miami Springs Branch Library
	2	2
Bib Delta	Manually-added Bibs	Bookmobile
	1	1
Bib Delta	Manually-added Bibs	North Central Branch Library
	7	7
Bib Delta	Manually-added Bibs	North Dade Regional Library
	8	8

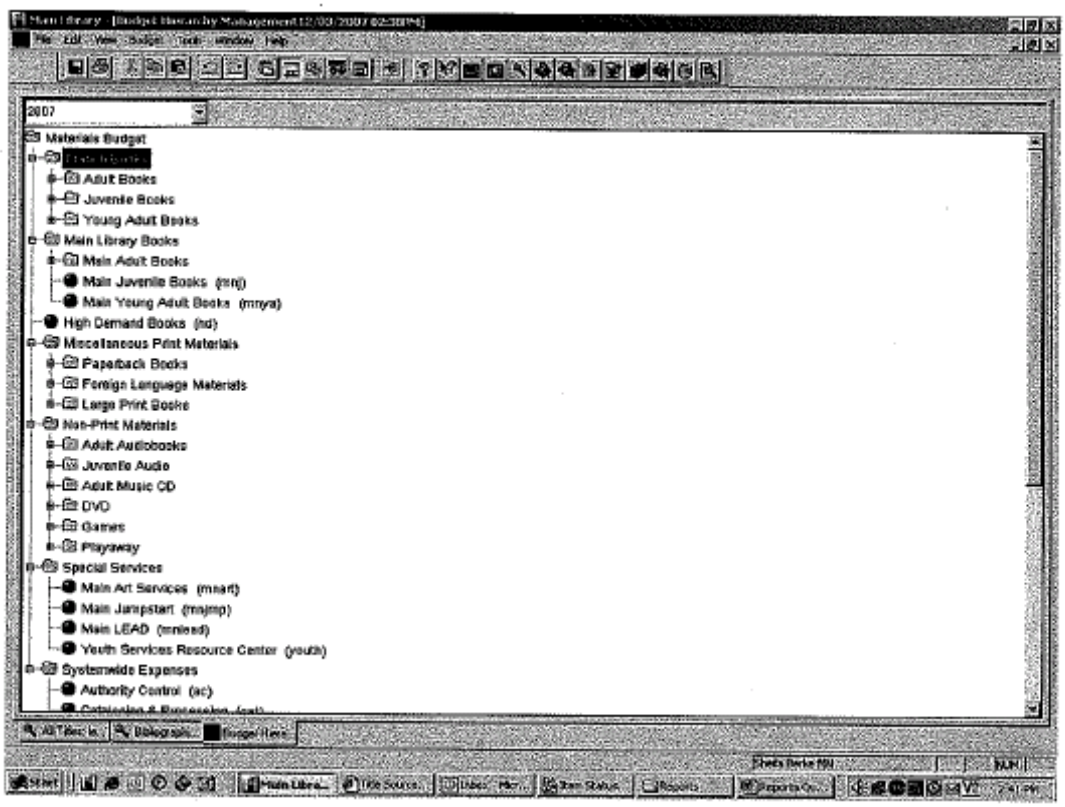
Bib Delta	Manually-added Bibs	North Shore Branch Library
	11	11
Bib Delta	Manually-added Bibs	Opa-locka Branch Library
	1	1
Bib Delta	Manually-added Bibs	South Dade Regional Library
	1	1
Bib Delta	Manually-added Bibs	South Miami Branch Library
	4	4
Bib Delta	Manually-added Bibs	South Shore Branch Library
	1	1
Bib Delta	Manually-added Bibs	West Dade Regional Library
	4	4
Bib Delta	Manually-added Bibs	West Kendall Regional Library
	5	5
Bib Delta	Manually-deleted Bibs	Main Library
	295	295
Bib Delta	Manually-deleted Bibs	South Dade Regional Library
	1	1
Bib Delta	Manually-deleted Bibs	Serials Control
	1	1
Bib Delta	Batch-added Bibs	Main Library
	"3,361"	"3,361"
Bib Delta	Batch-deleted Bibs	Main Library
	"1,126"	"1,126"
Item Delta	Manually-added Items	Allapattah Branch Library
	23	23
Item Delta	Manually-added Items	California Club Branch Library
	21	21
Item Delta	Manually-added Items	Concord Branch Library
	39	39
Item Delta	Manually-added Items	Coral Gables Branch Library
	89	89
Item Delta	Manually-added Items	Connections
	19	19
Item Delta	Manually-added Items	Coconut Grove Branch Library
	71	71
Item Delta	Manually-added Items	Coral Reef Branch Library
	166	166
Item Delta	Manually-added Items	Culmer Branch Library
	13	13
Item Delta	Manually-added Items	Civic Center Branch Library
	32	32
Item Delta	Manually-added Items	Country Walk Branch Library
	10	10
Item Delta	Manually-added Items	Doral Branch Library
	49	49
Item Delta	Manually-added Items	Edison Branch Library
	20	20
Item Delta	Manually-added Items	Fairlawn Branch Library
	33	33
Item Delta	Manually-added Items	Golden Glades Branch Library
	20	20
Item Delta	Manually-added Items	High Demand Collection
	12	12
Item Delta	Manually-added Items	Hialeah Gardens Branch Library
	10	10
Item Delta	Manually-added Items	Homestead Branch Library
	206	206

Item Delta	Manually-added Items	Hispanic Branch Library
	134	134
Item Delta	Manually-added Items	Key Biscayne Branch Library
	27	27
Item Delta	Manually-added Items	Closed Kendale Lakes Branch Library
	25	25
Item Delta	Manually-added Items	Kendall Branch Library
	61	61
Item Delta	Manually-added Items	Lemon City Branch Library
	6	6
Item Delta	Manually-added Items	Lakes Of The Meadow Branch Library
	11	11
Item Delta	Manually-added Items	Little River Branch Library
	46	46
Item Delta	Manually-added Items	Miami Beach Regional Library
	121	121
Item Delta	Manually-added Items	Model City Branch Library
	18	18
Item Delta	Manually-added Items	Miami Lakes Branch Library
	219	219
Item Delta	Manually-added Items	Main Library
	"15,220"	"15,220"
Item Delta	Manually-added Items	Miami Springs Branch Library
	29	29
Item Delta	Manually-added Items	Bookmobile
	67	67
Item Delta	Manually-added Items	Naranja Branch Library
	8	8
Item Delta	Manually-added Items	North Central Branch Library
	31	31
Item Delta	Manually-added Items	North Dade Regional Library
	130	130
Item Delta	Manually-added Items	Northeast Branch Library
	5	5
Item Delta	Manually-added Items	North Shore Branch Library
	41	41
Item Delta	Manually-added Items	Opa-locka Branch Library
	7	7
Item Delta	Manually-added Items	Closed Pinecrest Branch Library
	29	29
Item Delta	Manually-added Items	Palm Springs North Branch Library
	6	6
Item Delta	Manually-added Items	South Dade Regional Library
	141	141
Item Delta	Manually-added Items	Shenandoah Branch Library
	35	35
Item Delta	Manually-added Items	Sunny Isles Branch Library
	64	64
Item Delta	Manually-added Items	South Miami Branch Library
	82	82
Item Delta	Manually-added Items	Sunset Branch Library
	134	134
Item Delta	Manually-added Items	South Shore Branch Library
	12	12
Item Delta	Manually-added Items	West Dade Regional Library
	208	208
Item Delta	Manually-added Items	West Flagler Branch Library
	19	19

Item Delta	Manually-added Items	West Kendall Regional Library
	199	199
Item Delta	Manually-deleted Items	Allapattah Branch Library
	546	546
Item Delta	Manually-deleted Items	California Club Branch Library
	164	164
Item Delta	Manually-deleted Items	Concord Branch Library
	18	18
Item Delta	Manually-deleted Items	Coral Gables Branch Library
	176	176
Item Delta	Manually-deleted Items	Connections
	710	710
Item Delta	Manually-deleted Items	Coconut Grove Branch Library
	152	152
Item Delta	Manually-deleted Items	Coral Reef Branch Library
	"1,565"	"1,565"
Item Delta	Manually-deleted Items	Culmer Branch Library
	134	134
Item Delta	Manually-deleted Items	Civic Center Branch Library
	21	21
Item Delta	Manually-deleted Items	Country Walk Branch Library
	288	288
Item Delta	Manually-deleted Items	Doral Branch Library
	439	439
Item Delta	Manually-deleted Items	Edison Branch Library
	118	118
Item Delta	Manually-deleted Items	Fairlawn Branch Library
	172	172
Item Delta	Manually-deleted Items	Golden Glades Branch Library
	295	295
Item Delta	Manually-deleted Items	High Demand Collection
	57	57
Item Delta	Manually-deleted Items	Hialeah Gardens Branch Library
	22	22
Item Delta	Manually-deleted Items	Homestead Branch Library
	400	400
Item Delta	Manually-deleted Items	Hispanic Branch Library
	46	46
Item Delta	Manually-deleted Items	Key Biscayne Branch Library
	614	614
Item Delta	Manually-deleted Items	Kendall Branch Library
	381	381
Item Delta	Manually-deleted Items	Lemon City Branch Library
	24	24
Item Delta	Manually-deleted Items	Lakes Of The Meadow Branch Library
	38	38
Item Delta	Manually-deleted Items	Little River Branch Library
	300	300
Item Delta	Manually-deleted Items	Miami Beach Regional Library
	894	894
Item Delta	Manually-deleted Items	Model City Branch Library
	"1,234"	"1,234"
Item Delta	Manually-deleted Items	Miami Lakes Branch Library
	641	641
Item Delta	Manually-deleted Items	Main Library
	"2,487"	"2,487"
Item Delta	Manually-deleted Items	Miami Springs Branch Library
	38	38

Item Delta	Manually-deleted Items 192	Bookmobile 192
Item Delta	Manually-deleted Items 62	Naranja Branch Library 62
Item Delta	Manually-deleted Items 747	North Central Branch Library 747
Item Delta	Manually-deleted Items 145	North Dade Regional Library 145
Item Delta	Manually-deleted Items 390	Northeast Branch Library 390
Item Delta	Manually-deleted Items 50	North Shore Branch Library 50
Item Delta	Manually-deleted Items 7	Opa-locka Branch Library 7
Item Delta	Manually-deleted Items 1	Closed Pinecrest Branch Library 1
Item Delta	Manually-deleted Items 9	Palm Springs North Branch Library 9
Item Delta	Manually-deleted Items 561	South Dade Regional Library 561
Item Delta	Manually-deleted Items 52	Shenandoah Branch Library 52
Item Delta	Manually-deleted Items 279	Sunny Isles Branch Library 279
Item Delta	Manually-deleted Items 169	South Miami Branch Library 169
Item Delta	Manually-deleted Items 46	Sunset Branch Library 46
Item Delta	Manually-deleted Items 59	South Shore Branch Library 59
Item Delta	Manually-deleted Items 21	Tamiami Branch Library 21
Item Delta	Manually-deleted Items 591	West Dade Regional Library 591
Item Delta	Manually-deleted Items 309	West Flagler Branch Library 309
Item Delta	Manually-deleted Items 372	West Kendall Regional Library 372
Total		
	"39,344"	"39,344"

AcqRpt 1 – Hierarchy Report – As needed.
Fund accounts are grouped by type of material, and display budgeted amounts, encumbrances, expenditures, and balances.



