

Exhibit A
System Functionality Worksheet
Revised 1/29/2021

Below is a list of desired functions. Please indicate the status of each item within the proposed solution using the following indicators:

A - Available now

D - Currently in development and ready by June 1, 2021

P - Planned development but not ready by June 1, 2021

N - Not planned

***If submitting a proposal for a Discovery Layer only, some sections may not apply. In this case, please enter N/A for Vendor Status.**

1.1 Acquisitions

Synopsis: Ability to provide a fully functional, integrated acquisitions subsystem that automatically manages encumbrances, disencumbrances, and expenditures in multiple library-defined accounts based on acquisitions activities including, but not limited to, selecting, ordering, receiving, claiming, cancelling, invoicing and reporting.

Item Number	Description	Vendor Status	Vendor Notes
1.1.1	Allows staff to search, create, copy, modify, display and remove fund accounts for single or multiple years		
1.1.2	Allows staff to search, create, copy, modify, display and remove vendor accounts for single or multiple years		
1.1.3	Allows creation of different types of orders, especially firm, standing, and continuation orders		
1.1.4	Supports adding of fund and vendor cycles		
1.1.5	Supports setting and modifying budget amounts		
1.1.6	Allows for unlimited fund accounts		
1.1.7	Allows for unlimited vendor accounts		
1.1.8	Updates and balances funds in real time		
1.1.9	Allows for multiple accounts for a single vendor		

1.1.10	Allows clear process to “roll-over” fund and vendor accounts from one year to the next		
1.1.11	Provides search, create, display, modify, receive, cancel and remove functions for order records		
1.1.12	Supports manual addition of order lines for multiple libraries to a single order record		
1.1.13	Supports loading of automated MARC record data, with order information in 9xx tags		
1.1.14	Allows orders to be attached to an existing matching MARC record without overlay of the MARC record		
1.1.15	Allows display and holds placement of on-order items in OPAC		
1.1.16	Acquisitions module is fully integrated with all other modules, allowing on-order items to be accessed in all other modules		
1.1.17	Supports acquisitions functions with key vendors, especially Baker & Taylor, and RBDigital.		

1.2 Administration and Customization

Item Number	Description	Vendor Status	Vendor Notes
1.2.1	Allows designated staff to edit an export system settings, including circulation maps, item types, user profiles, etc.		
1.2.2	Allows staff administrators to restrict access to specific modules depending on staff level. Please describe how permission levels work within the solution.		
1.2.3	Allows circulation rules to be created based on material type.		
1.2.4	Allows staff administrators to edit or add new patron types and determine parameters for each profile.		

1.2.5	Allows staff administrators to update the content of email and text notices.		
1.2.6	Allows the batch deletion of item, patron and transaction records based on library-determined criteria, including patron expiration date, amount of money owed, etc., providing a review mechanism so that the records to be deleted can be reviewed before deletion.		
1.2.7	Provides the ability to identify and automatically delete specific fees (such as "Lost Processing fee") when patron returns lost items tied to the fee.		
1.2.8	Identifies "last activity" date for patrons. Indicate how this is selected (e.g. checkout, SIP2 activity, online account activity, etc.).		
1.2.9	Vendor provides roadmap of planned software updates to HPL		
1.2.10	The solution allows for report generation by staff on the production server without impacting search response times.		
1.2.11	Allows staff workstation to run multiple modules at the same time and to open multiple instances of the staff side solution.		
1.2.12	Allows staff administrators to add and edit defined bill types and for all bills (not only those tied to an item) to be resolved through the staff side solution and e-commerce functionality.		
1.2.13	System supports SIP2.		
1.2.14	System supports self-check units.		

