



## AGENDA

### PLACENTIA LIBRARY DISTRICT BOARD OF TRUSTEES UNUSUAL DATE & LOCATION MEETING

May 17, 2019  
3:00 p.m.

City Hall – 401 E. Chapman Avenue  
Community Meeting Room

#### Mission Statement:

Placentia Library District provides lifelong learning and reading opportunities that inspire, open minds, and bring our community together.

#### The Centennial Vision Statement:

The Vision of the Trustees is intended to help celebrate the 100-year anniversary of the District.

- 📖 We will be the place where the community “sees and experiences” the technical edge and premier programming.
- 📖 We will renovate and expand our Library.
- 📖 We will remain financially self-sufficient.
- 📖 We will seek strong community support.
- 📖 We will reach our community with an active marketing plan.
- 📖 We will increase the percentage of our operating budget that supports establishing the premier collection in Orange County.
- 📖 We will plan for maintaining our qualified and professional staff.

**AGENDA DESCRIPTIONS:** *The Agenda descriptions are intended to give members of the public notice and a general summary of items of business to be transacted or discussed. The Board may take any action which it deems to be appropriate on the Agenda and is not limited in any way by the notice of the recommended action.*

**REPORTS AND DOCUMENTATION:** *Reports and documentation relating to Agenda items are on file in the Administrative Office and the Reference Department of Placentia Library District, and are available for public inspection. A copy of the Agenda packet will be available for use during the Board Meetings. Any person having any question concerning any Agenda item may call the Library Director at 714-528-1925, Extension 200.*

**PLEDGE OF ALLEGIANCE**      Library Board President

#### **CALL TO ORDER**

1. Call to Order      Library Board President
2. Roll Call      Recorder
3. Adoption of Agenda  
*This is the opportunity for Board members to delete items from the Agenda, to continue items, to re-order items, and to make additions pursuant to Government Code Section 54954.2(b).*  
Presentation:      Library Director  
Recommendation: Adopt by Motion

4. Oral Communications

*Members of the public may address the Library Board of Trustees on any matter within the jurisdiction of the Board. Presentations by the public are limited to 5 minutes per person. Members of the public are also permitted to address the Library Board of Trustees on specific Agenda Items before and at the time that an Item is being considered by the Board. Action may not be taken on items not on the Agenda except in emergencies or as otherwise authorized. Reference: California Government Code Sections 54954.3, 54954.2(b).*

**TRUSTEE & ORGANIZATIONAL REPORTS**

5. Board President Report - oral

*The President makes announcements of general interest to the community and the Library Board of Trustees as well as conducting any ceremonial matters.*

6. Trustee Reports

*The Trustees make announcements of general interest to the community and the Library Board of Trustees, and report on meetings attended on behalf of the Board of Trustees.*

7. Library Director Report

8. Placentia Library Friends Foundation Board of Director's Report

**CONSENT CALENDAR (Items 9 – 22)**

Presentation: Library Director

Recommendation: Approve by Motion

*Items 9 – 22 may be considered together as one motion to approve the Consent Calendar. Items may be removed for individual consideration before the Consent Calendar is adopted. Items removed must then each have a separate motion.*

**MINUTES (Item 9)**

9. Minutes of the April 15, 2019 Date Library Board of Trustees Meeting. (Receive & File and Approve)

**CASH FLOW ANALYSIS (Items 10 – 11)**

10. Check Register for April 2019. (Receive & File and Approve)

11. FY2018-2019 Cash Flow Analysis through April 2019; the Schedule of Anticipated Property Tax Revenues for FY2016-2017 as provided by the Orange County Auditor. (Receive & File).

**TREASURER'S REPORTS (Items 12 – 15)**

12. Financial Reports for April 2019 for Placentia Library District Accounts on Deposit with the Orange County Treasurer. (Receive & File)

13. Balance Sheet for April 2019. (Receive & File)

14. Acquisitions Report for April 2019. (Receive & File)

15. Entrepreneurial Activities Report for April 2019. (Receive & File)

**GENERAL CONSENT REPORTS (Items 16 – 18)**

16. Personnel Report for April 2019. (Receive, File, and Ratify Appointments)

17. Circulation Report for April 2019. (Receive & File)

18. Review of Shared Maintenance Costs with the City of Placentia under the JPA. (Receive & File)

**STAFF REPORTS (Items 19 – 22)**

19. Administration Report for April 2019.
20. Children's Services Report for April 2019.
21. Adult Services Report for April 2019.
22. Placentia Library Web Site & Technology Report for April 2019.

**CONTINUING BUSINESS**

23. Review and adopt Placentia Library District Policy 6055 – Barbara & Ed Hemmerling Group Study Rooms, as presented.

**PUBLIC HEARINGS**

24. Public Hearing for the Budget for Fiscal Year 2019-2021 and Adopt Resolution 19-01: A Resolution of the Board of Trustees of the Placentia Library District of Orange County to Adopt Fiscal Year 2019-2021 Budget for the Placentia Library District of Orange County.
25. Public Hearing for the Fines and Fees for Fiscal Year 2019-2021 and Adopt Resolution 19-02: A Resolution of the Board of Trustees of the Placentia Library District of Orange County to Adopt the Fines and Fees Schedule for Fiscal Year 2019-2021 for the Placentia Library District of Orange County.
26. Establish the Holiday and Library Closure Schedule for Fiscal Year 2019-2021 and Adopt by Resolution 19-03: A Resolution of the Library Board of Trustees of the Placentia Library District of Orange County to Establish the Holiday and Library Closure Schedule for Fiscal Year 2019-2021.

**NEW BUSINESS**

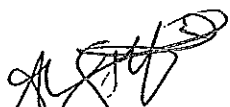
27. Award Contract for Placentia Library District's Financial Audit, Management Letter, Financial Transactions Report and Supplement to the Annual Report and Preparation of the GANN Limit Review Report for the 2018-2019 Fiscal Year to White, Nelson, Diehl & Evans LLP.
28. Authorize the first change order to Project #PLD-2018-003 in the amount of \$46,593.23 with Vincor Construction, Inc., a California-based company, to provide additional construction services for the District's Renovation Project. This would result in an amended contract with a new total amount not to exceed \$1,241,000.
29. Discuss the Request for Proposal for an Integrated Library System.

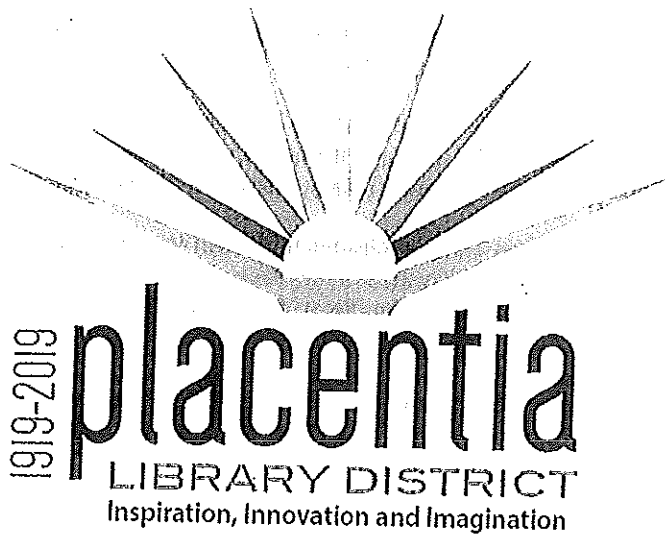
**ADJOURNMENT**

30. Agenda Preparation for the June Date Meeting which will be held on June 17, 2019 unless re-scheduled by the Library Board of Trustees.
31. Review of Action Items.  
*No action or discussion shall be taken on any item not appearing on the posted Agenda, unless authorized by law.*
32. Adjourn

\*\*\*\*\*CERTIFICATION OF POSTING\*\*\*\*\*

I, Alyssa Stolze, Administrative Assistant of the Placentia Library District, hereby certify that the Agenda for the May 17, 2019 Unusual Date Meeting of the Library Board of Trustees of the Placentia Library District was posted on May 14, 2019

  
\_\_\_\_\_  
Alyssa Stolze, Administrative Assistant



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MINUTES  
PLACENTIA LIBRARY DISTRICT  
WORK SESSION MEETING OF THE BOARD OF TRUSTEES  
APRIL 15<sup>TH</sup>, 2019

**CALL TO ORDER**

President Carline called the Work Session of the Placentia Library District (PLD) Board of Trustees to order on March 18<sup>th</sup>, 2019 at 6:02 pm.

**Members Present:** President Gayle Carline, Secretary Al Shkoler, Trustee Richard DeVecchio, Trustee Jo-Anne Martin, Trustee Elizabeth Minter

**Members Absent:** None

**Staff Present:** Jeanette Contreras, Library Director; Fernando Maldonado, Acting Business Manager; Jon Legree, Technology Manager; Alyssa Stolze, Administrative Assistant

**Guests:** None

**ADOPTION OF AGENDA**

It was moved by Trustee Martin and seconded by Secretary Shkoler to adopt the Agenda (Item 3).

|         |   |
|---------|---|
| AYES:   | Carline, Martin, DeVecchio, Shkoler, Minter |
| NOES:   | None  |
| ABSENT: | None  |

**ORAL COMMUNICATION**

None (Item 4).

**BOARD PRESIDENT REPORT**

None

**TRUSTEE &  
ORGANIZATIONAL  
REPORTS**

None

**LIBRARY DIRECTOR  
REPORT**

None

**FRIENDS FOUNDATION  
REPORT**

None

**CONSENT CALENDAR**

None

**DISCUSSION**

Library Director Contreras gave an overview on the proposed budget for Fiscal Year 2019-2020 and Fiscal Year 2020-2021 with the following reflected changes to the 2019-2020 Fiscal Year: iBank loan payments, new phone system, new library cards, common area improvements with the City, an independent ILS system, graphic designer for the website, and a decrease of 2.3% in the materials budget to reallocate the funds to these other categories. The Board of Trustees reviewed the presented budgets, asked questions, and openly discussed the projected expenditures and revenues for the next two fiscal years in detail. With additional suggestions and further clarifications, the Board agreed to review the budget to reallocate funds to the 8.7% book budget mid-year should other funding be available. The proposed budget will be presented at a Public Hearing on May 17<sup>th</sup> at 3 p.m. at the City Meeting Room.

**ADJOURNMENT**

The Board of Trustees Work Session Meeting of April 15<sup>th</sup>, 2019 was adjourned at 6:28 p.m.

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Gayle Carline, President  
Library Board of Trustees

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Al Shkoler, Secretary  
Library Board of Trustee

MINUTES  
PLACENTIA LIBRARY DISTRICT  
REGULAR DATE MEETING OF THE BOARD OF TRUSTEES  
APRIL 15<sup>TH</sup>, 2019

Agenda Item 9  
**Page 7**

**CALL TO ORDER**

President Carline called the Unusual Date Meeting of the Placentia Library District (PLD) Board of Trustees to order on March 18<sup>th</sup>, 2019 at 6:30 pm.

**Members Present:** President Gayle Carline, Secretary Al Shkoler, Trustee Richard DeVecchio, Trustee Jo-Anne Martin, Trustee Elizabeth Minter

**Members Absent:** None

**Staff Present:** Jeanette Contreras, Library Director; Fernando Maldonado, Acting Business Manager; Jon Legree, Technology Manager; Alyssa Stolze, Administrative Assistant

**Guests:** None

**ADOPTION OF AGENDA**

It was moved by Secretary Shkoler and seconded by Trustee Minter to adopt the Agenda (Item 3).

**AYES:** Carline, Martin, DeVecchio, Shkoler, Minter

**NOES:** None

**ABSENT:** None

**ORAL COMMUNICATION**

None (Item 4).

**BOARD PRESIDENT REPORT**

President Carline attended a Joint Use Committee meeting, presented C21 awards at Melrose Elementary, and served as Principal for a Day at Ruby Drive.

**TRUSTEE &  
ORGANIZATIONAL  
REPORTS**

Secretary Shkoler attended the H.I.S. House Luncheon, the Financial Partners Credit Union Auction for Kids, and Coleen's retirement luncheon.

Trustee DeVecchio attended Coleen's retirement luncheon.

Trustee Martin attended a H.I.S. House Luncheon, the Financial Partners Credit Union Auction for Kids, a PLFF Board Meeting, a Centennial Gala Meeting, and is working on having H.I.S. House be classified as a 501cb, separate from the church. Trustee Martin was also a Principal for a Day at El Camino High School and presented C21 awards at Brookhaven Elementary.

Trustee Minter attended the ISDOC meeting with the CSDA Director as the speaker and the Joint Use Committee meeting.

**LIBRARY DIRECTOR  
REPORT**

Library Director Contreras attended a Centennial Gala meeting, the California Library Services Board Meeting, the H.I.S. House Luncheon, the first General Managers Special District's meeting, a Joint Use Meeting, and ongoing meetings with contractors for the renovation, roofing and energy efficiency projects. Director

Contreras also presented updates for these projects and the logistical changes for staff during different phases of the interior construction project.

**FRIENDS FOUNDATION REPORT**

Placentia Library Friends Foundation (PLFF) President Sherri Dahl reported out on the Volunteer Luncheon, participating at Easter Eggcitement, and how the Friends are no longer accepting book donations due to capacity. There is a discussion of a large sale after the re-opening and creation of an inventory management system. Additionally, the Friends are working on silent auction baskets for the Gala.

**CONSENT CALENDAR**

It was moved by Secretary Shkoler and seconded by Trustee DeVecchio to approve Agenda Item 9-22. A roll call vote was taken:

AYES: Carline, Martin, DeVecchio, Shkoler, Minter  
NOES: None  
ABSENT: None

**MINUTES FOR THE MARCH 18<sup>TH</sup>, 2019 BOARD MEETING**

The minutes for the March 18, 2019 Library Board of Trustees Regular Date Meeting and the March 18, 2019 Library Board of Trustees Work Session Meeting were received, approved, and filed. (Item 9)

AYES: Carline, Martin, DeVecchio, Shkoler, Minter  
NOES: None  
ABSENT: None  
ABSTAIN: None

**CASH FLOW ANALYSIS AND TREASURER'S REPORTS**

Check Registers for March 2019 – received and filed (Item 10)  
Fund 707 Balance Report for March 2019 – received and filed (Item 11)

Financial Reports through March 2019 for Placentia Library District Accounts on Deposit with the Orange County Treasurer and Placentia Library District General Ledger: Summary of Cash and Investments. (Item 12)

Balance Sheets for March 2019 – received and filed. (Item 13)  
Acquisitions Report for March 2019 – received and filed. (Item 14)  
Service Revenue Report for March 2019 – received and filed. (Item 15)

**GENERAL CONSENT REPORTS**

Personnel Report for March 2019 – received and filed. (Item 16)  
Circulation Report for March 2019 – received and filed. (Item 17)  
Review of Shared Maintenance Costs with the City of Placentia – received and filed. (Item 18)

**STAFF REPORTS**

Administration Report for March 2019 (Item 19)  
Children's Services Report for March 2019 (Item 20)  
Adult Services Report for March 2019 (Item 21)  
Placentia Library Website Technology Report for March 2019 (Item 22)

**AUTHORIZE BOARD PRESIDENT CARLINE TO SIGN THE PURCHASING AGREEMENT 19-001 WITH YAMADA ENTERPRISES TO PROVIDE THE FURNITURE, FIXTURES AND EQUIPMENT (FF&E), LIBRARY BOOKSTACKS, AND CUSTOM MILLWORK FOR PROJECT #2018-03, DATED JANUARY 25, 2019**

Library Director Contreras presented the Purchasing Agreement 19-001 with Yamada Enterprises to provide all the new, unblemished furniture, fixtures and equipment (FF&E), library bookstacks and custom millwork for the renovation project. Director Contreras noted she has consulted with Legal Counsel, other public works professionals, and library directors, confirming that a request for approval is not required for FF&E projects as they are not under the provision of the public works requirement. Additionally, it was confirmed that no performance bond was needed. The importance of the renovation project timing and schedule were also discussed and considered to ensure the completion of work for re-opening with full library access on September 14, 2019. Therefore, the waiver of Placentia Library District Policy 3080.2 was also presented.

It was motioned by Trustee DeVecchio to waive Policy 3080.2 as presented and seconded by Trustee Martin.

AYES: Carline, Martin, DeVecchio, Shkoler, Minter  
NOES: None  
ABSENT: None

It was then motioned by Trustee Minter to authorize Board President Carline to sign the Purchasing Agreement #19-001 with Yamada Enterprises for the procurement and installation of furniture, fixtures, and equipment, in the amount of \$970,600. This was seconded by Trustee Martin.

AYES: Carline, Martin, DeVecchio, Shkoler, Minter  
NOES: None  
ABSENT: None

It was then motioned by Trustee Martin to authorize the Library Board President to approve related change orders, not to exceed \$50,000 and the Library Director to approve related change orders, not to exceed \$20,000. This was seconded by Secretary Shkoler.

AYES: Carline, Martin, DeVecchio, Shkoler, Minter  
NOES: None  
ABSENT: None

**AUTHORIZE THE AMENDMENT TO PLACENTIA LIBRARY DISTRICT POLICY 2319- JOB DESCRIPTION- LIBRARY ASSISTANT AS PRESENTED.**

Director Contreras presented on behalf of staff to include literacy services as a defined category under the Library Assistant job description. The presented job description was discussed and reviewed by the Board. It was then motioned to authorize the amendments to Policy-2319- Library Assistant, as presented, by Trustee Martin and seconded by Secretary Shkoler.