02/11/08 Report: Budget Hierarchy Fiscal Year 200702/11/2008 04:38PM Page No. 1

Budget Group	Amount	On Order	Spent	Unspent	Available
|---Materials Budget	5500000.00	808812.08	2556196.98	2943803.02	2134990.94
|---Branch Books	1215573.41	444074.30	272425.93	943147.48	499073.18
|---Adult Books	490534.53	107630.76	177593.15	312941.38	205310.62
|---Allapattah Adult Books (ala)	3013.59	1041.78	894.62	2118.97	1077.19
|---California Club Adult Books (	2892.00	254.73	2144.26	747.74	493.01
|---Concord Adult Books (cda)	5786.70	1212.42	1828.32	3958.38	2745.96
|---Coral Gables Adult Books (c	23685.01	4218.14	6129.75	17555.26	13337.12
|---Connections Adult Books (cr	3002.40	518.65	707.34	2295.06	1776.41
|---Coconut Grove Adult Books	4957.32	953.25	1379.86	3577.46	2624.21
|---Coral Reef Adult Books (cra)	14806.68	2501.77	4328.34	10478.34	7976.57
|---Culmer/Overtown Adult Book	4800.40	1765.82	1863.84	2936.56	1170.74
|---Civic Center Adult Books (cv	1456.59	134.49	100.83	1355.76	1221.27
|---Country Walk Adult Books (c	3629.75	911.34	877.34	2752.41	1841.07
|---Doral Adult Books (dra)	5145.41	986.26	1612.25	3533.16	2546.90
|---Edison Adult Books (eda)	4758.02	1828.93	1799.41	2958.61	1129.68
|---Fairlawn Adult Books (fra)	4219.34	868.38	1188.99	3030.35	2161.97
|---Golden Glades Adult Books	5642.37	799.74	1332.37	4310.00	3510.26
|---Hialeah Gardens Adult Books	1069.44	258.78	334.94	734.50	475.72
|---Homestead Adult Books (hm	12295.01	2801.97	2953.49	9341.52	6539.55
|---Hispanic Adult Books (hsa)	3087.50	710.80	670.58	2416.92	1706.12
|---International Mall Adult Books	5500.00	134.90	370.48	5129.52	4994.62
|---Key Biscayne Adult Books (k	6155.77	1170.15	2321.05	3834.72	2664.57
|---Kendall Adult Books (kna)	19541.35	3902.53	7403.39	12137.96	8235.43
|---Lemon City Adult Books (lca	6722.69	715.84	2098.57	4624.12	3908.28
|---Lakes of the Meadow Adult B	6603.70	1234.15	1858.58	4745.12	3510.97
|---Little River Adult Books (lra)	5553.60	1893.06	3508.94	2044.66	151.60
|---Miami Beach Adult Books (m	39376.74	7242.44	12025.40	27351.34	20108.90
|---Model City Adult Books (mca	12541.28	2351.33	3088.77	9452.51	7101.18
|---Miami Lakes Adult Books (m	11680.66	4985.24	6114.88	5565.78	580.54
|---Miami Springs Adult Books (	1525.45	240.98	607.32	918.13	677.15
|---Mobile Library Adult Books (	1400.00	287.33	246.25	1153.75	866.42
|---Naranja Adult Books (naa)	5494.42	1517.74	1763.56	3730.86	2213.12
|---North Central Adult Books (n	8319.92	2091.07	2958.66	5361.26	3270.19
|---North Dade Adult Books (nd	29231.14	6086.16	6423.31	22807.83	16721.67
|---Northeast Adult Books (nea)	5065.62	1213.94	2827.27	2238.35	1024.41
|---North Shore Adult Books (ns	6539.85	1763.28	1780.74	4759.11	2995.83
|---Opa-Locka Adult Books (opa	5141.10	1484.65	2470.50	2670.60	1185.95
|---Palmetto Bay Adult Books (p	0.00	0.00	0.00	0.00	0.00
|---Palm Springs North Adult Boo	3999.95	1630.28	1304.47	2695.48	1065.20
|---Pinecrest Adult Books (pca)	11209.00	224.56	625.91	10583.09	10358.53
|---South Dade Adult Books (sd	38885.73	8231.33	13937.25	24948.48	16717.15
|---Shenandoah Adult Books (sh	6346.96	1990.59	2465.99	3880.97	1890.38
|---Sunny Isles Adult Books (sia	3206.60	944.18	1310.08	1896.52	952.34
|---South Miami Adult Books (sr	12152.29	2969.64	5132.08	7020.21	4050.57
|---Sunset Adult Books (sna)	5031.19	1086.43	970.98	4060.21	2973.78
|---South Shore Adult Books (ss	4074.08	799.60	1035.28	3038.80	2239.20
|---Tamiami Adult Books (taa)	4016.19	737.16	987.71	3028.48	2291.32
|---Virrick Park Adult Books (vp	5472.00	106.15	276.83	5195.17	5089.02
|---West Dade Adult Books (wd	33518.27	7596.05	13116.48	20401.79	12805.74
|---West Flagler Adult Books (w	5794.34	1057.10	1431.02	4363.32	3306.22
|---West Kendall Adult Books (w	33411.67	5495.64	7044.85	26366.82	20871.18
|---System Request (req)	15999.19	2311.49	4042.27	11956.92	9645.43
|---Adult Book Cataloging & Proc	26776.25	12368.50	35897.75	-9121.50	-21490.00
|					
|---Juvenile Books	550205.67	251344.57	56364.13	493841.54	242496.97
|---Allapattah Juvenile Books (al	8906.12	3556.38	620.70	8285.42	4729.04
|---California Club Juvenile Book	4276.37	2525.62	446.82	3829.55	1303.93

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AcqRpt 2 - Budget Summary Report – As needed.

Fund accounts grouped using a compound search, usually by location. Shows budget amounts, encumbrances, expenditures and balances.

Total Amount	49912.71		
Total On Order	6926.33	Total Percent On Order	13.87
Total Spent	3434.21	Total Percent Spent	6.88
Total Available	39552.17	Total Percent Available	79.24
Total Unspent	46478.50	Total Percent Unspent	93.11

Category	Year	Status	Amount	On Order	Spent	Available
coa	2007	Open	4957.32	926.57	750.66	3280.09
coaud	2007	Open	5832.76	1774.56	1374.36	2683.84
cocasj	2007	Open	200.00	0.00	0.00	200.00
cocd	2007	Open	0.00	0.00	0.00	0.00
coj	2007	Open	4128.78	1480.94	478.99	2168.85
cola	2007	Open	0.00	0.00	0.00	0.00
coli	2007	Open	0.00	0.00	0.00	0.00
colj	2007	Open	0.00	0.00	0.00	0.00
colp	2007	Open	700.00	144.85	298.60	256.55
colpba	2007	Open	0.00	0.00	0.00	0.00
cont	2007	Open	25709.00	0.00	0.00	25709.00
copba	2007	Open	400.00	17.95	12.57	369.48
copbj	2007	Open	300.00	0.00	0.00	300.00
copbya	2007	Open	200.00	0.00	0.00	200.00
cova	2007	Open	3314.99	1068.30	112.19	2134.50
covj	2007	Open	2312.02	1171.76	198.44	941.82
coya	2007	Open	1857.84	341.42	208.40	1308.02

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AcqRpt 3 – Acquisitions Fund Status – As needed.

Fund accounts grouped by location. Shows budget amounts, encumbrances, expenditures and balances.

Acquisitions Fund Status - Miami

Account Descr	Budget	Year	Status	Budget Amt	Encumbered Amt	Expended Amt	Balance Remaining	Remaining %
Coconut Grove Adult Books	coa.2006	2006	Closed	$9,935.87	$137.32	$7,825.40	$1,973.15	19.86%
Coconut Grove Adult Audiobooks	coaud.2006	2006	Closed	$13,312.55	$232.76	$9,208.44	$3,871.35	29.08%
Coconut Grove Juvenile Audio	cocasj.2006	2006	Closed	$405.25	$0.00	$173.45	$231.80	57.20%
Coconut Grove Adult Music CD	cocd.2006	2006	Closed	$0.00	$0.00	$0.00	$0.00	
Coconut Grove Juvenile Books	coj.2006	2006	Closed	$6,097.76	$1,150.97	$3,872.96	$1,073.83	17.61%
Coconut Grove Language Adult	cola.2006	2006	Closed	$449.54	$0.00	$140.48	$309.06	68.75%
Coconut Grove Language Instruction	coli.2006	2006	Closed	$501.60	$0.00	$282.75	$218.85	43.63%
Coconut Grove Language Juvenile	colj.2006	2006	Closed	$307.17	$0.00	$66.42	$240.75	78.38%
Coconut Grove Large Print	colp.2006	2006	Closed	$2,634.24	$0.00	$2,311.52	$322.72	12.25%
Coconut Grove Language Paperback Adult	colpba.2006	2006	Closed	$0.00	$0.00	$0.00	$0.00	
Coconut Grove Paperback Adult	copba.2006	2006	Closed	$600.00	$0.00	$496.23	$103.77	17.30%
Coconut Grove Paperback Juvenile	copbj.2006	2006	Closed	$360.00	$0.00	$67.34	$292.66	81.29%
Coconut Grove Paperback Young Adult	copbya.2006	2006	Closed	$300.00	$0.00	$32.07	$267.93	89.31%
Coconut Grove Adult DVD	cova.2006	2006	Closed	$3,212.15	$14.99	$2,999.99	$197.17	6.14%
Coconut Grove Juvenile DVD	covj.2006	2006	Closed	$2,233.66	$212.02	$416.14	$1,605.50	71.88%
Coconut Grove Young Adult Books	coya.2006	2006	Closed	$2,650.18	$257.84	$1,113.59	$1,278.75	48.25%

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AcqRpt 4 – PR Distribution by Budget – As needed.

