

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.

Barcode	Location	Collection	Call No.	Status	created	Title	cko_location/due_date	last_status_update/Last CKO date/CKOs/Staff Only/last update date/BitType
1. 1014209357	visa	tcaf	FIC STEINBECK	dmrg	04/05/90	The pearl, John Steinbeck, with	11/17/03	10/15/03 69 11/17/03 1810011 TCBK
2. 1013941719	visa	tcaf	FIC LES	i	11/05/87	The memoirs of a survivor / Doris	10/08/03	10/17/81 2 04/20/93 114124 TCBK
3. 1015302043	visa	tcaf	FIC WEL	i	07/16/90	The cloning of Joanna May / Fay	10/08/03	02/21/92 11 04/20/93 325338 TCBK
4. 1015379686	visa	tcaf	FIC WEL	i	03/25/91	Darcy's utopia / Fay Weldon.	10/08/03	08/15/95 19 04/20/93 617169 TCBK
5. 1024914879	visa	tcaf	FIC GER	i	10/01/93	The kingdom of Brooklyn / Merrill	10/08/03	12/29/95 10 05/18/94 898988 TCBK
6. 1015200940	visa	tcaf	FIC JOH	i	05/22/93	In the night cafe / Joyce Johnson.	04/20/93	04/20/93 303374 TCBK
7. 1025584000	visa	tcaf	FIC OIL	i	05/06/95	The age of miracles / stories / Ellen	01/25/96	01/30/96 996209 TCBK
8. 1025268465	visa	tcaf	FIC GRI	i	08/19/94	Stealing time / Mary Grimm.	04/10/96	04/06/95 993996 TCBK
9. 1025394428	visa	tcaf	FIC DAV	i	10/18/94	Kolymysk Heights / Lionel Davidson.	10/08/03	04/18/96 16 06/28/95 988771 TCBK
10. 1015490897	visa	tcaf	FIC WLU	i	10/19/88	The past is another country / Peter	04/23/96	04/20/93 287711 TCBK
11. 1027211554	visa	tcaf	FIC GEO	i	04/17/96	Seduced: the life and times of a one-	06/13/96	06/05/96 1057936 TCBK
12. 1025014901	visa	tcaf	FIC KEE	i	05/31/94	Cleanwater summer / John C. Keegan.	10/09/03	06/22/96 14 12/29/94 923952 TCBK
13. 1023365628	visa	tcaf	FIC GRI	i	05/05/92	Season's end : a novel / Tom Grimes.	07/03/96	06/02/93 788058 TCBK
14. 1015733502	visa	tcaf	FIC OCO	i	06/14/91	Like China / Varley O'Connor.	07/06/96	04/20/93 711623 TCBK
15. 1022747701	visa	tcaf	FIC MOR	i	09/17/92	Santiago and the drinking party / Clay	07/09/96	06/04/93 837513 TCBK
16. 1025541978	visa	tcaf	FIC PEE	i	11/22/93	Covenant of the poppies / Colin D.	10/09/03	07/10/96 10 09/12/94 895000 TCBK
17. 1027211372	visa	tcaf	FIC GLI	i	04/17/96	Sounding the waters / James	07/18/96	1 05/30/96 1048595 TCBK
18. 1027193636	visa	tcaf	FIC FON	i	01/19/95	Dreams of the centaur : a novel /	03/05/96	5 06/29/96 1033354 TCBK
19. 1027189172	visa	tcaf	FIC PER	i	11/27/95	Dostoevsky's last night / Cristina Peri	03/05/96	5 05/13/96 1032296 TCBK
20. 1027181278	visa	tcaf	FIC SKV	i	01/19/96	The bride of Texas / by Josef	08/27/96	13 08/29/96 1036859 TCBK
21. 1027211570	visa	tcaf	FIC HAY	i	04/10/96	Live at five / David Haynes.	10/17/96	1 06/05/96 1046497 TCBK
22. 1027193851	visa	tcaf	FIC CLA	i	01/19/96	The flight of the osprey / by Ewan	10/23/96	11 10/28/96 1037238 TCBK
23. 1025278563	visa	tcaf	FIC LOW	i	08/19/94	The track of real desires : a novel / by	01/16/97	11 04/24/96 959382 TCBK
24. 1023215204	visa	tcaf	FIC GIB	i	06/30/92	Shelter / Wesley Gibson.	01/21/97	10 05/03/93 833940 TCBK
25. 1023389767	visa	tcaf	FIC KAL	i	07/17/92	Graced land / by Laura Kalpakian.	10/17/08	01/21/97 13 10/17/08 789929 TCBK
