Scenarios for Vendor Demonstrations

The purpose of these sessions is to demonstrate system functionality and to answer any questions MSSA members might have from the RFP proposals. Please do not spend time presenting a company profile or repeating factual information that was included in your company's written response. We really want to see how your system is managed administratively and how it functions from both staff and patron perspectives.

Systems (45 minutes)

1. Please describe the process for reporting and resolving issues. What is upgrade schedule? Is there any downtime that results from these upgrades? Do consortia libraries have to upgrade at the same time?
2. What hard and soft limits are placed on records, data elements, etc.? For example, is there a limited number of item records an institution can have? Are there character limits to certain fields? What is involved in changing these limits? Are there any limits that cannot be changed?
3. What security measures are in place to protect data from other libraries and from outside entities? Is private individual data (names, addresses, circulation history, etc.) encrypted? Demonstrate security settings that prevent one library viewing private information from another library.
4. What APIs do you have available for use? Are these included or do you charge for access? Can you show or give examples of other Libraries using these APIs?
5. Please discuss what authentication methods are supported by your system. What single sign on solutions are supported? If there is a system authentication option are passwords encrypted?
6. How are staff rights/permissions managed? Are there various levels of permission? Does the information that library staff can see if the public interface differs from what a student/faculty member would see? Demonstrate your security module where these settings are set.
7. What campus financial systems does your solution work with? Can you provide examples of institutions who are using your solution with the various campus financial solutions? Demonstrate links if possible.
8. Please describe the migration process. What is the recommended timeline?
9. How does customer feedback get incorporated into your enhancement process? Is there a user group that handles this?
10. What ability will each library have to customize the public user interface? Please demonstrate the customization process and settings.
11. How does backup-restore work? Timing? Who is involved? What is the down time?
12. Demonstrate the ad hoc reporting capabilities that exist.

Resource Management (90 minutes)

Collaboration and Shared Collection Management

1. Demonstrate both local and consortial collection management capabilities of the system. Show how the system supports collaborative collection development and shared print initiatives such as the Michigan Shared Print Initiative (MI-SPI).
2. Demonstrate how consortium member libraries can see what other libraries are acquiring or cancelling. If multiple libraries have orders for the same title, will the local library's order display first in the local display? If multiple libraries own the same title, will the local holdings display first?

Acquisitions

1. Is there a workflow to allow renewal information to be automatically added to order records for serials and approval plans? Demonstrate importing an invoice from an outside vendor such as EBSCO.
2. Demonstrate the creation of a PO/invoice/line items both manually and via an automated process (EDI). Demonstrate how to download a brief bibliographic and order record from a vendor such as YBP.
3. Demonstrate posting an invoice. Can invoices can be posted at any time?
4. Demonstrate how funds can be organized and displayed in groups.
5. Can fields in order records (e.g. fund code, invoice date, invoice #, payment amount) be changed after posting? If so, please demonstrate.
6. Demonstrate how to move an order record from one bibliographic record to a different bibliographic record.
7. What indexes are available for searching? (title; journal title; ISSN/ISBN, bib, item, order record numbers, etc.)
8. Add a note to an order record, and change it after it has been posted. How many notes can be added?
9. Is there a limit on the number of payments on an order record for a serial?
10. Can debits and credits be put on the same order record? Please demonstrate.
11. Demonstrate the ease of editing order and check-in records.
12. Demonstrate options for fiscal year close. Can each library do a different process (e.g. close the book and reopen; have funds roll over; encumbrances roll forward, etc.)?
13. Different customers may have different account managers for the same vendor. How can your solution help us manage our contact information for vendors without confusion?

Serials Management

1. What is the integrated workflow for ordering a print title and a new electronic resource from material selection to the point of patron access? Include any shared data that can be integrated across institutions to avoid repetitive data management.
2. Demonstrate the overall workflow notification tools to include reminders to pay, renew, close a trial, set up access, or complete a subscription period. Include vendor

notifications for orders, claims and cancellations. Include notification to a faculty/requestor that an item has arrived.
3. Demonstrate the process to deselect and withdraw all holdings of an electronic serial and a print serial.
4. Demonstrate how a new serial record in the LMS is set up.
5. Demonstrate how prediction patterns are created and shared across libraries.
6. How are summary holdings updated and displayed in the discovery tool when a new issue has arrived?
7. Demonstrate how to check in a new issue of a serial. How do you route an item, print labels, record multiple issues combined by the publisher, and distinguish between multiple formats of a single title?
8. How do you run a report for missing issues to be claimed? Demonstrate the claiming process.
9. Demonstrate how the LMS handles binding processes for print resources.