Titles selected from specified selection lists, using specified fund account, with total amount.

AUDBBC0807 PR Distribution by Budget (Miami)

title	author	isbn	budget	POL Unit Price	quantity	ext_price
CALDER STORM	Dailey, Janet.	9780792750604 :	cgaud.2007	$79.95	1	$79.95
IN BIG TROUBLE	Lippman, Laura.	9780792744917 :	cgaud.2007	$89.95	1	$89.95
MIDNIGHT RAMBLER	Swain, James.	9780792750338 :	cgaud.2007	$79.95	1	$79.95
STRONG POISON	Sayers, Dorothy L.	9780792750581 :	cgaud.2007	$64.95	1	$64.95
THE HEIR	BRADFORD, BARBARA TAYLOR.	9780792750475 :	cgaud.2007	$115.95	1	$115.95
THE RACE	Patterson, Richard North.	9780792750505 :	cgaud.2007	$94.95	1	$94.95
Total					6	$525.70

AcqRpt 5 – Encumbrance Totals by PO, Paged by Budget – As needed.
Amounts encumbered for specified fund account, totaled by purchase order.

wka.2006

Encumbrance Totals by PO, Paged by Budget - Miami

PO Creation Date	PO Number	Me	On Order
9/21/2006	BT0806C-2		$79.84
4/16/2007	FC0307		$14.97
5/1/2007	TP0407C2		$89.05
5/8/2007	200RP0307C		$91.01
6/19/2007	TP0507ADD		$40.79
7/11/2007	FC0407		$101.79
	FC0607		$14.71
Total			**$432.16**

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AcqRpt 6 – Expenditure Totals by PO, Paged by Budget – As needed.
Amounts expended for specified fund account, totaled by purchase order.

wka.2006

Expenditure Totals by PO, Paged by Budget - Miami

PO Creation Date	PO Number	N	Spent
1/10/2006	TP1205C-2		$820.34
3/30/2006	TP0306C-2		$28.00
5/9/2006	TP0406C		$111.42
	TP0406C-2		$46.32
5/24/2006	FC0406		$565.61
6/5/2006	TP0506C		$60.00
	TP0506C-2		$57.74
7/3/2006	BIORP0606		$765.73
7/6/2006	FC0506		$825.02
7/7/2006	TP0606C		$2,337.33
	TP0606C-2		$1,789.17
	TP0606R		$1,420.78
7/11/2006	FC0606		$1,334.41
8/8/2006	NONFICTION33		$16.92
	TP0706C		$2,510.44
	TP0706C-2		$2,756.26
	TP0706R		$2,243.71
8/23/2006	BT0606C		$45.14
8/25/2006	NONFICTION36		$115.40
8/31/2006	TP0806C		$1,899.14
	TP0806C-2		$1,260.72
	TP0806R		$614.95
9/12/2006	NONFIC0906		$11.89
9/14/2006	FC0706		$1,230.31
9/21/2006	BT0806C-2		$33.23
10/2/2006	BRODART10		$11.19
10/3/2006	BT0706C		$15.23
	TP0906C		$1,754.39
	TP0906C-2		$1,951.27
	TP0906R		$503.02
10/4/2006	FC0806		$1,318.31
10/25/2006	BT0906C		$54.16
10/27/2006	FC0906		$1,237.59
10/31/2006	SM0906A		$393.96
	SM0906B		$629.05
	SM1006A		$142.03
	TP1006C		$1,541.05
	TP1006C-2		$850.85
	TP1006R		$219.24
11/20/2006	700RP0906C		$1,176.54
11/27/2006	BN1127		$71.19
12/4/2006	TP1106C		$690.95
	TP1106C-2		$985.88

AcqRpt 7 – Encumbrances by Budget Account – As needed.
Titles ordered for specified fund account, grouped by purchase order and totaled.

coa.2006

Encumbrances by Budget Account - Miami

PO Number	Title	Unit Price	On Order
FC0407	BOBBIE FAYE'S VERY (VERY, VERY, VERY) BAD DAY : A NOVEL	$12.95	$7.64
	BRIGHT LIGHTS, BIG ASS : A SELF-INDULGENT, SURLY, EX-SORORITY GIRL'S GUIDE TO WHY IT OFTEN SUCKS IN THE CITY, OR WHO ARE THESE IDIOTS AND WHY...	$14.00	$8.12
	CRIME AND CLUTTER : A FRIDAY AFTERNOON CLUB MYSTERY	$12.99	$7.66
	DIRTY GAME	$14.95	$8.67
	GIRL WITH THE GOLDEN SHOES	$12.95	$8.23
	LITTLE BIT MARRIED : A NOVEL	$13.95	$8.23
	SCENT OF BLOOD	$14.95	$8.82
	Simple gifts /	$12.99	$7.66
	STREET GIRL NAMED DESIRE : A NOVEL	$13.95	$8.23
	TAKE HER MAN	$15.00	$8.85
TP0307C2	PANTHER IS A BLACK CAT : AN ACCOUNT OF THE EARLY YEARS OF THE BLACK PANTHER PARTY - ITS ORIGINS, ITS GOALS, AND ITS STRUGGLE FOR SURVIVAL	$16.95	$15.26
TP0507C	LAST EPIC NAVAL BATTLE : VOICES FROM LEYTE GULF	$39.95	$39.95
Total			$137.32

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AcqRpt 8 – Expenditures by Budget & PO – As needed.

Titles invoiced for specified fund account, grouped by purchase order and totaled.

coa.2006

Expenditures by Budget & PO -
Miami

PO Number	Title	Unit Price	Spent
TP1206C	MELISSA LEAPMAN'S KNITTING BEYOND SCARVES : EASY LESSONS THAT LET YOU KNIT WHAT YOU NEVER THOUGHT YOU COULD	$19.95	$17.96
	ONE YEAR BIBLE FOR NEW BELIEVERS. NLT	$26.99	$26.99
	OUTLOOK 2007 ALL-IN-ONE DESK REFERENCE FOR DUMMIES	$29.99	$17.99
	POST-EMANCIPATION RACE RELATIONS IN THE BAHAMAS	$59.95	$59.95
	POWERPOINT 2007 ALL-IN-ONE DESK REFERENCE FOR DUMMIES	$29.99	$17.99
	SKINNY COOKS CAN'T BE TRUSTED	$26.95	$15.12
	Small-boat seamanship manual /	$19.95	$16.96
	The checklist : what you and your family need to know to prevent disease and live a long and healthy life /	$24.95	$14.00
	The judges : a major exploration of America's court system and the many changes it must make /	$27.95	$29.95
	TRUE STORIES OF LAW AND ORDER : THE REAL CRIMES BEHIND THE BEST EPISODES OF THE HIT TV SHOW	$14.00	$8.40
	WHAT YOUR DOCTOR MAY NOT TELL YOU ABOUT DEPRESSION	$14.99	$8.99
	WORD 2007 ALL-IN-ALL DESK REFERENCE FOR DUMMIES	$29.99	$17.99
Total			$7,825.40

14/14

AcqRpt 9 – Titles by Budget Report – As needed.
Titles ordered for specified fund account, with purchase orders and amounts encumbered or expended for each.

Description Hialeah Gardens Juvenile DVD
Accounting Reference
Total On Order 458.03
Total Spent 176.15

PO Number	Title	Unit Price	On Order	Spent
JDVD0607M	1Her very first adventures	14.98	0.00	11.24
JDVD0607M	Avatar, the last airbender. Book 2, Earth. Volume 2	16.99	0.00	12.74
JDVD0607M	Blues room. Knights of the snack table	16.99	0.00	12.74
JDVD0607M	Book 2: Earth: Volume 3.	16.99	0.00	12.74
JDVD0607M	BRIDGE TO TERABITHIA.	22.99	0.00	22.49
JDVD0607M	Charlotte's web	28.98	0.00	22.49
JDVD0607M	Eragon	29.98	0.00	22.49
JDVD0607M	Happy feet	28.98	0.00	21.74
JDVD0607M	Peter Pan	29.99	0.00	22.49
JDVD0607M	That's so suite life of Hannah Montana	19.99	0.00	14.99
JDVD1107M	The adventures of Tom Thumb and Thumbelina	19.99	14.99	0.00
JDVD1107M	Alice in Wonderland	29.99	22.49	0.00
JDVD1107M	All dogs go to heaven	14.99	11.24	0.00
JDVD1107M	Barney - the imagination collection	29.99	22.49	0.00
JDVD1107M	Cantos y rimas	16.99	12.74	0.00
JDVD1107M	Cars	29.99	22.49	0.00
JDVD1107M	Charlie and lola vol. 6-how many minutes until	14.99	11.24	0.00
JDVD1107M	A christmas story	19.99	14.99	0.00
JDVD1107M	The chronicles of Narnia. The lion, the witch and the	29.99	22.49	0.00
JDVD1107M	The dark crystal	24.99	18.74	0.00
JDVD1107M	Disney princess enchanted tales-follow your dreams	26.99	20.24	0.00
JDVD1107M	Dora the explorer dora saves the mermaids	19.99	14.99	0.00
JDVD1107M	Hannah montana - life's what you make it	19.99	14.99	0.00
JDVD1107M	Hannah montana - livin' the rock star life	19.99	14.99	0.00

Sort... Display... Total: 39

RFP 643

AcqRpt 10 – Cancellation Report for Branches – As needed.

List of titles cancelled with cancellation note, for specified fund account, grouped by purchase order.

co:Coconut Grove Branch Library Cancellation Report for Branches - Miami

PO Number	POLI Cancel Date	BIB ID	Title	Unit Price	POL Change Order Note
JBWI1105C	12/13/2006	1171050	Harry Houdini /	14.99	BEX
		1171066	Kingdom Hearts: Volume 1.	5.99	BEX
JBWI1205C	10/11/2006	1172647	Star wars : Clone Wars adventures. Volume 4 /	6.95	OOP/OOS - Per email dated 10/10/06
		1175056	Bone. [Vol. 2], The great cow race /	18.95	OOP/OOS - Per email dated 10/10/06
JBWIDVD0406	6/1/2007	998782	Hamtaro : little hamsters, big adventures. Vol. 3, a surprise party!	14.98	OOS - On cancellation email dated 07/05/06
		1194681	Aladdin & his wonderful lamp	6.98	OOS - On cancellation email dated 07/05/06
		1194694	The boy who left home to find out about the shivers	6.98	MOR - On email cancellation
		1194699	Cinderella	6.98	OOP - On cancellation email dated 07/05/06
		1194703	The dancing princesses	6.98	OOS - On cancellation email dated 07/05/06
		1194710	The emperor's new clothes	6.98	MOR - On email cancellation
		1194716	"Ham-Ham Times": The First Issue!.	14.98	BEX - On email cancellation
		1194717	A Ham-Ham Valentine!.	14.98	OOS - On cancellation email dated 07/05/06
		1194718	Hansel and Gretel	6.98	OOS - On cancellation email dated 07/05/06
		1194725	Jack and the beanstalk	6.98	NAC - On cancellation notice (MOR) dated 07/06/06
		1194726	Jack in!	14.98	BEX - On cancellation invoice dated 11/02/06
		1194730	King Of The Pirates.	19.98	BEX - On email cancellation

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AcqRpt 11 – Invoices to Hold Report – Weekly.

Items invoiced but still indicating unreceived status – statements that should not be approved for payment.

Invoices to Hold Report
(Items invoiced, but still On Order/Not Received)

invoice	PO	invoice date	vendor	branch	status	barcode	title
2671623	YANON0906	Jan 26 2007	Book Wholesaler Inc.	mn	On Order (Acq Use Only)	39081089195288	Careers for good samaritans other humanitarian types
2671623	YANON0906	Jan 26 2007	Book Wholesaler Inc.	nd	On Order (Acq Use Only)	39081089195601	Careers for kids at heart others who adore children
2676574	JBWIDVD0906	Mar 2 2007	Book Wholesaler Inc.	mn	On Order (Acq Use Only)	39081056340933	Akeelah and the bee
2676574	JBWIDVD0906	Mar 2 2007	Book Wholesaler Inc.	ms	On Order (Acq Use Only)	39081081790425	This is America Charlie Brown
2691402	JBWIDVD0906	Mar 9 2007	Book Wholesaler Inc.	dr	On Order (Acq Use Only)	acq5218562	Animaniacs Vol 1 disc 1
2691402	JBWIDVD0906	Mar 9 2007	Book Wholesaler Inc.	fr	On Order (Acq Use Only)	acq5218563	Animaniacs Vol 1 disc 1
2691402	JBWIDVD0906	Mar 9 2007	Book Wholesaler Inc.	fr	On Order (Acq Use Only)	acq5220142	Pinky and the Brain Vol 1 disc 1
2691402	JBWIDVD0906	Mar 9 2007	Book Wholesaler Inc.	lc	On Order (Acq Use Only)	acq5220143	Pinky and the Brain Vol 1 disc 1
2691402	JBWIDVD0906	Mar 9 2007	Book Wholesaler Inc.	mn	On Order (Acq Use Only)	acq5220145	Pinky and the Brain Vol 1 disc 1
2702874	JBWI1006C	Feb 22 2007	Book Wholesaler Inc.	lm	On Order (Acq Use Only)	39081089037811	Star wars Clone Wars adventures Volume 6
2707427	JBWI1006C	Feb 15 2007	Book Wholesaler Inc.	ms	On Order (Acq Use Only)	39081088332965	Blue Burt and Wiggles
2707430	JBWI0806C	Feb 22 2007	Book Wholesaler Inc.	lm	On Order (Acq Use Only)	39081089203645	Exploring ancient Egypt
2722773	JBWI1106C	Feb 22 2007	Book Wholesaler Inc.	lm	On Order (Acq Use Only)	39081089064047	Walt Disneys Mickey Mouse adventures 11
2724840	JBWI1106C	Feb 7 2007	Book Wholesaler Inc.	dr	On Order (Acq Use Only)	39081089066133	Flight
2732442	JBWISPAN0906	Mar 2 2007	Book Wholesaler Inc.	ms	On Order (Acq Use Only)	39081089051085	Rave 4
2735816	JBWIRPL1006	Feb 22 2007	Book Wholesaler Inc.	wd	On Order (Acq Use Only)	39081089873041	Margret H A Reys Curious George and the hot air balloon
2735820	YAFIC1206	Mar 9 2007	Book Wholesaler Inc.	wk	On Order (Acq Use Only)	39081089841089	Letters from a slave boy the story of Joseph Jacobs
2744582	JBWI1106C	Mar 13 2007	Book Wholesaler Inc.	dr	On Order (Acq Use Only)	39081089835073	Its shofar time
2748985	JBWIMUSICCD06	Mar 16 2007	Book Wholesaler Inc.	ms	On Order (Acq Use Only)	39081056375038	World party
2752117	JBWI0806C	Mar 2 2007	Book Wholesaler Inc.	ms	On Order (Acq Use Only)	39081089223114	Star wars Clone Wars adventures Volume 5
2752118	JBWI0906C	Mar 2 2007	Book Wholesaler Inc.	ms	On Order (Acq Use Only)	39081089042597	Micro machines ultra small world of nanotechnology
2768630	JBWILNG06	Mar 2 2007	Book Wholesaler Inc.	mb	On Order (Acq Use Only)	acq5268017	rapa gigante The giant turnip
2768630	JBWILNG06	Mar 2 2007	Book Wholesaler Inc.	mc	On Order (Acq Use Only)	acq5267760	armoire magique
2768630	JBWILNG06	Mar 2 2007	Book Wholesaler Inc.	mc	On Order (Acq Use Only)	acq5268018	rapa gigante The giant turnip
2768630	JBWILNG06	Mar 2 2007	Book Wholesaler Inc.	ms	On Order (Acq Use Only)	acq5268047	Goldilocks and the three bears
2768630	JBWILNG06	Mar 2 2007	Book Wholesaler Inc.	ms	On Order (Acq Use Only)	acq5268256	My Daddy is a giant
2768630	JBWILNG06	Mar 2 2007	Book Wholesaler Inc.	ps	On Order (Acq Use Only)	acq5268048	Goldilocks and the three bears
2775553	JBWI1206C	Mar 27 2007	Book Wholesaler Inc.	lr	On Order (Acq Use Only)	39081089982370	Probuditi
2785021	JBWI1206C	Mar 23 2007	Book Wholesaler Inc.	nc	On Order (Acq Use Only)	39081089830793	Walt Disney treasures Disney comics 75 years of innovation the official anniversary book
2792135	YANON1206	Apr 4 2007	Book Wholesaler Inc.	wk	On Order (Acq Use Only)	39081089860576	Frequently asked questions about online romance
2792136	YAFIC1206	Apr 4 2007	Book Wholesaler Inc.	wk	On Order (Acq Use Only)	39081089860519	Cupcake
2795069	CD1206	Apr 10 2007	Book Wholesaler Inc.	wd	On Order (Acq Use Only)	39081055355858	Voice of the violin
2795464	YAFIC0107	Apr 4 2007	Book Wholesaler Inc.	wk	On Order (Acq Use Only)	39081089828037	Boy heaven
2799600	JBWI0107C	Apr 4 2007	Book Wholesaler Inc.	mv	On Order (Acq Use Only)	39081089797752	Barnum Brown dinosaur hunter
2799600	JBWI0107C	Apr 4 2007	Book Wholesaler Inc.	mv	On Order (Acq Use Only)	39081089814326	Cool beaded jewelry
2799600	JBWI0107C	Apr 4 2007	Book Wholesaler Inc.	mv	On Order (Acq Use Only)	39081089797539	Dangles and bangles 25 funky accessories to make and wear
2799600	JBWI0107C	Apr 4 2007	Book Wholesaler Inc.	mv	On Order (Acq Use Only)	39081089797851	Lightning strikes
2799600	JBWI0107C	Apr 4 2007	Book Wholesaler Inc.	mv	On Order (Acq Use Only)	39081089797901	shadow companion
2799600	JBWI0107C	Apr 4 2007	Book Wholesaler Inc.	wk	On Order (Acq Use Only)	39081089797364	Peek a boo Christmas
2807739	YAFIC0107	Apr 11 2007	Book Wholesaler Inc.	wk	On Order (Acq Use Only)	39081089977396	Gift of the Unmage
2807740	YANON1106	Apr 11 2007	Book Wholesaler Inc.	mn	On Order (Acq Use Only)	39081089990589	Guide to teacher certification testing

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AcqRpt 12 – PR Distribution – As needed before ordering.

Items selected for specified selection list, showing locations and fund accounts used. This allows Acquisitions staff to identify and correct errors.

