**OUTDATED**

**~~Description of the Object of the Contract~~**

 **~~OMNIS e-services~~**

**~~Task 4 : Purchase and implementation of the Integrated Resource Management System for Libraries~~**

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1. **~~Introduction~~**

~~The fast growth of the Internet and electronic information sources and the changing needs and behaviour of patrons precipitate necessary changes to the methods of resource management, integration and circulation at Polish libraries. Presently in Poland, there is a number of library systems in operation, financed by various institutions that manage the library catalogues. In order to commence the clean-up of the Polish library electronic catalogues as a part of the "OMNIS e-service" project, one cloud-based library system service is to be purchased for the National Library and other libraries that wish to eventually transfer their data to the common catalogue environment. The cloud-based library system for the National Library and other institutions is to be provided in the SaaS (Software as a Service) model, leading to lower maintenance costs and the availability of more frequent software updates.~~

1. **~~Object of the contract~~**
	1. **~~General description~~**

~~The object of the contract is the provision and implementation of an existing Integrated Resource Management System for Libraries with an access service to the cloud based library system provided in the SaaS (Software as a Service) model along with the necessary licenses. An existing System is to be understood as a solution that is already in the possession of the Contractor and can be implemented by the Contractor within the deadline set forth in the contract attached hereto.~~

~~The System offered by the Contractor will be implemented at the National Library and at three other libraries indicated by the Contracting Authority (an academic library, a provincial library and a county library).~~

~~The system provided by the Contractor will ultimately target librarians in Poland (regardless of the nature of the library and the type of library materials collected). The Contractor is required to provide a System that will be fully scaled with future library implementations (after September 30, 2019).~~

~~The Contracting Authority expects the System to provide the management of library processes in the following scope:~~

* ~~acquisition of library materials,~~
* ~~cataloguing of library materials,~~
* ~~circulation of library materials,~~
* ~~registration of serials,~~
* ~~user interface (search engine browser),~~
* ~~system administration,~~
* ~~interoperability with other systems used at the library, e.g. through an API.~~
	1. **~~Contractor's obligations~~**

~~The Contractor is to ensure the performance of the following tasks:~~

1. ~~provision of the System along with the required licenses,~~
2. ~~implementation of the System,~~
3. ~~configuration of the System,~~
4. ~~migration of data from the existing library resources management system to the System,~~
5. ~~provision of technical documentation and user's manuals for the System,~~
6. ~~training for the System's administrators (training of trainers),~~
7. ~~service support for the System.~~
	1. **~~Plan of implementation~~**

~~As a part of the contract, the System offered by the Contractor will be implemented at the National Library and at three other libraries indicated by the Contracting Authority (an academic library, a provincial library and a county library).~~

~~Implementation at the National Library is to be completed no later than after 12 months following the commencement of the performance of the contract.~~

~~Implementation at the other libraries indicated by the National Library is to be completed no later than 14 August 2019.~~

* 1. **~~Description of requirements~~**

~~This Chapter describes the requirements of the Contracting Authority with regard to the System. All the requirements set forth below are indispensable requirements that must be met by the System. Those must be delivered and provided by the offered System as a part of its in-built features immediately following the installation of the System or must be delivered during the implementation, yet no later than prior to the commencement of the activities related to tests allowing the final acceptance of the System.~~

~~A dictionary of terms attached to this document constitutes an integral part of the description of business requirements. The dictionary defines the terms used throughout these requirements.~~

~~Please note: Wherever the terms "should" or "feature" are used throughout this description of requirements, irrespective of their form and grammatical construction, they shall be understood as expressing the obligation for the future Contractor under the contract to perform the specific activities, fulfil the requirement stated or meet a criterion.~~