AYES: Carline, Martin, DeVecchio, Shkoler, Minter  
NOES: None  
ABSENT: None

**AUTHORIZE AMENDMENTS  
TO PLACENTIA LIBRARY  
DISTRICT POLICY 6055-  
BARBARA & ED  
HEMMERLING GROUP  
STUDY ROOMS.**

Director Contreras presented how Barbara and Ed Hemmerling donated a substantial contribution towards the centennial renovation project, and to allow the naming of the group study rooms to be in the honor of Mr. & Mrs. Hemmerling as the Barbara & Ed Hemmerling Group Study Rooms. Additionally, the amendments to Policy 6055-Group Study Rooms, as presented, were reviewed and discussed. The Board requested revision of wording to correlate with the Meeting Room policies and to represent the amended Policy 6055. It was motioned by Trustee Martin to authorize the naming of the group study rooms to the Barbara & Ed Hemmerling Group Study Rooms.

AYES: Carline, Martin, DeVecchio, Shkoler, Minter  
NOES: None  
ABSENT: None

**REVIEW OF ACTION ITEMS**

The next Board Meeting will be held on May 17<sup>th</sup>, 2019 at 3:00 p.m.

**ADJOURNMENT**

The Board of Trustees Regular Date Meeting of April 15<sup>th</sup>, 2019 was adjourned at 7:16 p.m.

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Gayle Carline, President  
Library Board of Trustees

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Al Shkoler, Secretary  
Library Board of Trustee

4:00 PM  
05/10/19  
Accrual Basis

Placentia Library District  
Check Register  
April 2019

| Date       | Ref No. | Payee                                     | Memo  | Payment   | Type         |
|------------|---------|---|---|-----------|--------------|
| 04/01/2019 | 10435   | Michelle Meades                           | Volunteer Supplies and History Room Archives & Newspaper Digitization | 226.24    | Bill Payment |
| 04/01/2019 | 10436   | Baker & Taylor                            | Books   | 497.81    | Bill Payment |
| 04/01/2019 | 10437   | SDRMA                                     | Ancillary Benefits April 2019   | 2,215.81  | Bill Payment |
| 04/01/2019 | 10438   | SoCalGas                                  | Service for 02/19-03/20/19  | 50.18     | Bill Payment |
| 04/01/2019 | 10439   | Legacy Integrative Solutions              | Printer Services  | 829.29    | Bill Payment |
| 04/01/2019 | 10440   | OverDrive                                 | Adult e-books   | 1,964.22  | Bill Payment |
| 04/01/2019 | 10441   | O.C. Plumbing                             | Fridge Service on 02/28/19  | 155.00    | Bill Payment |
| 04/01/2019 | 10442   | Placentia Library Foundation              | For PLFF Pass-Through Feb 2019  | 601.00    | Bill Payment |
| 04/01/2019 | 10443   | Unique Management Services, Inc.          | Collection Services   | 250.60    | Bill Payment |
| 04/01/2019 | 10444   | Placentia Round Table Women's Club        | 19/20 Membership  | 45.00     | Bill Payment |
| 04/01/2019 | 10445   | Public Agency Retirement Services         | For Payroll on 02/06/19   | 2,331.34  | Bill Payment |
| 04/01/2019 | 10446   | Public Agency Retirement Services         | For Payroll on 12/26/18   | 2,316.43  | Bill Payment |
| 04/01/2019 | 10447   | Public Agency Retirement Services         | For Payroll on 01/09/19   | 2,281.04  | Bill Payment |
| 04/01/2019 | 10448   | Public Agency Retirement Services         | For Payroll on 02/20/19   | 2,341.29  | Bill Payment |
| 04/01/2019 | 10449   | Public Agency Retirement Services         | Correction For Payroll on 11/28/18                                    | 48.13     | Bill Payment |
| 04/01/2019 | 10450   | Public Agency Retirement Services         | For Payroll on 01-23-19   | 2,312.05  | Bill Payment |
| 04/01/2019 | 10451   | Public Agency Retirement Services         | For Payroll on 03/06/19   | 2,305.19  | Bill Payment |
| 04/01/2019 | 10452   | Public Agency Retirement Services         | For Payroll on 03/20/19   | 2,320.06  | Bill Payment |
| 04/01/2019 | 10453   | OverDrive                                 | JUV Audiobooks  | 1,113.48  | Bill Payment |
| 04/01/2019 | 10454   | Environmental Remediation Contractors Inc | Abatement Phase 3   | 5,600.00  | Bill Payment |
| 04/05/2019 | 10483   | Placentia Library District                | For Payroll on 05/01/2019   | 60,000.00 | Check        |
| 04/10/2019 | 10455   | Placentia Library District                | For Payroll on 04/17/19   | 60,000.00 | Check        |
| 04/10/2019 | 10456   | Baker & Taylor                            | Books   | 1,648.75  | Bill Payment |
| 04/10/2019 | 10457   | Placentia-Yorba Linda Unified School Dist | Business Cards  | 12.93     | Bill Payment |
| 04/10/2019 | 10458   | BankCard Center-Bank of the West          | Credit Card Charges for 3/1-3/28/19                                   | 5,664.04  | Bill Payment |
| 04/10/2019 | 10459   | Time Warner Cable                         | Service 4/12-5/11/19  | 65.72     | Bill Payment |
| 04/10/2019 | 10460   | Staples Advantage                         | Office Supplies Support Svcs  | 457.05    | Bill Payment |
| 04/10/2019 | 10461   | Midwest Tape                              | Audiobooks/DVDs   | 3,190.00  | Bill Payment |
| 04/10/2019 | 10462   | Pitney Bowes Purchase Power               | Mar 2019 Postage  | 820.99    | Bill Payment |
| 04/10/2019 | 10463   | Glasby Maintenance Supply                 | Maintenance Supply Order Mar 2019                                     | 238.76    | Bill Payment |
| 04/10/2019 | 10464   | Republic Services                         | Waste and Recycling Disposal  | 146.58    | Bill Payment |
| 04/10/2019 | 10465   | Ingram Library Services                   | Video Games/Media   | 45.93     | Bill Payment |
| 04/10/2019 | 10466   | Tim Worden                                | Mileage Reimbursement   | 20.82     | Bill Payment |
| 04/10/2019 | 10467   | City of Placentia                         | Monthly Invoice for Feb 2019  | 3,784.76  | Bill Payment |
| 04/10/2019 | 10468   | Laura Poladian                            | Literacy Workshop   | 250.00    | Bill Payment |
| 04/10/2019 | 10469   | Arcella Janitorial Service                | Mar 2019 Janitorial Services  | 1,044.00  | Bill Payment |

4:00 PM  
05/10/19  
Accrual Basis

Placentia Library District  
Check Register  
April 2019

|            |       |  |   |                   |              |
|------------|-------|--|---|-------------------|--------------|
| 04/10/2019 | 10470 | Train Party Express  | Eggcitement Train   | 550.00            | Bill Payment |
| 04/10/2019 | 10471 | Jump O' Rama Inflatables   | Eggcitement Bouncer   | 444.00            | Bill Payment |
| 04/10/2019 | 10472 | SCLLN  | Membership Renewal  | 150.00            | Bill Payment |
| 04/10/2019 | 10473 | Wonderlic  | Literacy Supplies   | 80.50             | Bill Payment |
| 04/15/2019 | 10474 | Woodruff, Spradlin & Smart<br>Public Agency Retirement<br>Services | Legal Services  | 2,907.00          | Bill Payment |
| 04/15/2019 | 10475 | Alyssa Stolze  | PP 03/15/19-03/28/19 & PP 03/29/19-04/11/19<br>Mar 2019 Reimbursement | 4,600.72          | Bill Payment |
| 04/15/2019 | 10476 | O.C. Plumbing  | Fridge Part Replacement and Labor                                     | 102.95            | Bill Payment |
| 04/15/2019 | 10477 | Baker & Taylor   | Books   | 485.00            | Bill Payment |
| 04/15/2019 | 10478 | CALNET3  | Phone   | 533.23            | Bill Payment |
| 04/15/2019 | 10479 | OverDrive<br>Unique Management Services,<br>Inc.                   | eBooks/Audiobooks   | 166.57            | Bill Payment |
| 04/15/2019 | 10480 | United Site Services   | Collection Services   | 45.98             | Bill Payment |
| 04/15/2019 | 10481 | Midwest Tape   | Portable Restrooms  | 53.70             | Bill Payment |
| 04/22/2019 | 10482 | Baker & Taylor   | Audiobooks/DVDs   | 61.33             | Bill Payment |
| 04/22/2019 | 10484 | Legacy Integrative Solutions                                       | Books   | 1,488.76          | Bill Payment |
| 04/22/2019 | 10485 | OverDrive  | Printer Services  | 380.75            | Bill Payment |
| 04/22/2019 | 10486 | Jeanette Contreras<br>CA Department of Tax & Fee<br>Administration | OverDrive   | 476.41            | Bill Payment |
| 04/22/2019 | 10487 | SDRMA  | Barnella Meeting  | 401.33            | Bill Payment |
| 04/22/2019 | 10488 | Glnny Sanatar  | Jan-Mar 2019 Tax Collection   | 53.41             | Bill Payment |
| 04/22/2019 | 10489 | Anaheim Public Library   | SDRMA Medical for May 2019  | 9.00              | Bill Payment |
| 04/22/2019 | 10490 |  | Replacement key for vending machine                                   | 22,305.36         | Bill Payment |
| 04/22/2019 | 10491 |  | Anaheim fees paid at PLD  | 4.72              | Bill Payment |
| 04/22/2019 | 10492 |  |   | 6.80              | Bill Payment |
|            |       |  |   | <u>202,502.01</u> |              |



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**PLACENTIA LIBRARY DISTRICT BOARD OF TRUSTEES**

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**TO:** Jeanette Contreras, Library Director

**FROM:** Fernando Maldonado, Business Manager

**SUBJECT:** Fund Balance Report through April 2019 for Placentia Library District Fund 9LX with Orange County Treasurer

**DATE:** May 17, 2019

| <b>Fiscal Year 2018-2019</b> |              |
|------------------------------|--------------|
| 07/31/2018                   | 2,515,468.78 |
| 8/31/2018                    | 2,518,547.43 |
| 9/30/2018                    | 2,521,728.47 |
| 10/31/2018                   | 2,325,166.55 |
| 11/30/2018                   | 2,328,648.65 |
| 12/31/2018                   | 2,332,182.94 |
| 01/31/2019                   | 2,335,771.87 |
| 2/28/2019                    | 2,339,428.02 |
| 3/31/2019                    | 2,343,290.63 |
| 04/30/2019                   | 2,347,359.46 |
| 5/31/2019                    |              |
| 6/30/2019                    |              |

| <b>Fiscal Year 2017-2018</b> |              |
|------------------------------|--------------|
| 07/31/2017                   | 2,491,457.82 |
| 8/31/2017                    | 2,493,625.46 |
| 9/30/2017                    | 2,495,857.28 |
| 10/31/2017                   | 2,498,084.78 |
| 11/30/2017                   | 2,500,309.42 |
| 12/31/2017                   | 2,502,508.82 |
| 01/31/2018                   | 2,502,381.29 |
| 2/28/2018                    | 2,502,253.65 |
| 3/31/2018                    | 2,504,538.94 |
| 04/30/2018                   | 2,509,766.98 |
| 5/31/2018                    | 2,512,623.18 |
| 6/30/2018                    | 2,512,581.20 |



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**PLACENTIA LIBRARY DISTRICT BOARD OF TRUSTEES**

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**TO:** Library Board of Trustees

**FROM:** Jeanette Contreras, Library Director

**SUBJECT:** Financial Reports through April 2019 for the Placentia Library District Accounts on Deposit with the Orange County Treasurer and the Placentia Library District General Ledger

**DATE:** May 17, 2019

**Summary of Cash and Investments as of April 30, 2019**

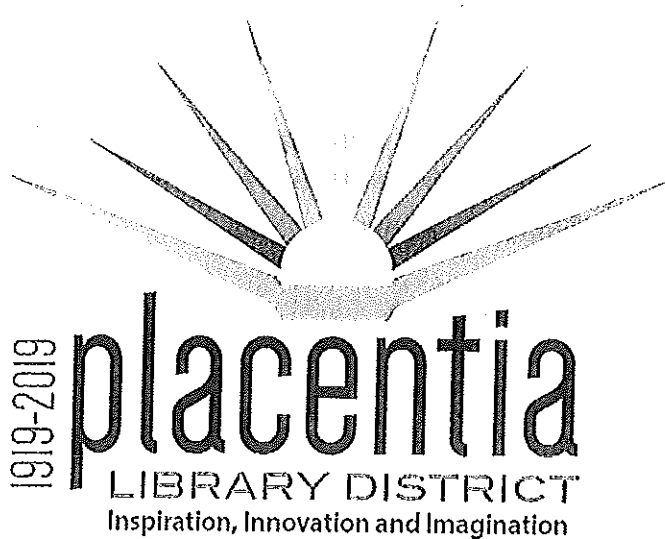
|  |                       |
|--|-----------------------|
| Cash with Orange County Treasurer Fund 9LX   | \$2,347,359.46        |
| General Fund Checking – Bank of the West     | 1,529,014.06          |
| General Fund Savings – Bank of the West      | 933,089.27            |
| <i>(Impact Fees in Savings – Restricted)</i> | \$696,164.75          |
| Payroll Checking – Wells Fargo Bank          | \$ 28,601.43          |
| <b>Total Cash and Investments</b>            | <b>\$4,838,064.22</b> |

I hereby certify that the investments are in compliance with Placentia Library District Policy 3035 – Investment of District Funds, as adopted by the Library Board of Trustees, and California Government Code Section 53646(b)(1); and that Placentia Library District has the ability to meet its budgeted expenditures for the next six(6) months.



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Jeanette Contreras  
Library Director



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PLACENTIA LIBRARY DISTRICT  
YTD REVENUE REPORT  
As of April 30, 2019

| Acct #  | DESCRIPTION                                   | BUDGET (AMENDED)   | YTD ACTUAL         | BALANCE            | PERCENT % RECEIVED |
|---|---|--------------------|--------------------|--------------------|--------------------|
| <b>PROPERTY TAX REVENUE</b>                     |   |                    |                    |                    |                    |
| 4010  | Property Taxes - Current Secured              | 2,353,852          | 2,131,824          | (222,028)          | 90.6%              |
| 4020  | Property Taxes - Current Unsecured            | 63,270             | 60,265             | (3,005)            | 95.2%              |
| 4030  | Property Taxes - Prior Secured                | 0                  | -                  | 0                  | 0.0%               |
| 4040  | Property Taxes - Prior Unsecured              | 0                  | -                  | 0                  | 0.0%               |
| 4050  | Property Taxes - Curr Supplemental            | 72,162             | 50,457             | (21,705)           | 69.9%              |
| 4060  | Property Taxes - Prior Supplemental           | 0                  | 0                  | 0                  | 0.0%               |
| * 4070  | Interest on Unsupport Tax                     | 0                  | 0                  | 0                  | -                  |
| ** 4080   | Penalties & Costs on Delinq Taxes             | 0                  | 581                | 581                | -                  |
| 4090  | Taxes Special Dist Augmentation               | 1,113              | 16,061             | 14,947             | 1442.4%            |
| 4190  | State - Homeowners Property Tax Relief        | 9,538              | 4,582              | (4,956)            | 48.0%              |
| * 4191  | Asset Sales of the Placentia Successor Agency | 51,177             | 6,513              | (44,664)           | 12.7%              |
|   | Sub Total                                     | 2,551,113          | 2,274,335          | (276,778)          | 89.2%              |
| <b>INTEREST REVENUE</b>                         |   |                    |                    |                    |                    |
| 4600  | Interest                                      | 8,500              | 23,556             | 15,056             | 277.1%             |
|   | Sub Total                                     | 8,500              | 23,556             | 15,056             | 277.1%             |
| <b>GRANT REVENUE</b>                            |   |                    |                    |                    |                    |
| 4210  | State Grants                                  | 30,000             | 21,000             | (9,000)            | 70.0%              |
| 4230  | Other Grants                                  | 20,000             | -                  | (20,000)           | 0.0%               |
|   | Sub Total                                     | 50,000             | 21,000             | (29,000)           | 42.0%              |
| <b>MISCELLANEOUS REVENUES</b>                   |   |                    |                    |                    |                    |
| 4420  | Newsletter Ads                                | 700                | -                  | (700)              | 0.0%               |
| 4410  | PLFF Grants                                   | 38,310             | 38,834             | 524                | 101.4%             |
| * 4430  | Other Revenue                                 | 0                  | 15,286             | 15,286             | -                  |
| 4440  | Centennial Renovation                         | 1,500,000          | 796,529            | (703,471)          | 53.1%              |
| 4310  | Fines & Fees                                  | 16,594             | 11,745             | (4,849)            | 70.8%              |
| 4320, 4330                                      | Passport/Photos                               | 189,500            | 205,951            | 16,451             | 108.7%             |
| * 4340  | Meeting Room Fees                             | 0                  | 340                | 340                | -                  |
| 4350  | Test Proctor                                  | 2,500              | 5,050              | 2,550              | 202.0%             |
|   | Sub Total                                     | 1,747,604          | 1,073,734          | (673,870)          | 61.4%              |
| 4500  | Impact Fees                                   | 90,000             | 67,888             | (22,112)           | 75.4%              |
|   | <b>TOTAL REVENUES YTD FOR FY 18/19:</b>       | <b>4,447,217</b>   | <b>3,460,514</b>   | <b>(986,704)</b>   | <b>77.8%</b>       |
| <b>Total Revenue without Renovation Revenue</b> |   | <b>\$2,947,217</b> | <b>\$2,663,985</b> | <b>(\$283,233)</b> | <b>90.4%</b>       |

\*Mathematically unable to divide by zero. Dividing by zero provides a null value.

