



RFP for Electronic Resources Management System (ERMS)

OCLS RFP #2014-004

September 2014

All information contained within this document should be considered confidential and is provided to give bidders an understanding of the Ontario Colleges Library Service requirements.

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1. INTRODUCTION

1.1 Ontario Colleges Library Service

The Ontario Colleges Library Service (OCLS) was established in 2009 by the Ontario Colleges Committee of Presidents (COP) as a non-profit corporation to provide a suite of core and opt-in services to the libraries and learning resources/learning commons (college libraries) of Ontario's 24 publicly-funded colleges of applied arts and technology, including two French language colleges.

OCLS reports to a Board of Directors elected by the Committee of Presidents of the member colleges. Heads of Libraries & Learning Resources (HLLR) is comprised of the directors (or designate) of libraries / learning resources (college libraries) of each of Ontario's 24 publicly funded colleges, and serves as an advisory group to OCLS, and provides an advisory member for the OCLS Board of Directors.

The services currently provided to the college libraries by OCLS are:

- Electronic resources (eResources) services and contract management
- Maintenance and ongoing support of the Colleges Union Catalogue of bibliographic records relating to all print collections in the colleges' libraries
- Maintenance and ongoing support of Colleges Library Central (COLLECT), the digital repository containing bibliographic records for a range of print, electronic and multimedia collections in the colleges' libraries.
- A research service
- A remote access/proxy service for off-site access to resources
- A video streaming service
- An integrated library system

An increasing proportion of electronic resources (electronic journals, research databases, online references, e-book packages, etc.) is acquired collectively by all or a group of colleges, to benefit from financial and organisational efficiencies. On behalf of the colleges, OCLS acquires and manages collectively purchased electronic resources as identified by the college libraries. OCLS' eResource services include:

- negotiation with vendors
- organisation of the trial and selection of content by the colleges
- management of usage licenses, access information and financial agreements
- handling of acquisition, payment and renewal processes
- establishment, management and reporting of deposit accounts for each college; used to pay for the content

1.2 Background

Demand for acquisition and management of electronic resources (eResources) is expected to grow in the coming years, as colleges continue their evolution from print reference to its digital counterpart. Electronic resources already represent more than 50% of the acquisition budget of the colleges (source: HLLR statistics 2010-2011). 83% of these expenses are on collections that are managed by OCLS. If the trend of replacing print reference with online resources continues, OCLS may be asked to manage at least twice as many resources within the next decade.

Furthermore, the colleges are embarking on several initiatives, supported by the Province of Ontario, to accelerate this transition. An increasing number of degrees are now being completed through online programs, while traditional classrooms are also transitioning to a broader online presence. The shift of the curriculum from the physical to the online world is mirrored in the evolution of documentation sources that support this curriculum. Adding to this trend, the operation by OCLS of a planned eBook consortium for the colleges, will further contribute to the rapid growth of demand on OCLS' electronic resources management service.

The current tasks related to electronic resource management at OCLS are carried out using a variety of systems:

- **Excel spreadsheets** contain financial information about all products licensed by OCLS on behalf of the colleges. They also encode the information about which college is currently licensing each product. The spreadsheet only represents the situation at a certain point in time. Every fiscal year, another copy of the sheet has to be made. Previous versions of the sheet act as an archive of the ERM operations and provide a history of each product and its relationship with OCLS.
- **Flat files:** Contact information for vendor's representatives and college contacts is stored in separate spreadsheets. Flat files (in Word or Excel format) are used to keep all relevant information pertaining to a certain product, most importantly technical information such as access URL, instructions on how to access the administration portal, etc.
- **Archives:** Documentation pertaining to all products, licenses, original invoices, etc. are further stored as electronic files on OCLS' shared drive. A hard copy of each signed license is archived by OCLS' electronic resources management team.
- **Financial information:** The rationale behind the price that is charged by vendors to OCLS, and behind the redistribution of costs to participating colleges is mostly managed within the Excel spreadsheet discussed above. The management of all financial transactions and accounting records is however delegated to OCLS' finance department and the accounting services provided to OCLS by the Ontario Colleges Application Service (OCAS). Financial statements are provided by OCAS to OCLS on a monthly basis, and reconciled manually using the Excel spreadsheets as required. Colleges participating in consortium purchases managed by OCLS each hold a deposit account, also managed by OCAS. OCAS provides the colleges with account statements that

document all transactions. The rationale behind each transaction is provided by OCLS on the product pages on the eResources portal and in the monthly renewal notices sent to the colleges.