|  |  |
| --- | --- |
| **~~No.~~**  | **~~Description of requirement~~** |
|  | **~~General requirements for the System~~** |
|  | ~~The System shall be provided as a Software as a Service (SaaS) cloud-based solution.~~ |
|  | ~~The System shall be hosted in the Contractor's cloud located within the European Economic Area.~~ |
|  | ~~The System shall feature separate sections for each of the libraries participating in the project with regard to data related to the circulation and acquisition of resources. Only the owner library shall have access to such data.~~ |
|  | ~~The System shall ensure stability and performance irrespective of the number of concurrent users.~~ |
|  | ~~The Contractor shall ensure availability of the System for the users (patrons, staff) at the level of 99.98% throughout the year.~~ |
|  | ~~The System shall provide a reaction time of up to two seconds for the execution of basic operations.~~ |
|  | ~~The Contractor shall provide updates to the System in accordance with the following conditions:~~* ~~without the need to turn off the System (except for the need to restart the server and configure the System),~~
* ~~while keeping the current system settings (at the local and global level), language version, the layout of the interfaces, tables, API and supported protocols.~~
 |
|  | ~~The System shall provide the management of library processes in the following scope:~~* ~~System administration,~~
* ~~acquisition of library materials,~~
* ~~user interface (search engine browser),~~
* ~~cataloguing of library materials,~~
* ~~registration of serials,~~
* ~~circulation of library materials,~~
* ~~interoperability with other systems used at the library, e.g. through an API,~~
* ~~management of electronic documents.~~
 |
|  | ~~The System shall allow the management of all types of library materials:~~* ~~serials,~~
* ~~electronic documents,~~
* ~~ephemera,~~
* ~~DVDs, CDs or other audio records and other multimedia formats,~~
* ~~books,~~
* ~~microfilms,~~
* ~~notated music scores,~~
* ~~maps,~~
* ~~manuscripts,~~
* ~~digital collections,~~
* ~~iconographic collections.~~
 |
|  | ~~The Contractor shall provide access to descriptions and technical documentation in Polish and/or English and their updates resulting from software updates.~~ |
|  | ~~The Contractor shall provide access to user's manuals for the System in Polish.~~ |
|  | ~~The Contractor shall provide access to the System in two environments: production and training environment. Both environments should feature the same version of the application. The two environments should feature independent databases.~~ |
|  | ~~The Contractor shall ensure training for the System administrators at least in the following scope:~~* ~~training covering all the System features,~~
* ~~no less than 80 hours of training,~~
* ~~training for no less than 10 persons,~~
* ~~training to be held at the offices of the Contracting Authority.~~
 |
|  | ~~The System shall support at least the following data exchange and communication standards and protocols: Z39.50, SRU, SRW, OAI-PMH, SIP2, OpenURL, COUNTER, SUSHI. [DT]~~ |
|  | ~~The System shall support the UNICODE encoding standard (UTF8 encoding) for bibliographic and administrative data for data originally generated in the System or imported from any other source, irrespective of the original encoding of the imported data.~~ |
|  | ~~The System shall feature user interface in Polish and feature another selectable language version.~~ |
|  | ~~The System shall feature switchable language versions without the loss of the context.~~ |
|  | ~~The System shall feature customisable working interface, at least with regard to the font colour and size.~~ |
|  | ~~The System shall provide full support for the following standards and formats: ISBD, RDA and MARC21 (for bibliographic records, authority records and serials).~~ |
|  | ~~All the data in the System shall be encoded with the use of the Unicode standard. This applies to data originally generated in the System or imported from any other source, irrespective of the original encoding of the incoming data.~~ |
|  | ~~The System shall feature configuration and administration of parameters and rules governing all of its components.~~ |
|  | ~~The System shall feature an API.~~ |
|  | ~~The System shall supports APIs, Internet services and/or other interfaces allowing the integration of the System with other systems (such as an accounting system). The Contractor shall provide documentation for such APIs, Internet services and/or other interfaces. The Contractor shall also provide support for integration featuring the APIs, Internet services and/or other interfaces.~~ |
|  | ~~The System shall feature operations on records of any type in the following scope:~~* ~~copying records,~~
* ~~modification of records,~~
* ~~deletion of records,~~
* ~~creating records.~~
 |
|  | ~~The System shall feature creating records of any type with the use of a predefined record template or form.~~ |
|  | ~~The System shall feature searching through records of any type for the content of any field, supporting Boolean operators.~~ |
|  | ~~The System shall feature searches in records of any type with the use of any search strategy.~~ |
|  | ~~The System shall feature printing data in the System.~~ |
|  | ~~The System shall feature sending data in the System to an e-mail.~~ |
|  | ~~The System shall feature global operations on records of any type.~~ |
|  | ~~The System shall feature setting up login parameters (such as account expiry, password strength, account lock after the specified number of incorrect login attempts).~~ |
|  | ~~The System shall feature setting up rights for the specific users of the System.~~ |
|  | ~~The System shall feature copying user account settings.~~ |
|  | ~~The System shall feature logging data change history for records of any type, budgets, staff and patron accounts, any and all transactions, including financial transactions, at least in the following scope:~~* ~~the type of operation,~~
* ~~the date and hour of operation,~~
* ~~the login used to carry out the operation.~~
 |
|  | ~~The System shall feature setting up search indices, in particular the:~~* ~~author,~~
* ~~patron ID,~~
* ~~ISBN/ISSN,~~
* ~~barcode,~~
* ~~vendor/supplier code (vendor/supplier name encoded by the library),~~
* ~~place of publication,~~
* ~~patron name,~~
* ~~vendor/supplier name,~~
* ~~check-in number,~~
* ~~national bibliography number,~~
* ~~control authority record number,~~
* ~~record system number,~~
* ~~bibliographic description keywords,~~
* ~~call number,~~
* ~~subject,~~
* ~~title,~~
* ~~UDC,~~
* ~~publisher.~~
 |
|  | ~~The System shall feature a facet search engine featuring simple and advanced searches of library materials.~~ |
|  | ~~The System shall feature account management by patrons themselves, at least with regard to renewals, reservations and change of contact details.~~ |
|  | ~~The System shall feature the management of library materials (traditional and electronic materials).~~ |
|  | **~~System safety requirements~~** |
|  | ~~The System shall meet the personal data protection requirements pursuant to the Polish law.~~ |
|  | ~~The Contractor shall ensure that the System is kept up-to-date with any amendments to the Polish law introduced following the installation and pertaining to the area of application (such as within the context of personal data protection).~~ |
|  | ~~The Contractor shall ensure the safety of data in the cloud, at least in the following scope:~~* ~~full backup (including all the System data and settings) – no less frequently than once every three months or on demand in exceptional cases,~~
* ~~partial backup (including all the data newly introduced into the System) – every day at night (22:00-4:00) CET.~~
 |
|  | ~~The System shall feature the management of rights of specific staff members with regard to specific features.~~ |
|  | ~~The System shall ensure that the patron account password is hidden in the staff view.~~ |
|  | ~~The System shall feature forced password change on first login.~~ |
|  | ~~The System shall ensure encrypted connection at the patron's and staff member's side.~~ |
|  | **~~System interoperability~~** |
|  | ~~The Contractor shall ensure unrestricted access to API calls.~~ |
|  | ~~The System shall feature communication with external systems expanding its features, at least with systems such as: USOS, AXAPTA, SAP.~~ |
|  | ~~The System shall feature integration with access control systems on the basis of user database - a sign-on mechanism such as CAS, LDAP (authorisation through sign-on and through the library system mechanism).~~ |
|  | ~~The System shall feature interoperability with external systems such as online payment systems (PayU).~~ |
|  | ~~The System shall feature registered access to personal data through API REST.~~ |
|  | ~~The System shall feature access at least to authority records, bibliographic records and item records through the REST API.~~ |
|  | ~~The Contractor shall ensure ongoing development of the features of the REST API.~~ |
|  | **~~Data migration~~** |
|  | ~~The Contractor shall ensure lossless migration of data from the hitherto used library systems, at least in the following scope:~~* ~~financial data,~~
* ~~electronic documents,~~
* ~~journal subscriptions and other subscriptions,~~
* ~~bibliographic records,~~
* ~~patron records,~~
* ~~vendor records,~~
* ~~item records,~~
* ~~authority records,~~
* ~~order records,~~
* ~~serials resource (holdings) records.~~
 |
|  | ~~The Contractor shall ensure the preparation and making available to the contracting authority of tools for the migration of data from the library systems currently used in Poland, at least in the following scope:~~* ~~Aleph,~~
* ~~Horizon,~~
* ~~Koha,~~
* ~~Libra,~~
* ~~MAK,~~
* ~~MAK+,~~
* ~~Mateusz,~~
* ~~Patron,~~
* ~~Prolib,~~
* ~~Sierra,~~
* ~~Sowa,~~
* ~~Virtua.~~
 |
|  | ~~The Contractor shall perform on its own the migration of data from the resource management systems currently used in the libraries participating in the project, by 14 August 2019.~~ |
|  | **~~System maintenance and technical support services~~** |
|  | ~~The Contractor shall provide the maintenance and technical support services as a part of the System subscription/license.~~ |
|  | ~~The Contractor shall provide service support available in the following scope:~~* ~~24 hours a day,~~
* ~~7 days a week.~~
 |
|  | ~~Any scheduled technical break during which the Contractor shall perform service activities may take place at the request of the Contracting Authority or of the Contractor. Such a break shall be agreed upon between the parties at least three days in advance. A technical break may not take place on a working day between 5:00 and 21:00.~~ |
|  | ~~The System shall have an interface featuring the reporting of malfunctions. errors and proposed feature enhancements. The Contractor shall provide service support via telephone.~~ |
|  | ~~The Contractor shall provide response as a part of the service support within the following maximum reaction time (waiting time for the Contracting Authority to receive response from the Contractor):~~* ~~Critical error – the System is unavailable or entirely unusable for another reason. Estimated maximum reaction time for the Contractor's response shall be one hour.~~
* ~~Major error - one of the System's features (listed in the feature requirements) is unusable. In the case of such an error, the Contractor should respond within no more than four hours.~~
* ~~Minor error - any other error other than a critical or major error. The maximum reaction time for the Contractor's response shall be eight hours.~~
 |
|  | ~~Any errors communicated by the Contracting Authority shall be fixed by the Contractor within the following deadlines:~~* ~~Critical error – maximum time to fix shall be 24 hours.~~
* ~~Major error – maximum time to fix shall be 48 hours.~~
* ~~Minor error – estimated maximum time to fix shall be 72 hours.~~
 |
|  | **~~Acquisition of library materials~~** |
|  | ~~The System shall feature the management of the process of acquisition of library materials of any type, at least in the following scope:~~* ~~serials,~~
* ~~electronic documents,~~
* ~~ephemera,~~
* ~~DVDs, CDs or other audio records and other multimedia formats,~~
* ~~books,~~
* ~~microfilms,~~
* ~~notated music scores,~~
* ~~maps,~~
* ~~manuscripts,~~
* ~~digital collections,~~
* ~~iconographic collections.~~
 |
|  | ~~The System shall feature the management of the following record types related to the process of acquisition of library materials:~~* ~~serials records,~~
* ~~vendor records,~~
* ~~item records,~~
* ~~fund records,~~
* ~~billing records,~~
* ~~order records.~~
 |
|  | ~~The System shall feature the management of the process of acquisition taking into account the type of acquisition, i.e. purchase, legal deposit, swap, donation, deposit.~~ |
|  | ~~The System shall feature the management of orders and the registration of check-ins, categorised by the document type (such as books, serials, maps, musical recordings, iconographic documents).~~ |
|  | ~~The System shall feature the financial management of the process of acquisition, featuring an option to manage that process through a financial and accounting system linked with the System.~~ |
|  | ~~The System shall feature financial management accounting for different sources of financing and different categories of expenses (such as postage expenses).~~ |
|  | ~~The System shall feature the generation of mail templates with the content and form defined by a System user.~~ |
|  | ~~The System shall feature the management of the wanted list form.~~ |
|  | ~~The System shall feature the generation of inventory books based on any field of the item record, bibliographic record or serials record.~~ |
|  | ~~The System shall feature the generation of the inventory as a text file.~~ |
|  | ~~The System shall feature the omission of some phases of acquisition, such as the management of check-ins without the need to set up the order records.~~ |
|  | ~~The System shall feature recording in the order record of at least the following data:~~* ~~the address of the supplier of the library material,~~
* ~~the address of the unit responsible for processing the order at the library,~~
* ~~the estimated price of the library material,~~
* ~~the date of cataloguing of the library material,~~
* ~~the date of the last update of the order record,~~
* ~~the date of check-in of the library material,~~
* ~~the date of creation of the order record,~~
* ~~the date of filing of a complaint with the supplier of the library material,~~
* ~~the date of filing of the order for the library material,~~
* ~~the target location of the library material at the library,~~
* ~~the supplier ID conferred by the library,~~
* ~~the ID of the author of the order record,~~
* ~~the number of items ordered of the library material,~~
* ~~the language of the library material,~~
* ~~the country of publication of the library material,~~
* ~~the currency rate of exchange,~~
* ~~the number of volumes of the library material,~~
* ~~the name of supplier of the library material,~~
* ~~the name of the main fund category,~~
* ~~the name of the unit responsible for the processing of the order,~~
* ~~the name of the specific fund category,~~
* ~~the previous order number,~~
* ~~the order record number,~~
* ~~the level of importance of the order,~~
* ~~the type of the library material,~~
* ~~the manner of acquisition of the library material,~~
* ~~the status of the order payment,~~
* ~~the status of the library material order record,~~
* ~~the temporary location of the library material,~~
* ~~the type of order of the library material,~~
* ~~comments on the supplier of the library material,~~
* ~~comments on the check-in of the library material,~~
* ~~comments on the order of the library material,~~
* ~~internal comments to the order,~~
* ~~external comments to the order,~~
* ~~encoded information on the library material complaint cycle,~~
* ~~the encoded subject category of the library material,~~
* ~~the encoded name of the supplier of the library material.~~
 |
|  | ~~The System shall feature recording in the vendor record of at least the following data:~~* ~~the address of the supplier of library material,~~
* ~~the e-mail address of the supplier of library material,~~
* ~~the FTP address of the supplier of library material,~~
* ~~the contact details of the supplier of library material,~~
* ~~the date of the last update of the vendor record,~~
* ~~the date of creation of the vendor record,~~
* ~~the number of current cancelled orders for the supplier of library material,~~
* ~~the number of current complaints to the supplier of library material,~~
* ~~the number of current orders for the supplier of library material,~~
* ~~the number of invoices/bills from the supplier of library material,~~
* ~~the number of all cancelled orders for the supplier of library material,~~
* ~~the number of all complaints to the supplier of library material,~~
* ~~the number of all orders for the supplier of library material,~~
* ~~the number of messages sent to the supplier of library material,~~
* ~~the language of the supplier of library material,~~
* ~~the unit responsible for the acquisition of library material,~~
* ~~the record number of the supplier of library material,~~
* ~~the telephone number of the supplier of library material,~~
* ~~the official name of the supplier of library material,~~
* ~~the abbreviated name of the supplier of library material,~~
* ~~the manner of acquisition of the library material,~~
* ~~the type of the supplier of library material,~~
* ~~the average number of monthly check-ins of library material from the supplier of library material,~~
* ~~comments on the supplier of library material,~~
* ~~comments on discount from the supplier of library material,~~
* ~~general comments,~~
* ~~the value of cancelled orders from the supplier of library material,~~
* ~~the invoice/bill value of the supplier of library material,~~
* ~~the value of orders for the supplier of library material,~~
* ~~the value of completed orders for the supplier of library material,~~
* ~~encoded information on the library material complaint cycle,~~
* ~~the encoded name of the supplier of library material.~~
 |
|  | ~~The System shall feature recording in the fund form of at least the following data:~~* ~~the number of orders out of the fund,~~
* ~~the number of completed payments out of the fund,~~
* ~~the encoded name of the fund,~~
* ~~the encoded type of the library material,~~
* ~~the unit responsible for the management of the fund,~~
* ~~the outstanding amount payable out of the fund,~~
* ~~the amount allocated to the main fund,~~
* ~~the amount drawn from the main fund,~~
* ~~the name of the fund,~~
* ~~charges to the specific categories of the fund,~~
* ~~general comments,~~
* ~~the amount drawn from the fund over the given period.~~
 |
|  | ~~The System shall feature entering in the invoice/bill form at least the following data:~~* ~~the price of the library material,~~
* ~~the date of issue of the invoice/bill for the library material,~~
* ~~the main fund category,~~
* ~~the number of items of the library material,~~
* ~~the ordinal number of the item,~~
* ~~the number of the invoice/bill for the library material,~~
* ~~the number of the library material order record,~~
* ~~the title of the library material,~~
* ~~general comments,~~
* ~~the currency of the invoice/bill for the library material.~~
 |
|  | ~~The System shall feature entering in the invoice/bill form of an auxiliary tool in the form of an index to include at least the following data:~~* ~~the author of the library material,~~
* ~~the ISBN/ISSN of the library material,~~
* ~~the record number,~~
* ~~the title of the library material.~~
 |
|  | ~~The System shall feature recording in the item record of at least the following data:~~* ~~the physical characteristics of the item of library material,~~
* ~~the price of the item of library material,~~
* ~~the current loan checkout date of the item of library material,~~
* ~~the current due return date of the item of library material,~~
* ~~the inventory date of the item of library material,~~
* ~~the date of the reminder note for the item of library material,~~
* ~~the date of the last modification of the record of the item of library material,~~
* ~~the date of previous return of the item of library material,~~
