



# RFQ for eBook Metadata Repository

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OCLS RFQ #2015-001 Rev. 1.0

March-April 2015

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 Ontario Colleges eBook Consortium Project**

The eBook Consortium Project aims to develop infrastructure to jointly acquire and manage eBooks and to establish a core eBook collection common to participating Ontario colleges. Its goals are for colleges to:

- Have a sustainable, common acquisition strategy for eBooks, with a dedicated budget and a structure for flexible, evidence-based selection of materials (governance)
- Benefit from attractive pricing and licensing conditions achieved through collective negotiation (licensing management)
- Offer fast and convenient access to these materials for all its students, staff and faculty through efficient content discovery (metadata management)

Establishing a shared core eBook collection is a key element of the colleges' online learning initiatives. The project will improve collaboration between colleges by minimizing duplication and enable access to a high-quality, robust electronic collection that supports distance, online, and hybrid learning programs across the province.

The initial core eBook collection will be acquired during the first half of 2015, followed by a second period of content acquisition in early 2016. The eBook consortium is expected to be fully implemented by the end of 2016; at this time, the management infrastructure and the long-term acquisition strategy should also be in place.

To assist college libraries in managing these resources more efficiently, the eBook Consortium Project will set up a common process for the selection, acquisition, management, and delivery of electronic books, as well as a shared digital repository to streamline cataloguing and improve access to this material by students and faculty. The present RFQ covers the provision of this repository.

## **1.3 COLLECT: College Libraries Central digital repository**

On behalf of its member colleges, OCLS maintains the Colleges Union Catalogue (CUC) and its recent evolution, the COLLECT digital repository (<http://searchcollect.ca/>). Using an instance of the VTLS *Vital* software, COLLECT is a digital repository capable of housing shared online resources such as eBooks and streaming videos.

Currently in its pilot phase, COLLECT facilitates discovery and system wide access to resources by providing link back functionality to individual library catalogues. Additional functionality enables users to filter by subject, college, language, date and medium, and to leverage advanced search capabilities. The technology behind COLLECT readily allows the creation of new repository instances. Such an instance is one of the possible options to provide the backend for the metadata repository concerned by this RFQ. Proponents are encouraged to consider this option or to describe the integration of their proposed solution with COLLECT.

#### **1.4 eBooks metadata management by the Colleges**

Even though the colleges have a long track record of rationalizing the management of their resources, thanks to collaboration and to the delegation of certain tasks to OCLS or vendors, they still rely on local catalogues to manage their content and make it accessible to their users. Under the current situation, every institution needs to follow a labour-intensive workflow for every new eBook product that is being purchased or licensed. Thankfully, metadata records are now delivered by vendors or shared amongst colleges and do not need to be created by librarians anymore. However, eBook records provided by vendors still require adaptation to each college system before they can be added to catalogues and discovery services. Some eBook collections evolve over time, and libraries have to invest more work in updating their records accordingly.

The metadata repository concerned by this RFQ aims to streamline the process of managing the metadata records associated with the eBooks acquired by the Colleges.

#### **1.5 Invitation to Bid**

OCLS is seeking proposals for the provision of a database to store and manage eBook metadata for all Ontario Colleges (“metadata repository”). This system is intended to serve as a one-stop source for the catalogue records that are associated with eBooks that have been collectively purchased by the Colleges. Records obtained from vendors will be edited if necessary to meet the Colleges’ bibliographic standards and then loaded into the repository. From there, they can be loaded into the Colleges’ individual catalogues. The repository will also have the ability to communicate directly with the Resource Discovery Services implemented by the Colleges (e.g. ProQuest Summon or EBSCO Discovery Service EDS) to expose records without the need to copy them into each of the Colleges’ individual catalogues, i.e. act as a “source” to the Discovery Service. The metadata repository is not meant to hold the digital objects (eBooks) themselves.

