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NATIONAL INSTITUTE FOR THE ORTHOPAEDICALLY HANDICAPPED

Department of Empowerment of Person with disability, Ministry of Social Justice & Empowerment,
Govt of India

B.T. Road, Bon-Hooghly, Kolkata-700090

Notice Inviting Tender

NIT No: LIB-DIGITIZATION/2167/LIBRARY/2014/NIOH

Dated:03/11/2015

Subject: Tender for implementation, support services, data migration and training on KOHA Library Management System (LMS) and implementation, support services and training on DSpace (Digital Library Software).

Sealed quotations are invited from the experienced organizations dealing in **computer software and services** with credentials, trade license and income tax clearance, for Implementation, support services, data migration and training on **KOHA** Library Management System (LMS) with all bibliographic data (around 7,120), all holding data, all users account (approx 600) with all up to date circulation status including historical records are also to be maintained and migrate accurately. (Technical specification of koha in Annexure - I) and

Quotations are also invited for Implementation, Customization, Training and Support service of **DSpace** (Digital Library Software). (Technical specification of DSpace in Annexure - II)

The technical and price bid should be as per format mentioned in the tender document, and should be addressed to **“The Director, National Institute for the Orthopedically Handicapped, B T Road, Bon-Hooghly, Kolkata – 700090”** and it should be sent latest by 24/11/2015 till 4pm.

The Institute reserves the right to reject any or all including the lowest quotation without assigning any reason whatsoever.

Date and Time Schedule:

Sl. No.	Particulars	Date & Time
1.	Tendering Date	03 /11/2015
2.	Last Date of Submission of Quotation	24/11/2015 (Between 10am to 4pm)
3.	Date & Time of Opening of Tender	26/11/2015 at 4:00pm

A. Installation and Commissioning:

Installation and commissioning of the entire project is to be executed by the bidder within the stipulated time, as mentioned in the Terms and Conditions under direct supervision of NIOH, Kolkata representative.

B. Technical Specification:

Please download **Annexure-I, Annexure-II** and submit the ink-signed & stamped document (i.e. Annexure I & Annexure II) in the respective bidder's letterhead as agreement to compliance of proposed software with the given specifications.

C. Quoting Format (Priced):

Tender Form & N.I.T. (download properly and submit the signed and stamped of the same). The rates must be quoted in the format attached (**Annexure-III**). In case quoting any rate in Tender Form, the bidder is liable to be summarily rejected. Please download the **Format of Price Bid** and submit the same after filling-up, signed and stamped.

D. Annual maintenance contract (AMC):

Free one year support and help desk facilities for Library staff for day to day use of Koha and DSpace from the project completion date.

E. Time of Completion:

45 days from the issue of work order.

For any clarification please contact:

Library and Information Service
National Institute for the Orthopedically Handicapped
B.T. Road, Bon-Hooghly, Kolkata-700090
Phone: 033-2531 0279 Extension No. 271

Note: Say YES/NO as per our requirement furnished below :

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

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

Sr. No	DESCRIPTION	SPECIFICATIONS	QUANTITY	YES/NO
1.	Installation, configuration and general introduction to KOHA (Latest version)	OS: Debian8. 64 bit/ Ubuntu LTS		
2.	Customization, Testing and Implementation	In general, customization should function properly across Koha version upgrades as covered under AMC period.	As per ANNEXURE -I	
3.	Documentation, Up-gradation of OS & KOHA, and Implementation of Offline Circulation module	Using Koha Offline Circulation Tools mode		
4.	Support and help desk facilities for Library staff for day to day use of Koha LMS, on annual basis (from project completion date).	Support may be provided through atleast 12 (1 per month) personal visits/year, unlimited Email, Phone and Skype/Google Video Chat. It includes updating KOHA & OS including any types of trouble shooting	1 Year	
5.	Additional on-site Training within the project period.	3 Days or more, as will be required to complete the training	5 Staff Members	
6.	MOPAC	Mobile application for OPAC module of KOHA	01 Unit	
7.	Data Migration (Data in English)	From proprietary library software (database-SQL) to Koha	All bibliographic records. All holding data. All membersø records. All circulation records (NB: Indicative quantity mentioned in NIT)	

Terms & Conditions:

1. Quoted Price:

- a. All duties, taxes and other levies payable by the bidder shall be included in the quoted rate. Sales/Service tax if any should be quoted separately.
- b. The rates quoted for each item/service shall be fixed for the duration of the contract and shall not be subject to adjustment.
- c. Each bidder must submit only one quotation.