\*\*An increase of 1442.4% means the final amount is 14.42 times larger than the original amount predicted.

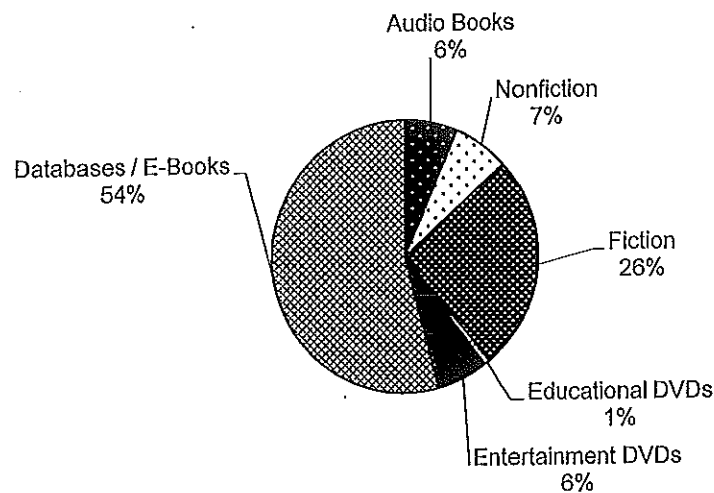
PLACENTIA LIBRARY DISTRICT  
EXPENDITURES REPORT  
April 30, 2019  
83.33% of the year completed.

| ACCOUNT                                 | DESCRIPTION                                | APPROPRIATIONS (AMENDED) | EXPENDED           | CURRENT     | REMAINDER          |
|---|--|--------------------------|--------------------|-------------|--------------------|
| <b>SALARIES &amp; EMPLOYEE BENEFITS</b> |  |                          |                    |             |                    |
| 5010, 5020                              | Salaries & Wages                           | 1,513,099                | 1,232,041          | 0.81        | \$281,058          |
| 5030                                    | Retirement                                 | 58,553                   | 44,510             | 0.76        | \$14,043           |
| 5040                                    | Unemployment Insurance                     | 4,000.00                 | 2,700.00           | 0.68        | \$1,300            |
| 5050                                    | Health Insurance                           | 297,502                  | 213,351            | 0.72        | \$84,151           |
| 5064                                    | Dental Insurance                           | 17,796                   | 12,701             | 0.71        | \$5,095            |
| 5066                                    | Life Insurance                             | 5,603                    | 3,799              | 0.68        | \$1,804            |
| 5066                                    | AD & D Insurance                           | 8,720                    | 6,346              | 0.73        | \$2,374            |
| 5068                                    | Vision Insurance                           | 3,441                    | 2,543              | 0.74        | \$898              |
| 5090                                    | Employee Assistance Program                | 12,000                   | 6,672              | 0.56        | \$5,328            |
| 5070                                    | Workers' Compensation Insurance            | 13,768                   | 4,873              | 0.35        | \$8,895            |
|   | <b>TOTAL</b>                               | <b>\$1,934,482</b>       | <b>\$1,529,537</b> | <b>0.79</b> | <b>\$404,945</b>   |
| <b>SERVICES &amp; SUPPLIES</b>          |  |                          |                    |             |                    |
| 5100                                    | Communications                             | 9,120                    | 12,677             | 1.39        | (\$3,557)          |
| 5170                                    | Household Expenses                         | 15,000                   | 9,850              | 0.66        | \$5,150            |
| 5099                                    | Library Insurance                          | 17,000                   | 13,668             | 0.80        | \$3,332            |
| 5205                                    | Maintenance Expense                        | 25,000                   | 15,046             | 0.60        | \$9,954            |
| 5220-5280, 5160, 5180                   | Maintenance, Buildings & Improvements      | 75,000                   | 68,965             | 0.92        | \$6,035            |
| 5290                                    | Memberships                                | 9,000                    | 6,426              | 0.71        | \$2,574            |
| 5300, 5310, 5350                        | Office Expenses & Postage                  | 77,500                   | 61,345             | 0.79        | \$16,155           |
| 5400                                    | Prof./Specialized Services                 | 204,950                  | 128,438            | 0.63        | \$76,512           |
| 5495, 5900, 5910                        | Programs                                   | 52,067                   | 19,192             | 0.37        | \$32,875           |
| 5500                                    | Books/Library Materials                    | 352,000                  | 145,028            | 0.41        | \$206,972          |
| 5600                                    | Meetings/Professional Development          | 44,640                   | 49,009             | 1.10        | (\$4,369)          |
| 5700                                    | Mileage/Parking                            | 1,600                    | 856                | 0.54        | \$744              |
| 5800                                    | Utilities                                  | 59,858                   | 25,976             | 0.43        | \$33,882           |
|   | <b>TOTAL</b>                               | <b>\$942,735</b>         | <b>\$556,475</b>   | <b>0.59</b> | <b>\$386,260</b>   |
|   | <b>OPERATING EXPENSES</b>                  | <b>\$2,877,217</b>       | <b>\$2,086,012</b> | <b>0.73</b> | <b>\$791,205</b>   |
| <b>FIXED ASSETS &amp; TAXES</b>         |  |                          |                    |             |                    |
| 1310                                    | Building & Improvements                    | \$30,000                 | -                  | 0.00        | \$30,000           |
| 4200                                    | Equipment & Furniture                      | \$30,000                 | -                  | 0.00        | \$30,000           |
| 6100                                    | Taxes and Assessments                      | \$10,000                 | 8,559              | 0.86        | \$1,441            |
|   | <b>TOTAL</b>                               | <b>\$70,000</b>          | <b>8,559</b>       | <b>0.12</b> | <b>\$61,441</b>    |
| <b>CAPITAL PROJECT</b>                  |  |                          |                    |             |                    |
| 5211                                    | Renovation                                 | \$4,100,000              | 1,871,806          | 0.46        | \$2,228,194        |
|   | <b>TOTAL</b>                               | <b>\$4,100,000</b>       | <b>1,871,806</b>   | <b>0.46</b> | <b>\$2,228,194</b> |
| <b>TOTAL BUDGET</b>                     |  |                          |                    |             |                    |
|   |  | <b>\$7,047,217</b>       | <b>\$3,966,376</b> | <b>0.56</b> | <b>\$3,080,841</b> |
|   | Total Expenses without Renovation Expenses | <b>\$2,947,217</b>       | <b>\$2,094,570</b> | <b>0.71</b> | <b>\$852,647</b>   |

# Placentia Library District

## ACQUISITIONS REPORT FOR FISCAL YEAR 2018-2019 THROUGH THE MONTH OF APR 2019

|                           | YTD 2018/19 | YTD 2018/19 | YTD 2018/19 | YTD 2017/18 | YTD 2017/18 | YTD 2017/18 |
|---------------------------|-------------|-------------|-------------|-------------|-------------|-------------|
|                           | Amount      | Titles      | Volumes     | Amount      | Titles      | Volumes     |
| Total Fiction             | \$33,489    | 1193        | 1321        | \$39,138    | 2283        | 2483        |
| Total Non-Fiction         | \$9,055     | 381         | 599         | \$31,939    | 1278        | 1822        |
| Total Databases / E-Books | \$70,809    | 771         | 0           | \$32,489    | 174         | 0           |
| Total Audio Books         | \$8,439     | 176         | 176         | \$5,095     | 331         | 333         |
| Total Educational DVDs    | \$839       | 26          | 26          | \$3,129     | 83          | 83          |
| Total Entertainment DVDs  | \$8,180     | 222         | 304         | \$6,890     | 155         | 251         |
| Total Library of Things   | \$0         | 0           | 0           | \$0         | 0           | 0           |
| YTD TOTAL MATERIALS       | \$130,811   | 2769        | 2426        | \$118,680   | 4304        | 4960        |
| Budget                    | \$272,000   |             |             | \$255,689   |             |             |
| % Spent YTD               | 48%         |             |             | 46%         |             |             |



The 2017-2018 materials budget was \$255,689. The Library Board approved \$79,387 to rollover into the 2018-2019 fiscal year materials budget.

ACQUISITIONS REPORT FOR FISCAL YEAR 2018-2019 THROUGH THE MONTH OF APRIL 2019  
 Prepared by Katie Matas, Librarian I

| Adult Fiction                         | GENERAL FUND |        |         | ADOPT-A-BOOK/GRANT |        |         | TOTAL PURCHASED |        |         | DONATED |        |         | TOTAL ITEMS |        |         |
|---------------------------------------|--------------|--------|---------|--------------------|--------|---------|-----------------|--------|---------|---------|--------|---------|-------------|--------|---------|
|                                       | Amount       | Titles | Volumes | Amount             | Titles | Volumes | Amount          | Titles | Volumes | Value   | Titles | Volumes | Amount      | Titles | Volumes |
| Total Adult Fiction                   | \$24,211     | 871    | 881     | \$0                | 0      | 0       | \$24,211        | 871    | 881     | \$436   | 15     | 15      | \$24,647    | 886    | 906     |
| Adult Non-Fiction                     | \$7,540      | 326    | 356     | \$0                | 0      | 0       | \$7,540         | 326    | 356     | \$530   | 18     | 18      | \$8,073     | 344    | 374     |
| Adult Reference                       | \$351        | 9      | 9       | \$0                | 0      | 0       | \$351           | 9      | 9       | \$739   | 21     | 21      | \$1,100     | 30     | 30      |
| Adult Magazines                       | \$3,216      | 335    | 549     | \$0                | 0      | 0       | \$3,216         | 335    | 549     | \$0     | 0      | 0       | \$3,216     | 1      | 184     |
| TOTAL ADULT PRINT MATERIALS           | \$32,427     | 1207   | 1440    | \$0                | 0      | 0       | \$32,427        | 1207   | 1440    | \$1,765 | 54     | 54      | \$34,192    | 1261   | 1484    |
| Adult Music CDs                       | \$0          | 0      | 0       | \$0                | 0      | 0       | \$0             | 0      | 0       | \$0     | 0      | 0       | \$0         | 0      | 0       |
| Adult Audio Books                     | \$8,439      | 176    | 176     | \$0                | 0      | 0       | \$8,439         | 176    | 176     | \$0     | 0      | 0       | \$8,439     | 176    | 176     |
| Adult Educational DVDs                | \$20,249     | 450    | 0       | \$0                | 0      | 0       | \$20,249        | 0      | 0       | \$0     | 0      | 0       | \$20,249    | 0      | 0       |
| Adult Entertainment DVDs              | \$839        | 26     | 26      | \$0                | 0      | 0       | \$839           | 26     | 26      | \$0     | 2      | 2       | \$839       | 28     | 28      |
| Libraries of Things                   | \$5,552      | 135    | 205     | \$0                | 0      | 0       | \$5,552         | 135    | 205     | \$137   | 28     | 28      | \$5,689     | 163    | 233     |
| TOTAL ADULT NON-PRINT MATERIALS       | \$35,079     | 796    | 407     | \$0                | 0      | 0       | \$35,079        | 796    | 407     | \$137   | 30     | 30      | \$35,216    | 826    | 437     |
| TOTAL ADULT MATERIALS                 | \$67,506     | 2,003  | 1,847   | \$0                | 0      | 0       | \$67,506        | 2,003  | 1,847   | \$1,902 | 84     | 84      | \$69,408    | 2,087  | 1,931   |
| Young Adult Fiction                   | \$1,523      | 122    | 122     | \$0                | 0      | 0       | \$1,523         | 122    | 122     | \$176   | 10     | 10      | \$1,699     | 132    | 132     |
| Young Adult Non-Fiction               | \$1,523      | 122    | 122     | \$0                | 0      | 0       | \$1,523         | 122    | 122     | \$176   | 10     | 10      | \$1,699     | 132    | 132     |
| Young Adult Reference                 | \$203        | 12     | 13      | \$0                | 0      | 0       | \$203           | 12     | 13      | \$0     | 0      | 0       | \$203       | 12     | 13      |
| Young Adult Magazines                 | \$203        | 12     | 13      | \$0                | 0      | 0       | \$203           | 12     | 13      | \$0     | 0      | 0       | \$203       | 12     | 13      |
| TOTAL YOUNG ADULT PRINT MATERIALS     | \$1,726      | 154    | 155     | \$0                | 0      | 0       | \$1,726         | 154    | 155     | \$176   | 10     | 10      | \$1,902     | 164    | 165     |
| Young Adult Audio Books               | \$0          | 0      | 0       | \$0                | 0      | 0       | \$0             | 0      | 0       | \$0     | 0      | 0       | \$0         | 0      | 0       |
| Young Adult E-books                   | \$3,224      | 92     | 0       | \$159              | 4      | 4       | \$3,383         | 96     | 4       | \$0     | 0      | 0       | \$3,383     | 96     | 4       |
| Young Adult Videos/Series             | \$726        | 12     | 12      | \$0                | 0      | 0       | \$726           | 12     | 12      | \$751   | 30     | 30      | \$1,477     | 42     | 42      |
| TOTAL YOUNG ADULT NON-PRINT MATERIALS | \$3,950      | 104    | 12      | \$159              | 4      | 4       | \$4,109         | 108    | 16      | \$751   | 30     | 30      | \$4,860     | 138    | 46      |
| Juvenile Fiction                      | \$7,755      | 200    | 308     | \$0                | 0      | 0       | \$7,755         | 200    | 308     | \$419   | 33     | 34      | \$8,174     | 233    | 342     |
| Juvenile Non-Fiction                  | \$7,755      | 200    | 308     | \$0                | 0      | 0       | \$7,755         | 200    | 308     | \$419   | 33     | 34      | \$8,174     | 233    | 342     |
| Juvenile Reference                    | \$635        | 33     | 36      | \$0                | 0      | 0       | \$635           | 33     | 36      | \$62    | 5      | 5       | \$698       | 38     | 41      |
| Juvenile Magazines                    | \$0          | 0      | 1       | \$0                | 0      | 0       | \$0             | 0      | 1       | \$0     | 0      | 0       | \$0         | 0      | 1       |
| TOTAL JUVENILE PRINT MATERIALS        | \$8,391      | 233    | 345     | \$0                | 0      | 0       | \$8,391         | 233    | 345     | \$682   | 5      | 5       | \$9,073     | 238    | 42      |
| Juvenile Music CDs                    | \$0          | 0      | 0       | \$0                | 0      | 0       | \$0             | 0      | 0       | \$481   | 38     | 38      | \$4,811     | 271    | 384     |
| Juvenile Audio Books                  | \$0          | 0      | 0       | \$0                | 0      | 0       | \$0             | 0      | 0       | \$0     | 0      | 0       | \$0         | 0      | 0       |
| Juvenile E-books                      | \$4,967      | 211    | 0       | \$0                | 0      | 0       | \$4,967         | 211    | 0       | \$0     | 0      | 0       | \$4,967     | 211    | 0       |
| Juvenile Educational DVDs             | \$0          | 0      | 0       | \$0                | 0      | 0       | \$0             | 0      | 0       | \$0     | 0      | 0       | \$0         | 0      | 0       |
| Juvenile Entertainment DVDs           | \$1,902      | 75     | 87      | \$0                | 0      | 0       | \$1,902         | 75     | 87      | \$0     | 0      | 0       | \$1,902     | 75     | 87      |
| TOTAL JUVENILE NON-PRINT MATERIALS    | \$6,869      | 286    | 87      | \$0                | 0      | 0       | \$6,869         | 286    | 87      | \$0     | 0      | 0       | \$6,869     | 286    | 87      |
| TOTAL JUVENILE MATERIALS              | \$14,960     | 519    | 432     | \$0                | 0      | 0       | \$14,960        | 519    | 432     | \$481   | 38     | 38      | \$15,441    | 557    | 471     |
| Databases                             | \$42,669     | 9      | 0       | \$0                | 0      | 0       | \$42,669        | 9      | 0       | \$0     | 0      | 0       | \$42,669    | 9      | 0       |
| E-books                               | \$28,140     | 762    | 0       | \$159              | 4      | 4       | \$28,299        | 766    | 4       | \$0     | 0      | 0       | \$28,299    | 766    | 4       |
| TOTAL DATABASES / E-BOOKS             | \$70,809     | 771    | 0       | \$159              | 4      | 4       | \$70,968        | 770    | 4       | \$0     | 0      | 0       | \$70,968    | 774    | 4       |
| Total Fiction                         | \$33,489     | 1183   | 1321    | \$0                | 0      | 0       | \$33,489        | 1183   | 1321    | \$1,031 | 58     | 58      | \$34,520    | 1241   | 1380    |
| Total Non-Fiction                     | \$9,055      | 361    | 599     | \$0                | 0      | 0       | \$9,055         | 361    | 599     | \$1,391 | 44     | 44      | \$10,446    | 405    | 643     |
| Total Databases / E-books             | \$70,809     | 771    | 0       | \$159              | 4      | 4       | \$70,968        | 770    | 4       | \$0     | 0      | 0       | \$70,968    | 774    | 4       |
| Total Audio Books                     | \$8,439      | 176    | 176     | \$0                | 0      | 0       | \$8,439         | 176    | 176     | \$0     | 0      | 0       | \$8,439     | 176    | 176     |
| Total Entertainment DVDs              | \$839        | 26     | 26      | \$0                | 0      | 0       | \$839           | 26     | 26      | \$0     | 2      | 2       | \$839       | 28     | 28      |
| Total Educational DVDs                | \$6,160      | 222    | 304     | \$0                | 0      | 0       | \$6,160         | 222    | 304     | \$0     | 0      | 0       | \$6,160     | 222    | 304     |
| Total Library of Things               | \$0          | 0      | 0       | \$0                | 0      | 0       | \$0             | 0      | 0       | \$0     | 0      | 0       | \$0         | 0      | 0       |
| TOTAL MATERIALS                       | \$130,811    | 2769   | 2426    | \$159              | 4      | 4       | \$130,970       | 2773   | 2430    | \$3,310 | 162    | 163     | \$134,280   | 2935   | 2563    |