The successful proponent must therefore have extensive experience developing and integrating library resource discovery systems. Experience in developing solutions for library consortia 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 **April 2, 2015** 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:	Thomas Guignard	Ontario Colleges Library Service
	eBook Project Manager	74 Gervais Drive
	Ontario Colleges Library Service	Toronto, ON M3C 1Z3
	Email: <a href="mailto:tguignard@ocls.ca">tguignard@ocls.ca</a>	Canada
	Fax: 647-722-9319	

## 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: Thomas Guignard,  
eBook Project Manager

Bids are to be received on or before: **April 30, 2015 at 3:00 PM (EST)**

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: Thomas Guignard,  
eBook Project Manager  
Ontario Colleges Library Service  
Email: [tguignard@ocls.ca](mailto:tguignard@ocls.ca)

## 2.3 Schedule

Date	Event
March 25	RFQ issued and distributed
April 2	Intent to Respond submitted by bidders
April 16	Last date for questions from bidders
April 23	Formal response to all questions submitted by bidders
April 30, 2015 at 3:00 PM EST	RFQ proposals are due
May 1-15	Proposal evaluation and recommendation approval period
May 19-29	Contract negotiation
May 29	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.

## 2.4 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 the proposed solution that achieves the goals mentioned in this RFQ.
  - List of all requirements (as per Section 3.2), for each of them specifying
    - Whether the requirement can be met as described;
    - Whether the proposed solution requires an adjustment of the requirement, and why;
    - Whether the proposed solution will not meet the requirement, or not entirely, and why.
  - Demonstrated understanding of the current situation and articulation of the path that will help OCLS meet its goals and future requirements
  - Recommendations and/or methodology that will allow OCLS to evaluate and measure the efficiencies gained by implementing this solution
  - Timeframe for the implementation of the proposed solution, including testing and training
- Cost proposal:
  - To complete and implement all requirements as identified in the project plan above
  - To provide training and 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.

## 2.5 Questions

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

Thomas Guignard

Ontario Colleges Library Service

Email: [tguignard@ocls.ca](mailto:tguignard@ocls.ca)

Quote Reference in Subject Line: "OCLS RFQ Proposal #2015-001 – eBooks Metadata Repository"

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 RFQ.

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

## **2.6 Subcontracting**

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

## **2.7 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.

## **2.8 Agreement**

OCLS intends to negotiate an agreement with the winning bidder. This RFQ, 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.

## **2.9 Evaluation**

The selection of a preferred development partner for the eBook Metadata Repository will be made by the eBook Consortium Project Steering Committee. The received proposals will be reviewed by the Project's Repository Working Group, who will submit a recommendation for the selection of a proposal to the Steering Committee.

The evaluation process will use information drawn from the written submission portions of the proposal and the information supplied by references. The Steering Committee'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 the achieves as many of our goals, objectives and requirements as possible, and that deliver a functional, scalable system within the stated time frame and within the available 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** requirements, scalability and interoperability of presented solution (functional and technical)
- Implementation - stated ability to meet timeline(s), services provided, training, ability to integrate with existing systems currently used by OCLS and the Colleges
- 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, integration, identification of future



developments and requirements, training/documentation 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**

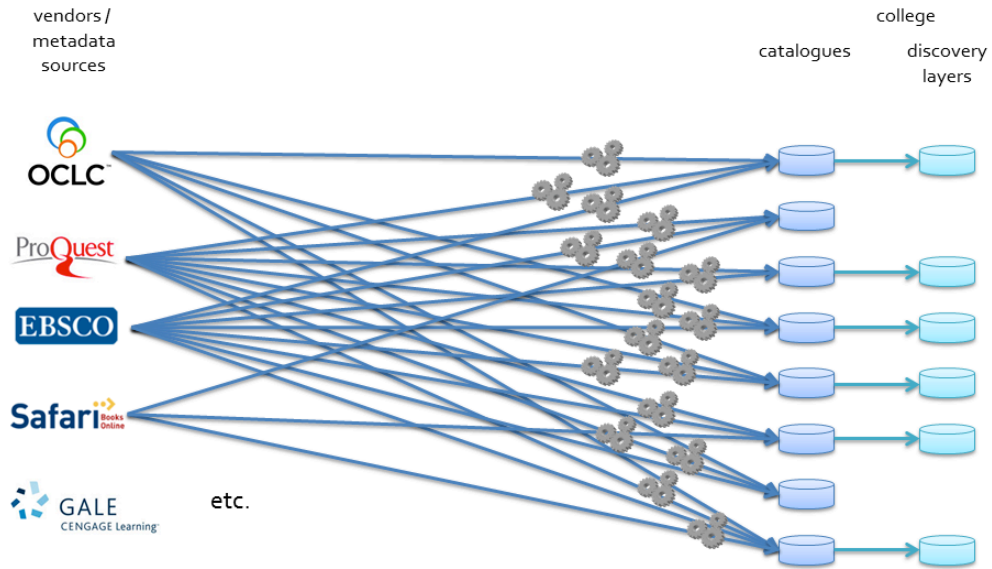
#### **3.1 Project Goals**

This project is envisioned as a multi-phased, multi-year endeavour. The first phase, to be developed and delivered by July 31, 2015, is to acquire and build a scalable metadata repository solution for a consortium eBooks collection. College cataloguing staff will be able to download metadata records from the repository for inclusion in their local integrated library systems.