2. Payment:

90% of the payment shall be made on submission of bills in triplicate after delivery, successful installation and deployment of the entire system. Remaining 10% of the payment will be made after satisfactory completion of the warranty period, if no fault is reported against the system or the project or part of the project at the end of the warranty period. However, 100% payment may be made in lieu of equivalent bank guarantee against the security deposit of 10%.

3. Validity of quotations:

- a. Proposals received beyond the deadline will not be opened.
- b. Email or Facsimile quotations are not acceptable.
- c. The quotation shall remain valid for a period not less than 60 days after the deadline fixed for submission of quotations.

4. General Criteria for KOHA software:

- a. The Vendor must be registered under Companies Act
- b. The Vendor should have an office for KOHA support in West Bengal
- c. The Vendor should have implemented & automated at-least 15 libraries using KOHA in West Bengal. Kindly attach valid Purchase order or Completion certificate/s.
- d. The Vendor should be competent with the Hindi and local language of West Bengal (Bengali).
- e. The software must follow MARC 21 compatibility with the required metadata tags therein.
- f. Total software solution should be FOSS based.
- g. The source code for all the solution components to be used/integrated for the proposed deployment *must* be freely available under an open source license.
- h. It must follow the Z39.50 international protocol standards
- i. It must have the Radio Frequency Data Identification (RFID) qualities.
- j. It must have the MySQL server to follow the international standard.
- k. It must have the data conversion capability.
- l. It must follow the Web 2.0 standard.
- m. It must have the in-built APACHE.
- n. It must have the RSS (Real Simple Syndication) feed burners included herein.
- o. It must follow the PICS (Platform for Internet Content Substance) accreditation parameters prescribed therein.
- p. The software must have the tight security measures both at the Administrative level and the sub modular level also.
- q. It must be enabled with Google Jacket. Or local image
- r. No restrictions on number of records & Housekeeping users should be kept.

- s. Must be able to generate and print Barcode labels and Spine Labels.
- t. Must be able to generate and print Bar-coded Patron Cards.
- u. Must be able to perform Full-Text Search.
- v. Must be able to perform Automatic Indexing.
- w. It must enable Flexible reporting & Faceted Search.
- x. It can work in consortia, multi-branch or single-branch mode.
- y. It can generate automated overdue notices either by email or SMS.
- z. It can email issue slips instead of printing them at point of circulation.
- aa. It should have an offline circulation module.
- bb. It must be user friendly. and
- cc. Others customization as per our requirements

Other Terms & Conditions on services required:

- i. Latest stable version of open source Koha Library Management Software (LMS) should be implemented.
- ii. Data Backup: Facility for easy regular data backup by the library personnel.
- iii. Data Privacy, Confidentiality & Security: Vendor should strictly ensure privacy, confidentiality and security of all clients' data.
- iv. In case of local modifications to database, the database schema with relationship, data type and comments should be documented and handed over during project acceptance test phase.
- v. Standards compliance: MARC21, Z39.50, UTF8/Unicode, SIP2 etc.
- vi. Vendor should have minimum three years experience in implementation, maintenance of KOHA on Linux platform as Library Management System in
- vii. Academic/ Public libraries and organizing trainings for/day to day running of the software.
- viii. Vendor should have implemented of KOHA in at least 15 academic/public libraries or consortia of Academic/public libraries with documented evidence, out of that 10 in Govt. departments/institutes.
- ix. Vendor should have ability to migrate data from proprietary software to Koha
- x. Experience of at least one successful and live implementation on centralized server with multiple independent library instances, each having its own OPAC, staff client and independent databases.
- xi. KOHA being on open source software, any customization and configuration details as per requirements of client should be documented and provided to client for future references.
- xii. Offline circulation facility is required in case of failure of internet connectivity for short time.
- xiii. Vendor should provide details of Customer base/references and Management profile of the company.
- xiv. Automatic system monitoring, alert and notification system using AGIOS/ZABBIX/RRD/Cacti for HDD health, disk space, memory usage, processor loads, network throughput.
- xv. Warranty will be for minimum one year from the date of operation (i.e. after hand-over of the system to the institute for live operation)