* ~~the date of creation of the record of the item of library material,~~
* ~~the date of check-in of the item of library material,~~
* ~~information on the item (internal and external),~~
* ~~information on the status of the item of library material,~~
* ~~the barcode of the item of library material,~~
* ~~the binding code of the item of library material,~~
* ~~the serial number of the item of library material,~~
* ~~the number of days of the renewal of the loan of the item of library material,~~
* ~~the number of overdue days of the loan of the item of library material,~~
* ~~the number of renewals of the loan of the item of library material,~~
* ~~the number of circulations of the item of library material (e.g. over the last 12 months),~~
* ~~the number of loans of the item of library material,~~
* ~~the location of the item of library material,~~
* ~~the check-in number of the item of library material,~~
* ~~the ID number of the patron currently in the possession of the item of library material,~~
* ~~the ID number of the patron previously in the possession of the item of library material,~~
* ~~the inventory number of the item of library material,~~
* ~~the record number of the item of library material,~~
* ~~the numbering of the multi-volume publication of the item of library material,~~
* ~~the previous call number of the item of library material,~~
* ~~the status of the item of library material,~~
* ~~the call number of the item of library material,~~
* ~~the type of the item of library material,~~
* ~~the record type of the item of library material,~~
* ~~comments (internal and external),~~
* ~~the lending rules for the item of library material,~~
* ~~the source of check-in of the item of library material.~~
 |
|  | ~~The System shall feature defining the currency of the purchase.~~ |
|  | ~~The System shall feature processing the invoice/bill data.~~ |
|  | ~~The System shall feature payment monitoring.~~ |
|  | ~~The System shall feature modifications to the price of the library material following the completion of the order.~~ |
|  | ~~The System shall feature linking an item record with more than one bibliographic record.~~ |
|  | ~~The System shall feature automatic generation of complaints pertaining to uncompleted orders.~~ |
|  | ~~The System shall feature barcode support.~~ |
|  | ~~The System shall feature control mechanisms for the management of financial operations (such as verification of the aggregate item prices against the invoice total value). [DT]~~ |
|  | ~~The System shall feature budget modification during a reporting year.~~ |
|  | ~~The System shall feature the management of centralised purchases for numerous locations (library branches) and individual purchases for one location.~~ |
|  | ~~The System shall feature the archiving of invoices and related payments for the period of five years since their recording in books and accounts. [to be verified with BFK]~~ |
|  | ~~The System shall feature linking a bibliographic record with the order, item, serials and reservation records.~~ |
|  | ~~The System shall feature the integration of the above mentioned features related to the process of acquisition of library materials.~~ |
|  | **~~Registration of serials~~** |
|  | ~~The System shall feature the registration of serials.~~ |
|  | ~~The System shall feature the management of the acquisition of serials at least in the following scope:~~* ~~serials check-in cards,~~
* ~~complaints pertaining to serials check-in,~~
* ~~the manner of acquisition of the serials publication,~~
* ~~the serials order.~~
 |
|  | ~~The System shall feature the recording of complaint data at least in the following scope:~~* ~~the address of the supplier of the serials publication,~~
* ~~the e-mail address of the supplier of the serials publication,~~
* ~~the data of the serials publication that is the subject of the complaint (such as the title, number, volume, ISSN),~~
* ~~the date of complaint pertaining to the check-in of the serials publication,~~
* ~~the name of the supplier of the serials publication,~~
* ~~the chosen complaint procedure for the serials publication (individual or collective).~~
 |
|  | ~~The System shall feature modifications to the status of the serials that is the subject of the compliant following the complaint.~~ |
|  | ~~The System shall feature the collation of annual collections of subsequent serials issues on the basis of the data in the check-in card.~~ |
|  | ~~The System shall feature the generation of lists of serials that are the subject of complaints at least in the following scope:~~* ~~the address of the supplier of the serials publication that is the subject of a complaint,~~
* ~~the frequency of publication of the serials publication,~~
* ~~the name of the supplier/publisher of the serials publication that is the subject of a complaint,~~
* ~~the volume/annual number of the serials publication that is the subject of a complaint,~~
* ~~the expected check-in date of the serials publication that is the subject of a complaint.~~
 |
|  | ~~The System shall feature the generation of expected serialss issues.~~ |
|  | ~~The System shall feature recording in the serials record of at least the following data:~~* ~~the data of the supplier of the serials,~~
* ~~the expected complaint date pertaining to the supply of the serials,~~
* ~~the serials barcode sticker format,~~
* ~~the number of copies received with regard to the manner of acquisition of the serials,~~
* ~~information on the binding of the serials,~~
* ~~the serials supplier code,~~
* ~~the encoded physical description of the serials,~~
* ~~the serials subject category code,~~
* ~~the unit responsible for the acquisition of the serials,~~
* ~~the number of issues of the serials received,~~
* ~~the location of the serials at the library,~~
* ~~the serials check-in number,~~
* ~~the manner of acquisition of the serials,~~
* ~~the acquisition status of the serials,~~
* ~~the serials record status,~~
* ~~the call number of the serials,~~
* ~~comments on the supplier of the serials,~~
* ~~internal comments on the serials,~~
* ~~external comments on the serials,~~
* ~~the serials collection.~~
 |
|  | ~~The System shall feature setting up and modification of serials registration patterns.~~ |
|  | ~~The System shall feature recording in the serials check-in card of at least the following data:~~* ~~the serials issue URL,~~
* ~~the page numbering of the serials supplement/index,~~
* ~~the page numbering of the serials,~~
* ~~the frequency of publication of the serials,~~
* ~~the frequency of publication of the serials supplement/index,~~
* ~~the expected check-in date of the serials supplement/index,~~
* ~~the expected check-in date of the serials,~~
* ~~the serials supplement/index issue date (e.g. day, month, season),~~
* ~~the serials issue date (e.g. day, month, season),~~