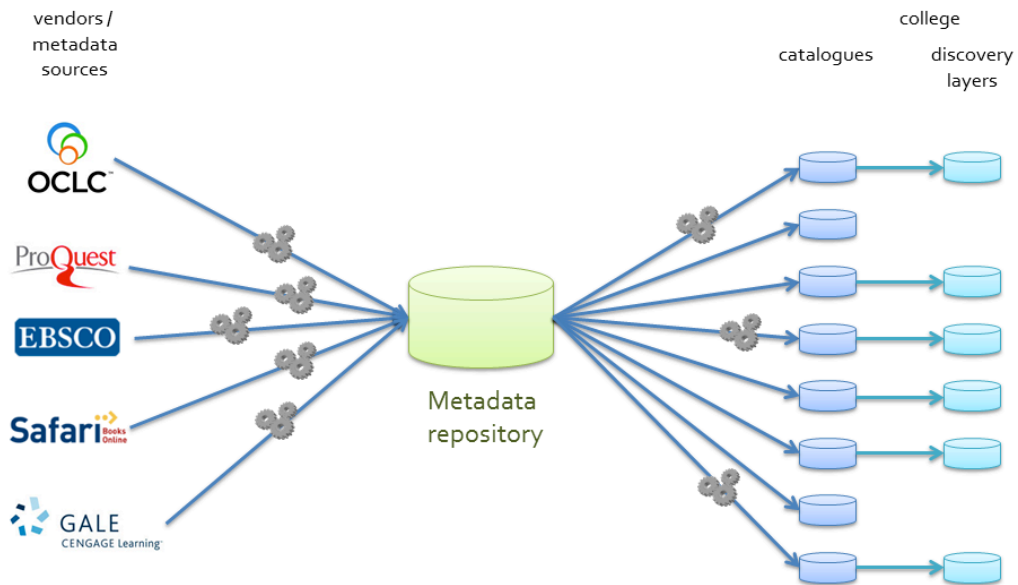
In the second phase, to be developed and delivered by May 27, 2016, the repository will interface with discovery layers so that those layers can automatically harvest the metadata. It is envisioned that in the future, this repository will provide “one-stop shopping” for metadata records for locally purchased eBooks and other digital objects for each Ontario college (however, this development is not part of the present RFQ). As such, this project will identify a repository solution provider with the demonstrated commitment, capability and expertise to meet the scalability and interoperability demands associated with future phases of this project.

The following figures map the current flow of eBook metadata in the colleges, the situation with the repository in the first development phase and in the second development phase. Note that those figures are simplified representations for illustration purposes only.