ANNEXURE – I

Technical Specifications consisting of Customization/Configurations & Fine Tuning that should be incorporated for KOHA software & Services:

	General System Requirements	YES/NO
1	Total software solution should be based on Boot-Strap Technology	
2	There should be Module-wise customization	
3	Software should be enabled with one screen technology	
4	There should be scalable/flexible reporting in the reports section	
5	There should be SSL and HTTPS Access	
6	Staff must be able to manage the system without vendor intervention and be able to shutdown and restart the system without vendor intervention. The system must check the integrity of the entire file system during each restart of the system and servers must log errors by date and time.	
7	The system must provide protection for all data files through the use of locally defined passwords or other security measures so that information critical functions cannot be performed without proper authorization. That is, the system must allow the restriction of specific functions to specific users.	
8	Procedures and programs must be established which enable rapid data recovery from software failure.	
9	Provision of Remote Database Back-up to local staff system should be provided with one click.	
10	The system must provide different levels of security: Network, Database, and Application.	
11	There should be provision for MOPAC: Android application for OPAC in different platforms (Smart phones/Tablets/Etc)	
12	The system must not restrict the number of workstations that can access programs as long as equipment requirements are met and operating system license limits are not exceeded.	
13	The system must be compatible with the barcodes currently used by the library for materials and for borrowers.	
14	The system must allow restriction of access to local or remote databases based on the IP address of the user and User's log-in ID.	
15	The system must be able to authenticate users by user name & password/Barcode/SIP and retain the user's authorization as he or she navigates among databases.	
16	Libraries must be able to set individual parameters for material types, locations, patron types, checkout periods, fines, and other library policies.	
17	Libraries must have the ability to generate statistical reports for all data relating to the use of library materials, borrowers, and other data needed for operations of a library.	
18	The system must allow printing/email/SMS of various alerts/notices.	
19	ILS must check each user's access privileges at login, and automatically disable or enable client functions (in real time) based upon the user's profile.	
20	ILS should not require a separate login to access different subsystems; the initial login should set all privileges for all subsystems.	

Cataloguing, Database, and Authority Control Requirements		
21	The Cataloguing interface must support context sensitive hyperlink help functionality that can connect directly to a locally loaded or Internet accessible Cataloguer's reference database.	
22	Librarians must have the ability to define if records are immediately available for the Library Public Access Catalogue or must be hidden for a specified period of time.	
23	When deleting records, restrictions must occur when records have fines or fees due, holds pending, or pending action from Acquisitions with a message alert for staff with the reason why the record cannot be deleted and a choice to either abort or continue, stating the results of deletion, i.e. "if the record is deleted, fines will also be deleted", or "holds will be moved to the next copy, "hold will be deleted" if no more copies.	
24	Item records must link in real-time to due date (if checked out), the last check-in date, number of circulations since a specified date, and holds against the item and display that information in staff programs, displaying borrower information.	
25	The system must support global updates of all occurrences of a heading in a bibliographic file with a single machine transaction. Cataloguing must include a global editor. It must be possible to globally edit any field within the MARC record.	
26	The system must allow authorized headings or entries to be added, changed, or deleted as part of a new bibliographic record.	
27	The system must display "see" and "see also" references, scope notes, reference notes, and general information notes in Library Public Access Catalogue and staff displays.	
28	The system must support customized label printing of spine call numbers, property stamps, and other appropriate labels. It should also support printing of Catalogue cards (Main Card, Added entries) directly or in batch mode.	
29	The real-time update of Catalogue records that are imported throughout the rest of the subsystems and modules.	
30	The retrieval of records by at least accession number, title control number, title, author, ISBN, and ISSN.	
31	It must be possible for the brief MARC record to automatically be updated to a full MARC record from a hierarchy of defined sources.	
32	The Cataloguing module must have the abilities to create and edit by: (a) A full screen MARC edits view. (b) The use of templates in MARC format that contain required and recommended bibliographic fields. (c) An interface for staff members unfamiliar with MARC. The data from this interface must be stored in MARC format allowing it to be retrieved, indexed, and searched the same as full MARC records.	
33	Ability to change record formats (e.g. Book to sound recording).	
34	10 and 13 digit ISBN searching.	
35	Indexing of 505 subfield codes.	
36	URL checker for 856 tags	
37	Ability to edit item records regardless of circulation status (e.g. Checked out, on hold...)	
Public Access Catalogue and User Portal Requirements		