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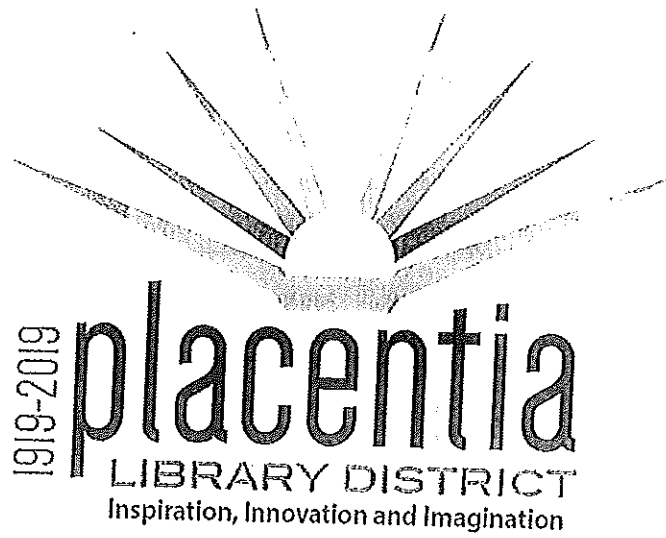
**PLACENTIA LIBRARY DISTRICT BOARD OF TRUSTEES**

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**TO:** Jeanette Contreras, Library Director  
**FROM:** Fernando Maldonado, Business Manager  
**SUBJECT:** Service Revenue Activities Report for April 2019  
**DATE:** May 17, 2019

**Net Revenue Summary for April 2019**

|                 | Apr-2019         | Apr-2018         | YTD<br>2018-2019  | YTD<br>2017-2018  |
|-----------------|------------------|------------------|-------------------|-------------------|
| Passport        | 24,990.00        | 31,605.00        | 177,375.03        | 163,484.50        |
| Passport Photos | 4,512.00         | 4,704.00         | 28,576.25         | 41,058.00         |
| Test Proctor    | 150.00           | 750.00           | 5,050.00          | 7,200.00          |
| Fines & Fees    | 160.74           | 1,463.88         | 11,744.70         | 16,725.86         |
| Meeting Room    | 0.00             | 440.00           | 340.00            | 2,475.00          |
| <b>Total</b>    | <b>29,812.74</b> | <b>38,962.88</b> | <b>223,085.98</b> | <b>230,943.36</b> |



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**PLACENTIA LIBRARY DISTRICT BOARD OF TRUSTEES**

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**TO:** Jeanette Contreras, Library Director

**FROM:** Fernando Maldonado, Business Manager

**SUBJECT:** Personnel Report for April 2019

**DATE:** May 17, 2019

|                             | Apr-19   | Apr-18   | YTD<br>2018-2019 | YTD<br>2017-2018 |
|-----------------------------|----------|----------|------------------|------------------|
| Separation                  | 0        | 1        | 2                | 7                |
| Retirement                  | 0        | 0        | 0                | 0                |
| Appointments                | 0        | 2        | 5                | 11               |
| Open Positions              | 1        | 0        | 4                | 8                |
| Workers' Compensation Leave | 0        | 0        | 0                | 0                |
| <b>Total</b>                | <b>1</b> | <b>3</b> | <b>11</b>        | <b>26</b>        |

SEPARATION: None

RETIREMENT: None

APPOINTMENTS: None

OPEN POSITIONS: Library Assistant-Teen Services, Public Services



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**PLACENTIA LIBRARY DISTRICT BOARD OF TRUSTEES**

**TO:** Jeanette Contreras, Library Director  
**FROM:** Jon Legree, Technology Manager  
**SUBJECT:** Circulation Activity Report: April 2019  
**DATE:** May 17, 2019

| <u>CIRCULATION</u>             | Apr-19 | Apr-18 | Y-T-D<br>2018-19 | Y-T-D<br>2017-18 | Y-T-D<br>% change |
|--------------------------------|--------|--------|------------------|------------------|-------------------|
| New Patron Registrations       | 91     | 234    | 1,965            | 2,761            | -28.8%            |
| Total Circulation              | 3,204  | 20,609 | 142,799          | 219,623          | -35.0%            |
| Total Active Borrowers*        | 6,024  | 7,751  |                  |                  |                   |
| Attendance                     | 10,642 | 25,452 | 168,315          | 246,599          | -31.7%            |
| Adult Fiction                  | 385    | 2,283  | 11,121           | 25,107           | -55.7%            |
| Adult Nonfiction               | 172    | 1,908  | 6,678            | 19,042           | -64.9%            |
| Adult Magazines                | 0      | 155    | 559              | 1,865            | -70.0%            |
| Adult Music CDs                | 0      | 153    | 97               | 946              | -89.7%            |
| Adult Audio Books              | 146    | 500    | 2,582            | 5,156            | -49.9%            |
| Adult DVDs                     | 1,123  | 2,167  | 17,064           | 23,127           | -26.2%            |
| Library of Things              | 29     | 31     | 1,517            | 236              | 542.8%            |
| YA Fiction                     | 64     | 1055   | 3,722            | 10,824           | -65.6%            |
| YA Nonfiction                  | 13     | 106    | 441              | 996              | -55.7%            |
| YA Audio Books                 | 0      | 0      | 0                | 0                | 0.0%              |
| Video Games                    | 71     | 34     | 630              | 609              | 3.4%              |
| JV Fiction                     | 457    | 8,548  | 46,411           | 96,467           | -51.9%            |
| JV Nonfiction                  | 116    | 2,415  | 6,453            | 23,502           | -72.5%            |
| JV Magazines                   | 0      | 2      | 30               | 28               | 7.1%              |
| JV Music CDs                   | 0      | 23     | 66               | 270              | -75.6%            |
| JV Audio Books                 | 0      | 39     | 32               | 392              | -91.8%            |
| JV DVDs                        | 577    | 1,190  | 8,087            | 14,169           | -42.9%            |
| * YTD % change not applicable. |        |        |                  |                  |                   |

**TEST PROCTORING**

| April<br>2019 | April<br>2018 | Y-T-D<br>2018-19 | Y-T-D<br>2017-18 | Y-T-D<br>% change |
|---------------|---------------|------------------|------------------|-------------------|
| 3             | 14            | 105              | 141              | -26%              |

**PATRON COUNT**

| Gate Count                            |               |                  |                  |                   | Hours<br>Open   | Average<br>Per Hour | Open<br>29 days |                          |  |  |        |  |  |
|---------------------------------------|---------------|------------------|------------------|-------------------|---|---------------------|-----------------|--------------------------|--|--|--------|--|--|
| April<br>2019                         | April<br>2018 | Y-T-D<br>2018-19 | Y-T-D<br>2017-18 | Y-T-D<br>% change |   |                     |                 |                          |  |  |        |  |  |
| 6,909                                 | 24,060        | 132,630          | 239,957          | -81%              | 267   | 26                  |                 |                          |  |  |        |  |  |
| Open 29 days; Closed 1 day (4 hours). |               |                  |                  |                   |   |                     |                 |                          |  |  |        |  |  |
| Outside Gate Counts                   |               |                  |                  |                   | <table border="1"> <tr> <th colspan="3">Library Attendance Total</th> </tr> <tr> <td colspan="3">10,642</td> </tr> </table> |                     |                 | Library Attendance Total |  |  | 10,642 |  |  |
| Library Attendance Total              |               |                  |                  |                   |   |                     |                 |                          |  |  |        |  |  |
| 10,642                                |               |                  |                  |                   |   |                     |                 |                          |  |  |        |  |  |
| Adult/Teen Programs                   |               |                  |                  |                   |   |                     |                 |                          |  |  |        |  |  |
| Children Programs                     |               |                  |                  |                   |   |                     |                 |                          |  |  |        |  |  |
| Outreach Events                       |               |                  |                  |                   |   |                     |                 |                          |  |  |        |  |  |
| Meeting Room Rentals                  |               |                  |                  |                   |   |                     |                 |                          |  |  |        |  |  |
| <b>TOTAL</b>                          | 3733          |                  |                  |                   |   |                     |                 |                          |  |  |        |  |  |

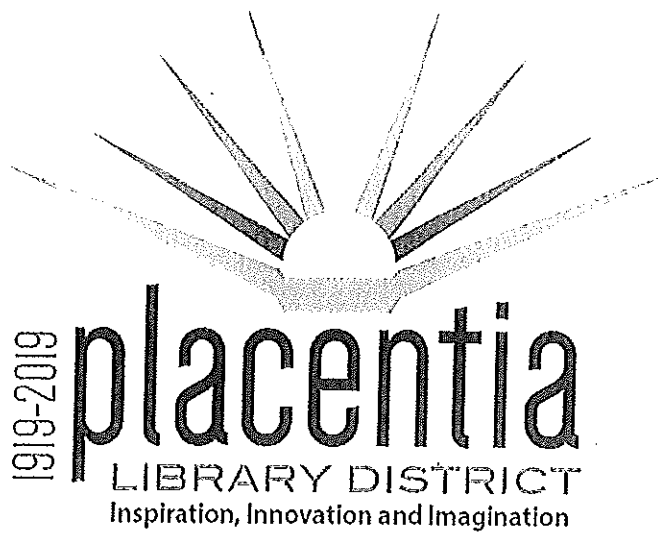
**PASSPORTS**

| Apr. 2019         | SUN        | MON        | TUES       | WED       | THURS      | FRI       | SAT        | HOUR<br>TOTALS |
|-------------------|------------|------------|------------|-----------|------------|-----------|------------|----------------|
| 9:00              |            | 5          | 3          | 3         | 4          | 1         | 22         | 38             |
| 10:00             |            | 7          | 7          | 7         | 6          | 2         | 27         | 56             |
| 11:00             |            | 7          | 5          | 10        | 8          | 6         | 29         | 65             |
| 12:00             |            | 10         | 7          | 2         | 8          | 9         | 26         | 62             |
| 1:00              | 40         | 6          | 4          | 7         | 5          | 9         | 28         | 99             |
| 2:00              | 34         | 9          | 10         | 9         | 13         | 10        | 34         | 119            |
| 3:00              | 26         | 15         | 7          | 9         | 13         | 11        | 29         | 110            |
| 4:00              | 6          | 15         | 14         | 13        | 14         | 3         | 11         | 76             |
| 5:00              |            | 25         | 18         | 9         | 16         |           |            | 68             |
| 6:00              |            | 16         | 20         | 11        | 15         |           |            | 62             |
| 7:00              |            | 7          | 9          | 3         | 1          |           |            | 20             |
| <b>DAY TOTALS</b> | <b>106</b> | <b>122</b> | <b>104</b> | <b>83</b> | <b>103</b> | <b>51</b> | <b>206</b> | <b>775</b>     |

| April<br>2019 | April<br>2018 | Y-T-D<br>2018-19 | Y-T-D<br>2017-18 | Y-T-D<br>% change |
|---------------|---------------|------------------|------------------|-------------------|
| 775           | 974           | 5240             | 6351             | -21%              |

STAFF ACTIVITY

- Katie attended Friday Huddles on April 5<sup>th</sup>, 12<sup>th</sup>.
- Jon attended 2 CSDA webinars.
- Staff attended the Police and Fire recognition breakfast.
- Support Services staff attended 2 staff recognition luncheons.
- Jon attended a meeting at Anaheim Central library about the separation.
- Tim worked at the LOT 318 homework club on April 3, 10, 17 and 24.



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**PLACENTIA LIBRARY DISTRICT BOARD OF TRUSTEES**

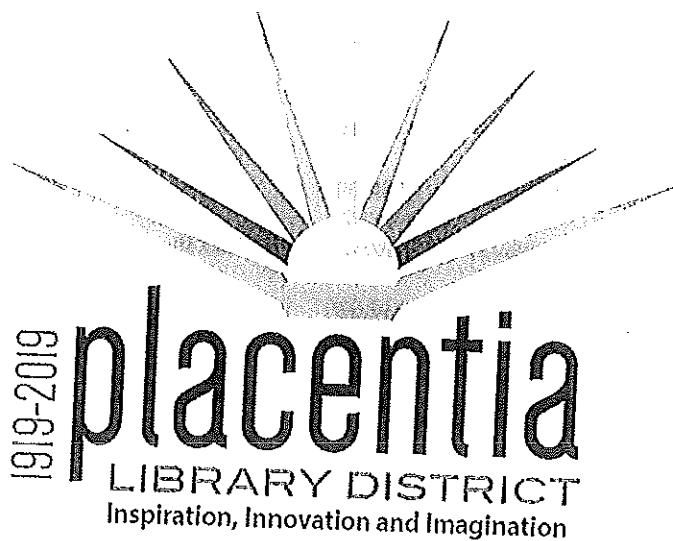
**TO:** Jeanette Contreras, Library Director  
**FROM:** Fernando Maldonado, Business Manager  
**SUBJECT:** City of Placentia - Shared Maintenance Costs through April 2019  
**DATE:** May 17, 2019

**CITY OF PLACENTIA INVOICES**

| PERIOD COVERED<br>FY 2018-2019 | INVOICE DATE | SO. CAL EDISON    | TURF (Merchants)   | GROUND (SA Aquatics) | AT&T           | FACILITY MAINT | <u>TOTAL</u>       |
|--------------------------------|--------------|-------------------|--------------------|----------------------|----------------|----------------|--------------------|
| Jul-18                         | 07/26/18     | 8,222.06          | 1,258.19           | 285.00               | 10.14          | 0.00           | 9,775.39           |
| Aug-18                         | 08/27/18     | 9,438.40          |                    | 142.50               | 10.16          | 0.00           | 9,591.06           |
| Sep-18                         | 9/18/18      | 9,300.92          | 2,985.34           | 142.50               | 10.55          | 0.00           | 12,439.31          |
| Oct-18                         | 10/15/18     | *                 | 1,492.67           | *                    | *              | *              | 1,492.67           |
| Nov-18                         | 11/08/18     | 11,870.17         | 1,492.67           | 142.50               | 10.30          | *              | 13,515.64          |
| Dec-18                         | *            | *                 | *                  | *                    | *              | 0.00           | *                  |
| Jan-19                         | 12/18/18     | 4,218.28          | 1,492.67           | 285.00               | 20.75          | *              | 6,016.70           |
| Feb-19                         | 02/27/19     | 2,892.69          | 1,492.67           | *                    | 10.36          | *              | 4,395.72           |
| Mar-19                         | 03/19/19     | 2,139.23          | 1,492.67           | 142.50               | 10.36          | *              | 3,784.76           |
| Apr-19                         | 04/16/19     | 2,910.43          | 1,492.67           | 142.50               | 10.36          | *              | 4,555.96           |
| May-19                         |              |                   |                    |                      |                |                |                    |
| Jun-19                         |              |                   |                    |                      |                |                |                    |
|                                | <b>TOTAL</b> | <b>\$50992.18</b> | <b>\$13,199.55</b> | <b>\$1,282.50</b>    | <b>\$92.98</b> | <b>0.00</b>    | <b>\$65,567.21</b> |

\* City Billing  
Not Received

| PERIOD IN<br>FY 2017-2018 | INVOICE DATE | SO. CAL EDISON     | TURF             | GROUND          | AT&T          | FACILITY MAINT | <u>TOTAL</u>       |
|---------------------------|--------------|--------------------|------------------|-----------------|---------------|----------------|--------------------|
| Jul-17                    | *            | *                  | *                | *               | *             | 0.00           | *                  |
| Aug-17                    | 08-15-17     | 16,166.86          | *                | 42.50           | 19.79         | 0.00           | \$16,229.15        |
| Sep-17                    | 09-20-17     | 8,558.53           | 1,452.49         | *               | *             | 0.00           | \$10,011.02        |
| Oct-17                    | 10-26-17     | 8,314.14           | 2,904.98         | 427.50          | 10.87         | 0.00           | \$11,657.49        |
| Nov-17                    | 11-21-17     | 5,075.75           | *                | *               | 9.59          | 0.00           | \$5,085.34         |
| Dec-17                    | *            | *                  | *                | +               | *             | 0.00           | *                  |
| Jan-18                    | 01-16-18     | 8,800.12           | 1,452.49         | 285.00          | 8.10          | 0.00           | \$10,545.71        |
| Feb-18                    | 02-21-18     | *                  | *                | 142.50          | 10.13         | 0.00           | \$152.63           |
| Mar-18                    | 03-28-18     | 9,310.29           | *                | 142.50          | *             | 0.00           | \$9,452.79         |
| Apr-18                    | 04-04-18     | *                  | 6,290.93         | *               | *             | 0.00           | \$6,290.93         |
| May-18                    | 05-15-18     | 4,556.81           | 2,516.38         | 285.00          | 30.52         | 0.00           | \$7,388.71         |
| Jun-18                    | 06-13-18     | 9,993.33           | *                | 142.5           | 20.25         | 0.00           | \$10,156.08        |
|                           | <b>TOTAL</b> | <b>\$70,775.83</b> | <b>14,617.27</b> | <b>1,467.50</b> | <b>109.25</b> | <b>0.00</b>    | <b>\$86,969.85</b> |