## Current situation (without repository)

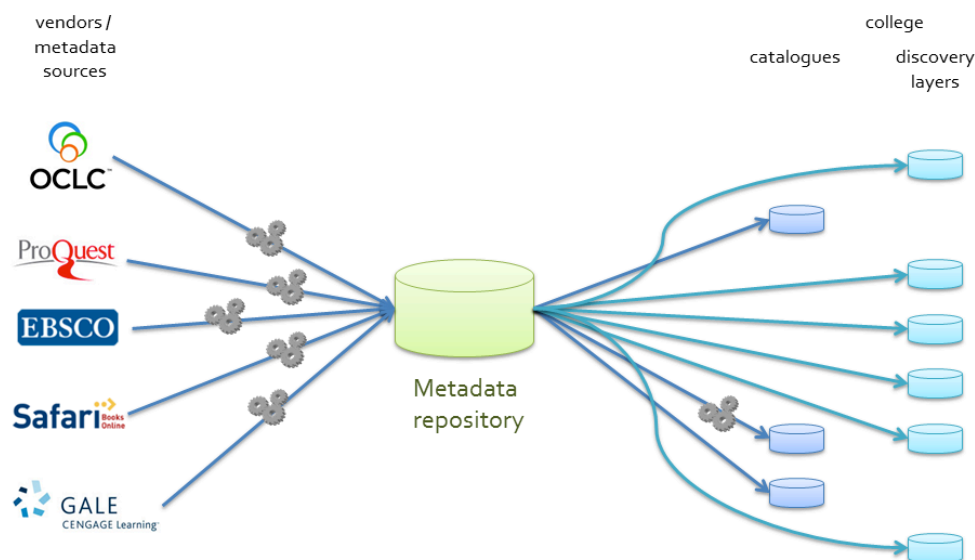


## Metadata repository – Phase 1 Reservoir of records



## Metadata repository – Phase 2

### Direct interaction with discovery layers



### 3.2 Technical Requirements

The primary goal of the repository is to serve as a reservoir for metadata records of the eBooks purchased collectively by the consortium. Colleges should be able to retrieve records in the correct format directly from the repository for loading into their local integrated library system (ILS) catalogues. Further, the repository will be developed so that it can ultimately be queried directly by the colleges' resource discovery solutions (e.g. Summon, EDS, etc.), eliminating the need to transfer records from the repository into each college's local ILS catalogue. A secondary goal of the repository is to serve as a reservoir for metadata records of eBooks purchased by each college individually.

The proposed solution must allow OCLS to meet the goals outlined above while integrating with its existing services and workflows. Furthermore, the proposed solution must comply with the following technical requirements.

#### 1. METADATA STANDARDS

- 1.1. The system uses the following content standards for the data: AACR2, RDA, FRBR
- 1.2. The system uses the following structural/encoding standards: MARC, MARCXML, ISBD, RDF, XML, Dublin Core, Can Core, MODS.

## 2. SECURITY

- 2.1. The system has granular/customized permission levels, including top-level administrative accounts, administrative accounts for each participating college, and multiple levels of user accounts.
- 2.2. Administrative accounts have the authority to set up additional administrative and user accounts with varied permission levels.
- 2.3. The system supports shared data (group purchase) and exclusive data (individual college purchase). Each college can log into the system and view / edit / download only their own records and those for shared collections in which they participate. Specifically:
  - 2.3.1. For each college's own records ONLY, the college can
    - view / edit / download those records.
    - view / edit / add / delete metadata fields for those records.
  - 2.3.2. For records that are part of a shared collection, each college can
    - edit records which will then require administrative-level approval before the changes are released to other colleges.
    - view / edit / add / delete metadata fields which will then require administrative-level approval before changes are released to other colleges.
  - 2.3.3. During update, the system has a mechanism (e.g. records locking) to ensure data integrity and consistency; logs and history are included.

## 3. SYSTEMS COMPATIBILITY

- 3.1. The system is compatible with database discovery services such as EBSCO EDS and ProQuest SerialsSolutions Summon. This feature pertains to Phase 2 of the project.
- 3.2. The system supports automatic metadata harvesting between the repository, individual colleges' ILS, discovery layer (EDS and Summon), and other digital management systems (e.g. Vital system) using OAI-PMH (Open Archives Initiative – Protocol for Metadata Harvesting) and/or other metadata harvesting protocols. This feature pertains to Phase 2 of the project.
- 3.3. User interfaces are browser-based and accessible via the web.
- 3.4. The system is compatible with existing systems in the college and consortium

## 4. SYSTEM FEATURES

- 4.1. Metadata records can be edited within the repository system, singly and/or in batch.
- 4.2. System allows users to perform a global edit of metadata records (e.g. find / replace / replace all).
- 4.3. There are separate "spaces" for each college within the system.
- 4.4. The system has an open and documented application programming interface.
- 4.5. The system supports multiple front-ends (e.g. centralized eBooks interface, individual college's digital assets interface, etc.). This is not a requirement, but a desirable feature.
- 4.6. The interface is customizable for each college.

- 4.7. The system interface is user-friendly, intuitive to search, and visually appealing; the administrative back-end should be comparatively easy to implement and manage.
- 4.8. Users can download: 1) all records, 2) all records / changes since last download, and 3) all records from a user-defined date, onward. Upon completion of download, there is confirmation that the download is complete.
- 4.9. Each college can upload its own metadata and content.
- 4.10. The system has controls to avoid duplication of records. This is not a requirement, but a desirable feature.
- 4.11. The system is scalable.
- 4.12. The system provides standard reports as well as customized reports addressing different types of statistics such as usage, content, access, and record activities.
- 4.13. Users can set up schedule(s) to have report files delivered to them.