38	<p>The general functions of the Online Public Access Catalogue (OPAC) are:</p> <ul style="list-style-type: none"> • The portal must be custom designed by the vendor based on the specifications of library staff. It is desirable for the vendor to offer a template or templates, but not to limit the library to templates only. • Patrons must be able to what type of search strategy they want to use. • Patrons must be able to limit search by format, language, call number, and publication date. • OPAC must interact with the circulation system in real time. The status of library material (available/issued/etc.) should be available in OPAC. • Catalogue enrichment such as book jackets (stored locally or remotely) and reviews are available. It should be hyperlink to the library Catalogue. • If no cover art image is available the system must display a “generic” cover art image as an option. • The System must offer a federated search option to include at a minimum: Library Catalogue, Remote Resources including news feeds & websites, and Subscription Databases all in ONE search. • The Web-based OPAC should have the capability to be accessible from Phone / PDA /other mobile devices with necessary graceful degradations. • OPAC must provide English and Bengali and Hindi versions. 	
39	<p>The Library Public Access Catalogue must permit remote patrons to authenticate themselves once for their entire session in order to access third party databases that are made available by the library or perform other activities that require authentication. Web portal must allow authenticated patrons access to licensed databases from locations outside of the library.</p>	
40	<p>User portals must allow users to renew their checked out items, place hold(s) unless restrictions have been placed on either the material, such as holds for someone else or on their borrower privileges. They should be able to cancel the specific hold.</p>	
41	<p>User portals must allow users to view their circulation accounts for items checked out, fines and fees dues, and other relevant information.</p>	
42	<p>The system must allow users to use their account to keep a history of materials they have previously checked out and therefore must be interactive with circulation.</p>	
43	<p>The Library Public Access Catalogue must include an online tutorial accessible from any session of the Library Public Access Catalogue. Online help is required for all modules</p>	
44	<p>The system must allow librarians to define whether or not selected items such as <i>lost</i>, <i>in transit</i>, or <i>withdrawn</i> be displayed to users.</p>	
45	<p>Library Public Access Catalogue which may include number, type, duration, response times, unsuccessful, help requests, prints, downloads, e-mails and other relevant information.</p>	
46	<p>Hardware and software standards for the OPAC are:</p> <ul style="list-style-type: none"> • System must be able to function on a standard keyboard. • System must be fully compliant with MARC21 and Z39.50 standards. • System’s public Catalogue interface must be accessible from any type of client running a Web browser. • System’s public Catalogue interface must support English and Bengali language typing (phonetic) and searching 	

47	The display of the OPAC must include the total number of records found along with brief bibliographic information, circulation status for an item. It should provide hyperlinked author, class number and subject fields.	
48	Ability to see logs/report of unsuccessful searches (no hits).	
49	Ability for virtual shelf browse (limit by format, Dewey number).	
50	Support a tag cloud display.	
51	Ability to print or export to email or save, a bibliography displaying brief or full bibliographic records.	
	Circulation, Inventory, Holds, Fines, and Fee Requirements	
	General Functions	
52	Circulation must manage all basic Circulation operations of the library -- check-out, check-in, renewal, fine and fee processing, managing holds and recording statistical usage of library collection and borrowers.	
53	Circulation must allow librarians to profile circulation parameters using types of materials, types of borrowers, overdue thresholds, and various fines, maximum fines and fees.	
54	An offline circulation product must be available to enable the check out and check in of materials on a circulation workstation or portable device and to be able to load these transactions to the online system at a later time and within the circulation interface.	
55	At the time of new borrower registration, the system must perform a duplicate check to determine if there are existing records that meet the criteria being entered.	
56	Borrower records must contain at least name, borrower id, permanent address and telephone, secondary address and telephone, cell telephone number, e-mail address (es), and must be searchable by all of these fields.	
57	Circulation must support a calendar function to define closed days and automatically adjust check-in times accordingly.	
58	The module must not confuse patron barcode number with material barcode numbers.	
59	An automatic update in the Catalogue of item status when it is checked in or checked out etc.	
60	Librarian must be able to generate statistical records for all transactions	
61	The system must produce a "purchase alert" for titles when certain number of holds is place on certain numbers of copies. This ratio should be a library defined ratio.	
62	Patron record does not lock if accessed on multiple staff workstations	
63	Permissions that can be set by staff role and workstation to restrict access and/or modification to patron records.	
64	Support patron types tied to different expiry periods.	
65	Support ability for the Library to specify which kinds of materials can be borrowed by specific patron types.	
66	Support ability for the Library to specify limits on number of items held and/or the type of items held by a patron at any one time; this limit to be set by the Library for each patron type/item type.	