Where selection = "audbbc0507"

Selection/Title	Quantity	Location	Budget	ISBN Author
AUDBBC0507	1	cw	cwaud.2006	9780792744900 :
BUTCHERS HILL				Lippman, Laura.
AUDBBC0507	1	ml	mlaud.2006	9780792744900 :
BUTCHERS HILL				Lippman, Laura.
AUDBBC0507	1	mn	mnaud.2006	9780792744900 :
BUTCHERS HILL				Lippman, Laura.
AUDBBC0507	1	hm	hmaud.2006	9780792748519 :
THE CRIME WRITER				HURWITZ, GREGG.
AUDBBC0507	1	mn	mnaud.2006	9780792748519 :
THE CRIME WRITER				HURWITZ, GREGG.
AUDBBC0507	1	sd	sdaud.2006	9780792748519 :
THE CRIME WRITER				HURWITZ, GREGG.
AUDBBC0507	1	mn	mnaud.2006	9780792740452 :
THE FOURTH ORDER				Frey, Stephen.
AUDBBC0507	1	sm	smaud.2006	9780792740452 :
THE FOURTH ORDER				Frey, Stephen.
AUDBBC0507	1	wd	wdaud.2006	9780792740452 :
THE FOURTH ORDER				Frey, Stephen.
AUDBBC0507	1	mn	mnaud.2006	9780792748601 :
THE GOSPEL ACCORDING TO JUDAS BY BENJAMIN				Archer, Jeffrey.
AUDBBC0507	1	sd	sdaud.2006	9780792748601 :
THE GOSPEL ACCORDING TO JUDAS BY BENJAMIN				Archer, Jeffrey.
AUDBBC0507	1	wd	wdaud.2006	9780792748601 :
THE GOSPEL ACCORDING TO JUDAS BY BENJAMIN				Archer, Jeffrey.
AUDBBC0507	1	cg	cgaud.2006	9780792748670 :
LEAN MEAN THIRTEEN				Evanovich, Janet.
AUDBBC0507	1	kn	knaud.2006	9780792748670 :
LEAN MEAN THIRTEEN				Evanovich, Janet.
AUDBBC0507	1	mn	mnaud.2006	9780792748670 :
LEAN MEAN THIRTEEN				Evanovich, Janet.
AUDBBC0507	1	co	coaud.2006	9780792748649 :
ORIGIN				Abu-Jaber, Diana.
AUDBBC0507	1	sd	sdaud.2006	9780792748649 :
ORIGIN				Abu-Jaber, Diana.
AUDBBC0507	1	wd	wdaud.2006	9780792748649 :
ORIGIN				Abu-Jaber, Diana.
AUDBBC0507	1	cc	ccaud.2006	9780792748731 :
POWER PLAY				Finder, Joseph.
AUDBBC0507	1	cr	craud.2006	9780792748731 :
POWER PLAY				Finder, Joseph.
AUDBBC0507	1	ml	mlaud.2006	9780792748731 :
POWER PLAY				Finder, Joseph.
AUDBBC0507	1	mn	mnaud.2006	9780792749288 :
ROOTS				Haley, Alex.
AUDBBC0507	1	nd	ndaud.2006	9780792749288 :
ROOTS				Haley, Alex.
AUDBBC0507	1	sd	sdaud.2006	9780792749288 :
ROOTS				Haley, Alex.
AUDBBC0507	1	si	siaud.2006	9780792748571 :
SAVAGES				Pronzini, Bill.
AUDBBC0507	1	sm	smaud.2006	9780792748571 :
SAVAGES				Pronzini, Bill.
AUDBBC0507	1	wd	wdaud.2006	9780792748571 :
SAVAGES				Pronzini, Bill.

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AcqRpt 13 – Purchase Alert Report – Weekly.

Shows titles for which the ratio of requests to the number of copies warrants the purchase of additional items.

Purchase Alert Quick - Miami

PA Bib ID	Title	Author	Request Count	Item Count	Ratio
936366	I am legend /	Matheson, Richard, 1926-	46	1	**46.00**
1203256	Eat, pray, love [text (large print)] : one woman's search for everything across	Gilbert, Elizabeth, 1969-	40	1	**40.00**
1266510	Sizzle and burn /	Krentz, Jayne Ann	40	1	**40.00**
1252917	BLOOD DREAMS	Hooper, Kay	36	1	**36.00**
402458	Citizenship [videorecording] = Ciudadania /		29	1	**29.00**
335176	The pillars of the earth /	Follett, Ken	82	3	**27.33**
1271540	Beverly Hills dead /	Woods, Stuart	27	1	**27.00**
1262214	Planet terror [videorecording] /		79	3	**26.33**
1262185	Quentin Tarantino's Death proof [videorecording] /		76	3	**25.33**
998598	The little mermaid II [videorecording] : return to the sea /		42	2	**21.00**
1260843	KNUFFLE BUNNY TOO: A CASE OF MISTAKEN IDENTITY	Willems, Mo	21	1	**21.00**
1266885	Hand of evil : a novel of suspense /	Jance, Judith A.	20	1	**20.00**
1160737	Raiders of the lost ark [videorecording] /		20	1	**20.00**
294274	The candy corn contest /	Giff, Patricia Reilly	20	1	**20.00**
1053363	28 days later [videorecording] /		57	3	**19.00**
1190242	The secrets of success [sound recording] : eight self-help classics that have ch		38	2	**19.00**
1181962	Doubt!!: Volume 5.	Izumi, Kaneyoshi.	19	1	**19.00**
607347	I was a third grade science project /	Auch, Mary Jane	113	6	**18.83**
1262221	Reign over me [videorecording] /		131	7	**18.71**
788251	The Cool Crazy Crickets /	Elliott, David, 1947-	74	4	**18.50**
1037781	The gadget war /	Duffey, Betsy	36	2	**18.00**
1266421	T is for trespass /	Grafton, Sue	123	7	**17.57**
1266108	In the land of women [videorecording].		68	4	**17.00**
1129101	A Child called "it" ; and, The lost boy : one child's courage to survive /	Pelzer, David J.	34	2	**17.00**
1203242	Devil in winter [text (large print)] /	Kleypas, Lisa	17	1	**17.00**
1271304	Duma Key /	King, Stephen, 1947-	17	1	**17.00**
1259738	Entourage. The complete second season. Disc 2 [videorecording] /		17	1	**17.00**
1266892	The Venetian betrayal : a novel /	Berry, Steve, 1955-	17	1	**17.00**
1209092	The Backyardigans. Surf's up [videorecording] /		49	3	**16.33**
1186010	Born to be BAD [text (large print)] /	Kenyon, Sherrilyn, 1965-	16	1	**16.00**
1271550	Killing ground /	Higgins, Jack, 1929-	16	1	**16.00**
1242376	No one belongs here more than you : stories /	July, Miranda, 1974-	16	1	**16.00**

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SerRpt 1 – Serial Titles Currently Received – As needed.
Shows serials titles currently subscribed to by specified location, including bibliographic number and ISSN.

dr

Serial Titles Currently Received (list)
- Miami

BIB ID	Title	ISBN/ISSN
1078350	Bookmarks.	1546 0657
306045	Buenhogar.	0186 422X
		1087 1993
305822	Consumer reports.	0010 7174
503182	Consumer reports. Buying guide issue.	
623138	El Nuevo herald.	
965199	National geographic kids.	1542 3042
288951	National geographic world.	0361 5499
288318	Newsweek.	0028 9604
1134109	Ocean drive en espanol	
488818	Parenting.	0890 247X
592267	People en espa~nol.	1096 5750
1038180	People.	0093 7673
288462	Sports illustrated.	0038 822X
1150490	The Miami herald.	0898 865X
289730	U.S. news & world report.	0041 5537

SerRpt 2 – Serials Union List by Location – As needed. Shows serials titles at specified location, and holdings summary information, including public notes, chronology and enumeration.

ms

Serials Union List by Location - Miami

Title	BIB #	Retention Note	Order		From	To	Free Text Enum	Free text Chron
Aviation week & space technology.	287461	Branch keeps current issue only.	main	1	v. 167 no. 21 (2007 November 26)			
Better homes and gardens.	287478	Branch keeps current issue only.	main	1	v. 85 no. 9 (2007 September) -	v. 85 no. 10 (2007 October)		
Business week.	287518	Branch keeps current issue only.	main	1	no. 4062 (2007 December 10)			
			supp	1	Small Biz (2007 October) -	(2007 November)	Small Biz	
Car and driver.	574568	Branch keeps current issue only.	main	1	v. 53 no. 6 (2007 December)			
Consumer reports.	305822	Branch keeps most recent 2 years.	main	1	v. 70 no. 10 (2005 October) -	v. 72 no. 12 (2007 December)		
Consumer reports. Buying guide issue.	503182	Branch keeps most recent 3 years.	main	1	(2005) -	(2008)		
Cooking light.	537711	Branch keeps current issue only.	main	1	v. 21 no. 11 (2007 December)			
Cosmopolitan.	288553	Branch keeps current issue only.	main	1	v. 243 no. 5 (2007 November)			
Country.	880559	Branch keeps current issue only.	main	1	v. 22 no. 1 (2008 January)			
Current biography yearbook.	358075	Not currently received.	main	1		(1946-1996)		1946-1996
			main	2	(2001) -	(2003)		
Discover.	289640	Branch keeps current issue only.	main	1	v. 28 no. 12 (2007 December)			
Discovery girls.	1028890	Branch keeps current issue only.	main	1	v. 8 no. 1 (2008 January)			
Disney adventures.	880714	Branch keeps current issue only.	main	1	v. 18 no. 8 (2007 October) -	v. 18 no. 9 (2007 November)		

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SerRpt 3 – Serials Claim Review – Weekly.
Shows location's expected serials issues that have not been received so that they can be claimed from the vendor.

12/03/07 Serials Claims Review Page No. 1

Title/enum/Vendor No.	Media
Better homes and gardens.	Magazines -
85,11	
32	v. 85 no. 11 (2007 November)
Forbes.	Magazines -
32	Annual Report on American Industry; 2006
The Miami herald.	Magazines -
63	2007 November 27
The Miami herald.	Magazines -
63	2007 November 29
El Nuevo herald.	Magazines -
63	2007 November 29
El Nuevo herald.	Magazines -
63	2007 November 27
El Nuevo herald.	Magazines -
63	2007 November 30
Pack-o-fun.	Magazines -
56,5	
562	v. 56 no. 5 (2007 November)
Teen Vogue.	Magazines -
7,8	
562	v. 7 no. 8 (2007 October)
Vanidades continental.	Magazines -
32	2008 January 1
Vogue.	Magazines -
32	Movies Rock Fall 2007
The Wall Street journal.	Magazines -
32	2007 November 27
The Wall Street journal.	Magazines -
32	Saturday/Sunday December 1-2, 2007

CNRpt1: List of Patrons Due for Service – daily

Next visit	Borrower #	Name
	Route Comments	
12/24/07	65332 ADISA *, TALIBAH, [CONNECTIONS]	
		RA
	ONLY DVD NEXT SHIPMENT	
12/24/07	1023622	ANDERSON *, WILBERT,
[CONNECTIONS]		RA
12/24/07	745042	CACERES *, CARMELA,
[CONNECTIONS]		OL
12/24/07	321844	COTO *, ADELAIDA,
[CONNECTIONS]		
	OL STOP = 11/20 – START 12/24	
12/24/07	951448	DE TUYA *, SHEILA,
[CONNECTIONS]		
	RA	
12/24/07	280533	DUFFY *, MARGARET MARY,
[CONNECTIONS]	RA	
12/24/07	196148	GEE *, PHYLLIS SHUE,
[CONNECTIONS]		RA
12/24/07	963889	GETTINGER *, ARLENE,
[CONNECTIONS]		RA
12/24/07	275767	* GOLDEN PALMS,
[CONNECTIONS]		
	RD	
12/24/07	348103	KAPLAN *, PHYLLIS,
[CONNECTIONS]		
	RA CALL BEFORE SENDING	
12/24/07	123650	KEMMEL *, OLGA,
[CONNECTIONS]		
	OL	
12/24/07	689443	KULICK *, MATILDA,
[CONNECTIONS]		
	RA	
12/24/07	606545	LEWIS *, RUTH, [CONNECTIONS]
		RA
12/24/07	972444	LLOYD*, ALBERTA,
[CONNECTIONS]		
	RA	
12/24/07	361837	ORTIZ *, ROSAMARIA,
[CONNECTIONS]		RA
12/24/07	288697	OWENS *, IRIS, [CONNECTIONS]
		RA