1.2.15	System allows for the automation of these administrative maintenance tasks: • Daily email notice bounces • Daily updates of holds pull list • Daily blocking of delinquent accounts • Daily notice creation • Monthly change of patron type (e.g. as a patron ages, the type gets changed from juvenile to young adult)		
1.2.16	ILS is fully self-contained and capable of being operated by Library staff with no dependency on vendor for its routine operation.		
1.2.17	Solution keeps a log of each transaction which alters the database. Logs are date and time stamped and accessible through reporting tools.		
1.2.18	Solution complies fully with the latest version of Z39.50 on both the client and server sides		
1.2.19	Provides the ability to specify closed days both globally and irregular closures.		
1.2.20	Allows for privatization of patron data after a specified time frame, and patron data to be removed from transaction logs after a separate time frame.		

4.1.3 Cataloging and Item Records

Synopsis: Ability to incorporate MARC21 validation tables to verify a high quality and consistency of cataloging input. These tables must be applied to both imported and manually created records.

Item Number	Description	Vendor Status	Vendor Notes
1.3.1	Supports real-time importing of catalog records from any MARC- or RDA-based cataloging source, in both single-record basis and batch mode		
1.3.2	Provides a method for loading batches of bibliographic records from different providers, including acquisitions vendor. Note: HPL currently receives MARC records from Baker & Taylor, RBDigital and OCLC		
1.3.3	Allows loading batches of bibliographic records via FTP or files stored on hard drive or network		
1.3.4	Supports Identifying and overlaying duplicate bibliographic records based on specific criteria		
1.3.5	Allows protection of certain bibliographic fields during overlay, and can reverse the overlay, if needed		
1.3.6	Supports creation of item records during the loading of bibliographic records from specific fields		
1.3.7	Captures and imports bibliographic records from any Z39.50 source		
1.3.8	Provides a full-text database, with the means to search, create, display, modify, duplicate, and remove bibliographic records		
1.3.9	Provides a bibliographic editing function with copy, cut, and paste functions		

1.3.10	Allows the transfer of item records from one matching bibliographic record to another full record, combining all existing holds in order of request date		
1.3.11	Provides automatic flagging of MARC format and MARC tag errors		
1.3.12	Supports full diacritics and the addition or change of diacritics when editing a bibliographic record		
1.3.13	Allows unlimited bibliographic field lengths		
1.3.14	Provides real-time indexing and display of new or updated bibliographic holdings in staff and public modules		
1.3.15	Allows retrieval of bibliographic records by all available search types and system-established indexed fields		
1.3.16	Prevents removal of bibliographic records with attached copies, on-order items, or active hold requests		
1.3.17	Allows item, call, title and record level shadowing (making records visible in staff view only)		
1.3.18	Resource Description & Access (RDA) has been implemented		
1.3.19	RDA fields and subfields are visible and searchable in the OPAC Vendor		

1.3.20	Includes barcode, call number, creation date, due date, last activity, location, status, and price in item record fields		
1.3.21	Validates each barcode as it is entered into the database.		
1.3.22	Supports inclusion of note field in item record at public, staff and circulation levels		

1.3.23	Allows creation of local call numbers, regardless of classification, without restrictions		
1.3.24	Allows adding, editing, updating, and deleting item records in real time		
1.3.25	Allows global batch editing of item record fields		
1.3.26	Supports configuration and printing of spine and shelving labels by library location and item type, including diacritics Note: HPL uses the TSC TTP-247 thermal label printer		
1.3.27	Supports use of the barcodes		
1.3.28	Provides inventory functions and reports		
1.3.29	Provides authority control processing for name, uniform title, subject, genre, and series headings		
1.3.30	Supports batch load, deletion and merging of imported new and updated authority records, and removal of deleted authority records from any supplied authority vendors		
1.3.31	Allows global batch editing of Dewey Decimal author, subject and title headings		
1.3.32	Supports multiple authority files, including separate authority indexes for Dewey Decimal name and subject headings		
1.3.33	Detects and flags any unauthorized headings		
1.3.34	Allows addition of brief MARC records, with limited fields, by any authorized user.		
1.3.35	Allows addition of item records by any authorized user.		
1.3.36	Solution offers a Serial Management module for Checkin and Predictions.		