Checkouts		
67	System must be able to check out items when the borrower's barcode card is not present.	
68	The system must treat each checkout as a separate transaction but be able to list all checkouts for each person on one receipt.	
69	The system must check all items for outstanding holds, charges, and circulation restrictions before allowing them to be checked out.	
70	The system must allow for ephemeral records to be created to check out and count statistics, but not create an inventory trail, for items such as periodicals, brochures, and other library defined materials.	
71	Circulation must support expiration dates for borrower privileges and must automatically message library staff when that date is approaching and not check out items beyond that date.	
72	Circulation must support extension of expiration dates with a simple keystroke at the time of checkout or access to the user's record.	
73	If a claims returned, missing, or lost items are scanned during inventory, in library use, or at check-in or check-out, the status must automatically revert to on shelf or checked out status without requiring staff intervention.	
74	Circulation must restrict checking out of materials designated as non-circulating and allow library staff intervention to proceed with a single keystroke	
75	The system must display at least the following on the checkout screen: Patron name, Borrowing category, Patron barcode number, Lending status, Item identification number, Short title, Call number, Due date, Outstanding blocks (if any), Comment field on Patron's record.	
76	The system must alert (audio and text) staff if the item being checked out is already checked out to another patron. Staff must also have the ability to override the alert and checkout the item.	
77	Staff must be able to check out items by barcode, or title.	
78	Support backdate of check out.	
79	Support in house check out/in to track materials used within the Library.	
Check-ins		
80	Circulation must allow manual reset of check-in date to accommodate book drop check-in and unexpected closures.	
81	Circulation must support a batch check-in that does not message and require action for each fine transaction calculated during check-in.	
82	The system must support retention of the last two borrowers for each item in order to manage problems such as damages, at the library's option.	
83	If an item is deemed to be damaged, the system must allow the operator to identify the responsible borrower and invoke a message to be sent through standard notification parameters.	
84	Staff must be able to check in items by barcode, or title.	
85	The system must display at least the following on the checkout screen Patron name, Patron barcode, Title, Due date, Shelving location and Overdue alert (if any).	

86	During check-in the system must alert (audio and text) staff if an item is on hold and give the option to print a hold slip.	
	Blocks	
87	The block functions of the circulation module are: The system must provide automatic restriction of borrower privileges for Library-defined criteria, That blocks can be overridden by staff, That blocks alerts must be audio and/or visual, Fines must be able to be paid easily from the same window, System must block patrons with overdue materials and unpaid fines from placing holds, borrowing, or renewing items.	
88	The system must automatically block borrowers from continued privileges based on library defined parameters such as over dues, fines, claims returned, and lost books with a display message with the entire reason for the block without the need for library staff to conduct other inquires, and with the ability for the operator to proceed with a single keystroke.	
89	The system must allow library staff to quickly and easily place manual blocks with explanation note ("need address update," etc.) with a display message with the entire reason for the block without the need for library staff to conduct other inquires, and with the ability for the operator to proceed with a single keystroke.	
90	Authorized library staff must be able to override restrictions on borrowers or on materials by using one keystroke without leaving the transaction in progress.	
	Holds, Renewals	
91	<p>The holds and renewal functions of the circulation module are:</p> <ul style="list-style-type: none"> • That it must generate e-mail/sms notifications when items become available. • System must block the placing of holds on lost, missing items, available item, or non-circulating items. • System must allow staff view and alter the sequence of holds in a queue, • System must automatically activate the next hold in the queue when a hold is removed and generate a hold notice to the next patron in the queue. • System must monitor the length of time that an item sits on the hold shelf. • System must automatically print hold slips when items on hold are checked in. • System must allow the Library to restrict the number of renewals. 	
92	Circulation must allow for a library defined number of renewals, for renewals in person, via telephone software, via access to the user's record from any location and the calculation of the new due date when items are renewed.	
93	The system must allow for renewal of all items or individual items for a borrower with a single command.	
94	The system must allow library defined blocks of renewals if the patron is delinquent, the title has a hold registered against it, the renewal limit has been reached, or an item is restricted in some other way.	
95	Circulation must allow library staff to place holds from staff workstations or borrowers to place holds as part of the User Portal from any library or remote location if no restrictions are on the material or the user.	