## 5. OTHER REQUIREMENTS

- 5.1. The system interfaces comply with the requirements laid out in the *Accessibilities for Ontarians with Disabilities Act*<sup>1</sup>. Specifically, all web interfaces must comply with the World Wide Web Consortium's *Web Content Accessibility Guidelines (WCAG) 2.0*<sup>2</sup>, level AA.
- 5.2. The system interfaces are available in English and French.

### 3.3 User cases

The repository stores metadata records for eBooks. Each college has its own space in the repository where the metadata for its digital resources and collections is stored.

#### College with OPAC (Phase 1)

The consortium or College purchases or leases an electronic resource, which could be a single eBook title or an eBook collection. The subscribing College wishes to include the metadata records in the integrated library system so that they appear in the OPAC. Currently, the technical services person will visit the vendor's web site, download the records, customize the records by deleting extraneous fields or adding others (such as Local Notes), then upload the records to the College's integrated library system. The issue with this workflow is that the College has access to many resources – some that are accessible to the whole consortium, and some that are accessible only to that specific College – and the technical services person is obligated to visit many vendor web sites to complete the initial downloading/uploading process. In addition, this work must be repeated frequently for maintenance (e.g. monthly), in order to capture deletions and additions.

With the proposed repository solution, the necessity of visiting multiple vendor internet sites to retrieve cataloguing metadata would be eliminated, as the repository will provide "one-stop shopping" for all

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<sup>1</sup> See [http://www.mcsc.gov.on.ca/en/mcsc/programs/accessibility/understanding\\_accessibility/aoda.aspx](http://www.mcsc.gov.on.ca/en/mcsc/programs/accessibility/understanding_accessibility/aoda.aspx)

<sup>2</sup> See <http://www.w3.org/TR/WCAG20/>

metadata to which the College has resource access, whether that resource is accessible by the whole consortium or only that College. There would be editing functions so that the records could be modified in batch or individually before downloading from the repository. The repository records would be maintained to capture metadata changes, additions, and deletions for that resource. The repository tracks the last time that records for any specific resource was downloaded, so that the technical services person knows which files need updating, especially if there is a period of inactivity (e.g. depending on the needs of the College, some databases may be updated monthly, but others might be updated semi-annually). There may be an automatic notification system that alerts the College when changes to the metadata are posted.

### College with Discovery Layer (Phase 2)

The consortium or College decides to purchase or lease an electronic resource, which could be a single eBook title or an eBook collection. The metadata records are in the repository and made available to the subscribing College(s). The College's discovery layer then automatically and periodically ingests the metadata records directly from the repository, making the electronic resource discoverable to the College's users. Changes to the records such as updates and deletions are reflected in the repository, and the College's discovery layer automatically and periodically picks up those changes, thereby keeping the discovery service results current.

### 3.4 Project Timeline and Deliverables

Date	Deliverable
<b>May 29, 2015</b>	#1 (2.4) Metadata repository software selected
<b>July 31, 2015 (Phase 1)</b>	#2 (3.1) Metadata repository setup and running (no content)
<b>August 28, 2015</b>	#3 (3.2) First set of eBook records loaded into the repository
<b>October 16, 2015</b>	#4 (4.3) First set of records exported to local college catalogues
<b>October 30, 2015</b>	#5 (4.3) Repository GO LIVE
<b>May 27, 2016 (Phase 2)</b>	#6 (6.3) Repository linked with Resource Discovery Services via API or OAI-PMH harvesting for selected colleges
<b>June 30, 2016</b>	#7 (7.2) Second set of eBook records loaded and exported to local college catalogues
<b>September 30, 2016</b>	#8 (7.4) Repository linked with Resource Discovery Services for all colleges

The development and implementation of the metadata repository is part of the larger eBook Consortium Project. Consequently, the above timeline has strong dependencies with other project tasks and little flexibility is available for the accomplishment of the above tasks. Number in brackets in the above timeline refer to the equivalent deliverable number within the eBook Consortium Project.

Final timeframe and deliverables are subject to negotiation between the successful bidder and OCLS.

### 3.5 Budget

The available budget for the development and implementation of the eBook metadata repository (both phases). These figures are provided to bidders for information purposes only. Proposals that exceed the figures quoted below will still be assessed and budget extensions will be considered if required.

Cost category	Phase 1	Phase 2	Total
License & maintenance fees	\$35,000	\$16,000	\$51,000
Development and setup	\$30,000	\$10,000	\$40,000
<b>Total</b>			<b>\$91,000</b>

Please note that those figures do not include cataloguing services, provision of metadata records, or the editing and loading of records.

