Vendor Teleconference SJVLS_15_002 Evergreen ILS Development, Migration and Support held May 21, 2015 at 10:00 AM PDT.

Moderator: Mary Ellen Tyckoson

There were 9 people on the call, 4 from SJVLS and 5 from vendors.

The basic purpose of the RFP was described, and the question/answer portion began.

Questions on development request for Batch item editing Appendix D

Item level fields – are there any other fields, such as call number field or owning library?

Call number might be nice, but is not essential, since we rarely batch change call numbers.

Owning library would be good to have in there.

Clarification of the results and actions:

What we envision is a search screen where the desired criteria can be entered (i.e. location = ‘visa’ AND collection = ‘tcaf’). The results are then displayed in a grid style list that can be sorted on any column. Below is a screen shot from Horizon showing the results of an item group editor search with some items selected for editing.
From there it brings up an editing window to change select values for the entire batch of items.

It would be fine to have it send the items to the normal batch editing interface if that gives us the ability to edit owning location, circ location, shelving location, istat, due date, item status, and check in alerts.

Returning to the search results list after editing – because we encourage people to break large batches of items into smaller groups, it would good to be able to return to the results list to see what was changed and select another batch. For example, they may have thousands of records that need to be changed, but to reduce impact on the server, they may only select batches of 500 from the search results. When they are finally done editing, there would be some kind of option to close the search results grid.

Incompatible changes – what should happen? Should a message pop-up on each item or just have a list at the end? A list at the end would be fine. Item status edits are typically batch changes to the same field / value, i.e. change items with a status of missing, damaged or checked in to our “to be withdrawn” status. So the error message would tend to be the same on all of them.

Do we need to edit call numbers through this process? – No, we rarely batch edit call numbers.

Do we need to be able to filter the results by say branch or system level? – As long as people can sort and select the results, there shouldn’t be a need for additional filtering. Generally the initial search criteria would already have placed the necessary limits on the items being edited.

Reports training – do we need two sessions, a basic and a more advanced writing/templating session?

Since we plan to use JasperReports for most of our reporting and do most of the report writing in SQL, just the basic session should be sufficient.
For an on-premisis system what are the interconnects, and are we planning to reuse any current network or server equipment?

Our current telecommunications enviroment hubs in Fresno where we have a large recently-redesigned data center with a robust core network and plenty of rack space available. The intention if we have an on-premisis Evergreen installation is to expand our existing VMWare installation, but with the Evergreen servers segregated from the other virtual servers. We don’t intend to try and reuse any equipment from the Horizon installation except for servers running 3rd party products such Comprise SmartPay, TalkingTech’s telephone notification system, JasperReports and any servers managing selfcheck or PCReservation software. We will need assistance with determining the number of servers and allocation of server resources. We are capable of managing the server hardware and operating systems within our VMWare environment, but will need the vendor to do the installation of the Evergreen components and will need assistance with Evergreen upgrades/patches, particularly in the first year. While we do not have requirements for a server hardware brand, we are currently a DELL shop so our network engineers are experienced at getting good service from DELL. It should be noted that Sun/Oracle hardware support in the Fresno area has not been good in recent years.

We have an existing mail gateway that Evergreen would use. A new Fortinet firewall and other key network pieces are in place. We currently have off-site backup from Barracuda which can be expanded to cover Evergreen.

How to get an idea of what to quote for on-premisis hardware, i.e. how many servers can we afford/support?

We are very good at stretching our small staff to support however many servers are needed. We have one network engineer who is proficient at Linux, with some additional Linux knowledge among the ILS team. Our engineers are adept at managing VMWare and spinning up new servers as needed. There is currently $425,000 budgeted for this project. While we obviously prefer to not spend the entire amount, it is paramount that the Evergreen installation perform at acceptable speeds, so the hardware environment should be specified for performance rather than cost savings.

Would we review a proposal that only quotes hosted or on-premisis servers, but not both?

While we would much prefer to have both options quoted, we will consider proposals that include the 9 major components of the RFP, but only one of the two hosting options. Our intention is to keep our options open for future hosting configuration as the knowledge of Evergreen among SJVLS staff members builds. In other words, if we start out vendor-hosted, we may wish to move to local hosting at a future time.

What is the top priority? Speed?

Performance is very important, so while speed isn’t the only factor, it is a very important factor. In the RFP we specified transaction speed and reliability.
Where do we test for the performance requirements?

Testing for speed of transactions is only done at the central office where local network congestion is not an issue. When it comes to branch library performance, our network engineers are very experienced at shaping network traffic to reserve sufficient bandwidth for ILS traffic.

Is there a time/place for discussion of space, size and ability to host to get understanding of what we can handle?

Quote what you think we need in term of servers to provide good performance. We have the physical space and expertise to manage a significant increase in the number of virtual servers in our data center. Once the proposals have been submitted, bidders may be asked to present to the Automation Committee (which can be done virtually) and our network engineers will be at that presentation.

Additional questions for clarification of the RFP can be submitted in writing until May 28, 2015 4:00 PM PDT. Our responses will be posted by June 2, 2015.