12/24/07 1009582 PARET *, CELENIA , [CONNECTIONS]
RA
12/24/07 91012
RAWLINS *, GLORIA, [CONNECTIONS]
RA
12/24/07 595089 SCHWARTZ *, SOPHIE, [CONNECTIONS]
RA

CNRpt 2: Detailed single page for each patron – daily on demand

Report of Home Service Visits Due **01/08/2008**
Route: RA/ Readers' Advisory Patrons A-Z - Stop 210

Name: HOMEBOUND *, JANE, [CONNECTIONS] Borrower ID: 538105
Address: 2455 NW 183 ST Miami Fl 33056-3641
Telephone/Email: 305-375-5233
Language: ENGLISH
Next Visit: 1/20/2008 Last Visit: 1/8/2008 Vist Frequency: 12
Visit comments:
Reader Profile:
Eligibility: PHYSICAL DISABILITY Date Joined: 11/5/1998
Service Plan Description: REQUEST ONLY Postage: FREE AND PAID
Special: ONLY ONE BOOK PER BAG
Residence:
Equipment:
Sex: 1 DUMMVS: 0
Shipment: ONLY: LP/2 OR: VHS/2
No: EXPLICIT SEX, BLOOD/GORE

Likes
LIKES = H. DENKER, D. STEEL, L. BRAUN, M. TWAIN, J. PLAIDY
INTERESTS = ROMANCES, AMATEUR SLEUTH/DETECTIVE MYSTERIES, THEATRICAL BIOGRAPHIES, CLASSICS, LITERARY/AWARD WINNERS, NATURE/ANIMALS (PETS)

Notes
LET PHONE RING 20-25 TIMES - TAKES AWHILE FOR HER TO GET TO IT.

CNRpt 3: Patron's reading history – on

Name: BUSTILLO *, ANTONIO, [CONNECTIONS] ID: 52395 Printed: December 15, 2007 Page: 1/21

Items Currently Out:

Author	Title	Call Nbr	BIB ID	CKO Date
	Decoding the past. Secrets of the Koran [videorecording] /	297 DECO DVD	1205347	12/4/2007
	Inside Mecca [videorecording] /	297.352 INSI DVD	1054215	12/10/2007
	Islam, empire of faith [videorecording] /	297 ISLA DVD	1148492	12/4/2007
	Kagemusha [videorecording] /	KAGEMUSH DVD Jpn	1239286	11/19/2007
	Thomas Hart Benton [videorecording] /	B BENTON DVD	1131486	12/10/2007
Segal, Ronald, 1932-	Leon Trotsky ... /	B T858seg	177323	12/4/2007
Tolstoy, Leo, graf, 1828-1910	War and peace [text (large print)] /	T6546w Large print	285884	11/1/2007
		TOLSTOY Large print	285884	11/1/2007
Wilson, A. N., 1950-	Tolstoy /	B TOLSTOY	932696	11/19/2007

Borrower Log:

Author	Title	Call Nbr	BIB ID	CKO Date	Rating
	12 monkeys	TWELVEMO DVD	1158561	2/14/2007	2
	1421 the year China discovered America	910 FOUR DVD	1119860	12/11/2006	2
	2001 a space odyssey	TWOTHOUS DVD	900270	4/10/2006	5
	3 iron	THREEIRO DVD Kor	1165873	6/30/2006	2
	8 1 2	EIGHTAND DVD Ita	955399	11/18/2005	1
	A conversation with Koko	599.884 NATU DVD	1111789	6/30/2006	3
	abuelo The grandfather	GRANDFAT DVD Sp	900372	9/12/2005	1
	adventure	781.65 JAZZ n.9 DVD	1075467	3/9/2006	2
	agony and the ecstasy	AGONYAND DVD	1172925	2/1/2006	3
	Akahige Red Beard	REDBEARD DVD Jpn	1148357	12/8/2005	1
				6/29/2007	1
	Albert Einstein	B EINSTEIN DVD	1180589	3/21/2006	4
	Alexander	ALEXANDE DVD	1176993	3/12/2007	2
	Alexander Dumas The Count of Monte Cristo	COUNTOFM DVD	994906	11/10/2005	2
	Alexander Graham Bell	B BELL DVD	1173663	3/9/2006	2
	Alexander the Great the man behind the legend	B ALEXANDE DVD	1148564	2/14/2007	3
				11/26/2007	10
	Ambassador inside the embassy	327.2 AMBA DVD	1036505	9/22/2006	0
	American splendor	AMERICAN DVD	1072383	12/4/2006	3
	Amistad	AMISTAD DVD	1072385	4/2/2007	2
	Amores perros Loves a bitch	AMORESPE DVD Sp	1093024	9/5/2006	2
	Ancient evidence mysteries of Jesus	232.901 ANCI DVD	1093407	9/18/2006	3
	Andy Garcia Latin rhythms American dreams	B GARCIA VHS	995025	11/13/2007	2

Name: BUSTILLO *, ANTONIO, [CONNECTIONS] ID: 52395 Printed: December 15, 2007 Page: 21/21

Author	Title	Call Nbr	BIB ID	CKO Date	Rating
VARIOUS AUTHORS	INTERLIBRARY LOAN ITEM 10	MIND AND DEATH OF A GENIUS/ABRAHAMENSEN	673756	6/7/2007	2
		MONEY SECRETS AT THE RACETRACK/MEADOW	673756	7/11/2007	10
		multiple-cat household/vella	673756	5/5/2006	2
				6/30/2006	1
		NEXUS/MILLER	673756	6/5/2007	2
		PERSECUTION AND THE ART OF WRITING/STRAUSS	673756	6/29/2007	2
		SERGEANT YORK/COOPER	673756	6/13/2007	2
		SMOKE/WANG	673756	12/11/2006	1
		TARA ROAD/BINCHY	673756	6/25/2007	3
		THE BOY WHO COULD FLY/ADELSON	673756	7/20/2006	1
		THE CREATURE FROM JEKYLL ISLAND/GRIFFIN	673756	11/21/2006	10
		THE LONG GOODBYE/ALTMAN	673756	7/13/2006	1
				9/11/2006	5
		THE SHADOW OF POWER/PERLOFF	673756	6/30/2006	1
				3/19/2007	10
Vivaldi, Antonio, 1678-1741	Six violin concertos for Anna Maria	CD VIVA cov G 78	1195636	8/23/2006	2
Voltaire, 1694-1778	Cartas filosoficas	848.5 V935c Sp	261308	4/16/2007	2
Wiles, Buster, 1910-	My days with Errol Flynn the autobiography of stuntman Buster Wiles with a special appendix the Flynn controversy	791.43 WILE	470507	1/4/2006	1
Wilson, A. N., 1950-	Tolstoy	B TOLSTOY	932696	5/31/2007	2
				11/19/2007	
Xenophon	Anabasis Books I VII	888.3 An1b	204806	7/11/2007	2

CNRpt 4: Custom hold alert report - daily

Hold Alert - Connections

Borrower Number	Name	Item Title	HS Route	Comments	HS Next Visit	HS Visit Comments
962505	ACEVEDO *, GEORGINA, [	innocent man murder and inju	RA	RA-LK	01/07/2008	
		Walking the Bible	RA	RA-LK	01/07/2008	
573994	BRODY *, HINDA, [CONNE	Ladys choice	RA	RA-LK	12/18/2007	
745042	CACERES *, CARMELA, [C	Aguila solitaria	OL	RA-LK	12/24/2007	
		Fuerzas irresistibles	OL	RA-LK	12/24/2007	
		vizconte que me am¢	OL	RA-LK	12/24/2007	
964134	COWLES *, WILMA, [CONN	Bad faith	RA	RA-LK	12/25/2007	
		Everyone dies	RA	RA-LK	12/25/2007	
		Taking the fifth	RA	RA-LK	12/25/2007	
951448	DE TUYA *, SHEILA, [CO	suspect	RA	RA-LK	12/24/2007	
280533	DUFFY *, MARGARET MARY	Mostly true a memoir of fami	RA	RA-LK	12/24/2007	
423915	EVANS *, MERCEDES C, [	Prior bad acts	RA	RA-LK	12/18/2007	
127917	FLEISCHER *, DOROTHY,	Finding Noel	RA	RA-LK	12/19/2007	
		Sadie Shapiro in Miami	RA	RA-LK	12/19/2007	
		Season of the swan	RA	RA-LK	12/19/2007	
928798	FORD *, HAZEL, [CONNEC	Cover up	RA	RA-LK	01/06/2008	
525577	FRIEDMAN *, BLANCHE, [	Bad blood	RA	RA-LK	12/19/2007	
		Marked man	RA	RA-LK	12/19/2007	
		Motif for murder	RA	RA-LK	12/19/2007	
		tin roof blowdown a Dave Rob	RA	RA-LK	12/19/2007	
		Under orders	RA	RA-LK	12/19/2007	
		Web of evil a novel of suspe	RA	RA-LK	12/19/2007	
		White sister	RA	RA-LK	12/19/2007	
1067638	GUELL *, ANA MARIA, [C	rey de los coleaderos	OL	RA-LK	01/07/2008	
		Tres mujeres	OL	RA-LK	01/07/2008	
282520	LINOFF - THORNTON *, M	Access denied	RA	RA-LK	12/25/2007	
		cat under the mistletoe an A	RA	RA-LK	12/25/2007	
		cat with the blues an Alice	RA	RA-LK	12/25/2007	
		Diagnosis dead a mystery wri	RA	RA-LK	12/25/2007	
		First cases new and classic	RA	RA-LK	12/25/2007	