96	Circulation must alert the operator when placing holds that a borrower is blocked, their privileges have expired, or if materials have restrictions against holds and allow the operator to proceed with a single keystroke.	
97	The system must allow librarians to define individual copies and/or titles that may not have holds placed on them so they always go to the shelf, available for borrowers who prefer to browse shelves.	
98	The system should allow library staff to remove a hold by a simple straightforward action. Librarians must have the ability to move a copy up or down in the hold list and define a priority for filling holds	
99	The system must support holds for "on shelf" items	
100	The system must allow staff to initiate a recall for specific titles or copies with a recall message notice produced and managed with standard notice procedures.	
101	Support ability for the Library to specify limits on the total number of hold requests any patron may have at any given time; limits to be set by each patron type.	
102	Ability to automatically delete all cancelled, unfilled or expired hold requests after a library specified period of time.	
	Fines, Overdue	
103	The fines and overdue functions of the circulation module are: <ul style="list-style-type: none"> • That it must generate e-mail/sms notifications of overdue notices. • System must allow the Library to set the parameters for overdue and bill notices. • Fines must be calculated at the time of check-in, renewal, or checkout. • System must allow full or partial payment of fines with receipts. • Staff must have the capability to exempt fees and fines. • System must automatically cancel the lost status when an item is returned. • System must keep a history of patron fine and fee payments. 	
104	Circulation must support library defined fines and fees with automatic calculation of fines when items are checked in late and calculation of estimated fines due if overdue books were returned today by borrower.	
105	The system must be able to accept debit, or credit card payments for fines and fees and other costs.	
106	The system must support a cash register function and print receipts for collections of fines, fees, <i>lost</i> books, and miscellaneous fees assessed such as photocopies and printing.	
107	The system must produce an overdue notice for the hold shelf so library staff can manage those items not retrieved by borrowers in a timely manner with library defined parameters.	
108	Alert staff of overdue fines on incoming items, allowing staff to pay, waives or charge such fines to the patron's account.	
109	Support ability to account for closed days and holidays or grace periods in the calculation of overdue fines; grace periods being defined by library.	
110	Support ability to manually add a charge to a patron record and for staff to be able to select a reason for the added charges from a list originating from the Library.	

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

125	The system must retain circulation history of individual items but not of individual borrower's information to protect the privacy of patrons.	
126	Circulation must compile a list of overdue, missing, claims returned and lost items for searching shelves, which can be printed, downloaded, or e-mailed.	
127	The system must allow reports to be generated by any authorized library or computer staff.	
128	Libraries must be able to design report and notice formats.	
129	The system must allow for a variety of library defined notices to be generated for notification using mail, e-mail, or SMS.	
130	The system must support customizable report generation and production functions that will allow library and computer staff to prepare customized reports as necessary.	
131	The system must support a variety of standard reports and notices for users based on library defined parameters such as over dues, fines and fees, lost books.	
132	The system must support the ability to send user notifications by email, SMS, and print through mail and must allow librarians to define a hierarchy to send e-mail notices first (if e-mail is in the user record), phone notices second, and print notices as the last resort.	
133	Circulation must send an alert message at check-out, renewal, or check-in, or any other transaction that accesses the borrower records that items are available on the holds shelf and accumulated fines etc.	
	Acquisitions Requirements	
134	The Acquisitions program must manage the entire Acquisitions process including duplicate check, preparation of approval list, selection lists, purchase orders, receiving, claiming and processing invoices, fund accounting, accessioning and payments.	
135	Selection lists must be able to be converted to purchase orders or imported into the purchase order format.	
136	Acquisitions must allow for adequate security and password features so that authorized staff has rights to perform only those functions for which they are authorized.	
137	Acquisitions must detect duplication and perform de-duplication of records in the library local Acquisitions orders database with options to create a new order record, not add the record, or attach a new order to the existing bibliographic record.	
138	The module must allow for MARC record downloads into the acquisitions module directly. Field(s) filtering is required.	
139	F-12 should be mapped in such a way that it will accept prefix of the Accession Series and will show last accession number.	
140	Acquisitions must support viewing of effects on the fund before, during, and after an order is sent.	
141	Acquisitions must support entry of brief title records that will be overlaid by full MARC records when each title is received and Catalogued.	
142	Acquisitions must be integrated with the library Public Access Catalogue and, at the library's discretion, display title-specific on order status information so holds may be placed.	