## 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 any existing systems or services provided by OCLS and the Colleges. Bidders must state whether they commit to the project deliverables and timeline as listed in Section 3.6 above. Variations in the timeline must be explained.

Further, bidders must list all requirements as stated in Section 3.2 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 and outline how their proposed solution will provide the flexibility required for the evolution of the services provided by OCLS and the Colleges.



## 6. BIDDING FORM

### OCLS PROPOSAL #2015-001 – eBook Metadata Repository

**Bidder:**

Company Name:

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Address:

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---

---

Signature of Signing Officer:

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Print Name / Title of Signing Officer:

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Bid Contact Person:

---

Telephone / Fax / Email for Contact

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---

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

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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:

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Rev 1.0 – Added Appendix A with questions received from interested bidders and responses.

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## APPENDIX A – Questions and Answers

Please be aware that duplicate questions have been combined and that some wording has been edited for clarity. As a result, the questions listed below may not exactly reflect the wording of questions received from prospective vendors.

**1. Do you require an A-Z listing of titles or collections? Or would searching through the usual options (e.g., titles, subjects, author, etc.) suffice?**

As the metadata repository is not intended to be a user-facing service, an A-Z listing of titles is not required. Ideally, records should be searchable by any given field (title, author, ISBN, subjects, etc.). If your solution only provides a search function using certain fields, please specify which fields are searchable in your response.

**2. Do you require this database to reside on-site or it can be hosted in the cloud (or by the vendor)?**

A cloud-based or vendor-hosted solution is acceptable.

**3. You have outlined 5 vendors as eBook metadata sources, are there any others? What format is the eBook metadata in?**

As indicated, the figures presented on pages 10 and 11 of the RFQ are for illustration purposes only. Content vendors typically either provide metadata records directly or through a 3<sup>rd</sup> party such as OCLC. There can therefore be as many metadata sources as content vendors.

Currently, records are most often provided in MARC format. However, the proposed solution is expected to be compatible with all standards and formats as specified in items 1.1 and 1.2 of the technical requirements list.

**4. How will the eBook metadata be delivered?**

Content vendors typically either provide metadata records directly or through a 3<sup>rd</sup> party such as OCLC. Usual delivery methods include distributing records from FTP servers, or HTTP download from a web interface; as well as database queries using the Z39.50<sup>i</sup> protocol, SRU/SRW<sup>ii</sup> or OAI-PMH<sup>iii</sup>.

**5. Is there a standard schema to transmit data to the library systems? Is there currently a defined schema in place or should we develop our own?**

Support for MARC (ISO 2709) downloading is required. In addition, Z39.50 is the protocol that is currently compatible with the majority of Integrated Library Systems. Therefore, support for Z39.50 is required. Solutions that also implement alternative protocols such as SRU/SRW or OAI-

PMH with the DublinCore<sup>iv</sup> format will be preferred, as this will provide greater compatibility with future developments.

**6. Do we have to develop an additional interface to SearchCollect.ca. Or does it utilize the same schema as the library systems do/will?**

COLLECT is built on the III VITAL platform<sup>v</sup> and uses the same industry standard protocols as described in items 1.1 and 1.2 of the technical requirements list. There is therefore no need to develop an additional interface to searchcollect.ca.

**7. Licenses - How many user would need edit privileges in the solution? Read/write only access? First phase? Second phase?**

A minimum of 100 users with read/write privileges should be supported for the edit functions. Solutions not limiting the number of users will be preferred. As specified by requirement # 4.11, the system should be scalable and vendors are encouraged to document scalability in their proposal (e.g. possible licensing fees based on total number of records or users).

In the second phase (integration with Discovery Layers), the number of record queries to the database should be unlimited.

**8. What sort of reports are required? Do you prefer ad-hoc or automated reports?**

Vendors are free to define the report functionality that they intend to provide. Expected reports include, but are not limited to, access logs, number of records added or deleted (total, by institution, by user). In the second phase, reports should include e.g. the number of queries in a given period, a list of most frequent search terms, etc.

Both ad-hoc and automated reports are required (cf. requirement # 4.13).

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<sup>i</sup> <http://www.loc.gov/z3950/agency/>

<sup>ii</sup> <http://www.loc.gov/standards/sru/>

<sup>iii</sup> <https://www.openarchives.org/OAI/openarchivesprotocol.html>

<sup>iv</sup> <http://dublincore.org/specifications/>

<sup>v</sup> <http://www.iii.com/products/vital>