Communication between OCLS and the colleges use three main vectors:

- The **eResources Portal** uses an instance of the web-based collaborative software platform (groupware) Igloo to organise and share information relating to the electronic resources managed by OCLS with the colleges. The instance of Igloo used by OCLS is provided by the Ontario Research and Innovation Optical Network (ORION) under the name O3. All pages on the eResources Portal are written in free form by OCLS staff, there is no relational database structure that allows for related information to be linked. For example, all products offered by the same vendor cannot be listed, all colleges subscribing to a particular product cannot be listed, all products subscribed by a college cannot be listed, usage statistics information cannot be linked to the relevant products or vendor, etc. The eResources Portal does not provide information about which of the college subscribes to which of the products managed by OCLS, let alone under which conditions. This information is currently provided to the colleges through a service called OLIVER.
- **OLIVER:** This service currently consists of a series of Drupal nodes that replicate the contents of the Excel spreadsheet used by OCLS to manage its licenses (see above). Data from the Excel Spreadsheets is uploaded weekly into OLIVER. Consequently, OLIVER presents information using the same structure as the spreadsheet. OLIVER and the eResources Portal are two distinct systems and are not linked to each other.
- **Personal communication:** Since information is poorly structured on the eResources Portal and OLIVER, colleges frequently ask OCLS directly for information about the electronic resources they subscribe to or for details on financial statements relating to these resources. Such requests are mainly handled over email and phone conversations, but OCLS would like to implement its Customer Service Ticketing System, that uses the Request Tracker (RT, developed by Best Practical) software and that is currently used in other aspects of its business, to keep track of all requests relating to eResources.

The current workflow and tools used by OCLS to manage these resources is barely sufficient to handle the current workload, and definitely will not accommodate the anticipated growth. As the volume of eResources increases, the difficulty that OCLS will have efficiently managing the workflow with these stand-alone systems, and with little ability to increase staff, has been recognized as a major problem that must be resolved as a priority. The ability to provide colleges with easy and efficient access to information on products to which they subscribe is a secondary area of interest. To mitigate this situation, the implementation of a dedicated Electronic Resource Management System (ERMS) for OCLS has been recommended.

The new ERMS should address the issues of **information management**, making it more efficient to manage, track and add data on the subscriptions under management one time and have that information populated in several related places; **scalability** both in the ability of the system to handle more data and

the ability to add additional future functionality; and **information flow** between OCLS and the member colleges. It should enable OCLS staff to efficiently and seamlessly add information about the subscriptions (trials, licensing, current and past pricing, renewal dates, terms and access information) under management and allow the colleges to easily access the same information thus reducing the need to contact OCLS for readily available information. Currently, OCLS communicates with the colleges through the eResources Portal, but its structure is not suited to organising information efficiently, making it hard to navigate and inefficient to maintain. The new ERMS aims to provide better integration with the current services provided by OCLS and help organise data in a way that makes it easier for OCLS to enter, manage and track data and for college staff to find information on their electronic resources that are being managed.

1.3 Invitation to Bid

OCLS is seeking proposals for the development of a new ERMS. This system is intended to be web-based and to integrate with (and/or replace) the existing Drupal-based OCLS website (Drupal 7). There is also an opportunity to build the new ERMS on an existing Drupal application that was developed for another post-secondary library consortium (See Section 3.3 and Appendix 1). The successful proponent must therefore have extensive experience developing and integrating web applications, using the Drupal framework. Experience in developing solutions for libraries or library consortium is also highly desired, as is an excellent record of sound project management.

2. BIDDING PROCESS

2.1 Intent to Respond

Send a confirmation of your intent to submit a proposal by **September 24, 2014** as noted in the Schedule (Section 2.3). Please include the name, title and contact information for the Company representative with whom we will communicate, and send via email to:

Attention: Virginia Roy,
Director of Services
Ontario Colleges Library Service
Email: vroy@ocls.ca
Phone: 647-722-9306
Fax: 647-722-9319

Ontario Colleges Library Service
74 Gervais Drive
Toronto, ON M3C 1Z3

2.2 Bid submission

Two copies, one with original signature, are to be submitted in writing and sent via courier (with signature required) or delivered in person to:

Ontario Colleges Library Service
74 Gervais Drive
Toronto, ON M3C 1Z3

Attention: Virginia Roy,
Director of Services
Phone: 647-722-9306

Bids are to be received on or before: **Monday, October 14, 2014 at 3:00 PM**

Bids received after the deadline will not be considered.

Bids must be valid for 90 days from the date bids are due.

Additionally, a follow up electronic copy of the bid is requested and should be sent to:

Attention: Virginia Roy,
Director of Services
Ontario Colleges Library Service
Email: vroy@ocls.ca

2.3 Schedule

Date	Event
September 15, 2014	RFP issued and distributed
September 24, 2014	Intent to Respond submitted by bidders
September 29, 2014	Last date for questions from bidders
October 3, 2014	Formal response to all questions submitted by bidders
October 14, 2014 at 3:00pm	RFP proposals are due
October 14-20 2014	Proposal evaluation and recommendation approval period
October 21-30, 2014	Contract negotiation
October 31, 2014	Announcement of successful bid and start of project

During the evaluation period, OCLS may request clarifications from and a meeting with bidders.

Dates subsequent to the bids being submitted are estimates only and are subject to modification without notice to bidders.

Bid formats

All responses **must** include the following elements:

- Executive Summary
- A letter of introduction outlining experience and qualifications appropriate to this project
- Current curricula vitae of the principal(s) and other key team members that the bidder proposes to employ in this project
- Project plan with:
 - description of proposed solution that achieves OCLS' goals and meets as many of the priorities and requirements outlined in Section 3.3/3.4 as possible, by March 15, 2015.
 - list of all requirements, indicating which will be implemented as stated by March 15, 2015 which will be altered in the proposal, and which cannot be met (see Section 5)
 - demonstrated understanding of our current situation and articulation of the path that will help us meet our goals and future requirements
 - recommendations and/or methodology that will allow us to evaluate and measure the efficiencies gained by implementing this solution
- Cost proposal:
 - to complete and implement all requirements as identified in the project plan above
 - best estimates and timeframes for completing any remaining requirements from Priorities 2 and 3
 - to provide training, documentation
 - detail any other additional costs
- Company Profile
- Descriptive examples of at least two similar engagements including the project goals, scope and the solutions employed to meet the project requirements on time and on budget
- Names and contact information for three references for whom similar work has been completed
- Completed bid form with original signature - See Section 6.

Bid responses are subject to the Freedom of Information and Protection of Privacy Act. Any information that the bidder regards as confidential must be in a separate appendix that is labelled as confidential. OCLS shall endeavour to honour such confidential designations to the extent allowed under the appropriate legislation.

2.4 Questions

Questions about the contents of this document should be submitted by email to:

Virginia Roy

Ontario Colleges Library Service

Email: vroy@ocls.ca

Quote Reference in Subject Line: "OCLS RFP Proposal #2014-004 – ERMS"

Queries will be acknowledged within two business days. Queries not acknowledged may be resubmitted.

A copy of all queries received by the deadline detailed in Section 2.3 and OCLS's responses will be sent to all bidders confirming their intent to respond to the RFP.

Bidders may not rely in any fashion on communication with any staff at OCLS or any College except through the process defined above.

2.5 Subcontracting

Bidders must clearly identify any and all subcontractors that they intend to use in supplying services to meet the obligations of the RFP. Bidders are responsible for all work performed by subcontractors.

2.6 Bidder's costs

OCLS and the college libraries are not liable for any costs incurred by any bidder as part of the bidding process. This includes, but is not limited to, costs to prepare bids, visits to OCLS, legal or other costs.

2.7 Agreement

OCLS intends to negotiate an agreement with the winning bidder. This RFP, any amendments to it and the bidder's full response shall form part of the agreement. In the event that a mutually satisfactory agreement cannot be reached with the selected bidder, OCLS reserves the right to open negotiations with other bidders.

2.8 Evaluation

Selection of a preferred ERM development partner will be made by OCLS Management Team. The evaluation process will use information drawn from the written submission portions of the proposal and the information supplied by references. The OCLS Management Team's decision will be weighted towards the proposals that demonstrate a thorough understanding of our current situation, that outline a creative implementation and development plan that achieves as many of our goals, objectives and requirements as possible, and that deliver a functional, scalable system within the stated time frame (March 15, 2015) and within our budget. Unless otherwise specified, such an evaluation will be confidential, and no totals or scores of such a rating will be released to any Bidder.

Submitted proposals will be evaluated upon the following criteria (organized by priority)

- Quality of approach and completeness of plan to meet **all** Priority 1 and as many as possible Priority 2/3 requirements, scalability and interoperability of presented solution (functional and technical)
- Implementation - stated ability to meet timeline(s), services provided, training, ability to integrate and build on e-HLBC data model (Appendix 1) or other similar existing model
- Demonstrated understanding of project's overall goals and objectives
- References and description of similar engagements
- Value-added information, creativity and innovation of approach and plan
- Pricing (to complete all aspects of the plan as proposed, estimate of costs to meet additional requirements (Priority 2 and Priority 3 requirements), integration, identification of future modules and requirements, training/document costs etc.
- Recommendations and/or methodologies for evaluating and measuring efficiencies gained
- Overall assessment of the proposal

OCLS reserves the right to seek clarification on any Proposal submitted by a Bidder to assist in making its evaluation, without notifying any other Bidder of such.

The lowest-cost proposal or any proposal will not necessarily be accepted.

OCLS reserves the right to waive any requirement if this is in the best interest of OCLS.

3. SCOPE OF WORK

3.1 Project Goals

The planned development is expected to fulfill the following objectives for OCLS' electronic resources management service:

More efficient information management

The ERMS will allow the OCLS eResources team to efficiently enter, manage, track data pertinent to the management of eResources on behalf of the college libraries. Data should only have to be entered once but populate to all related sections, modules or tools.

Better integration

The ERMS integrates seamlessly with other services provided by OCLS. Users do not require separate logins to navigate between the ERMS and other services (e.g. the request tracker (RT) system). Direct links are possible to navigate between services (e.g. product license terms). OCLS staff and colleges can download the products database as a spreadsheet to integrate with their internal workflows.

Better communication

The new ERMS will provide a **seamless flow of information** between OCLS and the colleges. Information on products currently subscribed will be structured according to how the products themselves are organized: vendors – products – colleges. Users of the system can easily list all products a particular college subscribes to, access the conditions under which the products are licensed, and navigate to related information, such as vendor profiles and contacts. The history of each product within the college system can be brought up, including price evolution and the rationale behind its selection (trial results).

The ERMS is the **primary source of information** regarding subscribed products. Information only needs to be updated once; no manual steps are needed to “push” it to other systems.

Communication is integrated: the main flow of information from OCLS to the colleges is through the ERMS product description pages. Conversely, colleges are encouraged to access this information first to answer their questions. Queries directed at OCLS can be easily generated from within the ERMS and don't require requesters to manually input information that can be inferred from the system.

The ERMS is **web-based** and can be accessed by an unlimited number of concurrent users, both to edit and retrieve information, regardless of their location, operating system and time. The ERMS has a mobile-friendly interface.

Greater robustness and scalability

The data structure of the ERMS will accommodate at least a **tenfold augmentation** of the number of managed products and clients. There are regular **back-ups** of the data, and accidental changes to the database can be **reversed** at all times. All changes are **logged**. The database can be safely accessed and edited by at least 50 **concurrent users**.

The scalability of the system is further enhanced by its ease of use, freeing OCLS and college staff from repetitive tasks.

3.2 Prioritized Development

While this is envisioned as a multi-year project with the 1st priorities, to be developed and delivered by March 15, 2015 there is no guarantee that OCLS will receive funding to complete additional priorities. Therefore the goal is to develop and implement as many of the requirements listed in Section 3.3/3.4 (including all those identified as Priority 1 and as many Priority 2 or 3) as possible to create a functional system that will stand alone and offer efficiencies to the eResources service even if future developments have to be delayed or are constrained by funding. Priority 1 requirements primarily aim to rationalise the creation and management of data and the flow of information between OCLS and the colleges through an efficient web application that is easy to update and navigate. In parallel, OCLS will continue to manage electronic resources using its current workflows and procedures.

Priorities 2 and 3 (see Section 3.4) aim to further develop the system to progressively integrate the management functions (including cost tracking and invoicing) and further improve efficiencies. The successful bidder must be able to demonstrate the commitment, capability and expertise to meet the scalability and interoperability demands associated with this project.

3.3 Project Scope

Based on a prior evaluation of existing tools and frameworks, the recommended option for OCLS is to develop its own ERMS solution within the Drupal framework that is already in place to manage its public web pages, intranet and upcoming services such as an interface for colleges to suggest new products that should be investigated for consortium acquisition. A major advantage of developing a Drupal-based system is the possibility of integrating the data structure, custom code and product description data (as required) that was developed for a similar purpose on the behalf of the British Columbia Electronic Library Network (BCELN) for the Electronic Health Library of British Columbia (e-HLbc, <http://ehlbc.ca/>).

While bidders are free to propose their own preferred approach to implement the priorities and requirements listed below, it is suggested that the integration of the ERMS with the e-HLbc model be considered and bidders will be selected partly on their ability to implement this integration. The data model of the e-HLbc solution is provided as Appendix 1.

Following are the requirements that have been identified as essential to the development of OCLS' ERMS solution. This RFP is primarily concerned with the development and implementation of the Priority 1 requirements. However, OCLS encourages bidders to consider any Priority 2 or 3 requirements as indicated, that could be integrated into their proposed solution while still meeting the required timeline (March 15, 2015). At minimum the proposed solution must have the necessary flexibility and scalability to accommodate further development as envisioned.

Priority 1

1-A. Core functions

- 1-A.1. The system documents all electronic resources managed by OCLS and their relationship with the colleges. Each product (collection) is described (see below for details). The vendor providing that product is mentioned and colleges subscribing to that product are mentioned. Conversely, a list of products provided by each vendor can be displayed, as is a list of all products subscribed by a college.
- 1-A.2. The database is made out of
- Products
 - Vendors
 - Colleges
 - Trials
 - As well as an unlimited number of relationships between the above tables.
- 1-A.3. Product records include, but are not limited to, the following fields:
- Product ID
 - Product title
 - Product vendor (link to vendor record)
 - Product summary *
 - Renewal date
 - Price for the current year (each college + total, in original currency and CAD)
 - Price discount
 - Pricing model (free-form) *
 - Consortium offer vs. single subscription (one-off offer)
 - Notes (created by OCLS) *
 - Relationship with colleges:
 - Many-to-many: several colleges can subscribe to each collection.
 - For each relationship, the date of the start of the subscription and the end of the subscription is stored.
 - Products licensed in the form of perpetual access are described accordingly.
 - A college can renew its subscription after it has expired; in this case a new relationship is formed.
 - The subscription start and end dates are used to compute the subscription duration for each college.

- The visibility of each relationship between a product and a college can be toggled on or off. “Invisible” products are not shown in the lists of products subscribed by a college for regular users. Only OCLS administrators can see “invisible” products (see below for user roles).
 - Number of titles
 - Access link (may be different for each college)
 - Link to associated license and license terms (see Requirement 1-C.4)
 - Link to MARC records and usage statistics (see Priority 2 Requirements 2-C.2 and 2-C.3)
 - Link to product history (same information as above for a minimum of the 5 preceding fiscal years)
- 1-A.4. Product title and Product vendor are the only fields that cannot be blank. When a product page is displayed, blank fields are not shown (including their headings) to regular users. Only OCLS administrators can see these fields marked as blank/empty.
- 1-A.5. An unlimited number of files can be uploaded and linked to each product description. Each file can be described using a free-form text field. The order in which attached files are listed can be determined by OCLS administrators.
- 1-A.6. Vendor information records include, but are not limited to, the following fields:
- Vendor name
 - Parent company name
 - Website URL
 - Account Manager name
 - Account Manager email
 - Account Manager Phone/Fax
 - Account Manager Address
 - Tech Support contact
 - Notes (created by OCLS) *
- 1-A.7. College records include, but are not limited to, the following fields:
- College name
 - Catalogue URL
 - Notes (created by OCLS) *
 - Link to one or more registered users linked with that college (see below).
 - One of the linked users can be assigned the role of “primary contact” and is listed accordingly on the college record.
- 1-A.8. Trial records include, but are not limited to, the following fields:
- Trial start date
 - Trial end date
 - Link with concerned product
 - List of concerned colleges
 - College response deadline
 - Trial description *

- Files can be attached to trial records.

1-A.9. The fields marked with * in the lists above can contain rich text (HTML markup or equivalent). A visual editor is provided for these fields (markup doesn't need to be entered manually).

1-A.10. User management. Administrators can create users and assign roles. At the minimum, the following roles must be present (higher-order roles inherit all capabilities of lower orders):

- OCLS super-administrator (access system core, implement new functionalities)
- OCLS administrator (ability to add new users and change roles, ability to restore the database, undo changes)
- OCLS staff (read access to all data)
- College administrator (read/write access to contact information data for own college)

Access matrix	Own college	All colleges
Contact information	r/w	r
Products description	r	r
Link to license terms	r	r
Pricing fields	r	no
Renewal (priority 2)	r/w	r

- College user (read access to all data, including pricing)

Access matrix	Own college	All colleges
Contact information	r	r
Products description	r	r
Link to license terms	r	r
Pricing fields	no	no
Renewal (priority 2)	r	r

- Anonymous user (read access to list of products subscribed by colleges, not pricing).

Access matrix	Own college	All colleges
Contact information	r	r
Products description	r	r
Link to license terms	r	r

Pricing fields	no	no
Renewal (priority 2)	no	no

1-A.11. OCLS administrators can change permissions for each database field for the above roles.

1-A.12. All data tables support versioning (all changes are incremental, administrator can revert database to earlier stage).

1-A.13. The data model must accommodate the information currently stored in OCLS' existing systems (Excel database, eResources Portal).

1-A.14. Ability to add new database fields when needed (OCLS administrator)

1-A.15. Ability to hide/archive database fields no longer needed (OCLS administrator)

1-A.16. The primary data source is OCLS' Excel database. OCLS staff can easily update the information on the developed system from the Excel database. Product IDs are used to univocally identify products both in the Excel database and in the developed system. The update process never deletes information from the developed system but only updates fields as required.

1-B. Communication

1-B.1. College "dashboard". Colleges can quickly access the list of products they currently subscribe to, at which price and under which rebate scheme. Information on the how the price was computed is available within the product page. Products listed on the "dashboard" feature their direct access link (college-specific access URL).

1-B.2. A "current subscription" for a college is defined as all subscription for which the subscription end date is not in the past. It includes all perpetual subscriptions for this college. The duration of each subscription is displayed on each college's list of subscriptions.

1-B.3. The history of each product can be accessed, including the date each college first subscribed to it and the rationale for the selection (trial results).

1-B.4. Information relating to each college such as FTE numbers and IP range can easily be accessed from the "dashboard" and within a college page.

1-B.5. The college dashboard displays a news feed. News can be created by OCLS staff and administrators (in rich-text, with graphical editor) and published either as a broadcast to each college dashboard or to a specified list of colleges (one or many). News items have a start and end date that determines their visibility on the dashboard.

1-B.6. Each product page lists the colleges that have access to it and the FAQ entries related to it (see Requirement 1-B.9).

1-B.7. College users can generate reports listing

- Products they currently subscribe to
- Number of journal/ebook titles contained in each package (when available)
- Current prices and rebate for that college
- Which other colleges subscribe to the same products. Conversely, a list of products subscribed by other colleges that an institution does not subscribe to can be generated.
- Reports can be downloaded in a ready-to-print format (e.g. PDF) and Excel/CSV

1-B.8. Alerts are automatically issued at a (customizable) period before products are up for renewal

- 1-B.9. FAQ pages can be created by OCLS staff and linked to from products pages
- Each FAQ is a separate page/database entry containing a Question and an Answer field.
 - Each FAQ can be linked to zero, one or many products
 - Linked products are displayed on FAQ pages. Product pages to which an FAQ is linked to display the relevant links to FAQ entries.

1-C. Interconnectivity

- 1-C.1. If the developed solution uses Drupal as a framework, it needs to integrate within the existing Drupal 7 OCLS installation. A mirror testing instance of this installation is available during development. Notably, user account already exists for OCLS and college staff. Existing user accounts must be used by the developed solution and their current permissions (relating to other existing services) must be retained.
- 1-C.2. Data can be exported from the system in a format adequate for import into other systems (e.g. CSV).
- 1-C.3. Data exports can be customized using a wizard-like interface. Customized exports can be stored for later use.
- 1-C.4. All products can be linked with the relevant license information on a separate website, for example, in the OUR (Ontario Council of University Libraries) database/Mondo License Grinder (or equivalent).
- 1-C.5. On each product page, registered users can create a ticket for OCLS' request tracking system (Request Tracker (RT)). Information on the user and the relevant product is pre-populated on the RT form (using an API or equivalent). NB. OCLS plans to work with Best Practical (developer of RT) to create a REST based form that would be available on each product page. Integration with Drupal should be considered within the scope of this work.

1-D. Technology

- 1-D.1. New system is Drupal based.
- 1-D.2. The system conforms to AODA (Accessibility for Ontarians with Disabilities Act) regulations.
- 1-D.3. The design is responsive (mobile-friendly).
- 1-D.4. The system integrates within the existing OCLS' single-sign-on structure.
- 1-D.5. All data is stored on Canadian soil and in compliance with privacy-protection guidelines.
- 1-D.6. All data transfer is encrypted (e.g. SSH).
- 1-D.7. All data is backed up on a user-definable schedule.
- 1-D.8. Database is in an open format (e.g. MySQL) and can be accessed in read/write mode via SQL queries (or similar) by the super-administrator.
- 1-D.9. The system is fully documented: database structure and software modules are documented so as to allow extension of the system by another third-party. End-user documentation is available for all functions available to OCLS and college staff.
- 1-D.10. The use of Free or Open-Source Software (FOSS) is preferred. Frameworks that have a strong user community are preferred.
- 1-D.11. The database can accommodate a minimum of 4,000 products in relation with a minimum of 1,000 vendors and a minimum of 30 colleges.

1-E. Migration

- 1-E.1. Historical data from the Excel database used by OCLS to manage e-resources can be imported (current and archived versions).
- 1-E.2. Existing information about products can be imported from the current eResources Portal, as required.
- 1-E.3. Existing information about products can be imported from other Drupal-based electronic resource description pages (e.g. BCELN, COPPUL websites), as required.
- 1-E.4. New system can function in parallel with existing services (e.g. OLIVER) during the migration. Transition downtime must not exceed 24 working hours.

3.4 Future developments

This RFP covers the development of a system that meets, at minimum, the Priority 1 requirements listed in the above section. However, requirements for Priority 2 and 3 have been identified for the subsequent development priorities of the software, and are listed here to help bidders frame their proposal with an eye towards future development. Bidders are encouraged to include any and all Priority 2 and 3 requirements that can be delivered by March 15, 2015 in their proposal, as well as indicate in their proposal, a tentative timeline and budget for any of these requirements not included in Priority 1.

Priority 2

2-A. Core functions

- 2-A.1. Products' price structure can be coded in the system (price tiers)

2-B. Communication

- 2-B.1. College users can add their own notes (rich text with visual editor) to each product they subscribe to. This field is only visible to users from that college, as well as to OCLS staff and administrators.
- 2-B.2. Reports can be customized by users, including custom field names for downloads (to ease import into other systems)
- 2-B.3. The developed system integrates with OCLS' Drupal-based "voting system" that allows users to nominate products for consideration and "vote" for products that should be considered.
- 2-B.4. College administrators can indicate directly within the developed system which products should be renewed.

2-C. Interconnectivity

- 2-C.1. Links from eBook product pages to relevant metadata repository entries (cf eBook project). Not visible to anonymous users.
- 2-C.2. Link to MARC records, as well as a field containing instructions on how to access this resource. Not visible to anonymous users.
- 2-C.3. Link to usage statistics reports for each product and college (possibly through parametric URLs), as well as a field containing instructions on how to access this resource. Not visible to anonymous users.
- 2-C.4. Ability to produce usage statistics reports from the OCLS BIBLITE database (Microsoft SQL database containing access statistics for Remote Access and Video on Demand products managed by OCLS).

Priority 3

3-A. Core functions

- 3-A.1. The developed system includes all functionalities of the current OCLS Excel database and becomes the primary information source for the management of e-resources.
- 3-A.2. The price structure, including tier-based pricing when applicable, list price, initial price, negotiated price and rebates can be tracked.
- 3-A.3. Invoices sent to the colleges and operations made to their deposit accounts can be tracked.
- 3-A.4. Colleges can add college-specific products to the database. The same reporting and analysis functions as for the collective products are available for these.

3-B. Communication

- 3-B.1. All communications to the colleges regarding e-resources occur within the developed system: renewal alerts and decisions, trial alerts and feedback, deposit account statements, etc. Colleges receive an alert when statements have been updated and can download them from the developed system. Statements can be downloaded at any time.
- 3-B.2. Integration of usage statistics within the system, including BIBLITE (see Requirement 2-C.4)
- 3-B.3. Analysis of usage statistics: trend analysis (change over time), comparison between colleges and products.

3.5 Project Timeline and Deliverables

Date	Deliverable
November 7, 2014	#1 - Development Plan and Timeline
November 14, 2014	#2 - Migration procedure for OCLS data
November 21, 2014	#3 - OCLS and College dashboards functional on test instance
January 2, 2014	#4 - Reporting features functional on test instance.
February 15, 2015	#5 - All Priority 1 and any identified Priority 2 and 3 functional requirements developed to the satisfaction of OCLS and college staff.
February 27, 2015	#6 - Migration strategy to live version, including communication to colleges
March 15, 2015	#7 - Live version running and acceptance testing complete
May 1, 2015	#8 - End user and developer documentation complete

This is provided for general reference. Final timeframe and deliverables are subject to negotiation between the successful bidder and OCLS.

3.6 Budget

Although funds are available for this work we do not have a pre-established budget. Rather than set a fixed budget we are asking that proposals provide us with the most complete solution possible based on our goals and requirements and indicate the cost to get us there, by March 15, 2015. Creativity and flexibility in the responses will be an important factor in our deliberations. We recognize that it is unlikely that we can complete this work, with the level of expertise and assistance that we need, and with the quality of outcome that we expect, for less than \$30-40K. Bidders could consider that as a starting range for providing a proposal that would help us achieve our goals.

4. GENERAL REQUIREMENTS

4.1 Bid contact person

The bidder shall provide a single person to whom all requests for clarifications or additional information may be addressed. Name, telephone, fax, and email contact information is required.

4.2 Company Profile

The bidder shall provide a brief profile of your company and information demonstrating relevant experience and qualifications.

4.3 References

Bidder shall provide three references for work requiring similar knowledge and capacity. Contact information for each of the three references shall be provided.

5. FEATURE REQUIREMENTS

Responses must contain a summary description of the proposed solution, including details on its integration within the existing Drupal OCLS website and existing ERMS solutions such as the e-HLbc model. Bidders must state whether they commit to the project deliverables and timeline as listed in Section 3.6 above, and notably whether the final product can be delivered on or before March 15, 2015 (deliverable #7). Variations in the timeline must be explained.