143	The ability to print barcode labels by individual accession numbers and/or range of accession numbers.	
144		
145	The library should have the option to display items in the OPAC automatically when the order is released, transmitted, received, approved, or not at all.	
146	It should support different order types including firm orders, subscriptions, and gifts.	
147	Can it handle Standing Order?	
148	Ability to support multiple overlapping fiscal periods in fund accounting structure.	
149	Ability to create, manipulates, and order/receive in multiple fiscal years.	
150	Capability to produce fund summary reports that include fund allocations, amount encumbered and expended, and remaining percentage free for a given fiscal year.	
151	Ability to adjust amount encumbered and expended in a fund, and ability to transfer monies between funds.	
152	Ability to search orders/requests, approvals, main Catalogue, Cataloguing working file.	
153	Ability to retrieve last/previous order worked on.	
154	Ability to track an item through processing.	
155	Ability to place orders using overspent funds.	
156	Ability to receive items not ordered via acquisitions module (e.g. local purchases).	
157	Ability to receive and pay for incomplete orders.	
158	Ability to edit amounts and funds when paying, which automatically adjust encumbrances.	
159	Ability to receive a partial order.	
160	Ability to receive items without purchase order.	
161	Ability to suppress on-order items and on-order bibliographic records from displaying in PAC depending on order type.	
162	Ability to detect duplicate orders and provide alert of duplication at the time order is created.	
163	Acquisition status report that include encumbrances, expenditures, and funds available (e.g. outstanding orders).	
164	Monthly reports: generation, verification, payment.	
165	Year-end reports: year-end process, fund summary, year-end carry forward Process.	
166	Ability to delete items from order or re-order with different vendor.	
167	Ability to add new title to existing P.O. or change quantities.	
168	Ability to deal with duplicate invoice #'s.	
169	Ability to transfer outstanding item from previous years to new year.	
	Serials Control Requirements	
170	The Serials module must notify staff when a subscription is about to expire.	
171	The Serials module must support prediction patterns and notify staff automatically if a new prediction pattern, based on the check in, is needed.	

172	The Serials module must support claiming from a list or individual claims.	
173	The Serials module must support binding.	
174	The Serials Control module must include a fully integrated database with check-in tracking of all periodically published materials.	
175	Serials Control must support access to serials information by using standard searches that are available in other programs.	
176	Serials Control must keep complete check-in history files of all missing or claimed items and automatically produce notifications for staff review without the need for staff to enter data.	
177	Check-in history must be sorted and displayed in issue date order so that issues checked in out-of-order do not skew the receipt history.	
178	The system must produce claiming notices and allow claiming of missing and late issues.	
179	Serials Control must provide a "notes" option to track claims and subscription extensions.	
180	Serials Control must automatically create a summary holdings statement to be displayed in the Library Public Access Catalogue.	
181	Ability to check in items by scanning the SICI (Serial item and contribution identifier)	
182	Serials Control must keep complete check-in history files of all issues received and automatically update without the need for staff to enter data.	
183	The user to override the predicted number if the received issue is not the expected issue but does conform to the prediction pattern.	
184	Ability to combine issues that arrive unexpectedly as a combined issue.	
185	Ability to undo the check-in of issues erroneously checked in.	
186	Ability to manage subscriptions (additions, renewals, cancellations).	
187	Ability to view a subscription list, indicating all subscriptions eligible to be renewed.	
188	Ability to cancel or reopen a subscription.	
189	Allow automatic claiming or mediated claiming.	
190	Claim notices must be available in print and electronic formats.	
191	Claiming data must include: supplier information, subscription ID, claim response, claim reason, notes, claim history, issue claimed, number of issues claimed.	
180	Ability for staff to claim issues from a list of pending claims.	
192	Ability to show missing volume/issues along with bound volume data.	
	Training, Documentation and Technical Supports	
193	Describe and provide a copy of its training plan.	
194	Provide a minimum five hour, for 4 days of onsite training in the use of the system modules, features, and administration.	

