Library PC Management and Reservation System, Print Management, Pay for Print and Fines Payment, and Wi-Fi Printing

Request for Information

Issued: February 24, 2017
Final Questions by: April 5, 2017 at 4:00 p.m.
Due: April 7, 2017 at 4:00 p.m.

Introduction

This Request for Information (RFI) is issued by the Fort Vancouver Regional Library District ("the Library") for the purpose of obtaining information and budgetary estimates about the software and support services necessary to replace our integrated print management and internet reservation systems for public access computers.

Between February 24, 2017 and April 7, 2017, vendors are welcomed to submit written responses to the RFI and/or schedule live or online demonstrations and discussions about their systems with the Library project team. The Library project team will review and assess the information provided and determine if a competitive bid is required in order to move forward with procurement.

If a competitive bid is required, the Library will issue a Request for Proposal by the end of April 2017. If a competitive process is not required, the Library will move forward with direct procurement of its preferred product. A competitive process may not be required if there is sufficient justification for a "sole source" purchase.

Disclaimer

This RFI does not obligate the Library to contract for services specified herein. The Library reserves the right at its sole discretion to reject any and all proposals received without penalty and not to issue a contract as a result of this RFI. All proposals and any accompanying documentation become the property of the Library and will not be returned. Information submitted in response to this RFI shall become the property of the Library.

All proposals will be considered as public records as defined in Chapter 42.56 of the Revised Code of Washington (RCW). Any information in a proposal that the vendor desires to claim as proprietary and exempt from disclosure under the provisions of Chapter 42.56 RCW, or other
state or federal law that provides for the non-disclosure of your document, must be clearly designated. The information must be clearly identified and the particular exemption from disclosure upon which the vendor is making the claim must be cited. Each page containing the information claimed to be exempt from disclosure must be clearly identified by the words “Proprietary Information” printed on the lower right hand corner of the page. Marking the entire proposal exempt from disclosure or as Proprietary Information will not be honored.

If a public records request is made for the information that the vendor has marked as "Proprietary Information" the Library will notify the vendor of the request and of the date that the records will be released to the requester unless the vendor obtains a court order enjoining that disclosure. Vendors who do not respond to this RFI are still eligible to submit a competitive bid during any future process for related products and services. Vendors who do respond to the RFI will not receive special consideration during any future competitive bid process for related products and services.

About the Library

The Fort Vancouver Regional Library District consists of one central Administrative Headquarters, 13 libraries, and 2 limited service locations. The Library serves 3 counties in Southwest Washington covering over 4,000 square miles. The Library holds a collection of approximately 760,000 items and has an annual circulation in excess of 4 million. The Library serves a population of approximately 470,000 residents.

The Library uses the SirsiDynix Symphony Integrated Library System (ILS).

About Public Computing and Printing at the Library

The Library has approximately 332 computers for public use throughout the system that are capable of printing to one of our laser printers.

All public computers have their Internet access filtered using the M8e6 filter from Trustwave. Electronic Resource and Early Learning computers are filtered by use of an whitelist of approved sites via a proxy server.

There are 187 public internet computers available for reservation which are classified into two modes of use: 1-hour and 15-minute express. Additionally there are 14 computers which reside in a classroom that alternate between public internet use and classroom use (during which the
reservation management is suspended and the software disabled to facilitate classroom use) at
the Vancouver Community Library Branch.

There are 145 Electronic Resource, Catalog, Circulating Laptop, Microfilm, and Early Learning
computers that are not controlled by the time management system, but all printing goes through
the print management system.

We have 29 self-service print release stations throughout the Library’s locations that manage print
queues. We allow patrons to print up to 10 free pages per day through the print management
system. Patrons printing more than 10 pages per day must pay $0.10/page (or side).

The Library currently uses Comprise Technologies products, Smart Access Manager (SAM),
Smart Pay, and Library Payment Centers (LPCs) to perform five functions in managing public
computers, printing, and payment:

SAM: Manages public computer time and access, patron balances, and public printing.

- Time Management: Client/Server software which authorizes patron accounts, enforces
time limits, enforces filtering levels, and otherwise limits access based on parameters set
by Library staff.

- ILS Authentication: Uses a SIP2 connection to authenticate patron accounts with the ILS
database to determine whether a patron is eligible to access an internet computer based
on the profile, birth date, and current status of the patron’s account.

- Patron Balances: Patron accounts are maintained in a database separate from and in
addition to our ILS to track monetary exchanges. Patrons can add money to their SAM
accounts for printing or copying.