* ~~the number of days needed to bind the serials supplements/indexes,~~
* ~~the number of days needed to bind the serials,~~
* ~~the number of serials issues to be bound,~~
* ~~the number of serials supplements/indexes to be bound,~~
* ~~the number of serials issues actually received,~~
* ~~the expected number of checked-in serials issues,~~
* ~~the serials issue number,~~
* ~~the serials supplement/index number,~~
* ~~the expected date of complaint pertaining to the check-in of the serials supplement/index,~~
* ~~the expected date of complaint pertaining to the check-in of the serials,~~
* ~~the status of the serials issue,~~
* ~~internal comments on the serials,~~
* ~~external comments on the serials.~~
 |
|  | **~~Cataloguing of library materials~~** |
|  | ~~The System shall feature carrying out at least the following operations on bibliographic, authority, item and serials records:~~* ~~edition of records,~~
* ~~copying of records,~~
* ~~modification of records,~~
* ~~transfer of records,~~
* ~~deletion of records,~~
* ~~searches in records,~~
* ~~creating records.~~
 |
|  | ~~The System shall feature carrying out at least the following operations within one bibliographic, authority, item and serials record:~~* ~~copying of fields and subfields,~~
* ~~deletion of fields and subfields,~~
* ~~transfer of fields and subfields.~~
 |
|  | ~~The System shall fully support the MARC21 data format for bibliographic and authority records – in accordance with the current list of fields and subfields as posted on the MARC Standards website (~~[~~https://www.loc.gov/marc/~~](https://www.loc.gov/marc/)~~).~~ |
|  | ~~The Contractor shall update the MARC21 format fields and subfields in accordance with the list of changes as posted on the MARC Standards website (~~[~~https://www.loc.gov/marc/~~](https://www.loc.gov/marc/)~~).~~ |
|  | ~~The System shall feature support for the authority file.~~ |
|  | ~~The System shall feature support for several languages for the purposes of information and searches.~~ |
|  | ~~The System shall feature entering context help in Polish for any fields and subfields in the bibliographic, authority, item and serials records.~~ |
|  | ~~The System shall feature locking specific fields and subfields in the bibliographic, authority, item and serials records at least in the following scope:~~* ~~editing of fields and subfields,~~
* ~~copying of fields and subfields,~~
* ~~deletion of fields and subfields,~~
* ~~transfer of fields and subfields,~~
 |
|  | ~~The System shall feature concurrent editing of several bibliographic or authority records.~~  |
|  | ~~The System shall feature transferring item, serials and order records between bibliographic records.~~ |
|  | ~~The System shall feature locking against deletion the bibliographic records of materials ordered by a patron.~~ |
|  | ~~The System shall feature creating bibliographic, authority, item and serials records with the use of a predefined record template or form.~~ |
|  | ~~The System shall feature data entry in writing systems other than the Latin script in bibliographic and authority records (among others in fields 400 and 880) at least in the following scope:~~* ~~the Greek script (ancient and modern),~~
* ~~the Cyrillic script,~~
* ~~Arabic scripts,~~
* ~~Chinese scripts,~~
* ~~Devanagari scripts,~~
* ~~Georgian scripts,~~
* ~~Hebrew scripts,~~
* ~~Japanese scripts,~~
* ~~Korean scripts,~~
* ~~Armenian scripts,~~
* ~~Persian scripts.~~
 |
|  | ~~The System shall feature importing from the index level to bibliographic records of authority record data from 1XX field group of the MARC21 format.~~ |
|  | ~~The System shall feature entry into bibliographic records of terms from a predefined list, at least for fixed-length fields.~~ |
|  | ~~The System shall feature automatic transfer of modifications introduced to field 1XX of the MARC21 format authority record to another authority record linked by linkage.~~ |
|  | ~~The System shall feature automatic verification of the validity of linkage in bibliographic and authority records.~~ |
|  | ~~The System shall feature automatic verification of the validity of ISBN/ISSN in bibliographic records.~~ |
|  | ~~The System shall feature searches in bibliographic, authority, item and serials records for the content of any field, supporting Boolean operators.~~ |
|  | ~~The System shall feature searches in bibliographic, authority, item and serials records with the use of any search strategy.~~ |
|  | ~~The System shall feature searches in data recorded in fixed-length fields – fields, 007, 008 in the MARC21 format.~~ |
|  | ~~The System shall feature a facet search engine for the cataloguing staff.~~ |
|  | ~~The System shall feature database searches with the use of writing systems other than the Latin script at least in the following scope:~~* ~~the Greek script (ancient and modern),~~
* ~~the Cyrillic script,~~
* ~~Arabic scripts,~~
* ~~Chinese scripts,~~
* ~~Devanagari scripts,~~
* ~~Georgian scripts,~~
* ~~Hebrew scripts,~~
* ~~Japanese scripts,~~
* ~~Korean scripts,~~
* ~~Armenian scripts,~~
* ~~Persian scripts.~~
 |
|  | **~~Circulation of library materials~~** |
|  | ~~The System shall feature creating, modification, deletion and searches in patron records.~~  |
|  | ~~The System shall feature creating patron records with the use of a predefined record template or form.~~ |
|  | ~~The System shall include, as a part of the circulation process, at least the following search indices:~~* ~~patron ID,~~
* ~~patron barcode,~~
* ~~patron name,~~
* ~~patron record number.~~
 |
|  | ~~The System shall feature defining circulation rules for materials at least in the following scope:~~* ~~the validity period of the reservation (holds placed) of library materials,~~
* ~~the definition of library closing dates,~~
* ~~the definition of loan rules for library materials,~~
* ~~the library opening hours,~~
* ~~the pickup location for reserved library materials,~~
* ~~the texts of notifications related to loaning library materials,~~
* ~~the specification of overdue fees for loaned library materials.~~
 |
|  | ~~The System shall feature the verification of the patron record at the time of creating the patron record, at least in the scope of check for duplicates, e.g. of the barcode.~~ |
|  | ~~The System shall feature the generation of history of all operations carried out on the patron account at least in the following scope:~~* ~~the date and hour of the modification of the patron account,~~
* ~~information on the modification of the patron account,~~
* ~~login of the staff member who carried out the modification of the patron account.~~
 |
|  | ~~The System shall feature defining loan rules at least in accordance with the following criteria:~~* ~~the limit of concurrent reservations of library materials,~~