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**PLACENTIA LIBRARY DISTRICT BOARD OF TRUSTEES**

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**TO:** Library Board of Trustees

**FROM:** Jeanette Contreras, Library Director  
Fernando Maldonado, Business Manager

**SUBJECT:** Administration Report for April 2019

**DATE:** May 17, 2019

**Meetings:**

- Library Board of Trustees: April 2<sup>nd</sup>, 15<sup>th</sup>
- Huddles: April 5<sup>th</sup>, 12<sup>th</sup>, 19<sup>th</sup>, 26<sup>th</sup>
- All-Staff Meeting: April 16<sup>th</sup>
- Summer Reading Celebration: April 16<sup>th</sup>
- PLFF: April 8<sup>th</sup>, 17<sup>th</sup>
- Fundraising Committee: April 12<sup>th</sup>, 19<sup>th</sup>
- Storage Room Committee: April 12<sup>th</sup> to discuss space allocation for departments, PLFF and Bodhi
- Joint Use Meeting with the City: April 1<sup>st</sup>
- Anaheim Public Library: April 30<sup>th</sup> to discuss dissolution of shared integration library system (ILS) for fiscal year 2019-2020.
- Johnson Controls, Inc. (JCI): April 5<sup>th</sup>, 12<sup>th</sup>, 17<sup>th</sup> to discuss energy efficiency project progress
- Vincor Construction, Inc.: April 11<sup>th</sup>, 18<sup>th</sup> to discuss renovation project progress
- Bank of the West & Wells Fargo: April 2<sup>nd</sup> to update signers' records
- Aflac: April 5<sup>th</sup> to discuss insurance options for staff
- Bodhi: April 16<sup>th</sup> to confirm layout for Bodhi area
- City of Yorba Linda City Manager & Assistant City Manager: April 18<sup>th</sup> tour of the renovated area
- Progress Power Energy: April 18<sup>th</sup> with Mr. Bryson Barnella
- Mr. Norman Haussmann: April 25<sup>th</sup> to provide update on renovation project

**Facilities:**

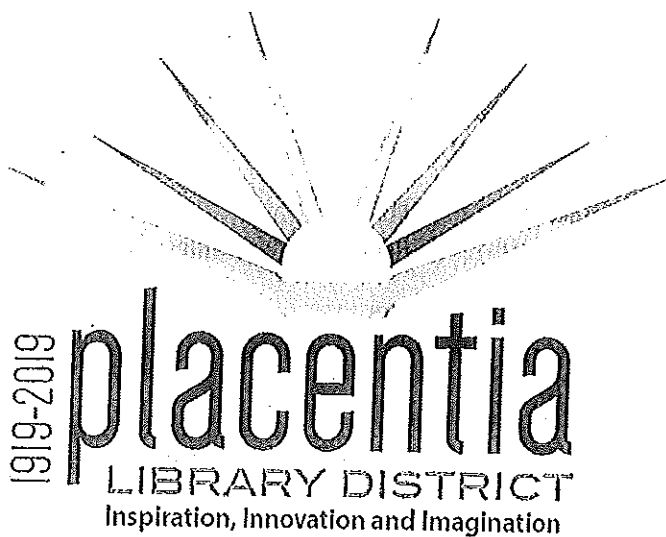
- April 30<sup>th</sup>: Staff entrance corridor re-opened.

**Training/Workshops/Conference:**

- California Society of Municipal Finance Officers Orange County Chapter Luncheon – April 18<sup>th</sup>
- Library Directors Forum – April 22<sup>nd</sup> - 23<sup>rd</sup>
- Training with Mr. Robert Housley, Accounting Consultant – April 5<sup>th</sup>, 30<sup>th</sup>

**Events:**

- Coleen Wakais' Retirement Celebration: April 5<sup>th</sup>
- Promotion luncheon for new Business Manager: April 16<sup>th</sup>
- PLFF Bookstore Volunteer Luncheon: April 17<sup>th</sup>
- Police, Fire & Safety Recognition Breakfast: April 25<sup>th</sup>



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**PLACENTIA LIBRARY DISTRICT BOARD OF TRUSTEES**

**TO:** Jeanette Contreras, Library Director  
**FROM:** Yesenia Baltierra, Public Services Manager  
**SUBJECT:** Children’s Services Report for April 2019  
**DATE:** May 20, 2019

**MONTHLY STATISTICS**

**Program Statistics**

| Type of Program | Number of Programs | Total Attendance | Number of Programs | Total Attendance | Total Programs | Total Attendance | Total Programs | Total Attendance | % Change Programs | % Change Attendance |
|-----------------|--------------------|------------------|--------------------|------------------|----------------|------------------|----------------|------------------|-------------------|---------------------|
|                 | April 2019         | April 2019       | April 2018         | April 2018       | Y-T-D 2018-19  | Y-T-D 2018-19    | Y-T-D 2017-18  | Y-T-D 2017-18    | Y-T-D 17/18-18/19 | Y-T-D 17/18-18/19   |
| Storytime       | 11                 | 461              | 12                 | 542              | 78             | 3,540            | 112            | 4,648            | -30.36%           | -23.84%             |
| Educational     | 13                 | 90               | 18                 | 548              | 121            | 7,370            | 158            | 4,326            | -23.42%           | 70.37%              |
| Reading         | 0                  | 0                | 1                  | 58               | 11             | 1,644            | 24             | 2,162            | -54.17%           | -23.96%             |
| Seasonal        | 2                  | 2,559            | 1                  | 103              | 3              | 2,759            | 6              | 2,826            | -50.00%           | -2.37%              |
| Totals          | 26                 | 3,110            | 32                 | 1,251            | 172            | 13,337           | 300            | 13,962           | -42.67%           | -4.48%              |

**Reference/Computer Usage Statistics**

|                            | April 2019 | April 2018 | Y-T-D 2018-2019 | Y-T-D 2017-2018 | Y-T-D % change |
|----------------------------|------------|------------|-----------------|-----------------|----------------|
| Reference—in person        | 185        | 516        | 3,430           | 4,899           | -29.99%        |
| Reference--telephone       | 15         | 14         | 177             | 249             | -28.92%        |
| <b>Total Reference</b>     | <b>200</b> | <b>530</b> | <b>3,607</b>    | <b>5,148</b>    | <b>-29.93%</b> |
| *Children's computer usage | 0          | 786        | 2,449           | 7,705           | -68.22%        |

\*Public access computers are no longer available to the public.

**ACHIEVEMENTS**

- Yesenia Baltierra managed the Easter Eggcitement and Spring Carnival on April 13th.
- Venessa Faber coordinated the Egg Hunt at Easter Eggcitement on April 13<sup>th</sup>.
- Deanna White and Ana Balderas delivered English, Spanish, and Bilingual Storytimes at Easter Eggcitement on April 13<sup>th</sup>.
- Kathy Carn attended the Emergency Worker Recognition Breakfast on April 25<sup>th</sup>.
- Lori Worden continued outreach at Tynes Elementary in April.
- Kathy Carn continued outreach at Ruby Drive Elementary in April.
- Ana Balderas continued outreach at LOT 318 in April.
- Children’s Services staff assisted with the PLFF Book Store project.
- Ana Balderas delivered bilingual programming for El Dia de los Ninos/Libros on April 30<sup>th</sup>.

**MEETINGS**

- Kathy Carn met with Yesenia Baltierra to discuss Easter Eggcitement on April 2<sup>nd</sup>.
- Kathy Carn and Yesenia Baltierra met with City of Placentia staff to discuss Easter Eggcitement on April 2<sup>nd</sup>.
- Kathy Carn attended the Placentia Community Foundation Grant orientation on April 4<sup>th</sup>.
- Kathy Carn, Venessa Faber, Ana Balderas, and Venessa Faber attended the Children's Services meeting on April 4<sup>th</sup>.
- Deanna White met with Ana Balderas to finalize the bilingual storytime for Easter Eggcitement on April 9<sup>th</sup>.
- Kathy Carn met with Yesenia Baltierra to discuss Children's Services on April 16<sup>th</sup>.
- Kathy Carn, Deanna White, Yesenia Baltierra, and Ana Balderas attended the All Staff Meeting on April 16<sup>th</sup>.
- Lori Worden assisted with set-up and attended the Placentia Library Friends Foundation volunteer luncheon on April 17<sup>th</sup>.
- Kathy Carn, Wendy Amireh, and Yesenia Baltierra met for a Supervisors Meeting on April 24<sup>th</sup>.
- Children's Services staff attended the Public Services Team Meeting led by Yesenia Baltierra on April 25<sup>th</sup>.

**PROFESSIONAL DEVELOPMENT**

- Yesenia Baltierra attended the Skill Building for Library Leaders training on April 22<sup>nd</sup>.

**PLACENTIA LIBRARY DISTRICT BOARD OF TRUSTEES**

**TO:** Jeanette Contreras, Library Director

**FROM:** Yesenia Baltierra, Public Services Manager

**SUBJECT:** Adult Services Report for April 2019

**DATE:** May 14, 2019

**MONTHLY STATISTICS**

| <b>Information Desk Activity</b>             | <b>April</b> | <b>April</b> | <b>Y-T-D</b>   | <b>Y-T-D</b>   | <b>Y-T-D</b>    |
|--|--------------|--------------|----------------|----------------|-----------------|
|  | <b>2019</b>  | <b>2018</b>  | <b>2018-19</b> | <b>2017-18</b> | <b>% change</b> |
| Information -- in person                     | 999          | 1,528        | 12,349         | 15,158         | -18.53%         |
| Information -- telephone                     | 558          | 719          | 5,945          | 6,863          | -13.38%         |
| Information -- email/chat                    | 4            | 4            | 38             | 129            | -70.54%         |
| Technology assistance                        | 0            | 284          | 1,348          | 2,520          | -46.51%         |
| Guest passes                                 | 0            | 65           | 635            | 674            | -5.79%          |
| Adult and Children's computer use (desktops) | 0            | 2,207        | 8,648          | 21,188         | -59.18%         |
| Adult computer usage (desktop)               | 0            | 1,888        | 9,032          | 17,396         | -48.08%         |
| Public computer use (express laptops)        | 0            | 21           | 11             | 122            | -90.98%         |

| <b>History Room Activity</b> | <b>April</b> | <b>April</b> | <b>Y-T-D</b>     | <b>Y-T-D</b>     | <b>Y-T-D</b>    |
|------------------------------|--------------|--------------|------------------|------------------|-----------------|
|                              | <b>2019</b>  | <b>2018</b>  | <b>FY2018-19</b> | <b>FY2017-18</b> | <b>% change</b> |
| History Room Visitors        | 6            | 8            | 42               | 95               | -55.79%         |

| <b>Volunteer Hours</b>       | <b>April</b>  | <b>April</b>   | <b>Y-T-D</b>   | <b>Y-T-D</b>   | <b>Y-T-D</b>    |
|------------------------------|---------------|----------------|----------------|----------------|-----------------|
|                              | <b>2019</b>   | <b>2018</b>    | <b>2018-19</b> | <b>2017-18</b> | <b>% change</b> |
| History Room                 | 10.25         | 44             | 130.75         | 493.5          | -73.51%         |
| PLFF                         | 373           | 387.17         | 3462.1         | 4292.71        | -19.35%         |
| General Library              | 118.75        | 384            | 2108.44        | 5569.37        | -62.14%         |
| Technology                   | 0             | 1.75           | 0              | 20             | -100.00%        |
| Homework Club                | 58.75         | 57             | 504.5          | 542.85         | -7.06%          |
| Adult Literacy Tutors        | 152.5         | 210.25         | 1300.69        | 1834.5         | -29.10%         |
| PTAC                         | 48            | 29.25          | 689.5          | 966.25         | -28.64%         |
| Summer Reading Program       | 0             | 0              | 675.75         | 1365.62        | -50.52%         |
| <b>Total Volunteer Hours</b> | <b>761.25</b> | <b>1113.42</b> | <b>9547.48</b> | <b>15084.8</b> | <b>-36.71%</b>  |

| <b>Public Services Outreach Activity</b> | <b>April</b> | <b>April</b> | <b>Y-T-D</b>     | <b>Y-T-D</b>     | <b>Y-T-D</b>    |
|--|--------------|--------------|------------------|------------------|-----------------|
|  | <b>2019</b>  | <b>2018</b>  | <b>FY2018-19</b> | <b>FY2017-18</b> | <b>% change</b> |
|  |              |              |                  |                  |                 |

|                     |     |     |      |       |         |
|---------------------|-----|-----|------|-------|---------|
| Outreach Attendance | 252 | 421 | 5113 | 12995 | -60.65% |
|---------------------|-----|-----|------|-------|---------|

**Adult Programs**

| Type of Program             | Number of Programs April | Attendance April | Number of Programs April | Attendance April | Number of Programs FYTD | Attendance FYTD | Number of Programs FYTD | Attendance FYTD | Number of Programs FYTD % change | Attendance FYTD % change |
|-----------------------------|--------------------------|------------------|--------------------------|------------------|-------------------------|-----------------|-------------------------|-----------------|----------------------------------|--------------------------|
| Date                        | 2019                     | 2019             | 2018                     | 2018             | FY1819                  | FY1819          | FY1718                  | FY1718          |                                  |                          |
| Book Club                   | 0                        | 0                | 1                        | 8                | 2                       | 16              | 10                      | 61              | -80.00%                          | -73.77%                  |
| Computer Workshops          | 0                        | 0                | 3                        | 33               | 0                       | 0               | 13                      | 138             | -100.00%                         | -100.00%                 |
| Educational Programs        | 1                        | 26               | 1                        | 45               | 3                       | 99              | 11                      | 2377            | -72.73%                          | -95.84%                  |
| Fine Art Programs           | 0                        | 0                | 2                        | 37               | 3                       | 341             | 9                       | 244             | -66.67%                          | 39.75%                   |
| Health & Fitness Programs   | 0                        | 0                | 3                        | 37               | 0                       | 0               | 13                      | 269             | -100.00%                         | -100.00%                 |
| History Room Programs       | 3                        | 275              | 0                        | 0                | 7                       | 512             | 6                       | 167             | 16.67%                           | 206.59%                  |
| Home and Lifestyle Programs | 0                        | 0                | 0                        | 0                | 0                       | 0               | 3                       | 330             | -100.00%                         | -100.00%                 |
| Literacy Programs           | 3                        | 28               | 7                        | 64               | 49                      | 677             | 60                      | 625             | -18.33%                          | 8.32%                    |
| Reading Programs            | 0                        | 0                | 0                        | 0                | 5                       | 654             | 5                       | 595             | 0.00%                            | 9.92%                    |
| Volunteer Programs          | 1                        | 12               | 1                        | 11               | 6                       | 78              | 17                      | 204             | -64.71%                          | -61.76%                  |
| <b>Totals</b>               | <b>8</b>                 | <b>341</b>       | <b>18</b>                | <b>235</b>       | <b>75</b>               | <b>2,377</b>    | <b>147</b>              | <b>5,010</b>    | <b>-48.98%</b>                   | <b>-52.55%</b>           |

| Literacy                  | YTD1819 | YTD1718 | % Change |
|---------------------------|---------|---------|----------|
| English Literacy Students | 59      | 43      | 37.21%   |
| Students Graduated        | 3       | 15      | -80.00%  |
| English Literacy Tutors   | 46      | 38      | 21.05%   |

**Teen Programs**

| Type of Program        | Number of Programs April | Attendance April | Number of Programs April | Attendance April | Number of Programs FYTD | Attendance FYTD | Number of Programs FYTD | Attendance FYTD | Number of Programs FYTD % change | Attendance FYTD % change |
|------------------------|--------------------------|------------------|--------------------------|------------------|-------------------------|-----------------|-------------------------|-----------------|----------------------------------|--------------------------|
| Date                   | 2019                     | 2019             | 2018                     | 2018             | FY1819                  | FY1819          | FY1718                  | FY1718          |                                  |                          |
| Collaboratory          | 0                        | 0                | 1                        | 12               | 4                       | 19              | 6                       | 88              | -33.33%                          | -78.41%                  |
| Friday Flicks          | 0                        | 0                | 4                        | 8                | 7                       | 29              | 34                      | 142             | -79.41%                          | -79.58%                  |
| PTAC                   | 2                        | 39               | 1                        | 26               | 19                      | 394             | 22                      | 483             | -13.64%                          | -18.43%                  |
| Summer Reading Program | 0                        | 0                | 0                        | 0                | 2                       | 122             | 2                       | 127             | 0.00%                            | -3.94%                   |
| Teen Misc.             | 0                        | 0                | 0                        | 0                | 1                       | 160             | 1                       | 61              | 0.00%                            | 162.30%                  |
| Test                   | 0                        | 0                | 0                        | 0                | 1                       | 14              | 4                       | 39              | -75.00%                          | -64.10%                  |
| The Vault              | 0                        | 0                | 0                        | 0                | 2                       | 167             | 4                       | 241             | -50.00%                          | -30.71%                  |
| <b>Totals</b>          | <b>2</b>                 | <b>39</b>        | <b>6</b>                 | <b>46</b>        | <b>26</b>               | <b>695</b>      | <b>73</b>               | <b>1,134</b>    | <b>-78.85%</b>                   | <b>-78.85%</b>           |



**ACHIEVEMENTS**

- Coleen Wakai coordinated Read, Write, Speak (RWS) Club on April 5th.
- Sally Federman coordinated RWS Club on April 12<sup>th</sup> and 26<sup>th</sup>.
- Victor Meza coordinated a PTAC meetings on April 4<sup>th</sup> and 18<sup>th</sup>
- Victor assisted in Mrs. Kim's class at Tynes Elementary on April 3<sup>rd</sup> and 10<sup>th</sup>.
- Michelle Meades shipped the newspapers for the California Revealed Grant on April 1<sup>st</sup>.
- Michelle Meades coordinated the 3<sup>rd</sup> grade visits on April 2<sup>nd</sup>, 12<sup>th</sup>, and 29<sup>th</sup>.
- Michelle Meades shipped the yearbooks for the OCI yearbook digitization project on April 16<sup>th</sup>.
- Michelle Meades and Victor Meza coordinated the volunteer orientation on April 25<sup>th</sup>.
- Adult Services Staff reviewed items in the PLFF pod April 22<sup>nd</sup>-25<sup>th</sup>.
- Wendy Amireh participated in the Huntington Beach interviews on April 9<sup>th</sup>.
- Wendy Amireh and Yesenia Baltierra participated in the Library Assistant Literacy second interviews on April 17<sup>th</sup>.
- Michelle Meades participated in the Orange Public Library interviews on April 23<sup>rd</sup>.
- Victor Meza submitted the Teen Top Ten grant to PLA on April 11<sup>th</sup>.
- Yesenia Baltierra participated in the City of Orange Librarian III interviews on April 9<sup>th</sup> and 10<sup>th</sup>.
- Yesenia Baltierra participated as a speaker for the Harwood Innovators Lab webinar on April 23<sup>rd</sup>.