Electronic Resource Management

1. A library discovers that the title list for a full text resource in the knowledge base of your solution is out of date with the title list for a resource as listed on that vendor's website. How does your product deal with out of date title list or coverage information once an error is pointed out? How many steps does the customer have to take to have the knowledge base title list updated for all customers?
2. Each customer in the consortium has a signed copy of a license agreement for a particular vendor. Some of us have negotiated specific terms that are different from the standard agreement. How does your solution allow for the tracking (and storage) of different license agreements for customers that may have the same product?
3. A vendor providing abstract/index resources is not following proper OpenURL protocol. For each OpenURL string sent to the link resolver, the vendor is sending through the journal number as a roman numeral. This is causing your link resolver to fail consistently for that product. How does your company propose to provide support for multiple institutions to resolve this issue? Can we rely on you to work with said vendor as opposed to each individual customer having to open a ticket with the vendor?
4. 7 members of the consortium are part of a group purchase for a full text journal database. We would like to review use at individual institutions but all across the 7 members that are part of the group deal. What tools will your solution provide that will allow for that review of usage statistics at both the individual and the group level?
5. Our consortium would like to provide multiple levels of discovery for our patrons. First searching the individual institutions collection, then the consortium's collection, then the entire MeLCat collection, finally everything in the knowledge base. How does your solution provide that level of functionality?

Description and Metadata

1. Each customer in the consortium subscribes to the same electronic resource package, individually. MARC records are provided by the resource vendor. Show how these

record sets can be loaded into the LMS including URLs granting access for each individual library. Will records overlay? How will the URLs appear on the production record and how will they show in the discovery interface?
2. Where are URLs attached? Bibliographic records, item records, or someplace else?
3. Demonstrate the workflow for uploading bibliographic and item records from OCLC.
4. Demonstrate how MARC records are uploaded from a vendor in a shelf-ready workflow (e.g. we currently order from a vendor's website, and we get a brief bibliographic and order record from the vendor. When the vendor ships the books, we go to OCLC to load a batch file of bibliographic and item records corresponding to the invoice).
5. A MARC record is already in the LMS. Another library is ordering a copy. Show the steps needed to add the item for the second library. Show how the new order displays in both staff mode and the discovery layer.
6. What is the process used to delete a monograph title including order, bibliographic, holdings, and item records? How does the deletion process affect financial transactions that had been recorded, such as invoice payments?
7. Demonstrate how designated fields such as local subject headings or local notes can be protected during overlay.
8. How is metadata for special collections materials handled in a shared system environment? How are special notes and local added entries retained and displayed both locally and to the rest of the consortium in a shared bibliographic database?
9. Show multiple call numbers for a single title. Where are multiple call numbers stored? Bibliographic records, item records, someplace else)?
10. Demonstrate label printing and record printing options.
11. Demonstrate spell checking in staff mode.
12. Demonstrate editing and navigation short cuts. Are there keyboard commands vs. mousing?
13. Explain the distinction between various creation and cataloged dates in the system.
14. What is the capacity for creating codes that do things like suppress a record from display or prohibit deletion of a bibliographic record? Does each library have the ability to define and use these codes, or is there a shared list of codes on which all libraries must agree? Demonstrate suppressing a record from public view and then un-suppressing it. Does this process occur in real time?