1.3.37	Solution provides the ability to exclude unavailable items from item searches on the staff side.		
1.3.38	Solution offers easy record selection for printing, or emailing, search results on the staff side		
1.3.39	Staff side solution offers auto-fill and suggestions for authors/titles.		

1.4 Label Management

Item Number	Description	Vendor Status	Vendor Notes
1.4.1	Ability to offer a label manager.		
1.4.2	Ability to produce spine labels individually on demand or batch run, on standard (non-proprietary) printers.		
1.4.3	Ability to support printing of labels to single sheets or to continuous form feed stock.		
1.4.4	Ability to print labels as they are generated or print all labels generated in a single session/operation.		
1.4.5	Ability to customize labels and print separate label queues at the location, library, and login levels.		
1.4.6	Ability to support a quick print option to print labels without opening the label manager.		
1.4.7	Ability for staff to choose which label type will open by default.		
1.4.8	Ability to indicate which content elements will appear on the label and in what order.		
1.4.9	Ability to support set up default printers for different label printing workflows.		

1.4.10	Ability to print labels that include diacritics.		
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4.1.5 Circulation

Item Number	Description	Vendor Status	Vendor Notes
1.5.1	Solution offers a customizable patron registration template		
1.5.2	Solution supports unlimited patron types without vendor intervention		
1.5.3	Solution offers a mechanism to automated patron profile updates upon reaching age limits (i.e. Youth to Adult at 18)		
1.5.4	Solution allows staff to add notes to patron records. Depending on time, they will be visible only on the staff side solution or through the patron interface.		
1.5.5	Ability to have multiple addresses in patron's account with the ability to choose the preferred one		
1.5.6	Ability to have a book-drop/fine free discharge (discharge without accruing fines)		
1.5.7	Provides offline circulation when server is not available		
1.5.8	Ability to add temporary title/item at time of checkout that can be flagged and sent to cataloging once returned		
1.5.9	Ability to send checkout receipts via email/text as well as (or in place of) a print receipt if desired		

1.5.10	Ability to mark an item as "claims returned." If the item is found by staff on the shelf, the "claims returned" note/count will be able to be removed from the patron record		
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1.5.11	Solution allows for “in house use” circulation for statistical purposes		
1.5.12	Solution allows for “ephemeral” that will record a usage but not charge the item to a patron		
1.5.13	Ability to modify due dates individually or en masse.		
1.5.14	Automatically modify due dates and hold pick up expirations according to library’s closed days/holidays		
1.5.15	Ability to process fine/fee and other payments & retain payment history		
1.5.16	Solution allows for flexibility in automatic charges for Lost Items. Allows staff to determine generic price for items with no cost on record, to select if fine assessed maxes out at cost of item or maximum overdue fee; when item is returned, the system will revoke lost/processing fees and only assess the overdue fee.		
1.5.17	Provide the option for a fully functional POS system that integrates with individual cash drawers attached to each workstation		
1.5.18	Ability to mark an item as “missing”		
1.5.19	Allows holds to be placed by staff through the circulation module or by patrons using the OPAC		
1.5.20	Allows holds to be placed by staff on the copy or title level		
1.5.21	Ability to place holds for multiple copies, e.g. Book Clubs, without doing individual copy-level holds, a ‘blanket hold option’		
1.5.22	Solution allows staff to adjust the hold queue or pick-up location		
1.5.23	Allows holds to be suspended while patron retains their place in the hold queue until unsuspended		