* ~~the limit of concurrent loans of library materials,~~
* ~~the location of the item of library material,~~
* ~~the loan period of the library material,~~
* ~~patron type,~~
* ~~the type of the item of library material,~~
* ~~the type of library material.~~
 |
|  | ~~The System shall feature carrying out operations on the patron record at least in the following scope:~~* ~~cancelling overdue fee for library material,~~
* ~~cancelling the reservation of library material,~~
* ~~locking the patron account,~~
* ~~adding a comment on the reservation of library material,~~
* ~~loan (check out) of library material,~~
* ~~return ( check in) of library material,~~
* ~~queuing reservations of library materials,~~
* ~~modification of reservations of library materials,~~
* ~~calculation of overdue fees for library materials,~~
* ~~renewal of loan of library materials,~~
* ~~sending a return reminder note for library materials,~~
* ~~placing a reservation (hold) for library materials.~~
 |
|  | ~~The System shall feature recording in the patron record of at least the following data:~~* ~~the e-mail address of the patron,~~
* ~~the address for correspondence of the patron,~~
* ~~the address of residence of the patron,~~
* ~~the patron account lockup date,~~
* ~~the date of the last update of the patron account,~~
* ~~the date of the last activity of the patron (e.g. the date of the last loan of library material),~~
* ~~the date of creating the patron record,~~
* ~~the validity date of the patron's ID,~~
* ~~the validity date of the patron's library card,~~
* ~~the patron statistical group,~~
* ~~the number of complaints filed by the patron,~~
* ~~the patron's account information,~~
* ~~information on the location of the returned library material,~~
* ~~the barcode of the loaned library material,~~
* ~~the number of library materials currently loaned by the patron,~~
* ~~the total number of library material loan renewals,~~
* ~~the total number of library materials loaned by the patron,~~
* ~~the pickup location for reserved library materials,~~
* ~~the name of the patron,~~
* ~~the library card number,~~
* ~~the patron record number,~~
* ~~the patron's telephone number,~~
* ~~the Personal Identification Number (PIN),~~
* ~~the manual lock of the patron account,~~
* ~~the manner of notification of the return date of library material,~~
* ~~the status of the patron record,~~
* ~~the patron type,~~
* ~~the type and number of the patron's ID,~~
* ~~internal comments on the patron,~~
* ~~the name of the patron's university faculty,~~
* ~~the amount of overdue fees charged for library materials,~~
* ~~the amounts payable by the patron to the library.~~
 |
|  | ~~The System shall feature the storage of reservation data at least in the following scope:~~* ~~the date and hour of filing of the reservation for library material,~~
* ~~the reserved library material's pickup date,~~
* ~~the validity period of the reservation of library material,~~
* ~~the barcode of the item of library material,~~
* ~~the serial number,~~
* ~~the location of the copy of library material,~~
* ~~the pickup location for reserved library materials,~~
* ~~the name of the patron,~~
* ~~the status of the reservation of library material for loan,~~
* ~~the call number of the item of library material,~~
* ~~the type of the patron,~~
* ~~the title of the library material,~~
* ~~comments on reservation of the library material.~~
 |
|  | ~~The System shall feature the storage of data on loaned library materials at least in the following scope:~~* ~~the return date of the library material,~~
* ~~the barcode of the library material,~~
* ~~the serial number,~~
* ~~the location of the library material,~~
* ~~the loan status of the library material,~~
* ~~the call number of the library material,~~
* ~~the title of the library material.~~
 |
|  | ~~The System shall feature carrying out operations pertaining to loans of library materials at least in the following scope:~~* ~~renewal of return date of the library material,~~
* ~~complaints against overdue return of library materials,~~
* ~~designation of library material as lost,~~
* ~~change of return date of the library material.~~
 |
|  | ~~The System shall feature recording data on returns of library materials of at least in the following scope:~~* ~~the return date of the library material,~~
* ~~the barcode of the library material,~~
* ~~the amount payable as an overdue fee for library material,~~
* ~~the name of the patron returning the library material,~~
* ~~the return status of the library material,~~
* ~~the call number of the library material,~~
* ~~the title of the library material.~~
 |
|  | ~~The System shall feature cancellation of patron's payment recorded in the System.~~ |
|  | ~~The System shall feature sending automated e-mail notifications on:~~* ~~the availability of the reserved library material,~~
* ~~the return date of the library material,~~
* ~~the overdue return of the library material.~~
 |
|  | ~~The System shall feature the group removal of expired reservations (holds).~~ |
|  | ~~The System shall feature the processing of wanted list forms.~~ |
|  | ~~The System shall feature printing patrons' orders featuring with the definition of the scope of data and print queuing.~~ |
|  | ~~The System shall feature the storage of information on lending forms printed.~~ |
|  | ~~The System shall feature the reservation of loaned items.~~  |
|  | ~~The System shall feature the filing of reservations (placing holds) with reference to the item record or bibliographic record.~~ |
|  | ~~The System shall feature the generation of notification pertaining to returned item for which a reservation has been filed.~~  |
|  | ~~The System shall feature the group renewal of return dates or reservations.~~ |
|  | ~~The System shall feature communication with patrons through e-mail and text messaging in the scope of sending personalised messages to a single user, a group of users or all users.~~ |
|  | ~~The System shall feature the manual change of return date.~~ |
|  | ~~The System shall feature the automatic lock of a patron's account and a manual lock of a patron's account.~~ |
|  | ~~The System shall feature a lock against the deletion of a patron's account in the case of overdue returns or payments on that account.~~ |
|  | ~~The System shall feature cancelling fees throughout the entire network or for one location only.~~ |
|  | **~~Search engine browser~~** |
|  | ~~The Contractor shall provide a search engine browser to each of the libraries participating in the project.~~ |
|  | ~~The System shall feature distinguishing in the search engine browser between the library materials of each of the Libraries participating in the project.~~ |