1/2

Hold Alert - Connections

Borrower Number	Name	Item Title	HS Route	Comments	HS Next Visit	HS Visit Comments
282520	LINOFF - THORNTON *, M	Guilty as charged a Mystery	RA	RA-LK	12/25/2007	
		Hangmans root a China Bayles	RA	RA-LK	12/25/2007	
		Murder with puffins	RA	RA-LK	12/25/2007	
		perfect crime	RA	RA-LK	12/25/2007	
		tale of Hill Top Farm	RA	RA-LK	12/25/2007	
961311	MARTINEZ *, GLADYS VAR	Jane Eyre	RA	RA-LK	12/30/2007	
8939	MCGUIRL *, THOMAS I, [	Thirty three teeth	RQO		12/17/2007	
997206	MCKERN *, KATE LINDSAY	Without sanctuary lynching p	RQO		12/18/2007	
435872	MENA *, DOLORES, [CONN	Catch and release	OL	RA-LK	12/17/2007	
632647	MULLIN *, JUSTIN C, [C	Edward R Murrow and the birt	ROUTE2	RA-LK	12/26/2007	
618349	PAYNE *, NANCIE B, [CO	One Mississippi a novel	RQO		12/26/2007	CFS 12/10/2007
279048	SCHREIER *, CECELIA ,	Kill zone a sniper novel	RA	RA-LK	12/18/2007	
468721	SOLOMON *, IDA, [CONNE	Ricochet	ROUTE2	RA-LK	01/07/2008	
885767	TOBOCMAN *, WILLIAM, [	Isaac Bashevis Singer about	RQO		12/12/2007	
853603	VAZQUEZ *, FLORENTINA,	Veneno de cristal	OL	RA-LK	01/05/2008	
906758	WILLIAMS *, SIDNEY, [C	Music and lyrics	RA	RA-LK	12/16/2007	
603774	WRIGHT *, JNITA D, [CO	greatest stories never told	RQO		12/16/2007	

BBMRpt 1: Mailing log - daily

359997 MUNGIN, DESHONE L
39081085121429: God don't play /

390904 MOREJON, ESTHER
39081048726959: A treasury of knitting patterns /

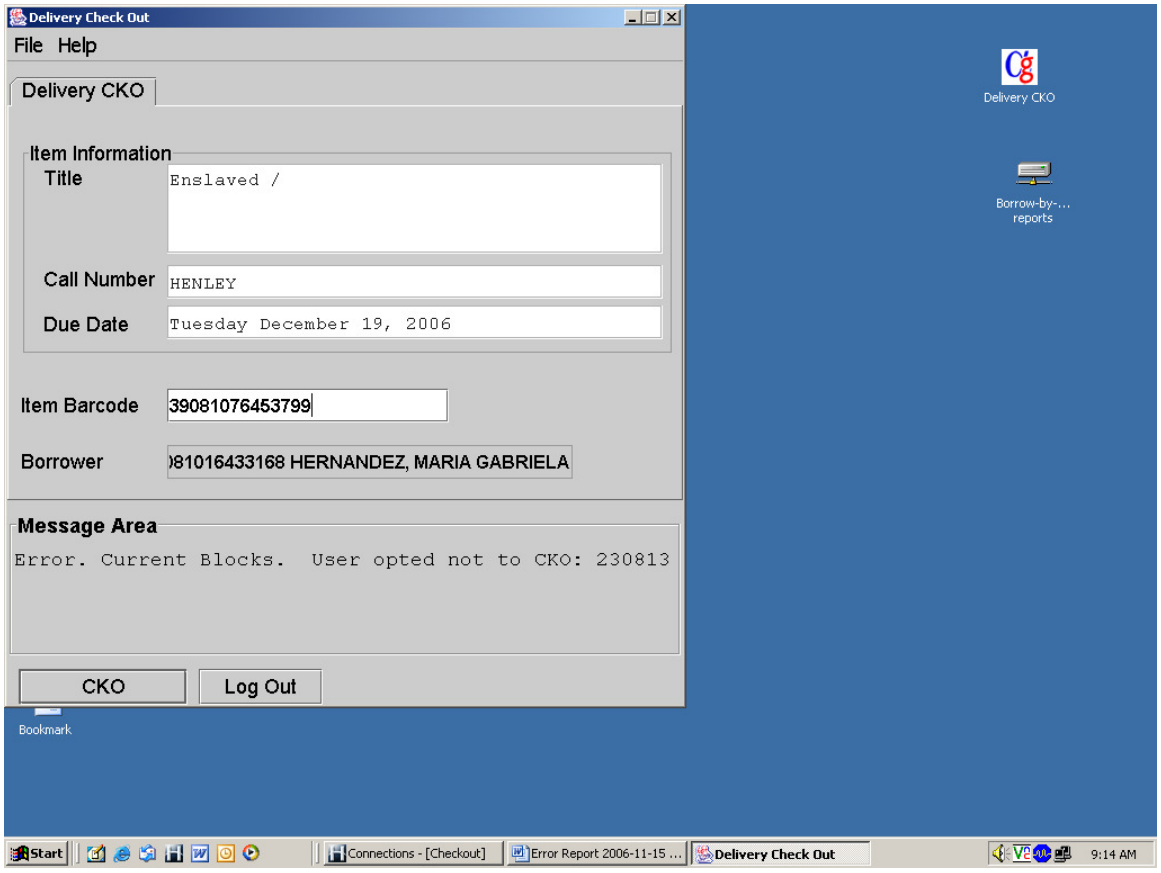
537538 GERACI, ABIGAIL
39081087485285: Inâes del alma mâia /

121276 BOURSIQUOT, MICHELET
39081070910174: Rich dad, poor dad : what the rich teach their kids about money-- that the poor and middle class do not! /

434329 ANGULO, MARIA MAGDALENA
39081083410279: How to organize just about everything : more than 500 step-by-step instructions for everything from organizing your closets to planning a wedding to creating a flawless filing system /

BBMRpt 2: Error report – daily

ACR
BORROWER #230813
Inocente T. Lariosa Jr
1800 West 54 St
Hialeah, Fl 33012
305-362-6873



Appendix O
SELF-CHECK MACHINES

Appendix O – Number and Distribution by Branch of 3M Self-Check Workstations

Group 1 1) West Dade Regional Library - 6 2) Golden Glades Branch - 2 3) Miami Beach Regional Library - 6 4) South Dade Regional Library - 6 5) West Kendall Regional Library - 6 6) Miami Lakes Branch - 4 7) Fairlawn Branch - 2 Group1 Total 32	Group 4 1) Allapattah Branch - 2 2) Coconut Grove Branch - 2 3) Concord Branch - 2 4) Coral Gables Branch - 4 5) Country Walk Branch - 1 6) Hialeah Gardens Branch - 2 7) Hispanic Branch - 2 8) Lemon City Branch - 2 9) Little River Branch - 2 10) Opa Locka Branch - 2 11) Shenandoah Branch - 2 12) South Miami Branch - 3 13) Tamiami Branch - 2 14) North Shore Branch - 2 Group4 Total 30
Group 2 1) Coral Reef Branch - 5 2) Kendall Branch - 5 3) Sunset Branch - 2 4) Homestead Branch - 4 5) Lakes of the Meadow Branch - 2 6) West Flagler Branch - 2 7) Doral Branch - 3 8) Palm Springs North Branch - 2 9) North Dade Regional Library - 5 10) California Club Branch - 2 11) Sunny Isles Branch - 2 12) Main Library - 5 Group2 Total 39	Group 5 1) Virrick Park Branch - 2 2) Kendale Lakes Branch - 4 3) Pinecrest Branch - 4
Group 3 1) Key Biscayne Branch - 2 2) Miami Springs Branch - 1 3) Culmer Branch - 2 4) Naranja Branch - 2 5) Edison Branch - 2 6) South Shore Branch - 2 7) North Central Branch - 2 8) Model City Branch - 2 Group3 Total 15	1) Automated Services (test unit) - 1 2) Maintenance's sample cabinet - 1 3) Ordered for Northeast Branch - 2
	Total number of : 130

Appendix P
ENVISIONWARE SOFTWARE AND HARDWARE

Appendix P – Envisionware Hardware and Software Versions

Envisionware Administration Council (Server) Main and Regional Libraries - 6 units
DELL Optiplex GX280
Pentium® 4 CPU 3.0 GHz
40 GB Hard Drive
CD-Rom Drive
Microsoft Windows XP Professional Version 2002 Service Pack 2
Envisionware PC Reservation Management Console 3.2.273
Envisionware PC Reservation Station Configuration Station 3.2.38
Envisionware PC Reservation Station Configuration Utility 2.14.1.0
DELL 17inch Monitor
Envisionware Administration Council (Server) at Branches – 36 units
DELL Optiplex GX270
Pentium 4 CPU 2.60 GHz
511.0 MB
40 GB Hard Drive
CD-Rom Drive
Microsoft Windows XP Professional Version 2002 Service Pack 2
Envisionware PC Reservation Management Console 3.2.273
Envisionware PC Reservation Station Configuration Station 3.2.38
Envisionware PC Reservation Station Configuration Utility 2.14.1.0
DELL 17inch Monitor
Print Release Terminal (KIOSK) – 58 units
DELL Optiplex GX270
Pentium 4 CPU 2.60 GHz
511.0 MB
40 GB Hard Drive
CD-Rom Drive
Microsoft Windows 2000 Workstation Service Pack 4
Envisionware LPT: One Print Cost Management JQE Version 4.1.32
Envisionware LPT: One Print Cost Management PRT Version 4.1.21
Envisionware AAM: Revalue Module Version 3.14
Envisionware LPT: One Print Cost Management LPT Admin Version 4.1.2.0
Envisionware PC Reservation Station Configuration Station 3.2.38
Envisionware PC Reservation Station Configuration Utility 2.14.1.0
Hewlett Packard 3500 Color Printer
Hewlett Packard LaserJet 4050 Series PCL
Epson TM-T88II Receipt Printer
DELL 17inch Monitor
Net Gear 8 Port Switch
Metro Logic Bar Code Scanner
Print Release Terminal (STAFF) – 84 units
DELL Optiplex GX270
Pentium 4 CPU 2.60 GHz
511.0 MB
40 GB Hard Drive
CD-Rom Drive
Microsoft Windows 2000 Workstation Service Pack 4