1.5.24	Ability to print hold wrappers with adjustable fields.		
1.5.25	Ability to allow patrons to cancel and suspend their holds through the OPAC		
1.5.26	Ability to create multiple types of patron notifications including, but not limited to, overdue notice, replacement notice, patron pre-expiration notice, hold notice, pre-overdue notice and allow the patron to opt-in to which type(s) of notice(s) they want		
1.5.27	Ability to send patron notifications in a variety of methods such as voice, text, email, printed mailer and/or 3 rd party produced notices		
1.5.28	Ability to allow patron to choose a preferred notice delivery method-including multiple methods		
1.5.29	Information about notices, such as when a notice was sent & the delivery method, will be retained in the history logs		
1.5.30	Ability for mobile inventory with use of tablet or wand barcode scanner		
1.5.31	Solution is compatible with any Windows compatible receipt printers and common barcode readers.		
1.5.32	Ability to type partial names or card numbers instead of having to perform a user search		
1.5.33	Ability to send notices to patrons concerning missing pieces (notices) or damage, directly from ILS instead of generating a notice or making a phone call.		
1.5.34	Ability to set an item status from the Item Search and Display screen. i.e. set an item as 'missing' without having to charge it to a library use account.		

1.5.35	Ability to enable blanket holds to recall all items on a bib record without placing a hold on each item.		
1.5.36	Ability to track items in a float location that may be returned to any location. Books float out to fill holds without changing the location. Changing locations as items float around the system to valid locations would be helpful to customers and staff.		
1.5.37	Ability to retain information on items that are missing, lost assumed, discarded or other statuses.		
1.5.38	Ability to work with HPL's debt collection management vendor (UMS) and their system requirements.		
1.5.39	Option for patrons who have forgotten their cards (or choose to use a mobile device) to access an on-screen touch keypad to enter their barcode number or user name and optional password. 4.1.5.41 Support an unlimited number of "libraries" or "home location" types.		
1.5.41	Ability for the self-check station to allow patrons to pay by credit card.		
1.5.42	Ability of the ILS to support RFID self-check.		

1.5.43	Option for patron self-registration from PAC with address verification.		
1.5.44	Manual creation of patron records.		
1.5.45	Bulk import of patron records from an external source.		

1.6 Discovery Layer

Item Number	Description	Vendor Status	Vendor Notes
1.6.1	Provides the ability to control display options of material type in the OPAC through System Administration.		
1.6.2	Solution allows library to prioritize search results based by relevancy instead of record type.		
1.6.3	Solution utilizes HTTPS on all pages		
1.6.4	Solution optimizes Google discovery.		
1.6.5	Solution is compatible with all major web browsers, Chrome, Firefox, Edge.		
1.6.6	Solution is mobile responsive while device agnostic.		
1.6.7	Solution provides ability to integrate popular title lists and auto-updated best seller lists.		

1.6.8	Solution integrates with e-content vendors, allowing HPL to manage content discovery without loading MARC records into main database		
1.6.9	Solution allows for basic patron account management		
1.6.10	Solution allows patrons to track checkout history, if desired		
1.6.11	Solution allows patrons to pay fines online		
1.6.12	Solution allows for patrons to submit and receive responses to materials requests		
1.6.13	Solution enables patrons to track their favorite authors/creators and receive alerts when new content is added		
1.6.14	Solution offers an easy to interpret holdings list for each entry, so patrons can easily tell if an item is checked in without navigating to a detailed display screen		
1.6.15	Supports enriched content (Syndetics) for graphics and allows for customizable images for items not provided in these files.		

1.7 Implementation, Training and Support

Implementation criteria and scoring is only applicable if the RFP results in a platform migration.

Item Number	Description	Vendor Status	Vendor Notes
1.7.1	Vendor tests the application software before implementation		

1.7.2	Vendor transfers HPL's current parameters to the new system and provides assistance to library staff in making changes to these parameters as required.		
1.7.3	Vendor migrates HPL's present databases to the proposed system so that the system is fully operational on 'Day One' of live operations with the public and for all staff related operations.		
1.7.4	Vendor migrates all library files including bibliographic records, items/copies, circulation transactions (charges, bills, holds), acquisitions data (vendor, orders, funds,) and patron data.		
1.7.5	Vendor performs a test migration, allowing HPL staff to review and approve data, before performing a final migration.		
1.7.6	Vendor provides training for all modules and applications purchased.		
1.7.7	Vendor provides documentation updates as changes are made to the system		
1.7.8	Vendor provides a software maintenance program to include all future software updates and system enhancements applicable to system modules licensed.		
1.7.9	Vendor provides a help desk/support service which is accessible via telephone, email, and web portal		
1.7.10	Vendor provides a dedicated contact who is responsible for acting as the liaison between the library and the vendor regarding any issue or problem or question.		
1.7.11	Library staff may search the vendor's knowledge base as a selfservice.		