195	<p>Must train the Library and system administration staff to manage and operate the system on a day to day basis including: (a) Start-up and shutdown. (b) Monitor system performance and perform routine management tasks. (c) Handle emergencies. (d) Troubleshoot and resolve routine problems. (e) Load bibliographic and patron records. (f) Perform backups, restoration, recommended preventive maintenance, and security measures. (g) Provide documentation updates and release notes electronically. (h) Perform day to day update with version upgrade.</p>	
196	<p>Should have an "Online Ticketing System" where a user will be provided a user ID and password wherein he/she can log-in and launch a support ticket. The support call will be recorded and support services will be provided as per the requirement at the earliest possible time. These records can be used for future reference too. The Up-time & Down-time will be calculated and further penalty will be imposed on the vendor if they are not able to provide the services as required within the stipulated time period. The response and problem resolution time will be decided by the Institute and will be mentioned in the Contract/Agreement.</p>	

ANNEXURE – II

DSPACE

DSpace is an open source repository software package typically used for creating open access repositories for scholarly and/or published digital content. While DSpace shares some feature overlap with content management systems and document management systems, the DSpace repository software serves a specific need as a digital archives system, focused on the long-term storage, access and preservation of digital content.

Terms and Conditions: General terms and conditions as remain same.

Key criteria for DSPACE software:

1. Application architecture: a full application, not just a framework with components. Components may be swapped or added, but there is no need to build new ones.
2. Built-in workflows: The embedded DSpace data model and workflows should be familiar to librarians and archivists.
3. Built-in search engine: It should come packaged with Apache Lucene, an OS indexing engine that allows for enabling full-text searching for end users. In addition, you can optionally enable a faceted search/browse interface via Apache Solr, an OS enterprise search platform.
4. File types: It should not only auto-recognizes files of any common format (e.g. TXT, DOC, PDF, JPEG, MPEG, TIFF) but also will accept files of any format.
5. Metadata: Qualified Dublin Core should be the default metadata schema.
6. Tools/plugin: It should come with management tools including batch import/ export, batch metadata editing, creation, and object backup & restoration tools.
7. Security: The platform should come with an authorization stack or organizations may use an existing LDAP, Shibboleth, or similar protocols to link their internal systems
8. Permissions: It should allow you to control permissions as granular as item level, or you can set global permissions based on communities and collections.
9. OAI-PMH/SWORD/WebDAV: It should comply with standard protocols for access, ingest and export.
10. Configurable database: Postgres or Oracle can be chosen for the database.
11. Languages: It should be available in over twenty languages.

Customizations/Configurations for DSPACE software:

- A. The customization includes:
 1. Submission process
 2. License
 3. Metadata input form
 4. Welcome message
 5. Creation of appropriate E-groups and E-People
- B. Configuration of CNRI Handler and OAI-PMH
- C. Software must meet network & Security requirements
- D. It should run on Ubuntu Latest version/Debian Linux Latest Version along with KOHA on the same server.
- E. It should be enabled with web 2.0 features such as RSS Feeds, Current News, Facebook, E-mail alerts, User Statistics, etc.
- F. Complete documentation required.
- G. On-site training (Minimum 3 days for 5 members)

ANNEXURE - III
FORMAT OF PRICE BID

Sr. No.	Description	Units	Unit Rate (Rs.)	Taxes (Rs.)	Total Amount (Rs.)
1.	Installation, configuration and general introduction to KOHA on Debian Linux server				
2.	Customization, Testing and Implementation as per Annexure - I				
3.	Documentation, Up-gradation of OS & KOHA, and Implementation of Offline Circulation module & Data Migration of 7,500 records into KOHA				
4.	On-site Training within the project period.				
5.	MOPAC-Mobile Application for OPAC Module of KOHA				
6.	Annual Maintenance charges (from 2 nd year onwards) for the complete system including customizations				
7.	Installation, Customization, Testing, Implementation and Training (Dspace) as per Annexure - II with AMC				

We agree to execute the above project in accordance with the technical specifications for a total contract price of Rs (in figures) (Rs (in words).

We also confirm that the normal Support Service ofmonths shall apply to the offered goods.

(Bidder)

Name:

Signature:

Date:

Address: