



ALBERTA LAW LIBRARIES
NEW INTEGRATED LIBRARY SYSTEM
REQUEST FOR PROPOSAL

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1. Introduction

1.1 Preamble

The purpose of this Request for Proposals (RFP) and subsequent Proponent demonstrations is to identify a Proponent with whom Alberta Law Libraries (ALL) will negotiate a contract to supply, install, and support a new integrated library system (ILS). Proponents are invited to submit proposals for the provision of a new ILS in accordance with the specifications of the terms and conditions set out in this RFP.

This competitive procurement will be conducted in accordance with one fundamental objective: to maximize the benefit to ALL while offering Proponents a fair and equitable opportunity to participate.

Proponents are advised to pay careful attention to the wording throughout this RFP. Failure to satisfy any term, condition, or mandatory requirement of this RFP may result in rejection of the Proposal.

STATEMENT ON PROHIBITIONS RELATED TO RUSSIAN AGGRESSION IN THE UKRAINE

Sanctions related to the Russian invasion of Ukraine have been imposed by the Government of Canada under the [*Special Economic Measures Act*](#). The Government of Canada has stated that the sanctions have been imposed “in order to respond to the gravity of Russia’s violation of the sovereignty and territorial integrity of Ukraine, and grave human rights violations that have been committed in Russia.”

The Special Economic Measures Regulations applicable to Russia, Belarus and Ukraine under the *Special Economic Measures Act* impose an asset freeze and dealings prohibition on designated persons listed in Schedule 1 of the Regulations, which include both individuals and entities.

Consistent with the Regulations, ALL reserves the right to limit or prohibit Proposals from the designated persons and entities listed in Schedule 1 of the [*Special Economic Measures \(Russia\) Regulations*](#), the [*Special Economic Measures \(Belarus\) Regulations*](#), and the [*Special Economic Measures \(Ukraine\) Regulations*](#), as amended from time to time, or from entities that could benefit such individual or entities, directly or indirectly, if they were to enter a Contract with the ALL.

1.2 Interpretation

Headings are used for convenience only, and they do not affect the meaning or interpretation of the clause.

Words in the singular include the plural and vice versa.

1.3 Definitions

Alberta Time – Mountain Standard Time or Daylight Saving Time, as provided for in the *Daylight Saving Time Act* (Alberta)

ALL – Alberta Law Libraries

Cloud Services – where computing infrastructure, platform or software is provided as a utility over the Internet, rather than as a product; and paid for on a subscription basis.

Contract – the written agreement between the successful Proponent and ALL to provide the Services contemplated by this RFP.

Contractor – the legal entity that will enter the Contract with ALL.

Evaluation Team – the individuals who will evaluate the Proposals on behalf of ALL.

ILS – Integrated Library System. This term is used interchangeably in this document with both Library Services Platform (LSP) and Library Management System (LMS).

Must or mandatory or shall – means that the requirement so described must be met in a substantially unaltered form in order for the Proposal to be compliant.

Official Contact – the individual identified in section 2.26 of this RFP.

OPAC – online public access catalog. Also used to refer to publicly accessible computer terminals in the library.

Preferred Proponent – the Proponent selected by ALL following the evaluation of the Proposals to finalize the Proposed Contract.

Proponent – an individual, business or organization responding to this RFP with a proposal.

Proposal – a Proponent's response to this RFP, and includes all the Proponent's attachments and presentation materials.

Proposed Contract – a written agreement proposed and included by a Proponent in its proposal

RFP Closing Date and Time – the date and time stated in section 2.1 of this RFP.

SaaS – Software as a service

Services – the work, duties, functions, and deliverables to be provided by the Contractor as specified in this RFP.

Should or desirable – means that a provision so described has a significant degree of importance to ALL and will be evaluated

2. RFP Information

2.1 RFP Schedule

The RFP process will proceed on the following schedule:

- Letter of intent to propose due: December 2, 2025
- Proposals Due: 3:00 pm MST, Edmonton, AB **January 9, 2026** (updated)
- Completion of proposal review: January 23, 2026
- Presentations by short-listed Proponents: February 2-13, 2026
- Completion of presentation review: February 20, 2026
- Selection of Preferred Proponent: March 1, 2026
- Completion of negotiations with successful Proponent: March 20, 2026
- Contract signed: March 31, 2026

These dates are provided for information only and are subject to change at the sole discretion of ALL.

2.2 Letter of Intent to Propose

A letter of intent to propose should be received by ALL by 3:00 pm, MST, December 2, 2025. Letters should be sent to the bid email address attached. [\[albertalaw.libraries@just.gov.ab.ca\]](mailto:albertalaw.libraries@just.gov.ab.ca) There is no specific required format for this initial communication.

2.3 Proposal Format

To assist evaluation by the Evaluation Team, Proposals should be organized in the following format using the section titles and sequence:

- a) Table of Contents
- b) Proponent Profile
- c) RFP Requirements (as set out in this RFP)
- d) Proposed Contract
- e) Appendices, if any.

2.4 What to Put in the Proposal

It is mandatory that Proposals include responses to requirements described with a “must”, “mandatory”, or “shall” in this RFP. Failure to provide a response to requirements described with a “must”, “mandatory”, or “shall” will result in rejection of the Proposal. It is highly desirable that Proposals also respond to “should” provisions. Proponents

should ensure that all supporting information is included so that ALL can evaluate the Proponent's ability and suitability to supply the Materials and perform the Services.

The Proposal response to all mandatory requirements will be screened to determine if the mandatory requirements have been met. Only Proposals meeting the mandatory requirements will be evaluated. Proposal scoring will be based on the Proposal response to the desirable provisions. Scoring for exceeding mandatory requirements, if any, will be applied where indicated in the RFP. In addition, the Proponent should provide cross references to any parts of the Proposal that contain information that the Proponent wishes to be considered in the evaluation of any given requirement or provision.

2.5 Proponents Proposed Contract

Proponents must include in the Proposal a Proposed Contract that the Proponent will require to perform the Services.

Submission of the Proposal shall be deemed agreement by the Proponent that if selected as the Preferred Proponent, the Proponent will negotiate in good faith to finalize a Contract based on the Proponent Contract and perform the Services in accordance with the finalized Contract.

2.6 Proposal Submissions

Proposals must be submitted electronically in Microsoft Word or Adobe Acrobat format using the ALL RFP submission form page at <https://lawlibrary.ab.ca/all-rfp-form-submission/> by the RFP Closing Date and Time.

The complete Proposal should be submitted in one upload. The maximum file size for the upload is 300MB in five attachments.

The official time and date of receipt of the Proposal will be determined by the time the upload is received by ALL. ALL will not be responsible for failures (technical or otherwise) that may result in a Proposal not being received prior to the RFP Closing Date and Time.

If the Proposal cannot be opened after reasonable efforts are made by ALL, the Proposal will be rejected.

The Proposal should be secured against accidental modification by ALL and should have the ability to search and print the document in its entirety.

2.7 Procedure for Submitting Proposals

Proposals must be received by ALL by 3:00 pm Alberta Time on Date. Late bids will not be accepted; they shall be deleted unread. Proposals must be submitted via the ALL-RFP webform, found at <https://lawlibrary.ab.ca/all-rfp-form-submission/>. Documents must be formatted as Word or PDF and have a maximum file size of 300MB.

2.8 Proponent Questions

All questions and any form of communication between the Proponent and ALL in relation to this RFP must be submitted in writing to the Official Contact. All questions and responses will be documented. The Official Contact will respond in writing to the enquiring Proponent and may, in ALL's discretion, distribute the response to all Proponents.

The Proponent has the responsibility to notify ALL, in writing, of any ambiguity, divergence, error, omission, oversight, contradiction, or item subject to more than one interpretation in this RFP, as it is discovered, and to request any instruction, decision, or direction necessary to prepare the Proposal.

Questions or concerns must be communicated in writing to the Official Contact at least seven business days prior to the RFP's Closing Date and Time. Questions received after this time will be answered if, in the opinion of ALL, time permits.

Verbal responses to inquiries are not binding on any party.

2.9 Screening

After receiving the Proposals, the Evaluation Team will screen each to determine if the Proponent met the mandatory requirements of this RFP. A Proponent must provide sufficient detail in its Proposal to demonstrate that it has met the mandatory requirements in this RFP.

The Evaluation Team will then evaluate Proposals that have passed the initial screening.

2.10 Evaluation of Proposals

Proposals submitted will be evaluated by a committee from ALL. Proposals will be evaluated on the following criteria:

- i. Functionality 30%
- ii. Training 10%
- iii. Technical Requirements 20%
- iv. Proponent Information 10%
- v. Migration/Implementation 10%
- vi. Price 20%

2.11 Proposal Clarifications

At any time during the evaluation process, ALL may ask the Proponent to clarify statements made in its Proposal.

2.12 Period of Commitment

Proposals shall be final and binding on the Proponent for 120 days from the RFP's Closing Date and Time and may not be altered by subsequent offerings, discussions, or commitments unless the Proponent is asked to do so by ALL.

2.13 Short Listing

ALL may establish a shortlist of Proponents who may be asked to make formal presentations regarding their proposals to the Evaluation Team. The formal presentation of the proposal may include a demonstration of the proposed ILS. Key Proponent management and technical resources are expected to participate in such presentations. These shortlist presentations must be made at no cost to ALL. Proposal scoring may be adjusted based on the shortlist presentations.

2.14 Selection

Proposals will be evaluated and scored based on the quality of response to the requirements and provisions of this RFP. The Evaluation Team will make the final selection, if any, based on the highest scoring compliant Proposal from evaluation scoring, shortlist presentation (if applicable) and, if applicable, reference checks.

2.15 Proposal Acceptance/Rejection

ALL is not required to accept the lowest cost proposal, and may reject any or all proposals.

2.16 Proprietary Information Agreement

Proponents are required to submit non-proprietary complete narrative descriptions to the statements, questions, products, and support services requested in this RFP.

Any part of the Proponent's response marked "trade secrets," "confidential," or "proprietary information" must be clearly identified. Failure to clearly identify any portion of trade secrets, confidential, or proprietary information shall relieve ALL from any responsibility, should such information be accidentally released.

Any part of the Proponent's proposal marked "trade secrets," or "confidential" shall be considered additional or supplemental information. The use of such information in the evaluation process shall be limited to verification or further explanation of information presented in the proposal. Submission of Proponent's proposal by a Proponent constitutes acceptance of these terms.

2.17 RFP Process Terms and Conditions

In addition to terms and conditions stated in this RFP, Proponents agree to adhere to and accept the following conditions:

- a) ALL reserve the right to qualify, accept, or reject any or all Proponents as deemed to be in the best interest of ALL.

- b) ALL reserve the right to accept or reject any or all proposals and to waive any irregularities or technicalities in the RFP and any proposal as deemed to be in the best interest of ALL.
- c) ALL reserve the right to accept or reject any exception taken by Proponent to the terms and conditions of this RFP.
- d) ALL reserve the right to seek clarification from Proponents about questions during the evaluation process.
- e) ALL will not pay for any information requested herein, nor will it be liable for any costs incurred by any Proponent in preparing a proposal.
- f) All proposals become the property of ALL and will not be returned to the Proponent.
- g) Proposals will not be opened in public.

2.18 Condition of Approval

The software provided must comply with the Government of Alberta's IMT and Cloud Policy where relevant.

2.19 RFP Terms and Conditions

By submitting a Proposal, all terms and conditions of this RFP are deemed to be accepted by the Proponent in their entirety and without any changes.

2.20 Modified RFP Process

If no compliant Proposals are submitted in response to this RFP, ALL reserves the right to undertake a modified RFP process in order to select a successful Proponent. The modified RFP process, if used, will be conducted as follows:

- a. All Proponents submitting non-compliant Proposals, other than those who submitted Proposals after the RFP Closing Date and Time, will be asked to prepare a "Modified Proposal". The necessity, scope and the timing of such a modified RFP process will be solely at ALL's discretion;
- b. Details regarding the manner and form of the modified RFP process and the expected deliverables to be included therein will be provided in advance to all Proponents who submitted a non-compliant Proposal;
- c. Modified Proposals and accompanying documentation, upon receipt by ALL, will become the property of and be retained by ALL.
- d. Proponents submitting Modified Proposals must meet the mandatory requirements identified in the modified RFP process; and
- e. At the conclusion of the modified RFP process, following the Proponent's submission of the Modified Proposals, the Evaluation Team will evaluate the Modified Proposals in accordance with and evaluation plan developed for the modified RFP process.

2.21 Access to Information Act (ATIA) and Protection of Privacy Act (Alberta) (POPA)

The Proponent acknowledges that:

- a. ATIA and POPA apply to all information collected and records relating to, or obtained, generated, created, collected, or provided under, the RFP or the Contract and which are in the custody of or under the control of ALL. POPA allows any person a right of access to records in the ALL's custody or control, subject to limited and specific exceptions as set out in the act(s); and
- b. The Proponent, if it considers portions of their proposal to be confidential, shall identify those parts of its proposal to ALL considered to be confidential and what harm could reasonably be expected from disclosure. ALL does not warrant that this identification will preclude disclosure under the act(s).

2.22 Extension, Amendment to or Cancellation of RFP

ALL may extend the RFP Closing Date and Time, or ALL may amend, suspend, postpone or cancel this RFP.

2.23 Costs of the Proposal

The Proponent is responsible for all costs of preparing and presenting its Proposal and, if applicable, negotiating and entering the Contract.

2.24 Contract Award

Following the final selection, if any, ALL and the Preferred Proponent will enter into negotiations to finalize the Proposed Contract provided in the Preferred Proponent's Proposal. If, in the opinion of ALL, it appears that a Contract will not be entered into with the Preferred Proponent within 30 days, ALL may contract with the Proponent that submitted the next highest scoring Proposal.

2.25 Representations and Warranties

Statements made in a Proposal may be incorporated into, attached to, or otherwise included in a schedule to the Proposed Contract, and shall constitute representations and warranties of the successful Proponent and shall form part of the Contract.

2.26 Official Contact

The Official Contact for this RFP:

Dale Barrie
Director, Alberta Law Libraries
Calgary Courts Centre
Suite 501 North

601 5th St. SW
Calgary, AB T2P 5P7
Canada

403-880-4292
albertalaw.libraries@just.gov.ab.ca

3. Introduction & Library Background

Alberta Law Libraries is a small special library that serves the legal profession in Alberta. Our primary users are lawyers and judiciary of the province of Alberta. Members of the public are welcome to use the collection on-site, as well as the electronic resources. There are 16 branches in the province, some serving only specific groups of users. ALL has approximately 38 staff profiles, as well as 16 self-checkout (kiosk/mobile) profiles via SIP2. ALL has publicly accessible computer terminals (OPACs) in every location, as well as a range of online resources.

Statistics as of November 12, 2025

Number of Bibliographic Records	19,240
Number of Authority Records	21,735
Number of Item Records	231,817
Number of Staff Workstations	40
Number of OPACs	43
Number of Registered Patrons	11,564
Circulation Stats	10,282 (April 1, 2024-March 31, 2025)

3.1 Current System

ALL is currently using Voyager 10.2.0.

Voyager is provided by ExLibris, which is part of Clarivate.

This ILS was brought online in 2002 and has received updates since then.

ALL is currently using the following modules of Voyager:

- Circulation
- Acquisitions
- Cataloguing
- System Admin.
- Reporter

- WebVoyage (Online catalogue)

Self-checkout capability is provided through Meescan, using a SIP2 connection (See: <https://meescan.com/>). This consists of a self-checkout kiosk at two locations, and app-based checkout in all locations.

3.2 New System Requirements

ALL is seeking a new ILS to be a cloud-based SaaS system. We require a patron management system and a Discovery layer as well.

4. System Functionality

Please describe how your system can meet the needs of ALL as they are listed below. Please provide a description to address the questions and issues noted in each section.

4.1 Circulation

Circulation is one of the core features of the Alberta Law Libraries.

Note: the ability to perform traditional/modern ILS functions are assumed to some degree and are considered as mandatory, though the list of items noted below must also be addressed within the Proposal.

Please describe how your system will handle the following processes/scenarios/issues:

1. Alberta Law Libraries creates all our patrons locally. Will your system provide patron management?
2. Can we create multiple patron groups with different borrowing privileges?
3. Can we create multiple patron groups with different expiry periods?
4. Is it possible to set defaults by patron group rather than by individual patron?
5. Our current ILS currently does not require a barcode or name to be unique, leading to duplicate patrons. How will your system avoid that problem?
6. Additionally we have another unique ID for lawyer roll number, (only lawyers are assigned a roll number, other patrons have a blank field entry) can your system handle multiple duplicate field checking?
7. How can a staff member search for a patron record? (i.e. What fields are searchable?)
8. How are overdue notices, courtesy reminders, and fine notices sent to the patron?
9. Are overdue notices, courtesy reminders, hold notifications, and fine/fee emails customizable, e.g. Alignment, text, and content?
10. Is the holds system able to:

- i. Have lists updated in real time
 - ii. Place a hold on one specific volume of a multi-volume record
 - iii. Mark certain items as no holds, or only certain patrons can place holds
 - iv. Specify if a patron wants the first available copy of a title, or the specific copy the hold is placed on
 - v. Have holds expire after a set period of time if not filled
 - vi. Ensure holds are held for patron pick up for a set period of time before being available for checkout
11. Does the system support receipt printing and regular printing for reports and checkout/hold slips?
 12. Are staff able to override functions?
 13. Are staff able backdate returns if needed?
 14. Does the system have the ability to interface with Proponents to support self-checkout?
 15. Are we able to suppress records from displaying publicly?
 16. Ability to support online payment of fines and fees
 17. User friendly date/time tools that automatically correct for daylight savings time
 18. Enable streamlined inventory through the use of apps and mobile devices
 19. Ability to generate an invoice, when invoicing for fines and fees is desirable
 20. Support of SMS messaging to patrons is desirable.

Digital Borrowing

1. Locally created or curated collections integrate with the discovery layer
2. Inclusion of digitized collections within the unified discovery interface.

Features that would be nice to have include:

1. The ability to have proxy accounts
2. Price to be added to the item record automatically from the purchase order

Please provide a description of any other features that the module provides.

4.2 Acquisitions

Note: the ability to perform traditional/modern ILS functions are assumed to some degree and are considered as mandatory, though the list of items noted below must also be addressed within the Proposal.

Please describe how your system will handle the following processes/scenarios/issues:

1. How is the acquisition of print materials, serials, e-resource and e-journals supported?
2. Alberta Law Libraries uses multiple account codes in each fiscal year. How will the system handle that?
3. Will we have the ability to re-link a Purchase Order to a different holding or bibliographic record?
4. Can multiple locations be added to a Purchase Order upon creation?
5. Is there a connection between Purchase Orders and Invoices?
6. Can approved Invoices be edited to correct errors?
7. Can we edit all parts of a Purchase Order or Invoice before they get to the “Received Complete” or equivalent stage?
8. Is there a link between the Acquisitions module and Circulation / Cataloguing module for updating item statuses?
9. Describe the workflow.
10. License management module to integrate with the discovery layer in order to facilitate the display of licensing terms and conditions of use in the discovery layer
11. Ability to order databases or other electronic subscriptions directly from various publishers
12. Support processing of invoices and tracking of payments, and automatic notifications to finance team of receipt of invoices with associated details.
13. Ability to combine usage data with financial data in order to report on cost/use and display other trends
14. Ability to generate shelf-lists of library holdings or other curated lists such as for weeding
15. Support EDI integration (invoices, claiming, renewal, etc.) with Proponents or publishers
16. Explain the fiscal year end and rollover procedure
17. Is there support for non Canadian currency? E.g. UK Pounds or US dollars
18. Can it integrate with the library’s internal accounting system, i.e. Sage?
19. Is there subscription or serial maintenance?
20. Serial control/check-in: Must provide tools to track continuing resource orders (e.g. Print subscriptions), set item receipt predictions (including frequency, chronology and enumeration) and processing instructions. Provide an issue check-in tool that supports automated item creation and MFHD (if applicable) record

updates. To provide notifications when issues are not received in a specific time frame

Please provide a description of any other features that the module provides.

4.3 Cataloguing

ALL uses a mix of original cataloguing and importation of catalogue records from other law libraries, so it is essential that our new system continues to support this.

Note: the ability to perform traditional/modern ILS functions are assumed to some degree and are considered as mandatory, though the list of items noted below must also be addressed within the Proposal.

Please describe how your system will handle the following processes/scenarios/issues:

1. Does the system offer support Z39.50 or more modern equivalent?
2. Ability to keep catalogue up to date based on evolving standards, and to have the ability to customize based on local needs
3. Cataloguing user management: permissions for different types of work
4. Tool for querying external data pools for re-use in our own LSP. This should support MARC and BIBFRAME and have flexibility to customize targets
5. Is it RDA/MARC compliant, or support other cataloguing standards?
6. Does the system support collections in multiple branches, with different fine and patron borrowing limits?
7. Is there version control – the ability to roll back to specific times possible to previous versions of records? This is desirable.
8. How detailed an audit trail on changed records is there?
9. Does it require unique identifiers within records (e.g. Record number, barcode) that can be validated for uniqueness at import or creation?
10. Is it possible to have the ability to have multiple users access a record simultaneously, but lock the record to the first user, to avoid conflicting edits?
11. Is authority control, both local and external, supported?
12. Can we use shelf locations (or something similar) within a branch, without creating physical locations?
13. Can we offer automatic broken link checking from within the catalogue or another module?
14. Is it possible to edit or delete a large group of records all at once?
15. Can we edit what items show up on a new items list?

16. The ability to create items and apply metadata at the item level. The ability to create multiple items under a single call number. The call number metadata must be able to distinguish the classification from the enumeration/chronology
17. The ability to add, edit and delete/deprecate at the bibliographic, holding, and item level
18. Ability to suppress or shadow at the library, location within library, title, call number and item/holding level in the catalogue and discovery environment
19. Support the potential future use of BIBFRAME data
20. Have the ability to both import and export MARC records
21. Supports BIBFRAME to MARC conversion and MARC to BIBFRAME conversion
22. Support desktop spine label generation, editing and printing.
23. Has a bulk bibliographic record editing tool that supports the use of scripting, regular expression and set editing tasks, with a user friendly UI to support batch data work.
24. Collection management tools (adds, deletes, changes, transfers, item update in general) whether for individual titles, sets of discrete items, collections or libraries, provides manual and bulk update tool.
25. Tool for managing individual items associated with a bibliographic record.
26. Supports diacritics and non-roman characters
27. Provides the ability to set default and session preferences
28. It is desirable to have the ability to print a template

Please provide a description of any other features that the module provides.

4.4 System Administration

Note: the ability to perform traditional/modern ILS functions are assumed to some degree and are considered as mandatory, though the list of items noted below must also be addressed within the Proposal.

Please describe how your system will handle the following processes/scenarios/issues:

1. Is there centralized administration of policies, rules, users, groups, security, and staff permissions?
2. Is there the ability to customize granular permissions for groups, users and locations?
3. Are there system wide and location specific calendars, for different branches with different open and closed days, as well as different hours of operation?
4. Is there the ability to create different user categories and groups with different borrowing privileges?

5. Is there the ability to set different fines and borrowing policies for different locations and patron groups?

Please provide a description of any other features that the module provides.

4.5 Reporting

Reporting is extremely important for Alberta Law Libraries. We use these numbers to generate annual statistics, to help manage our collections and patrons, and assist with acquisitions.

Note: the ability to perform traditional/modern ILS functions are assumed to some degree and are considered as mandatory, though the list of items noted below must also be addressed within the Proposal.

Please describe how your system will handle the following processes/scenarios/issues:

1. Are there built-in and customizable reports?
2. Is there the ability to export report data into various formats, including CSV?
3. What statistics about the collection and circulation are there?
4. What statistics about OPAC searches are kept?
5. Are daily reports, such as hold reports, patron notification, etc. run automatically and globally, rather than having to be done daily by staff in each location. This is desirable.
6. Is there the ability to track and reconcile financial data by payment location, payment reason, and payment method (cash, credit, debit, e-transfer)?
7. Do reports need specialized knowledge, (SQL or Microsoft Access) to create?
8. Data analysis and reporting is supported
9. System tools and processes need to handle large data sets and complex queries effectively. This will include user, bibliographic and item data sets being loaded, updated merged and extracted
10. Provides access to the following data: MARC (bibliographic and holdings), authorities, item, notes, charges and renewals, source of charges, holds and current status, a user identifier that does not compromise PII rules but can be searched for in the user module of the LSP, i.e. user database record id., patron counts and activities based on groups, configurations and policies, transactions.
11. Integrated into the user interface: a catalogue of delivered reports that are accessible to staff with minimal training or data structure knowledge.
12. Ability to create and utilize custom reports within system support (without needing to do custom development work). Flexible existing reports and the ability to create, run and maintain reports on data.

13. Functionality includes reports, visualizations, scheduled subscriptions and downloads in various formats.
14. Has the option for custom and complex query design for advanced reporting.
15. Each module has specific reports. e.g. cataloguing specific, acquisitions specific, etc.
16. Supports a tool to build, run and schedule custom and canned reports to support collection analysis and clean up. Reports on all datapoints, and has no limits on report creators. Tool works with the live database (not previous day's extract)

Please provide a description of any other features that the module provides.

4.6 Discovery Interface/OPAC

Being able to search our catalogue is an important part of our services to our patrons.

Note: the ability to perform traditional/modern ILS functions are assumed to some degree and are considered as mandatory, though the list of items noted below must also be addressed within the Proposal.

Please describe how your system will handle the following processes/scenarios/issues:

Please explain how your product will do the following:

1. Does it offer faceted searching?
2. Does it offer search suggestions for similar topics?
3. Does it offer mobile access with responsive design?
4. Does it offer an A-Z journal list?
5. Does it offer secure patron access to their account?
6. Are patrons able to update their own information in their account? E.g. Phone number, address, email address
7. Will it integrate with our eResource access and authentication software?
8. Does it offer predictive text, as well as 'did you mean' type prompts when misspellings occur?
9. Does it offer automatic groupings to ensure all editions of a title show up together in the list of results?
10. Does it offer a link between superseded and continuing titles?
11. Is there alert type text explaining why something is not possible, e.g. Telling a patron their item did not renew because the renewal limit has been reached?
12. Explain your systems Boolean operators (symbols) or special search characters.
13. Is it able to track eResource use from signed in users?
14. Is it possible to show hidden records that pertain only to internal patrons, or patrons belonging to a certain group when they are signed into their account.

15. Conforms to WCAG 2.1 Level AA for both user-facing and staff-facing interface
16. Ability to configure session time-out
17. Use one method (e.g. Barcode and PIN) for all authentication (including any in-application authentications)
18. Performs at acceptable standards for response/query time
19. Allows for customization of branding, colours and navigation
20. Provides an easy way for users to report problems and get help
21. Allows for integration with the library website/intranet
22. Indexes for search and filtering all metadata including item level metadata such as location, status, call number and notes
23. Provides tools to save and manage searches (build, review, edit) and save results and citations with ability for mass export
24. Search result relevance rankings must be clearly documented and should provide some way to adjust the weighting of results
25. Allow custom display of metadata (bibliographic, summary, holding) on both brief and detailed records
26. Display item location information in the results list and the detailed record
27. Display an image or icon for each item
28. URL as a permalink (user can copy and paste the URL from the browser)
29. Support permalink at the item AND search level (with filters included).
Permalinks should not include authentication components when generated by unauthenticated users)
30. Allow for customization of the order of items on a particular record by library location
31. Support the display of serial items by chronology/enumeration from newest to oldest
32. Provide a way to customize email notifications to patrons based on specific criteria
33. Provide comprehensive discovery layer usage information and analytics on searches (e.g. User actions, facet/filter usage and search statistics)
34. Provide a customizable advanced search interface
35. Is searching in other languages supported? (e.g. support for diacritics and non-roman characters.)
36. Allow for the future implantation of chat via the discovery layer/OPAC
37. Allows patrons to make bookings. E.g. Room bookings, equipment bookings
38. Ability to search the catalogue directly from the library's website

Please provide a description of any other features that the module provides

4.7 Other Modules

Are there any other modules that you offer, and if so, please give a brief description of each.

4.8 Third Party Interfaces

1. Please explain how your system will accommodate connections via SIP2 to our self-checkout kiosk and app, provided by Meescan (mandatory)
2. Please explain how your system will interact with our eResource authentication software, currently EZproxy (mandatory)
3. Please explain how your system will accommodate an on-line payment system for fees and fines (mandatory)
4. Can widgets be added to the search page for content such as blogs (desirable)
5. Integrate with payment options for self-serve printing and photocopying (desirable)

4.9 General System

1. Single sign-on through multiple authentication options is desirable
2. Provide definable user profiles and sufficient definable user statistical categories to track different users data that can be used by frontline staff to help test/troubleshoot commonly encountered issues
3. Comprehensive service agreements that outline support obligations for the Proponent and ALL.

4.10 Hardware

1. The system must ensure 24/7 uptime.
2. Successful failover and redundancy must be built in.
3. Must meet security standards for cloud ISO 27001.
4. As we are located in Canada, a Canadian datacentre is mandatory.
5. The system should be actively maintained and software updates with seamless enhancements should be included.
6. As ALL has staff in multiple locations, the system must be able to support multiple users signed in simultaneously.
7. The contract must include a backup/test server with a copy of production data, as well as at least one test instance of the database.

8. For ease of use, the system should have an intuitive interface
9. The ability to change font and window sizes, as well as use differing accessibility options without losing access to buttons.
10. We would like a linked connection between the acquisitions and cataloguing, and circulation modules.
11. The ability to access all modules from one window is desirable. Please explain how your system will meet the stated criteria.
12. Describe the underlying technology of your system, including operating system, container, database, programming language and indexing technology
13. Describe the system architecture of your product, and provide a system diagram covering the key components and systems
14. Indexing process should be efficient and minimize delays or disruptions to workflows

4.11 Information Security, Backup and Recovery

1. Have well established and available security policies and procedures. Examples include user/patron data encrypted in the database, browser/client sessions encrypted. Provide your policies and procedures.
2. Provide details on how patron data is encrypted within the database. How are client user sessions encrypted to ensure secure data transmission?
3. Please outline the procedures and policies in place for responding to a data breach
4. What should we expect in terms of reporting after a SaaS security incident?
5. How are access controls managed to ensure that users only have access to the data relevant to their roles
6. Describe your disaster recovery plan. Detail the backup and recovery mechanisms in place for critical system components and data.

4.12 Interoperability and Extendibility

1. Describe how we can interact with data within the system to extend functionality, create customization or develop integration with other applications
2. Describe details of APIs, including supported protocols, data formats and standards
3. What data do we have access to through the APIS and web services?