|  | ~~The System shall be compliant with the WCAG 2.0 standard to the extent greater than that set forth in the Ordinance of the Council of Ministers concerning the National Interoperability Frameworks, minimum requirements for public records and exchange of information in electronic form and minimum requirements for telecommunication and IT systems dated 12 April 2012.~~ |
|  | ~~The System shall update the data presented in the search engine browser on an ongoing basis.~~ |
|  | ~~The System shall feature support for community/ social media services plug-ins.~~ |
|  | ~~The System shall feature access to electronic payment for the purpose of payment of fees, from the search engine browser level. [DT]~~ |
|  | ~~The System shall feature hints on books on similar subjects.~~ |
|  | ~~The System shall feature displaying new acquisitions on the basis of recently added library materials.~~ |
|  | ~~The System shall feature displaying search history for the given session.~~ |
|  | ~~The System shall feature modification and addition of interface translations for languages supported. [DT]~~  |
|  | ~~The System shall feature support for community features (such as tags, reviews, rankings).~~ |
|  | ~~The System shall feature concurrent searches in local catalogues, databases, journals, ebook collections, institutional repositories and digital libraries and websites subscribed by the libraries and displaying search results in one list, featuring selecting the resources to be searched.~~ |
|  | ~~The System shall feature simple searches.~~ |
|  | ~~The System shall feature advanced searches at least in the following scope:~~* ~~right-truncated searches,~~
* ~~Boolean operators,~~
* ~~specific indices,~~
* ~~phrase searches.~~
 |
|  | ~~The System shall feature defining the search algorithm to further specify the order of displayed search result.~~ |
|  | ~~The System shall feature real-time display of the availability of the searched materials.~~ |
|  | ~~The System shall feature downloading of at least covers from external websites and displaying them in search results.~~ |
|  | ~~The System shall feature displaying search results at least as:~~* ~~a bibliographic description in the MARC21 format,~~
* ~~an expanded bibliographic description,~~
* ~~an abbreviated bibliographic description.~~
 |
|  | ~~The System shall feature sending search results via email or sending them to the bibliographic managers.~~ |
|  | ~~The System shall feature dynamic reloading of search results and facets following the selection of a given filter - without the need to reload the entire page.~~ |
|  | ~~The System shall feature sorting search results by at least the following criteria:~~* ~~the date of publication of the library material,~~
* ~~the relevance of search results,~~
* ~~the title of the library material.~~
 |
|  | ~~The System shall feature highlighting the searched word in search results.~~ |
|  | ~~The System shall feature word completion, synonyms, antonyms and suggested new searches.~~ |
|  | ~~The System shall feature searches in writing systems other than the Latin script at least in the following scope:~~* ~~the Greek script (ancient and modern),~~
* ~~the Cyrillic script,~~
* ~~Arabic scripts,~~
* ~~Chinese scripts,~~
* ~~Devanagari scripts,~~
* ~~Georgian scripts,~~
* ~~Hebrew scripts,~~
* ~~Japanese scripts,~~
* ~~Korean scripts,~~
* ~~Armenian scripts,~~
* ~~Persian scripts.~~
 |
|  | ~~The System shall feature placement of notices for patrons in the search engine browser window.~~ |
|  | ~~The System shall feature faceted narrowing of search results.~~  |
|  | ~~The System shall feature selection between expressing the number of hits for the given term in the facet as an absolute number or as a percentage of the entire set).~~ |
|  | ~~The System shall feature selection of multiple faceted narrowings in one search.~~ |
|  | ~~The System shall feature defining facets, setting up their names and the fields and subfields in the MARC21 format from which they are to draw content.~~ |
|  | ~~The System shall feature conversion of data recorded in the MARC21 format into data displayed in facets (e.g. conversion of country and language codes into the natural language) according to user-defined conversion tables.~~ |
|  | ~~The System shall feature cancelling reservations by patrons themselves with the use of their accounts.~~ |
|  | ~~The search engine browser shall feature exporting the lending history.~~ |
|  | ~~The System shall feature on-line registration of patron accounts.~~ |
|  | ~~The System shall feature access to information in a patron account at least in the following scope:~~* ~~the current overdue fees for late return of library materials,~~
* ~~the cancellation of reservations to loan library materials,~~
* ~~the expiry date of reservation to loan library materials,~~
* ~~the loan date and the expected return date of library materials,~~
* ~~the patron's lending history,~~
* ~~the barcode of loaned library material,~~
* ~~the reservation queue to loan library materials,~~
* ~~the pickup location for reserved library materials,~~
* ~~a feature allowing the patrons themselves to update their personal data and contact details.~~
* ~~the status of the library material (whether it is available for lending),~~
* ~~the call number of the library material,~~
* ~~the title of the library material,~~
* ~~comments on the library material.~~
 |
|  | **~~System administration~~** |
|  | ~~The System shall feature access to the administrator interface.~~ |
|  | ~~The Contractor shall provide access to the System's system codes, options and parameters and data transfer profiles.~~  |
|  | ~~The Contractor shall provide access to system messages.~~ |
|  | ~~The System shall feature user-defined statistics and reports based on any field in the System having a user-inputted value.~~ |
|  | ~~The System shall feature implementation of new versions of the System, new System products and components.~~  |
|  | ~~The System shall feature verification of proper operation of all the System features following each installation of a new version of the System.~~ |
|  | ~~The Contractor shall ensure access to the technical documentation of new versions of the System and of new System products and components.~~ |
|  | ~~The System shall have an interface featuring the reporting of malfunctions. errors and proposed feature enhancements. The Contractor shall provide service support via telephone.~~ |
|  | ~~The System shall feature the configuration and administration of the search engine browser interface.~~ |
|  | ~~The System shall feature group administration of user accounts and their rights to specific System options and features.~~ |
|  | ~~The System shall feature carrying out operations on user accounts at least in the following scope:~~* ~~locking a user account,~~
* ~~modification of a user account,~~
* ~~deletion of a user account,~~
* ~~setting up a user account.~~
 |