- Print Management: Manages print queues and print release/payment capabilities, and
tracks the number of pages printed by each patron. Wireless Printing is also available
enabling patrons using personal devices upload print jobs which can then be managed and
released at the Print Release station.

LPCs: Manage cash payments onsite.

- LPCs let patrons add money to an online account managed by SAM by use of a cash and
coin box. Patrons can use this account to pay for print jobs.
Smart Pay: Manages credit card payments from an online portal.

Lets patrons use MasterCard and VISA bank cards to pay their Library account fines.

Objectives

The Library wishes to learn more about software options that can replace or improve upon the current time and print management software deployment, allow us to enforce the same policies and practices we currently have in place, and improve upon the overall patron experience of interacting with library computers and printers.

During this RFI process, the Library is also interested in hearing about any products or services that may allow us to offer new services to our patrons.

Scope of Project

The Library is seeking information about software that performs the following functions:

Time Management: Allows patrons and staff to request and manage public computer reservations by authenticating against the Library’s ILS patron database, provide guest access options for users not in our ILS patron database, enforce session time limits, and limit access based on certain parameters such as patron age or status. Also desired is the ability to centrally manage Library hours of operation and schedule closed dates.

Print Management: Manages print queues and print release/payment capabilities in concert with our ILS payment processing system and ILS patron database. It should also support allowing patron to print a set number of free pages per day or per week and charge for additional printed pages. Color and grayscale printing information is also desired.

Wi-Fi Printing: Allow patrons using personal devices and the Library’s Wi-Fi network to submit print jobs through the print management system. This solution should support a wide variety of platforms including Windows, Mac, Chrome, Linux, iOS and Android.

Automated or User-friendly Report Generation: The ability to automate system reports to track usage of public computers including the number of sessions and session durations. Reports should also track the total number of pages printed and distinguish between free and paid pages printed.
The Library is planning a policy change to end our current practice of allowing patrons to apply money to an account balance in favor of a pay-as-you-go solution for all transactions.

In this preliminary information-gathering phase, we are asking respondents to describe the elements of the system and services they would propose to help us meet our stated objectives. A possible forthcoming RFP will specify requirements and optional functionality in a more detailed and comprehensive manner.

How to Respond

The Library would like to receive written responses to the following Informational Questions, or have the questions responded to via a remote or in-person presentation. Product sheets and specification documents may also be submitted where applicable to supplement written responses.

Providing both written responses and conducting presentation is also acceptable.

Written responses and scheduling presentations should be done through Bob Beck at bbeck@fvrl.org.

Written responses and/or presentations are due by 4:00 pm PDT on April 7, 2017. Late responses will not be considered.

Any questions regarding this RFI should be sent to Bob Beck at bbeck@fvrl.org.

Informational Questions

In written responses and/or live or remote presentations, vendors must respond to each question below and provide information about their proposed solution. The information provided may be used by the Library for developing formal requirements as part of a possible competitive bid process. During this RFI phase, Library staff and vendors may communicate for the purposes of clarifying vendor responses or providing additional contextual information about the Library.

1. Describe generally how your print management and PC management software integrate with each other. For example, is the print management software “aware” of a patron’s identity by virtue of the patron being logged in to the workstation, or must a patron re-enter
credentials to print a job? What other benefits are derived from a more integrated system as opposed to a “best of breed” approach?

2. Describe/diagram the step-by-step printing process from the end user perspective starting from initiation of a print job to picking up the paper from the printer. Provide information about how and when in the process the patron:
   a. Chooses one printer if multiple printers are available in a location
   b. Specifies single-sided or duplex printing
   c. Enters barcode/PIN credentials (if necessary)
   d. Releases and pays for the print job, or multiple print jobs.

3. Describe/diagram the step-by-step Wi-Fi printing process from the end-user perspective. Provide information about how and when in the process the patron:
   a. Chooses one printer if multiple printers are available in a location
   b. Specifies single-sided or duplex printing
   c. Enters barcode/PIN credentials (if necessary)
   d. Releases and pays for the print job

   b. Can a patron make a reservation for any library location from any location, including outside the Library?
   c. Is there a mobile-optimized client/website for making reservations?
   d. Can patrons opt to receive email and/or text reservation confirmations and/or reminders about their upcoming reservations?
   e. Will the system prevent a patron from logging in on multiple computers at the same time or two patrons from reserving the same computer station?
   f. What will happen if the patron fails to make the reservation?
   g. Can patrons log in early on a computer other than their reserved computer, and does the reservation transfer to the new computer?
   h. Are patrons able to lock the computer for a brief period of time, and is there an idle timeout if they do not return to the workstation?