**MEETINGS**

- Wendy Amireh and Yesenia Baltierra met on April 2<sup>nd</sup>.
- Wendy Amireh attended the supervisors meetings led by Yesenia Baltierra on April 10<sup>th</sup>, 24<sup>th</sup> and 26<sup>th</sup>.
- Wendy Amireh attended Kiwanis meetings on April 4<sup>th</sup>, 11<sup>th</sup>, 18<sup>th</sup> and 25<sup>th</sup>.
- Michelle Meades met with the Wendy Amireh on April 9<sup>th</sup>.
- Michelle Meades met with Coleen Wakai on April 4<sup>th</sup>.
- Public Services staff attended the Public Services Meeting led by Yesenia Baltierra on April 25<sup>th</sup>.
- Sally Federman met with Wendy Amireh on April 26<sup>th</sup>.
- Sally Federman met with individual literacy tutors on April 25<sup>th</sup>.
- Jeannie Killianey and Victor Meza met on April 8<sup>th</sup>.
- Jeannie Killianey and Wendy Amireh met on April 8<sup>th</sup>.
- Victor Meza met with Wendy Amireh on April 8<sup>th</sup> and 15<sup>th</sup>.
- Victor Meza met with a parent about PTAC on April 10<sup>th</sup>.
- Wendy Amireh met with PLFF and Jeanette Contreras on April 18<sup>th</sup>.
- Yesenia Baltierra attended the PRTWC meeting on April 3<sup>rd</sup>.
- Yesenia Baltierra attended the PLFF Fundraising Committee on April 12<sup>th</sup> and 26<sup>th</sup>.
- Yesenia Baltierra attended the Leadership Challenge Team meeting on April 18<sup>th</sup>.

**PROFESSIONAL DEVELOPMENT**

None



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**PLACENTIA LIBRARY DISTRICT BOARD OF TRUSTEES**


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**TO:** Jeanette Contreras, Library Director

**FROM:** Tim Worden, Emerging Technologies Assistant

**SUBJECT:** Placentia Library Website & Technology Report for April 2019

**DATE:** May 17, 2019

| <u>On-line database usage</u>                                   | April<br>2019            | Onsite<br>Usage 4/19 | Remote<br>Usage 4/19 | April<br>2018 | Y-T-D<br>2018-19 | Y-T-D<br>2017-18 | Y-T-D<br>% change |
|---|--------------------------|----------------------|----------------------|---------------|------------------|------------------|-------------------|
| Placentia Library Catalog                                       | 43,455                   | N/A                  | N/A                  | 31,661        | 194,759          | 179,401          | 9%                |
| General Reference Center  | 66                       | 58                   | 8                    | 62            | 951              | 393              | 142%              |
| Biography In Context  | 201                      | 152                  | 49                   | 156           | 3,880            | 3,729            | 4%                |
| Opposing Viewpoints   | 962                      | 913                  | 49                   | 83            | 4,087            | 1,606            | 154%              |
| Consumer Reports (new July 2016)                                | 386                      | N/A                  | N/A                  | 132           | 1,377            | 777              | 77%               |
| Freegal   | 911                      | N/A                  | N/A                  | 1,032         | 8,933            | 10,318           | -13%              |
| Heritage Quest  | 192                      | N/A                  | N/A                  | 376           | 1,132            | 2,771            | -59%              |
| Novelist  | 4                        | N/A                  | N/A                  | 33            | 452              | 290              | 56%               |
| Pronunciator  | 19                       | N/A                  | N/A                  | 55            | 219              | 464              | -53%              |
| ABC Mouse   | 39                       | N/A                  | N/A                  | 76            | 417              | 593              | -30%              |
| ABC Mouse - Bring Reading Home<br>(New March 2018)              | Data<br>Not<br>Available | N/A                  | N/A                  | 2             | 4                | N/A              | N/A               |
| World Book Online<br>(New February 2018)                        | 47                       | N/A                  | N/A                  | 4             | 45               | N/A              | N/A               |
| Career Cruising   | 0                        | N/A                  | N/A                  | 9             | 45               | 87               | -48%              |
| Tumblebooks   | 93                       | N/A                  | N/A                  | 75            | 762              | 1,078            | -29%              |
| Reference USA   | 177                      | N/A                  | N/A                  | 200           | 1,879            | 3,018            | -38%              |
| Enki  | 0                        | N/A                  | N/A                  | 7             | 23               | 119              | -81%              |
| Hoopla  | 1110                     | N/A                  | N/A                  | 752           | 10,480           | 6,862            | 53%               |
| Overdrive e-books   | 1,545                    | N/A                  | N/A                  | 1,240         | 16,020           | 16,155           | -1%               |
| Overdrive audio books   | 1,126                    | N/A                  | N/A                  | 789           | 10,129           | 10,224           | -1%               |
| Overdrive e-books - Placentia<br>Advantage (New March 2018)     | 1,103                    | N/A                  | N/A                  | 1,495         | 3,049            | N/A              | N/A               |
| Overdrive audio books - Placentia<br>Advantage (New March 2018) | 1,027                    | N/A                  | N/A                  | 1,400         | 2,830            | N/A              | N/A               |
| Zinio   | 156                      | N/A                  | N/A                  | 47            | 1,245            | 818              | 52%               |
| <b>TOTAL DATABASE USAGE</b>                                     | <b>52,619</b>            | <b>1,123</b>         | <b>106</b>           | <b>39,686</b> | <b>262,718</b>   | <b>238,703</b>   | <b>10%</b>        |

**Computer & Online Resource Use**

|                         | April<br>2019 | April<br>2018 | Y-T-D<br>2018-19 | Y-T-D<br>2017-18 | Y-T-D<br>% change |
|-------------------------|---------------|---------------|------------------|------------------|-------------------|
| Placentia Residents     | 1,227         | 1,015         | 9,921            | 16,116           | -38%              |
| Non-Placentia Residents | 1,070         | 773           | 7,861            | 11,687           | -33%              |
| <b>Total</b>            | <b>2,297</b>  | <b>1,788</b>  | <b>17,782</b>    | <b>27,803</b>    | <b>-36%</b>       |

**Website Traffic**

|                       | April<br>2019 | April<br>2018 | Y-T-D<br>2018-19 | Y-T-D<br>2017-18 | Y-T-D<br>% change |
|-----------------------|---------------|---------------|------------------|------------------|-------------------|
| Website visits        | 7,959         | 10,631        | 80,396           | 120,942          | -34%              |
| Page Hits             | 14,346        | 18,253        | 138,623          | 204,467          | -32%              |
| Users                 | 4,384         | 6,203         | 44,721           | 70,348           | -36%              |
| Pages/Session         | 1.82          | 1.72          | N/A              | N/A              | N/A               |
| Avg. Session Duration | 00:02:22      | 00:02:28      | N/A              | N/A              | N/A               |
| % New Sessions        | 71            | N/A           | N/A              | N/A              | N/A               |

**Wifi Use**

|              | April<br>2019 | April<br>2018 | Y-T-D<br>2018-19 | Y-T-D<br>2017-18 | Y-T-D<br>% change |
|--------------|---------------|---------------|------------------|------------------|-------------------|
| <b>Total</b> | <b>4,695</b>  | <b>1,832</b>  | <b>18,097</b>    | <b>19,188</b>    | <b>-6%</b>        |

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**PLACENTIA LIBRARY DISTRICT BOARD OF TRUSTEES**

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**TO:** Library Board of Trustees

**FROM:** Jeanette Contreras, Library Director

**SUBJECT:** Authorize an Amendment to Placentia Library District Policy #6055 – Barbara & Ed Hemmerling Group Study Rooms

**DATE:** May 17, 2019

**BACKGROUND**

At the February 17, 2009 Library Board of Trustees meeting, the Board authorized the use of the teen room to be designated as a group study room. At the time of approval, the purpose of the Library study room is to provide a facility for students to meet and conduct group discussions for the advancement of their education. Students were required to register at the Children's Desk and provide a valid library card. Students' library cards will be returned after use of the study room. Reservations were taken during normal library hours and are required 24 hours before use of the study room. The last reservation of the day was accepted one hour before the library closed. Usage was for one hour and if there was no reservation for the study room, students can request an additional hour at a time.

In October 2018, Mrs. Barbara Hemmerling donated a substantial contribution towards the centennial renovation project, in hers and her late husband's honor. A former teacher at Charles Wagner School from 1966-1989, Mrs. Hemmerling taught third through sixth graders from 1966-1989 and through her passion for the students and profession, her students received one of the best learning experiences. A current board member of the Placentia Library Friends Foundation and the Placentia Round Table Women's Club, Mrs. Hemmerling has volunteered over 6,000 hours since 2007 for the Library. Her family has visited the Library since they moved to Placentia in 1963. Mrs. Hemmerling was honored with the distinction of being the Citizen of the Year in 2008 and due partly to her amazing service to the Library. Mrs. Hemmerling's husband, Ed graduated from the University of Redlands. They both married and he was drafted, serving in Korea. Mr. Hemmerling worked for Rockwell until he retired in 1989. A book enthusiast, Mr. Hemmerling can also be seen at the Library often helping with book sales and vending machines. Barbara and Ed Hemmerling are active members of the Placentia Library District community and though he has passed, Mrs. Hemmerling continues to support for the Library and through Mr. Hemmerling's memories.

At the April 15, 2019 Library Board of Trustees meeting, the Board authorized the group study rooms to be named the Barbara & Ed Hemmerling Group Study Rooms. Library staff requests the Board of Trustees review and adopt the amended policy for the Barbara & Ed Hemmerling Group Study Rooms, as presented.

Attachment A is Policy 6050 – Community Meeting Room Policy

Attachment B is the amended Policy 6055 – Group Study Rooms

**RECOMMENDATIONS**

1. Motion to authorize amendments to Policy 6055 – Group Study Rooms, as presented; and,
2. Motion for a roll call vote.
3. Roll call vote.

# Placentia Library District

## POLICY HANDBOOK

**POLICY TITLE:** Community Meeting Room Policy  
**POLICY NUMBER:** 6050

- 6050.1** The purpose of the Community Meeting Room is to provide facilities for educational and cultural activities that are a part of the Library program. The room may also be used by community groups or organizations (businesses, realty, and energy) that are educational or cultural in nature. The Board of Trustees has established the following conditions to govern the use of the Community Meeting Room.
- 6050.2** A fee of \$20 per hour for non-profit organizations and \$35 per hour for other groups is charged for each meeting or event held in the Community Meeting Room. The fee will be collected at time of application, and must be submitted at least two (2) weeks prior to use of the meeting room. The rental fee for applications submitted less than two (2) weeks will be non-refundable. The fee is waived for those meetings or events sponsored by the Library Staff or Board of Trustees. The fee will also be waived for the Friends of Placentia Library, the City of Placentia, and elected public officials for nonpartisan presentations.
- 6050.3** Application for use of the room will be made through the Circulation Department on the form provided for that purpose at least two (2) weeks prior to use of the meeting room. The department should be notified 24 hours in advance of any change in a scheduled meeting. No group may reserve the Community Meeting Room for more than three dates per application without approval by the Library Director.
- 6050.4** An administrative fee of \$25 will be incurred for cancellation notices less than two weeks in advance.
- 6050.5** Full room charges will be enforced for all "No Shows."
- 6050.6** Permission to use the room is not transferable.
- 6050.7** Upon reasonable notice, the Library reserves the right to require a group to reschedule or relocate within the facility if the Community Meeting Room is needed for a Library function.
- 6050.8** Organizations using the facility are responsible for moving the chairs from the storage area and for arranging them and other furniture. Chairs are to be returned to the storage area after meeting. If library staff is needed to set up or return furniture, an additional fee of \$20 per hour is charged.

- 6050.9 The person who signs the application form will be deemed an official representative of the group, and liable for any damage to library and facilities. The person signing the application form must be at least 18 years old.
- 6050.10 Permission will not be granted for religious services, Sunday school classes, or to formal religious groups and organizations.
- 6050.11 Permission to use the facilities will not be granted to an individual or group representing a single political party or political action group except that in the interest of civic enlightenment and public education, use may be granted for political meetings provided all factions are invited and/or represented at the given meeting.
- 6050.12 No meetings or activities will be held for the purpose of advancing any doctrine or theory subversive under the Constitution of the United States or the State of California.
- 6050.13 Meals may not be served in the Community Meeting Room. If light refreshments are provided, the kitchenette must be left clean. The Library does not have supplies available for serving refreshments.
- 6050.14 There is a \$50 refundable deposit/cleaning fee required at time of application.
- 6050.15 Alcoholic beverages are prohibited.
- 6050.16 Use of the Community Meeting Room does not constitute an endorsement of the policies or beliefs of the group by the Library Board of Trustees or Library Staff and furthermore, the Board and Staff will not be held responsible for any action undertaken or administered by any organization.
- 6050.17 Personal property brought to or into the Community Meeting Room by any user is done so at the user's risk.
- 6050.18 Permits may be revoked by the Library Director whenever there has been a violation of these rules.
- 6050.19 Community Meeting Room must be vacated when the library closes; a \$25 fee will be incurred every hour after the library is closed. Exceptions will require approval from the Library Director.
- 6050.20 If a question should arise on the interpretation of these regulations, the matter is subject to the final decision of the Board of Trustees. These regulations may be changed or amended at any time by the Board of Trustees.
- 6050.21 Capacity limitations: 135
- 6050.22 Organizations requiring the presence of a staff member, will incur the cost of \$25 per hour per staff, after closing hours.

6050.23 Equipment available for the Community Meeting Room

6050.32.1 100 Chairs

6050.23.2 15 8' Tables

6050.23.3 Kitchenette

6050.23.4 Sound System

6050.23.5 1 Lectern

6050.23.6 2 Flags (American and State flag)

6050.23.7 Writing Board (Requires special markers)

6050.23.8 Santa Chair (\$25 Rental Fee)

6050.23.9 Projector (\$15 Rental Fee)

6050.23.10 Piano (Cost of tune up)



# Placentia Library District

## POLICY MANUAL

**POLICY TITLE:** Barbara & Ed Hemmerling Group Study Rooms  
**POLICY NUMBER:** 6055

### Proposed Policy

The Placentia Library District is committed to providing an environment that is conducive to study and group collaboration. The Library provides our patrons access to the Barbara & Ed Hemmerling group study rooms within the following guidelines:

**6055.1** The purpose of the Library study room is to provide a space for patrons to meet and collaborate. The Library will provide equal access to all patrons. The Library has two study rooms with a capacity of six people per room at one time. There is no charge for use of the study rooms.

- a. The Barbara & Ed Hemmerling group study rooms are not to be used to conduct business transactions.
- b. Patrons reserving room must be at least 12 years of age and have a current valid Placentia Library card.
- c. Rooms are available on first come, first served basis when not reserved. Patrons without reservations must vacate room when requested by patrons with valid reservations. Reservations can be made online or by calling the Information Desk.
- d. Reservations will be held 10 minutes after the scheduled start time. If the group of two or more is not present after the 10-minute grace period, the reservation is forfeited and the time slot becomes available to others.
- e. Rooms are reserved in one (1) hour time increments, up to two (2) hours/day. If there are no other reservations, time may be extended an additional hours, up to three (3).
- f. There is a minimum of two (2) patrons and maximum of six (6) patrons per room.
- g. Furniture are not to be moved in or out of the rooms.
- h. Maintain a moderate noise level that does not disturb those in adjoining rooms or outside the rooms. Rooms are not soundproof.
- i. Leave the room in good condition for the next patrons, including erasing the whiteboard and disposing of trash.
- j. Vacate study rooms 30 minutes before the Library closing time.
- k. Rooms are not intended to provide privacy. Library staff may enter rooms as needed for security, maintenance, or other reasons.
- l. Do not leave your valuables unattended in the rooms at any time. The Library is not responsible for lost or damaged personal property.
- m. All rules and regulations as outlined in the District policies, including but not limited to Policy 6020 – Internet and Computer Access, Policy 6040 – Beverage

& Food, Policy 6050 – Community Meeting Room, and Policy 6065 – Public Behavior.