Further, bidders must list all Priority 1 (and any Priority 2 or 3) requirements as stated in Section 3.3/3.4 above in their response, and provide for each of them a commentary as to whether they:

- are able to meet a requirement and intend to develop the required feature as stated; or
- suggest an alternative approach (with an explanation on why this is preferred and costs for providing it);
- are partially or entirely unable to meet a requirement (with details).

Bidders should also address the future development of the system (according to the requirements for Priorities 2 and 3 as listed above) and outline how their proposed solution will provide the flexibility required for outstanding priorities to be further developed. As noted in 2.4 Bidders should include tentative timeline and costs for the development of any remaining Priorities 2 and 3 requirements in their response.

6. BIDDING FORM

OCLS PROPOSAL #2014-004 – ERMS

Bidder:

Company Name: _____

Address: _____

Signature of Signing Officer: _____

Print Name / Title of Signing Officer: _____

Bid Contact Person: _____

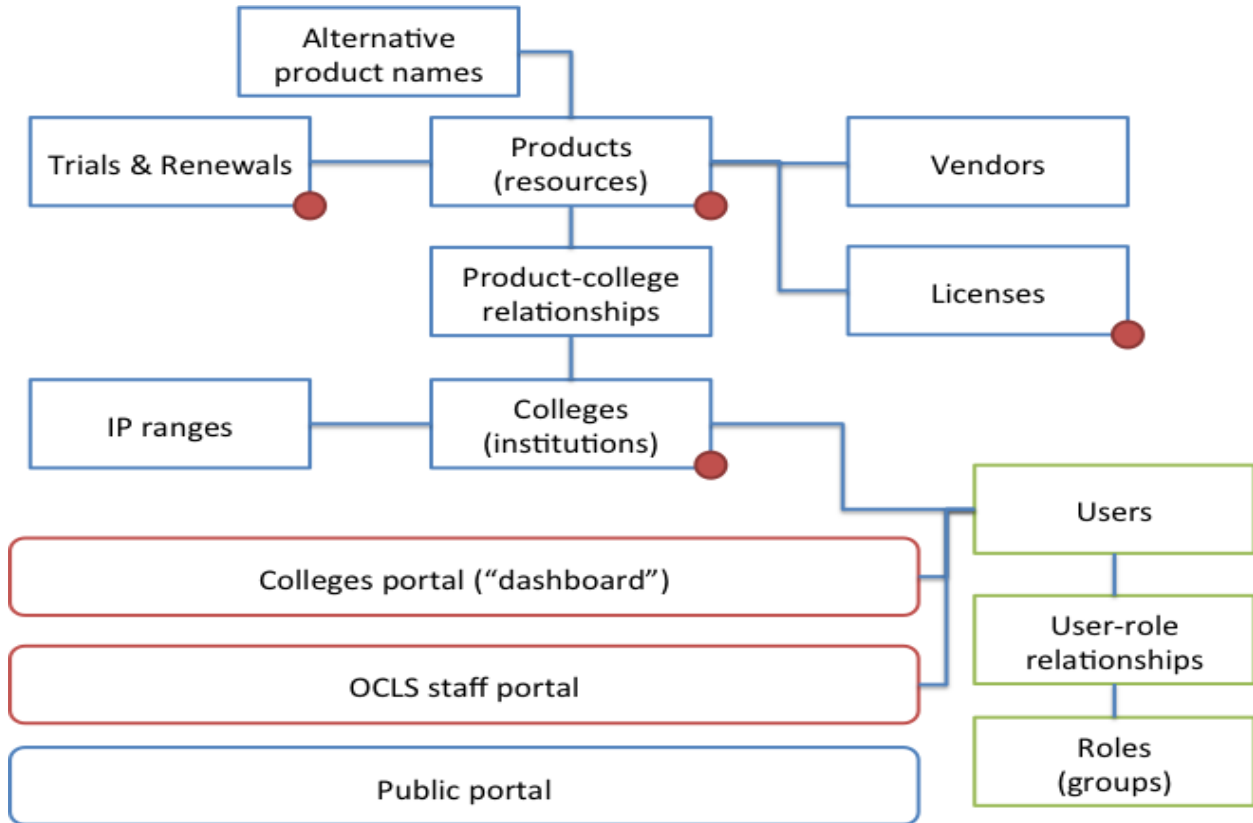
Telephone / Fax / Email for Contact _____

Date Bid is Valid until (DD/MM/YYYY): _____

In order to ensure that all bids are based on the same terms, bidders should list all bid revisions or updates that they have received and whose terms are incorporated in their bids.

List Bid Revisions / Updates: _____

Appendix 1 - e-HLBC Summary Data Model – provided with approval of e-HLBC & BCELN



Development is expected to impact all tables and current functions available within Drupal. The areas where major development is expected are signalled accordingly. A more detailed Data Model can be provided to bidders upon request.