5. Describe/diagram the overall system architecture and compatibilities, specifically addressing:
   a. What are the major system components—databases, servers, clients?
   b. What client operating systems are supported (e.g. Windows 7, Windows 10, Mac OS X, Linux, Chrome OS, etc.)?
   c. Does the system require static IP addresses for clients or servers?
   d. Are print jobs spooled/queued on a central server or a computer at each location?
   e. Describe how your system uses SIP2 to communicate with an ILS database.
f. How does a changing Library card number impact the system’s ability to authenticate a patron with the ILS?

g. Does the Library have full access to the system database, including the ability to query and export data from the database on demand?

h. How are software updates handled on the client and server?

i. Can the software be automatically deployed from a central location (e.g. Active Directory Group Policy, Desktop Authority, System Center Configuration Manager, etc.)?

j. With what cash vending systems (e.g. ITC, Jamex, etc.) is the system compatible?

6. Describe generally how the reservation component can be set up and configured, specifically:
   a. Can workstation session time limits be different at different locations and/or be different for different workstation types? For example: Can the Library decide to enforce a 90-minute session limit for PCs on one type and permit an additional 15 minutes only for PCs of a different type?
   b. Describe how certain workstations could be restricted by user age with your system.
   c. Can the library centrally define open hours, holidays, closure periods, and other time spans where reservations are not permitted?
   d. Can guest passes be created for users who do not have patron accounts in the ILS database?

7. Describe generally the kinds of features and security restrictions of the user authorization component. Also, specifically:
   a. Can the user authorization component be configured to permit multiple modes of computer use such as internet only access, approved applications access, and full access to the operating system?
   b. Can the Library display terms-of-use and other types of system messages upon log in?
   c. How are patrons prevented from disabling or circumventing the client software?

8. Describe the staff administration capabilities of the reservation and user authorization components. Also, specifically:
   a. How can authorized staff grant time extensions to patrons?
   b. Can the system be configured to automatically extend a session if availability permits? If so, please describe how this process works.
   c. Can the system be configured to allow patrons to request more than their daily allotted time if availability permits? Does this require staff intervention or can the patron request additional time on their own?
   d. Can authorized staff see a “real-time” view of active and upcoming reservations to help patrons locate an available workstation?
e. Can authorized staff view and generate reports that show the reservation history of the patron and the booking history of a workstation?

f. How can patrons be denied access based on statuses within the ILS?

9. Describe generally the staff administration capabilities of the print management component. Also, specifically:
   a. Can jobs be released at both public self-service print release stations by patrons and at designated staff workstations with staff intervention?
   b. Can authorized staff override payment restrictions to release jobs?
   c. Can authorized staff view current print queues and take actions upon those jobs (e.g., delete specific jobs, resend/restart jobs, etc.)?
   d. Can authorized staff view and generate reports that show printing/payment history by patron, by workstations, and by printer?
   e. Can authorized staff view and generate reports that show the utilization of the public computers?

10. Describe generally the payment system functions in cooperation with the ILS patron database. Also, specifically:
    a. Can the system be set to accept funds only associated with the ILS patron account?
    b. Can the system be implemented to have both public self-service and staff desk methods to accept payment?

11. Describe the security features used to protect the system and patron data. Also, specifically:
    a. Are communications between the client and server encrypted?
    b. Does the system maintain a patron database separate from the ILS patron database? If so, what data is stored in that database and how frequent is the synchronization between the two? Please describe the synchronization process.

Additional Information

Please provide information about any additional "value added" services or features of your product line that you think might be of interest to the Library. Please indicate of these additional features of included as part of the base products described above, or if they are available for an additional cost.

Budgetary Estimates

The Library has approximately 187 computers for public use throughout the system that will be running the reservation and print management software. It has approximately 145 computers for
public use that will be running only print management software. We also provide printing from personal devices for patrons visiting our libraries.

Based on those numbers, please provide a pricing quotation that the Library can use on a preliminary basis to help determine if this project fits within our available budget and/or if a formal competitive bid process would be required for procurement. Please indicate if the quoted pricing is a one-time cost and what, if any, ongoing costs are associated with continued licensing, maintenance, support, etc.

If there are additional fees associated with any value-added components you’ve described above, please indicate those amounts in your response.