- n. Failure to comply with this policy and other library policies may result in loss of study room and/or library privileges.

**6055.2** Patrons will be required to register at the Information Desk and provide a valid library card. Patrons' library cards will be returned after use of the study room.

**6055.3** Reservations are taken during normal library hours and are required 24 hours before use of the study room. The last reservation of the day will be accepted one hour before the Library closes. Reservations are for one hour. If there is no reservation for the study room, patrons can request an additional hour at a time.

**6055.4** Patrons are required to observe all library policies. There is no eating, drinking, and sleeping allowed in the study room. Bottled water is acceptable. Failure to comply with all library policies may result in loss of study room or library privileges.

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**PLACENTIA LIBRARY DISTRICT BOARD OF TRUSTEES**

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**TO:** Library Board of Trustees  
**FROM:** Jeanette Contreras, Library Director  
**SUBJECT:** Public Hearing for the Budget for Fiscal Year 2019-2021  
**DATE:** May 17, 2019

**BACKGROUND**

The Fiscal Year 2019-2021 Budget for the General Fund was presented to and reviewed by the Library Board of Trustees at its April 15, 2019 Regular Date Meeting and scheduled for Public Hearing at the Library Board's May 17, 2019 Unusual Date Meeting.

Legal Notices

The Notice of Public Hearing for the Proposed Budget for Fiscal Year 2019-2021 for the Placentia Library District was sent to the Orange County Register, posted in the Library's public bulletin board and on the Library's website.

Public Hearing

A Public Hearing needs to be conducted for the Proposed Budget for Fiscal Year 2019-2021 for the Placentia Library District. The guidelines for conducting a Public Hearing are in Attachment A.

Budget Resolution

The Fiscal Year 2019-2021 Budget for all District Funds needs to be adopted by Resolution 19-01.

Attachment B is Resolution 19-01.

Attachment C is the proposed Revenue for Fiscal Year 2019-2021.

Attachment D is the proposed Expenditures for Fiscal Year 2019-2021.

Attachment E is the proposed Salary Schedule for Fiscal Year 2019-2021.

Attachment F is the proposed organizational chart for Fiscal Year 2019-2021.

**RECOMMENDATIONS**

1. Conduct Public Hearing on the Budget for Fiscal Year 2019-2021 as published.
2. Finalize Placentia Library District Budget for Fiscal Year 2019-2021.
3. Motion to read Resolution 19-01 by title only; A Resolution of the Board of Trustees of the Placentia Library District of Orange County to Adopt Fiscal Year 2019-2021 Budget for the Placentia Library District of Orange County.
4. Motion to adopt Resolution 19-01 by a roll call vote.

## **Public Hearing Procedures**

1. Announce the Public Hearing topic.
2. Declare the Public Hearing open.
3. Ask for and listen to comments from the public. The Library Board of Trustees should not respond directly to public comments as they will have an opportunity to speak after the hearing.
4. Declare the Public Hearing closed.
5. Process Board discussion on the item.
6. Process motion to read Resolution by Title only.
7. Have the Administrative Assistant read the Resolution Title.
8. Motion to adopt the Resolution by roll call vote.
9. Have the Administrative Assistant conduct the roll call vote.
10. Be sure that the results of the roll call vote are read in to the record.

RESOLUTION 19-01

A RESOLUTION OF THE BOARD OF TRUSTEES OF THE  
PLACENTIA LIBRARY DISTRICT OF ORANGE COUNTY TO ADOPT  
FISCAL YEAR 2019-2021 BUDGET FOR  
THE PLACENTIA LIBRARY DISTRICT OF ORANGE COUNTY

WHEREAS, the preliminary budget for the Placentia Library District of Orange County for Fiscal Year 2019-2021 were reviewed at the Unusual Date Meeting of the Board of Trustees on May 17, 2019; and

WHEREAS, all sources of income have been identified to support said budgets.

THEREFORE BE IT RESOLVED, that the Placentia Library District of Orange County Board of Trustees adopts the budget for Fiscal Year 2019-2021, and implements such on July 1, 2019 as \$5,201,844 for Fiscal Year 2019-2020 which includes capital improvement costs and \$3,155,749 for Fiscal Year 2020-2021;

AYES:

NOES:

ABSENT:

ABSTAIN:

State of California    )  
                                  )ss.  
County of Orange     )

I, Al Shkoler, Secretary of the Board of Trustees of the Placentia Library District of Orange County hereby certify that the above and foregoing Resolution was duly and regularly adopted by the Board of Trustees at an Unusual Date Meeting hereof held on the seventeenth day of May 2019.

IN WITNESS THEREOF, I have hereunto set my hand and seal this seventeenth day of May 2019.

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Al Shkoler, Secretary  
Board of Trustees of the Placentia Library District

**Placentia Library District**

Proposed Revenue Budget for Fund 707 for Fiscal Year 2019-2021

|                      |                                  | 2017-2018        | 2018-2019        | 2018-2019        | 2019-2020        | 2020-2021        |
|----------------------|----------------------------------|------------------|------------------|------------------|------------------|------------------|
| Object Code          | Category                         | ACTUAL           | ADOPTED          | PROJECTED        | PROPOSED         | PROPOSED         |
| 4010                 | Current Secured                  | 2,286,865        | 2,269,805        | 2,265,896        | #REF!            | #REF!            |
| 4030                 | Prior Secured                    |                  |                  |                  |                  |                  |
|                      | SUB-TOTAL CURRENT SECURED        | 2,286,865        | 2,269,805        | 2,265,896        | 2,356,532        | 2,450,793        |
| 4020                 | Current Unsecured                | 72,245           | 62,335           | 71,485           | 74,344           | 77,318           |
| 4040                 | Prior Unsecured                  | 1,024            | 0                | 0                |                  |                  |
|                      | SUB-TOTAL SECURED                | 73,268           | 62,335           | 71,485           | 74,344           | 77,318           |
| 4050                 | SUPPLEMENTAL -- CURRENT          | 67,932           | 71,096           | 60,107           | 62,511           | 65,012           |
| 4060                 | SUPPLEMENTAL -- PRIOR            | 15,275           | 0                | 0                |                  |                  |
| 4070                 | INTEREST ON UNNAPORT. TAX        | 1,846            | 1,846            | 2,058            |                  |                  |
| 4080                 | PENALTIES & COST ON DELIQ. TAX   | 16,232           | 1,097            | 17,158           | 17,844           | 18,558           |
| 4090                 | TAXES SPECIAL DIST. AUGMENTATION | 9,100            | 9,397            | 9,093            | 9,457            | 9,835            |
| 4190                 | STATE - HOMEOWNERS PR TAX RELIEF | 13,224           | 50,421           | 61,976           | 64,455           | 67,033           |
|                      | TOTAL PROPERTY TAX REVENUE       | 2,483,743        | 2,465,997        | 2,487,773        | 2,585,144        | 2,688,549        |
| 4210                 | State Grants                     | 30,000           | 30,000           | 10,000           | 15,000           | 30,000           |
| 4220                 | Federal Grants                   |                  |                  |                  |                  |                  |
| 4230                 | Other Grants                     | 0                | 20,000           | 15,000           | 20,000           | 20,000           |
|                      | TOTAL GRANTS REVENUE             | 30,000           | 50,000           | 25,000           | 35,000           | 50,000           |
| 4310                 | Fines & Fees                     | 20,335           | 16,500           | 16,750           | 20,000           | 20,000           |
| 4320                 | Passports                        | 214,543          | 112,500          | 150,000          | 230,000          | 250,000          |
| 4330                 | Passport Pictures                | 54,375           | 12,000           | 25,000           | 60,000           | 70,000           |
| 4340                 | Meeting Room                     | 2,755            | 0                | 340              | 3,000            | 3,000            |
| 4350                 | Test Proctoring                  | 8,750            | 2,500            | 5,000            | 9,500            | 10,000           |
|                      | TOTAL SERVICE REVENUE            | 300,758          | 143,500          | 197,090          | 322,500          | 353,000          |
| 4410                 | PLFF Grants                      | 45,880           | 37,000           | 36,300           | 250,000          | 55,000           |
| 4420                 | Newsletter Ads                   | 1,750            | 700              | 700              | 700              | 700              |
| 4430                 | Misc. Revenue                    | 1,141            | 0                | 0                | 0                | 0                |
|                      | Rédevelopment Agency Funds       |                  |                  | 4,051            |                  |                  |
|                      | TOTAL MISCELLANEOUS REVENUE      | 48,771           | 37,700           | 41,051           | 250,700          | 55,700           |
| 4440                 | Centennial Renovation            | 13,282           | 50,000           | 1,800,000        | 2,000,000        | 0                |
| 4500 *               | IMPACT FEES                      | 8,239            | 10,000           | 90,000           | 50,000           | 20,000           |
| 4600                 | INTEREST                         | 24,517           | 8,500            | 8,500            | 8,500            | 8,500            |
| <b>TOTAL REVENUE</b> |                                  | <b>2,896,027</b> | <b>2,715,697</b> | <b>4,649,414</b> | <b>5,201,844</b> | <b>3,155,749</b> |

**PLACENTIA LIBRARY DISTRICT**  
**Proposed Expenditures Budget for Fund 707 for Fiscal Year 2019-2021**

| OBJECT  | 2017-2018        | 2018-2019        | 2018-2019        | 2019-2020        | 2020-2021        |
|---|------------------|------------------|------------------|------------------|------------------|
| CODE DESCRIPTION                                  | ACTUAL           | AMENDED          | PROJECTED        | PROPOSED         | PROPOSED         |
| 5010 Salaries & Wages                             | 1,065,943        | 1,334,746        | 1,128,018        | 1,490,942        | 1,530,118        |
| 5020 Payroll Taxes (SS & MEDICARE)                | 385,260          | 302,644          | 365,212          | 119,207          | 120,831          |
| 5030 Retirement (PARS)                            | 25,612           | 56,500           | 54,892           | 62,602           | 64,143           |
| 5040 Unemployment Insurance                       | 1,288            | 7,000            | 4,050            | 2,500            | 2,500            |
| 5050 Health Insurance                             | 251,714          | 266,515          | 245,739          | 268,587          | 289,038          |
| 5064 Dental Insurance                             | 14,043           | 17,240           | 15,145           | 17,796           | 17,796           |
| 5060 Life Insurance                               | 3,701            | 8,370            | 5,577            | 9,420            | 9,420            |
| 5066 Long Term Disability Insurance               | 5,822            | 5,452            | 7,351            | 6,172            | 6,172            |
| 5068 Vision Insurance                             | 2,788            | 3,340            | 3,437            | 3,541            | 3,541            |
| 5090 Education Assistance                         | 0                | 822              | 11,008           | 5,000            | 5,000            |
| <b>TOTAL EMPLOYEE INSURANCE</b>                   |                  |                  |                  |                  |                  |
| 5070 Workers Compensation                         | 4,806            | 13,832           | 6,080            | 15,894           | 16,252           |
| <b>TOTAL SALARIES &amp; EMPLOYEE BENEFITS</b>     | <b>1,760,977</b> | <b>2,016,461</b> | <b>1,846,509</b> | <b>2,001,661</b> | <b>2,064,811</b> |
| 5100 Communications                               | 26,292           | 24,000           | 9,120            | 22,000           | 11,000           |
| 5150 Household Expense                            | 18,615           | 15,000           | 33,770           | 25,000           | 25,000           |
| 5099 Liability Insurance                          | 14,885           | 15,000           | 15,352           | 20,000           | 22,000           |
| 5205 Maintenance - Equipment                      | 24,795           | 20,000           | 21,273           | 25,000           | 25,000           |
| 5220-5280 Maintenance - Building & Grounds        | 91,278           | 95,000           | 69,953           | 130,000          | 90,000           |
| <b>TOTAL MAINTENANCE EXPENSE</b>                  | <b>116,073</b>   | <b>115,000</b>   | <b>91,226</b>    | <b>155,000</b>   | <b>115,000</b>   |
| 5290 Memberships                                  | 10,540           | 9,000            | 10,134           | 10,000           | 11,000           |
| 5295 Miscellaneous Expense                        | 0                | 2,500            | 0                | 0                | 0                |
| <b>TOTAL OFFICE SUPPLY &amp; POSTAGE EXPENSES</b> | <b>64,843</b>    | <b>55,000</b>    | <b>77,500</b>    | <b>100,000</b>   | <b>90,000</b>    |
| 5405 Library Automated Library System             | 33,145           | 34,000           | 24,000           | 20,000           | 15,000           |
| 5410 Library Board Consultants & Legal            | 6,063            | 10,000           | 23,157           | 20,000           | 15,000           |
| 5415 HR/Finance Services                          | 7,131            | 2,000            | 3,766            | 4,000            | 10,000           |
| 5420 Audit & Accounting Services                  | 21,189           | 20,000           | 25,000           | 30,000           | 30,000           |
| 5430 Computer Services                            | 51,741           | 25,000           | 24,000           | 5,000            | 5,000            |
| 5440 Collection                                   | 1,468            | 2,500            | 1,000            | 2,000            | 2,000            |
| 5445 Payroll Preparation                          | 9,559            | 6,500            | 10,000           | 12,000           | 13,000           |
| 5450 Bank Fees                                    | 139              | 200              | 2,280            | 2,500            | 1,000            |
| 5455 Election Expenses                            | 0                | 20,000           | 0                | 0                | 20,000           |

**PLACENTIA LIBRARY DISTRICT**

**Proposed Expenditures Budget for Fund 707 for Fiscal Year 2019-2021**

| OBJECT   | 2017-2018        | 2018-2019        | 2018-2019                  | 2019-2020        | 2020-2021        |
|--|------------------|------------------|----------------------------|------------------|------------------|
| CODE DESCRIPTION                                   | ACTUAL           | AMENDED          | PROJECTED                  | PROPOSED         | PROPOSED         |
| 5460 BankCard Fees                                 | 13,005           | 2,000            | 9,000                      | 12,000           | 13,000           |
| 5465 Staff Training                                | 583              | 3,000            | 3,000                      | 7,500            | 5,000            |
| 5475 Employee Screening                            | 2,184            | 750              | 750                        | 1,000            | 1,000            |
| Other Professional and Specialized                 |                  |                  |                            |                  |                  |
| 5480 Services                                      | 19,457           | 50,000           | 45,000                     | 25,000           | 20,000           |
| Loan Obligation (ibank)                            |                  |                  |                            | 78,000           | 78,000           |
| <b>TOTAL PROFESSIONAL AND SPECIALIZED SERVICES</b> | <b>165,664</b>   | <b>175,950</b>   | <b>170,953</b>             | <b>219,000</b>   | <b>228,000</b>   |
| 5495 Programs                                      | 56,401           | 30,000           | 52,067                     | 150,000          | 55,000           |
| <b>TOTAL BOOKS/LIBRARY MATERIALS</b>               | <b>171,679</b>   | <b>272,000</b>   | <b>352,000</b>             | <b>265,183</b>   | <b>402,938</b>   |
| 5600 TOTAL TRAVEL & MEETINGS                       | 46,652           | 32,940           | 58,178                     | 25,000           | 25,000           |
| 5700 Mileage/Parking                               | 890              | 4,000            | 1,600                      | 1,000            | 1,000            |
| <b>TOTAL UTILITIES</b>                             | <b>78,807</b>    | <b>77,000</b>    | <b>47,564</b>              | <b>35,000</b>    | <b>35,000</b>    |
| <b>TOTAL SUPPLIES &amp; SERVICES</b>               | <b>771,342</b>   | <b>827,390</b>   | <b>919,464</b>             | <b>1,027,183</b> | <b>1,020,938</b> |
| 1310 Building & Improvements                       | 0                | 50,000           | 0                          | 10,000           | 40,000           |
| 1320 Equipment & Furniture                         | 0                | 50,000           | 17,824                     | 48,000           | 10,000           |
| 6100 Taxes & Assessments                           | 8,773            | 10,000           | 10,000                     | 15,000           | 20,000           |
| <b>TOTAL FIXED ASSETS &amp; TAXES</b>              | <b>8,773</b>     | <b>110,000</b>   | <b>27,824</b>              | <b>73,000</b>    | <b>70,000</b>    |
| 5211 Renovation                                    |                  | 1,800,000        | 1,800,000                  | 2,100,000        | 0                |
| <b>TOTAL Capital Project</b>                       |                  | <b>1,800,000</b> | <b>1,800,000</b>           | <b>2,100,000</b> | <b>-</b>         |
| <b>TOTAL EXPENSES</b>                              | <b>2,541,091</b> | <b>4,753,851</b> | <b>4,593,797</b>           | <b>5,201,844</b> | <b>3,155,749</b> |
|  |                  |                  | Expenses - Capital Project | 3,101,844        |                  |





# PLACENTIA LIBRARY DISTRICT

## ORGANIZATIONAL CHART / SERVICES FISCAL YEARS 2019-2021

### GOVERNANCE

BOARD OF DIRECTORS  
 Mayor, Council, Mayor Pro Tem  
 Mayor Pro Tem, Council Members  
 Mayor Pro Tem, Council Members  
 Mayor Pro Tem, Council Members