1.8 Interlibrary Loan and Requests

Item Number	Description	Vendor Status	Vendor Notes
1.8.1	Solution must offer an easy way to place and receive patron requests from the staff side		
1.8.2	Solution offers a way for staff to provide responses to requests, and track them within the patron account		
1.8.3	Solution must offer an easy way to catalog and circulate interlibrary loan items		
1.8.4	Solution allows easy modification of hold pickup dates for Interlibrary Loan Items		

1.9 Offline Functionality

Item Number	Description	Vendor Status	Vendor Notes
1.9.1	System must allow basic circulation functions in an offline environment (Checkout, Checkin)- most often caused by a power outage or Internet disruption		
1.9.2	System allows easy reconciliation of offline transactions and logs		

4.1.10 Mobile

Item Number	Description	Vendor Status	Vendor Notes
1.10.1	System offers a device agnostic mobile app for customers		
1.10.2	Solution offers a mobile staff client for use on tablets and laptops outside the library. This module offers all circulation functions and basic item search and display.		
1.10.3	Mobile solution allows for barcode scanner or integrated device camera for circulation functions.		
1.10.4	Mobile solution works with an RFID pad for checkout.		

1.11 Platform and Data

Item Number	Description	Vendor Status	Vendor Notes
1.11.1	Servers are mirrored at more than one location. Does your data center utilize multiple geographical locations for redundancy?		
1.11.2	Patron functions are compatible with Android, iOS, Chrome OS, Windows, Mac OS.		
1.11.3	Test server offered as part of the solution		

1.11.4	Staff functions are compatible with Windows 10 or higher.		
1.11.5	Solution is PCI compliant.		
1.11.6	Solution utilizes SSL for patron and staff functions		
1.11.7	Data centers utilize redundant Internet connections		
1.11.8	Hosting facilities/data center have an ISO/IEC 27001, or other industry specific certification.		

1.12 Reporting

Synopsis: Ability to use information in any fixed or variable field from any record type to create record sets for reporting purposes. The ability to specify field to be output for reporting purposes.

Item Number	Description	Vendor Status	Vendor Notes
1.12.1	Report module allows for test function before updating database.		
1.12.2	Multiple ways to access and share finished reports. (xls, xml and pdf)		
1.12.3	Reporting module contains a variety of pre-developed reports representing all modules in the ILS and the ability to generate and save staff-built templates.		
1.12.4	Report generator easily allows users to query the database without requiring any specialized SQL experience		
1.12.5	Ability to 'run now' or schedule reports to run in future or on a recurring schedule.		

1.12.6	Ability to allow scheduled reports to be auto-emailed to one or several email addresses if desired		
1.12.7	Ability to be able to run canned and custom statistical reports on non-standard and standard classification schema simultaneously.		
1.12.8	The solution provides report(s) that can be automatically sent to Unique Management regarding collection information.		

1.13 Third Party Integration

Item Number	Description	Vendor Status	Vendor Notes
1.13.1	Solution is compatible with OverDrive, Hoopla, RB Digital and Freegal.		
1.13.2	System is compatible with but not limited to, EZProxy and OpenAthens for offsite authentication or provides an alternative authentication solution.		
1.13.3	Ability to process credit card payments in person, or online through the OPAC, with a credit card system being fully integrated into the circulation module.		
1.13.4	Solution is compatible with Unique Management for materials collection.		
1.13.5	Solution is compatible with Envisionware print release and time management software		
1.13.6	Solution is compatible with CollectionHQ or offers similar functionality.		