26. 1019114427	visa	tcaf	FIC LHE	i	02/08/88	A woman run mad / John L'Heureux.	01/30/97	39 04/20/93 551776 TCBK
27. 1027196045	visa	tcaf	FIC CAD	i	01/19/96	The Judas glass / Michael Cadnum.	02/05/97	12 12/05/96 1036307 TCBK
28. 1027201043	visa	tcaf	FIC FLE	i	01/19/96	The legend of the barefoot mailman.	02/11/97	9 08/29/96 1036306 TCBK
29. 1017688991	visa	tcaf	FIC DUR	i	04/11/91	Happy ending : a novel / by	03/12/97	16 04/20/93 693603 TCBK
30. 1015193593	visa	tcaf	FIC CAN	i	03/02/89	Table number seven / Victor Canning	05/10/97	17 04/20/93 290612 TCBK
31. 1027231222	visa	tcaf	FIC GUI	i	09/04/96	Blindsight : a novel / by Steve Gibbert	05/16/97	7 05/16/97 1059418 TCBK
32. 1027210622	visa	tcaf	FIC WID	i	08/12/96	The cattle killing / John Edgar	05/27/97	4 05/27/97 1069818 TCBK
33. 1027229150	visa	tcaf	FIC HAW	i	09/06/96	A white Merc with fins / James Hawes.	05/30/97	7 05/30/97 1055892 TCBK
34. 1023220898	visa	tcaf	FIC WID	i	08/11/92	The stories of John Edgar Wideman /	06/05/97	12 06/15/93 821424 TCBK
35. 1015829383	visa	tcaf	FIC FEN	i	10/18/91	The colors of snow / Kate Fenton.	06/07/97	11 04/20/93 729802 TCBK
36. 1023351494	visa	tcaf	FIC OWE	i	06/09/92	The sharpest sight / by Louis Owens.	10/08/03	06/19/97 12 04/28/12 819778 TCBK
37. 1027211331	visa	tcaf	FIC OUS	i	04/17/96	Visitation / Don Cushman.	07/01/97	1 05/30/96 1045493 TCBK
38. 1027233418	visa	tcaf	FIC DAG	i	10/24/96	Dear future / Fred D'Aguiar.	07/16/97	6 07/16/97 1067296 TCBK
39. 1015341413	visa	tcaf	FIC AST	i	06/18/90	Reaching Tin River / Thea Attley.	10/08/03	07/22/97 14 04/20/93 572900 TCBK
40. 1017587815	visa	tcaf	FIC MAI	i	09/12/91	Three times table / Sara Maitland.	07/25/97	10 04/20/93 705634 TCBK
41. 1015870829	visa	tcaf	FIC GAR	i	11/29/90	Entered from the sun / by George	08/04/97	19 04/20/93 623103 TCBK
42. 1027236874	visa	tcaf	FIC YOU	i	01/15/97	Remnants of the first earth / Ray A.	08/07/97	6 08/07/97 1033302 TCBK
43. 1018791879	visa	tcaf	FIC HOL	i	03/23/88	Good Friday / by Robert Lawrence	08/12/97	24 04/20/93 235665 TCBK
44. 1018645281	visa	tcaf	FIC JON	i	04/25/88	Winter palace : a novel / by Dennis	09/22/97	32 04/20/93 271216 TCBK

From there it brings up an editing window to change select values for the entire batch of items.

Batch Change: Item Group Editor

* Item Type: tcbk TC Book Codes

* Location: visa Visalia Library (Tulare Co.) Codes

* Collection: tcaf Tc Adult Fiction Codes

Call Type: Codes

Call# Source Price

Item Note

Internal Note

* Item Status Codes

due_date

CKI Notes

Staff

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.

Imcompatible 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-premises system what are the interconnects, and are we planning to reuse any current network or server equipment?

Our current telecommunications environment 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-premises 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 as 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-premises 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-premises 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 terms 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.