4. Is there an API rate limit? If is, what is it? If not, then what mechanisms prevent API requests from degrading performance of other parts of the system?
5. What security protocols are implemented or APIs to ensure the confidentiality of and integrity of data exchanged between them?
6. Supports library and technology protocols. E.g. SIP2, NCIPv.2x, z39.50, codabar, code 29, etc.
7. Support the standard technologies for implementing digital cards/wallets such as Desfire Mobile Credentials or ECP 2.0

5. Migration and Implementation

1. Provide a timeline of implementation activities
2. Describe the data extraction and migration process, including pre-testing and the number of pulls
3. Describe the amount of down time required during the final pull and go-live
4. Describe included post migration support services
5. Describe the services you offer to support the implementation of the system
6. Describe the data preparation works and resources that would be required by ALL in data migration
7. Data migration and cleanup work is anticipated to be significant. Please demonstrate how the Proponent will provide comprehensive support for required metadata cleanup pre-migration to ensure successful migration of all ALL data.
8. Demonstrate how the Proponent will provide comprehensive support to ensure post migration data cleanup is supported to remedy any migration related metadata issues

6. Training and Ongoing Support

1. Provide details on training and support operations during and after the implementation
2. List ongoing training options
3. List the product documentation that is available to customers and any unique requirements or formats the documents are stored in.
4. Documentation should be easy to use and navigate, including full text searching functionality
5. Is support direct, or third party?

7. Proponent Information

7.1 Proponent Profile

- a) The Proponent must include the following in its Proposal:
 - a. The legal name of the Proponent; and
 - b. Details of any subcontracting arrangements proposed by the Proponent
- b) The Proposal should include:
 - a. A brief corporate background, especially pertaining to experience on similar projects
 - b. The location of the Proponent's head office and, if applicable, service centres;
 - c. A Proponent contact for all questions and clarifications arising from the Proposal, including the person's title, address, email, telephone and facsimile number; and
 - d. The legal name and address of any proposed subcontractors.

7.2 Customer References

Please give a summary of the type and number of library customers you have. Select three that are like ALL, either in size or subject matter as references. For references, please supply contact information, years with your system, and how many branches the library has.

ALL may contact the references, including references other than those submitted by the Proponent. The Proposal may be rejected if, in the opinion of ALL, the Proponent or any proposed resource received unsatisfactory references.

7.3 Development History

1. List last major release (number, release date, and list of enhancements and bug fixes)
2. List minor releases within the past year (numbers, release dates, and list of enhancements and bug fixes)
3. Describe next major release (number, projected release date, and list of enhancements)
4. List user groups if available. Please provide contact information for user groups, especially a website if available to non-customers
5. Describe how major releases are rolled out. What is the communication protocol, is testing provided before, and can updates be delayed? What is the delivery

method, and what measures are in place to ensure a smooth transition during major version updates?

7.4 General

1. How often are backups performed, and what is the typical recovery time objective and recovery point objective in the event of a system failure or data loss?
2. What processes are used to detect outages? When an outage occurs, what is the process to inform us and keep us apprised of the situation? How long from the beginning of an outage are we informed?
3. Describe outages that have happened in the last three years.
4. Describe pre-scheduled maintenance plans including the duration and timing of outages. Describe the extent of impact of clients. Is the system partially or completely unavailable?
5. Upon termination of agreement, please describe how we can retrieve and get back all the data we own out of the system

7.5 Pricing

ALL is interested in a five-year pricing and maintenance agreement. The price should include migration, service, maintenance, delivery, upgrades, and training. Please provide the first-year pricing, and then an additional four-year ongoing contract summary. Please include any information on discounts or special pricing available for advance payment, extended contracts, or other options.

Proponents should use the cost proposal template in the Appendix to lay out costings, adding additional fields if necessary.

Appendix

Cost Proposal Template

Description	Initial Cost + Year 1	Year 2	Year 3	Year 4	Year 5
SaaS					
Hosting Fee					
Test Database					
System Modules					
Circulation					
Acquisitions					
Cataloguing					
System Administration					
Reporting					
Discovery					
Other Modules					
Data Extraction/Migration					
Bibliographic					
Item					
Authority					
Patron					
Circulation Transactions					
Fines and Block Records					
Hold Records					

Professional Services

Project management

Installation, configuration,
staging and implementation of
ILS

Training on all modules

System Administration and User
Documentation

Integration of third-party
applications

Technical Support (trouble
tickets, calls and email)

Upgrades

Other

Any other items discussed in the
proposal

Total Cost Per Year