Circulation & Resource Sharing (60 minutes)

1. Demonstrate how to set up loan rules on the local, consortial and extra-consortial levels. Include the types of patron data available at each level.
2. Demonstrate how your solution would work with MeLCat.
3. Demonstrate moving between circulation functions at the local, consortial and extra-consortial levels, including the item and patron information available in each.
4. Demonstrate the patron account experience within the local, consortial and extra-consortial environments.
5. Demonstrate the life cycle of a course reserve item, for both print and electronic. Please show us the faculty request, placing item on reserve, any integrations with course

management software (Canvas, Blackboard, etc.,) the patron's experience, the removal of the item including suppression of records for later use (e.g. if an item is placed on reserve a year or two years later)

6. Demonstrate the life cycle of a hold. Please show the patron's experience in placing and tracking a hold, staff experience with local, consortial and extr-consortial holds, especially loan rules, recalls and item tracking.
7. Demonstrate how a patron record is created. Show how staff and patrons can change an existing patron record. Can patron editing of their own records be active for some sites, but prohibited in others?
8. Demonstrate the granularity of access with the different levels of staff permissions and what information is available to each. Show us the process for switching between permission levels.
9. Demonstrate the steps involved in creating, transferring and undoing a bill or fine. Please show the process for billing and payment between institutions in the consortium and outside the consortium.
10. Demonstrate access to, scheduling of and customization of notices and print products. Please show customizations available on the local, consortial and extra-consortial levels. Show any templates for email or SMS communications.
11. Demonstrate the inventory process and associated inventory reports.

Discovery (90 minutes)

G.1 Discovery

1. Conduct a simple unknown item search for the phrase: international adoption.
    a. Show how your interface recommends subjects or other search terms such as alternate titles, spelling corrections, or related terms. (G.1.14)
    b. Demonstrate how your interface retrieves relevant items regardless of format or physical location and displays, organizes, and limits search results in an understandable manner. (G.1.1)
    c. Exhibit how your interface will enable users to change search terms without losing selected parameters or limits. (G.1.10)
    d. Now, change the scope or refine the search by one or more of the following criteria: availability, location, creation/publication date, version, resource type/format, and electronic availability. (G.1.2) (G.1.6) (G.2.1)
    e. For an electronic resource, demonstrate how your interface communicates the difference between content that is available and unavailable in full text including how your interface identifies embargoed content. (G.1.3) (G.1.4) (G.2.2)
    f. Demonstrate how eBooks are discovered and accessed. (G.1.11)
    g. Exhibit how your interface displays additional contextual information such as book covers, tables of content, indexes, reviews, and content previews. (G.1.16)
    h. Display a print multi-volume or serial record and discuss options for local customization of the holdings display. (G.1.7)

2. Now, perform an advanced unknown item search for “international adoption” and demonstrate EACH of the Boolean operators AND, OR, and NOT. (G.1.9)
3. Next, conduct a known item search for one or more of the following terms and demonstrate the results as described below: the title Moby Dick, the author William Shakespeare, and the subject Wind power. (G.1.6)
    a. For the first two searches, show us how your interface displays FRBRized results. (G.1.8)
    b. Using Google, show us how your product exposes your results. (G.1.15)
4. Show examples of how each library can create custom search scopes such as searching only journal titles, reference books, or new books. (G.1.13)
5. Demonstrate how your interface handles non-English queries, particularly the use and retrieval of special characters, e.g. Cyrillic. (G.2.9)

G.2 User Experience

1. Exhibit how your interface enables users to create and save, print, share, or export single items or lists of items to citation management, word processing or other productivity software. (G.2.4)
2. Demonstrate how your interface works on a range of browsers and devices including but not limited to tablets, phablets, and mobile phones. (G.2.11)
3. Display what happens when a session times out on your interface. (G.2.10)
   If your interface offers permalinks for each record, display an example. (G.2.5)
4. Show how your interface interoperates with chat reference, social networks, research guides, and other electronic communication services. (G.2.13)
5. In addition to query help, show how your interface will direct users to librarian and other research assistance. (G.2.6)
6. Demonstrate how your interface will allow users to interact with the content through tagging, recommending, or writing reviews of resources. (G.2.14)

Analytics (45 minutes)

1. Provide a general overview of analytics. Show how to create a customized analytics dashboard. Demonstrate both standard and custom, ad hoc reports. Demonstrate the ability to export data analytics from the system and the ability to import data into the system from other sources. Demonstrate how ad hoc reports can be used to perform global changes and other actions.
2. Demonstrate the suite of systems analytics and reports.
3. Demonstrate the suite of resource management analytics and reports.
4. Demonstrate the suite of circulation and resource sharing analytics and reports.
5. Demonstrate the discovery and user experience suite of analytics and reports.