Envisionware LPT: One Print Cost Management PRT Version 4.1.21
Envisionware PC Reservation Station Configuration Station 3.2.38
Envisionware PC Reservation Station Configuration Utility 2.14.1.0
Envisionware AAM: Revalue Module Version 3.14
Epson TM-T88II Receipt Printer & Metro Logic Bar Code Scanner
DELL 17inch Monitor
Envisionware Clients with PC Refresh – 538 units
DELL Optiplex 745
Pentium D CPU 3.40 GHz
1,013.5 MB
80 GB Hard Drive
CD-Rom Drive
Envisionware LPT: One Print Cost Management LPT Svc Version 3.15
Envisionware PC Reservation Station Configuration Client Module Version 3.2.31.0
DELL FP. 1908
Envisionware Clients without PC Refresh – 229 units
DELL Optiplex GX270
Pentium 4 CPU 2.60 GHz
511.0 MB
40 GB Hard Drive
CD-Rom Drive
Microsoft Windows XP Professional Version 2002 Service Pack 2
Envisionware LPT: One Print Cost Management LPT Svc Version 3.15
Envisionware PC Reservation Station Configuration Client Module Version 3.2.31.0
DELL 17inch Monitor
Envisionware Client Laptop – 412 units
DELL Latitude D505
Pentium M CPU 1.60 GHz
510.2 MB
30 GB Hard Drive
Modular DVD-Rom and Floppy Drives
Microsoft Windows XP Professional Version 2002 Service Pack 2
Envisionware LPT: One Print Cost Management LPT Svc Version 3.15
Envisionware PC Reservation Station Configuration Client Module Version 3.2.31.0

Appendix Q
AVERAGE WEEKLY MONEY

APPENDIX Q: AVERAGE WEEKLY REVENUES

BRANCH NAME	Estimated Weekly Amount Collected
ALLAPATTAH	$115.95
CALIFORNIA CLUB	$176.25
CIVIC CENTER	$23.15
COCONUT GROVE	$77.45
CONCORD	$321.65
CORAL GABLES	$1,342.20
CORAL REEF	$599.27
COUNTRY WALK	$115.35
CULMER/OVERTOWN	$32.65
DORAL	$388.35
EDISON CENTER	$202.22
FAIRLAWN	$308.60
GOLDEN GLADES	$191.87
HIALEAH GARDENS	$198.25
HISPANIC	$255.65
HOMESTEAD	$611.54
KENDALL	$845.63
KEY BISCAYNE	$217.50
LAKES OF THE MEADOWS	$322.30
LEMON CITY	$50.70
LITTLE RIVER	$62.80
MAIN	$1,449.37
MIAMI BEACH	$1,120.07
MIAMI LAKES	$588.01
MIAMI SPRINGS	$128.50
MODEL CITY	$113.35
NARANJA	$163.30
NORTH CENTRAL	$890.55
NORTH DADE REGIONAL	$61.91
NORTH SHORE	$366.35
NORTHEAST	$45.56
OPA-LOCKA	$24.95
PALM SPRINGS NORTH	$139.75
SHENNANDOAH	$151.80
SOUTH DADE REGIONAL	$1,040.46
SOUTH MIAMI	$541.65
SOUTH SHORE	$274.90
SUNNY ISLES	$449.80
TAMIAMI	$210.35
WEST DADE REGIONAL	$1,740.76
WEST FLAGLER	$323.41
WEST KENDALL REGIONAL	$1,873.92

Appendix R
SUBSCRIPTION DATABASES

APPENDIX R - SUBSCRIPTION DATABASES

Appendix R: Subscription Databases

Alexander Street Press

Classical Music Library

EBSCO

Auto Repair Reference Center
NoveList

Facts on File

Today's Science
Science Online

Foundation Center

Foundation Grants to Individuals Online
Foundation Directory Online

Gale

Biography and Genealogy Master Index
Biography Resource Center
Business & Company Resource Center
Computer Database
Expanded Academic ASAP
General OneFile
General Reference Center Gold
Gale Informe
Gale's Ready Reference Shelf
Gale Virtual Reference Library
Health and Wellness Resource Center
Health Reference Center Academic
History Resource Center US
History Resource Center World
Infotrac Custom Journals
Infotrac Custom Journals –Fodor's Travel Guides
Infotrac General BusinessFile ASAP
Infotrac Investext Plus
Infotrac Junior Edition
Infotrac Kids Edition
Literature Resource Center
LitFinder
Ocenet Consulta
Opposing Viewpoints Resource Center
Student Edition
Thomson Gale LegalForms
What Do I Read Next?
e-books Arts and Humanities

e-books Biography and Genealogy
e-books Business
e-books Career and Education
e-books Environment
e-books History
e-books Law & Government
e-books Library Science
e-books Literature
e-books Medicine
e-books Multicultural Studies
e-books Nation and the World
e-books Religion
e-books Science
e-books Social Science

Generations Online

Generations Online

H.W. Wilson

Junior Authors and Illustrators

InfoUSA

ReferenceUSA

Learning Express

Learning Express Library

NewsBank

The Miami Herald
El Nuevo Herald

OCLC

FirstSearch (ERIC, MEDLINE, Worldcat, etc.)

Oxford University Press

Grove Art Online
Grove Music Online

Proquest

Ancestry Plus
Ethnic NewsWatch
Heritage Quest
New York Times
Sirs Discoverer
Sirs Researcher
Wall Street Journal

Scholastic, Inc

Grolier America the Beautiful
Grolier Encyclopedia Americana
Grolier Lands and Peoples
Grolier Multimedia Encylopedia
Grolier New Book of Knowledge
Grolier New Book of Popular Science
Grolier Nueva Enciclopedia Cumbre

TumbleBook Library

Tumble Book Library

U.S. National Library of Medicine & NIH

Medline Plus

World Book Online Reference Center

Appendix S
CURRENT/EXPECTED GROWTH

APPENDIX S: CURRENT/EXPECTED GROWTH STATISTICS

	ACTUAL	PROJECTED				
	As of 9/30/2007	As of 9/30/2008	As of 9/30/2009	As of 9/30/2010	As of 9/30/2011	As of 9/30/2012
# of Bibliographic Records	891,518	936,000	992,000	1,061,000	1,146,000	1,250,000
# of Items	4,046,706	4,210,000	4,420,000	4,685,000	5,031,000	5,415,000
# of Authority Records	1,414,284	1,485,000	1,574,000	1,685,000	1,820,000	1,984,000
# of Patron Records	874,229	1,014,000	1,197,000	1,436,000	1,752,000	2,172,000
Annual Circulation	7,582,777	8,645,000	10,028,000	11,833,000	14,200,000	17,320,000
# of Serials Records	23,782	25,000	26,500	28,400	30,700	33,500
# of Staff Workstations	508	562	569	600	620	636
# of Public Workstations	975	1,081	1,099	1,193	1,231	1,267
# of Public Laptops	422	484	660	691	711	731
# of Print Kiosks	60	69	70	75	80	83
# of OPACS	143	167	169	185	195	203
# of Self-Check	130	134	136	143	145	150
Acquisitions						
# of Vendor Records	459	482	506	531	558	586
# of Fund Records	1,213	1,303	1,339	1,393	1,429	1,465
# of Purchase Order Records	2,772	2,911	3,056	3,209	3,369	3,538
# of Statement Records	31,087	32,641	34,273	35,987	37,786	39,676
# of Purchase Request Records	218,664	229,597	241,077	253,131	265,787	279,077

Fiscal Year (FY) runs from October 1st to September 30th

APPENDIX T
RFP ACRONYMS

APPENDIX T: ACRONYMS

This Appendix contains the acronyms used in this RFP.

AAM	Authentication and Accounting Module
ADA	Americans with Disabilities Act
ALA	American Library Association
API	Application Programming Interface
API	Application Protocol Interface
BAFO	Best and Final Offer
DBD	Department of Business Development
DEP	Day End Processing
DPM	Department of Procurement Management
EAD	Encoded Archival Description
EDI	Electronic Data Interchanged
EEO	Equal Employment Opportunity
EPA	Environmental Protection Agency
ERM	Electronic Research Management
ES	Committee Evaluation/Selection Committee
ETSD	Enterprise Technology Services Department
FEIN	Federal Identification Number
FIRN	Florida Information Resources Network
FRBR	Functional Requirements for Bibliographic Records
FTE	“Full-Time equivalent” employees working 40 hours per week
GSM	Global system for Mobile Communications
HIP	Horizon Information Portal
HIPAA	Health Insurance Portability and Accountability Act
IDF	International Data Frame
IIHI	Individually Identifiable Health Information
ILL	Interlibrary Loan
ILS	Integrated Library System
IPSIG	Independent Private Sector Inspector General
ISO	International Organization of Standardization
ISP	International Service Provider
IVR	Interactive Voice Response
JNP	Juvenile, no parental authorization

LAN	Local Area Network
LCSH	Library of Congress Subject Headings
LDAP	Lightweight Directory Access Protocol
LTI	Library Technologies, Inc
MARC	Machine Readable Cataloging
MDPLS	Miami-Dade Public Library System
METS	Metadata Encoding and Transmission Standard
MIS	Masters in Information Systems
NAS	Network Area Storage
NAT	Network Address Translation
NVA	Non- Verifiable Address
OPAC	Online Public Access Catalog Portal
OS	Operating System
PAT	Port Address Translation
PDA	Personal Digital Assistants
PHI	Protected Health Information
PKI	Key Infrastructure
POS	Point of Sale
RDA	Resource Description and Access
RFI	Request for Information
RFP	Request for Proposal
RFQ	Request for Qualification
RJN	Juvenile reciprocal, no parental authorization
RPA	Remote Patron Authentication
RSS	Really Simple Syndication
SAN	Storage Area Network
SBE	Small Business Enterprises
SQL	Structured Query Language
SSL	Secure Socket Layer
SSO	Single Sign-on
TR	Committee Technical Review Committee
UAP	County User Access Program
URI	Uniform Resource Identifier
URL	Uniform Resource Locator
URN	Uniform Resource Names

VLAN	Virtual Local Area Network
VPN	Virtual Private Network
WAN	Wide Area Network
WAP	Wireless Application Protocol
WAPI	Wide Area Local Area Network Authentication and Privacy Infrastructure
WEP	Wired Equivalent Privacy