### LEADERSHIP

LIBRARY DIRECTOR  
 PUBLIC SERVICES MANAGER  
 TECHNOLOGY MANAGER

#### ADMINISTRATION: Business Manager, Administrative Assistant

|                    |                 |                 |            |                     |               |                           |
|--------------------|-----------------|-----------------|------------|---------------------|---------------|---------------------------|
| FINANCE ACCOUNTING | HUMAN RESOURCES | PUBLIC REQUESTS | PURCHASING | FACILITY MANAGEMENT | TRAINING      | MEETING AGENDAS & MINUTES |
|                    | RISK MANAGEMENT |                 |            | PUBLIC RELATIONS    | PUBLIC POLICY | PLUFF                     |

#### ADULT SERVICES DEPARTMENT: Supervising Librarian, Librarians, Library Assistants

|           |           |              |          |                    |                  |
|-----------|-----------|--------------|----------|--------------------|------------------|
| REFERENCE | VOLUNTEER | HISTORY ROOM | LITERACY | COMPUTER WORKSHOPS | TEEN SERVICES    |
|           |           |              |          |                    | BOOK DISCUSSIONS |

#### CHILDRENS SERVICES DEPARTMENT: Supervising Librarian, Librarians, Library Assistants

|           |              |            |              |                  |                   |
|-----------|--------------|------------|--------------|------------------|-------------------|
| STORYTIME | POCKET TALES | THE HANGAR | HOMWORK CLUB | READ TO THE DOGS | CROSSROADS CORNER |
|-----------|--------------|------------|--------------|------------------|-------------------|

#### CIRCULATION/TECHNOLOGY DEPARTMENT: Librarian, Emerging Technologies Assistant, Library Clerks, Library Aides

|             |                    |                   |                     |                      |                     |
|-------------|--------------------|-------------------|---------------------|----------------------|---------------------|
| CIRCULATION | TECHNICAL SERVICES | PASSPORT SERVICES | MEETING ROOM RENTAL | AUTOMATION SYSTEMS   | BUSINESS CENTER     |
|             |                    |                   |                     | WEBSITE SOCIAL MEDIA | PROCTORING SERVICES |

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**PLACENTIA LIBRARY DISTRICT BOARD OF TRUSTEES**

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**TO:** Library Board of Trustees  
**FROM:** Jeanette Contreras, Library Director  
**SUBJECT:** **Public Hearing for and Adoption of the Placentia Library District Policy 6035 – Fee Schedule for Fiscal Year 2019-2021 by Resolution 19-02**  
**DATE:** May 17, 2019

**BACKGROUND**

The Fiscal Year 2019-2021 Fees Schedule is scheduled for Public Hearing at the May 17, 2019 Unusual Date Library Board Meeting.

Legal Notices

The Notice of Public Hearing for the Fee Schedule for Fiscal Year 2019-2021 for the Placentia Library District was posted in the Library's public bulletin board and on the Library's website.

Public Hearing

A Public Hearing needs to be conducted for the Proposed Fee Schedule for Fiscal Years 2019-2021 for the Placentia Library District. The guidelines for conducting a Public Hearing are in Attachment A.

Fine Schedule Resolution

The Fiscal Year 2019-2021 Fee Schedule for the District needs to be adopted by Resolution 19-02.

Attachment B is Resolution 19-02.

Attachment C is the Fees Schedule for Fiscal Year 2019-2021.

**RECOMMENDATIONS**

1. Conduct Public Hearing on the Fees Schedule for Fiscal Year 2019-2021 as published.
2. Motion to read Resolution 19-02 by title only: A Resolution of the Board of Trustees of the Placentia Library District of Orange County to Adopt the Fee Schedule for Fiscal Year 2019-2021 for the Placentia Library District of Orange County.
3. Motion to adopt Resolution 19-02 by a roll call vote.
4. Roll Call Vote.

## Public Hearing Procedures

1. Announce the Public Hearing topic.
2. Declare the Public Hearing open.
3. Ask for and listen to comments from the public. The Library Board of Trustees should not respond directly to public comments as they will have an opportunity to speak after the hearing.
4. Declare the Public Hearing closed.
5. Process Board discussion on the item.
6. Process motion to read Resolution by Title only.
7. Have the Administrative Assistant read the Resolution Title.
8. Motion to adopt the Resolution by roll call vote.
9. Have the Administrative Assistant conduct the roll call vote.
10. Be sure that the results of the roll call vote are read in to the record.

**RESOLUTION 19-02**

**A RESOLUTION OF THE BOARD OF TRUSTEES OF THE  
PLACENTIA LIBRARY DISTRICT OF ORANGE COUNTY  
TO ADOPT THE FEE SCHEDULE FOR THE DISTRICT  
FOR FISCAL YEAR 2019-2021**

WHEREAS, the Placentia Library District Fee Schedule are reviewed each budget cycle and was last adopted on June 28, 2017; and

WHEREAS, the Fee Schedule is reflected in the Placentia Library District Policy 6035; and,

BE IT RESOLVED, that the Placentia Library District of Orange County Board of Trustees adopts the Placentia Library District Fee Schedule for Fiscal Year 2019-2021 dated May 17, 2019 and implements such on July 1, 2019.

AYES:  
NOES:  
ABSENT:  
ABSTAIN:

State of California        )  
  )ss.  
County of Orange        )

I, Al Shkoler, Secretary of the Board of Trustees of the Placentia Library District of Orange County hereby certify that the above and foregoing Resolution was duly and regularly adopted by the Board of Trustees at a regular Meeting hereof held on the seventeenth day of May, 2019.

IN WITNESS THEREOF, I have hereunto set my hand and seal this seventeenth day of May, 2019.

\_\_\_\_\_  
Al Shkoler, Secretary  
Placentia Library District Board of Trustees

# Placentia Library District

## POLICY HANDBOOK

POLICY TITLE: Fee Schedule

POLICY NUMBER: 6035

Effective July 1, 2017, the Placentia Library District will no longer collect overdue fines, as approved by the Library Board of Trustees on June 28, 2017.

| <b>RENTAL FEE</b>   |   |
|---|---|
| Canopies (24 hr. period)  | \$10.00 each  |
| Folding chairs (24 hr. period)  | \$ 1.25 each  |
| Tables, 6' (24 hr. period)  | \$ 8.50 each  |
| Meeting Room  |   |
| - Non-profit organizations  | \$20.00 per hour  |
| - Other groups  | \$35.00 per hour  |
| - Administrative Fee (for cancellation notices less than two weeks in advance)  | \$25.00   |
| - After hour fee / Staff attendee   | \$25 per hour, per staff  |
| - Clean-up fee  | \$20.00   |
| - Refundable security deposit / cleaning fee  | \$50.00   |
| - Set-up fee  | \$20.00   |
| <b>Barbara &amp; Ed Hemmerling Group Study Rooms</b>  | <b>No rental fee. There is a \$25.00 cleaning fee and repair or replacement cost associated with damage or lost item(s) and/or peripherals due to neglect or abuse.</b> |
| <b>LOST OR DAMAGED MATERIALS</b>  |   |
| An item that is 30 days overdue will become a "Lost" item. If a lost item is returned in its exact condition and damaged-free before 30 days from the overdue date, the \$10.00 processing fee will be waived. If a patron replaces a lost item, said item must have the same ISBN number and the \$10.00 processing fee will be applied. Accounts with lost items will be forwarded to Unique Management Services, Inc., a collection agency and all costs associated with recovery of the lost item will be applied including the \$25.000 collection services fee plus the \$10.00 processing fee. |   |

| <b>SPECIAL SERVICES &amp; REPLACEMENTS</b>   |  |
|--|--|
| Collection Services Fee  | \$ 9.00 per transaction  |
| Re-Shelving Fee  | \$ 1.00  |
| Library Card replacement   | \$ 2.00 each   |
| Barcode replacement  | \$ 1.00 each   |
| Book jacket cover / mylar replacement / RFID tag   | \$ 2.00 each   |
| CD – audio book replacement  | \$ 8.00 per CD   |
| CD case replacement  | \$ 2.00 each   |
| DVD case replacement   | \$ 2.00 each   |
| Earbuds  | \$ 2.00 each   |
| Fax Local  | \$ 1.00 per page   |
| Fax Long Distance  | \$ 1.50 per page   |
| Fax International  | \$ 5.00 per page   |
| Photograph digital file from Placentia History Room archives<br>(cost per item + packaging + postage + shipping) | \$10.00 – non commercial use<br>\$75.00 – commercial use   |
| Printing, photocopy Black ink  | \$.15 per page   |
| Printing, photocopy Color  | \$.50 per page   |
| Test proctoring  | \$50.00 per exam   |
| Passport Application   | <b>\$35.00 per application</b>   |
| Passport Photos  | \$12.00 per person   |
| Library of Things (LOTS)   | \$ 25.00 Cleaning Fee per item<br><br>Repair or Replacement cost associated with damage or lost item and/or peripherals due to neglect or abuse. |

Borrowers of materials from Placentia Library District assume full responsibility for their use. Placentia Library District assumes no responsibility for damage to personal property caused by the use of library materials or equipment of any type.

*(Adopted by the Library Board of Trustees, May 17, 2019.)*



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**PLACENTIA LIBRARY DISTRICT BOARD OF TRUSTEES**

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**TO:** Library Board of Trustees  
**FROM:** Jeanette Contreras, Library Director  
**SUBJECT:** Establish the Holiday and Library Closure Schedule for Fiscal Year 2019-2021 and Adopt by Resolution 19-03  
**DATE:** May 17, 2019

**BACKGROUND**

The Placentia Library District Policy 2030 establishes the following days as paid holidays:

- New Years Day
- President's Day
- Memorial Day
- Independence Day
- Labor Day
- Veteran's Day
- Thanksgiving Day
- Christmas Eve Day
- Christmas Day
- New Year's Eve Day

Attachment A is the proposed Holiday and Library Closure Schedule for Fiscal Year 2019-2021.

Attachment B is Resolution 19-03.

**RECOMMENDATIONS**

1. Determine and adopt the Holiday and Library Closure Schedule for Fiscal Year 2019-2021
2. Read Resolution 19-03 by Title Only: A Resolution of the Library Board of Trustees of the Placentia Library District of Orange County to Establish the Holiday and Library Closure for Fiscal Year 2019-2021.
3. Adopt Resolution 19-03 by a roll call vote.

**Placentia Library District  
Holiday and Library Closure Schedule  
Fiscal Year 2019-2021**

|                    |                      |  |
|--------------------|----------------------|--|
| Independence Day   | Thursday<br>Saturday | July 4, 2019<br>July 4, 2020           |
| Labor Day          | Sunday<br>Tuesday    | September 1, 2019<br>September 1, 2020 |
| Veteran's Day      | Monday<br>Wednesday  | November 11, 2019<br>November 11, 2020 |
| Thanksgiving Day   | Thursday<br>Tuesday  | November 28, 2019<br>November 26, 2020 |
| Christmas Eve Day  | Tuesday<br>Thursday  | December 24, 2019<br>December 24, 2020 |
| Christmas Day      | Wednesday<br>Friday  | December 25, 2019<br>December 25, 2020 |
| New Year's Eve Day | Tuesday<br>Thursday  | December 31, 2019<br>December 31, 2020 |
| New Year's Day     | Wednesday<br>Friday  | January 1, 2020<br>January 1, 2021     |
| President's Day    | Monday<br>Monday     | February 17, 2020<br>February 15, 2021 |
| Easter *           | Sunday<br>Sunday     | April 12, 2020<br>April 4, 2021        |
| Memorial Day       | Monday<br>Monday     | May 25, 2020<br>May 24, 2021           |

\*Denotes non-paid holiday

RESOLUTION 19-03

A RESOLUTION OF THE LIBRARY BOARD OF TRUSTEES OF THE  
PLACENTIA LIBRARY DISTRICT OF ORANGE COUNTY TO ESTABLISH THE  
HOLIDAY AND LIBRARY CLOSURE SCHEDULE  
FOR FISCAL YEAR 2019-2021

WHEREAS, Section 19469 of the Education Code of the State of California establishes that the Library Board of Trustees shall designate the hours during which the Library shall be open for the use of the public;

BE IT RESOLVED, that the Placentia Library District of Orange County Library Board of Trustees established its Holiday Schedule for Fiscal Year 2019-2021 dated May 17, 2019.

AYES:

NOES:

ABSENT:

ABSTAIN:

State of California )

)ss.

County of Orange )

I, Al Shkoler, Secretary of the Library Board of Trustees of the Placentia Library District of Orange County hereby certify that the above and foregoing Resolution was duly and regularly adopted by the Library Board of Trustees at the Unusual Date Meeting hereof held on the seventeenth day of May 2019.

IN WITNESS THEREOF, I have hereunto set my hand and seal this seventeenth day of May 2019.

\_\_\_\_\_  
Al Shkoler, Secretary  
Placentia Library District Board of Trustees



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**PLACENTIA LIBRARY DISTRICT BOARD OF TRUSTEES**

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**TO:** Library Board of Trustees

**FROM:** Jeanette Contreras, Library Director

**SUBJECT:** Award Contract for Placentia Library District's Financial Audit, Management Letter, Financial Transactions Report and Supplement to the Annual Report, and Preparation of the GANN Limit Review Report for the 2018-2019 Fiscal Year.

**DATE:** May 17, 2019

**BACKGROUND**

White, Nelson, Diehl & Evans LLP has prepared the Placentia Library District's annual financial audit for two fiscal years. They have provided superior service and works with library staff to ensure a transparent and efficient auditing process.

Attachment A are the letters of proposal from White, Nelson, Diehl & Evans LLP to provide the Financial Audit and the GANN Limit Review Report for the 2018-2019 Fiscal Year.

Fiscal Impact: \$20,715

**RECOMMENDATIONS**

1. Motion to award the Financial Audit and GANN Limit Review Report preparation contract for the 2018-2019 Fiscal Year to White, Nelson, Diehl & Evans LLP for the amount of \$20,715; and
2. Authorize the contract to White, Nelson, Diehl & Evans LLP by a roll call vote; and
3. Authorize Board President, Gayle Carline, to sign the engagement letter.



**WNDE**

White Nelson Diehl Evans LLP  
CPA's | TAX | ADVISORY | AUDIT

May 10, 2019

Ms. Jeanette Contreras  
Library Director  
Placentia Library District  
411 E. Chapman Ave.  
Placentia, CA 92870

Dear Ms. Contreras:

We are pleased to present our proposal to provide audit services to Placentia Library District (the District) for the year ending June 30, 2019. We will audit the governmental activities and major fund, including the related notes to the financial statements, which collectively comprise the basic financial statements of the District as of and for the year ending June 30, 2019. Accounting standards generally accepted in the United States of America provide for certain required supplementary information (RSI), such as management's discussion and analysis (MD&A), to supplement the District's basic financial statements. Such information, although not a part of the basic financial statements, is required by the Governmental Accounting Standards Board who considers it to be an essential part of financial reporting for placing the basic financial statements in an appropriate operational, economic, or historical context. As part of our engagement, we will apply certain limited procedures to the District's RSI in accordance with auditing standards generally accepted in the United States of America. These limited procedures will consist of inquiries of management regarding the methods of preparing the information and comparing the information for consistency with management's responses to our inquiries, the basic financial statements, and other knowledge we obtained during our audit of the basic financial statements. We will not express an opinion or provide any assurance on the information because the limited procedures do not provide us with sufficient evidence to express an opinion or provide any assurance. The following RSI is required by U.S. generally accepted accounting principles and will be subjected to certain limited procedures, but will not be audited:

1. Management's Discussion and Analysis
2. General Fund - Budgetary Comparison Schedule

Ms. Jeanette Contreras, Library Director  
Placentia Library District  
May 10, 2019  
Page 2

### **Audit Objective**

The objective of our audit is the expression of opinions as to whether your financial statements are fairly presented, in all material respects, in conformity with generally accepted accounting principles. Our audit will be conducted in accordance with auditing standards generally accepted in the United States of America and will include tests of the accounting records and other procedures we consider necessary to enable us to express such opinions. We will issue a written report upon completion of our audit of the District's financial statements. Our report will be addressed to the Board of Trustees of the District. We cannot provide assurance that unmodified opinions will be expressed. Circumstances may arise in which it is necessary for us to modify our opinions or add emphasis-of-matter or other-matter paragraphs. If our opinions are other than unmodified, we will discuss the reasons with you in advance. If, for any reason, we are unable to complete the audit or are unable to form or have not formed opinions, we may decline to express opinions or may withdraw from this engagement.

### **Audit Procedures - General**

An audit includes examining, on a test basis, evidence supporting the amounts and disclosures in the financial statements; therefore, our audit will involve judgment about the number of transactions to be examined and the areas to be tested. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements. We will plan and perform the audit to obtain reasonable assurance about whether the financial statements are free of material misstatement, whether from (1) errors, (2) fraudulent financial reporting, (3) misappropriation of assets, or (4) violations of laws or governmental regulations that are attributable to the District or to acts by management or employees acting on behalf of the District.

Because of the inherent limitations of an audit, combined with the inherent limitations of internal control, and because we will not perform a detailed examination of all transactions, there is a risk that material misstatements may exist and not be detected by us, even though the audit is properly planned and performed in accordance with U.S. generally accepted auditing standards. In addition, an audit is not designed to detect immaterial misstatements or violations of laws or governmental regulations that do not have a direct and material effect on the financial statements. However, we will inform the appropriate level of management of any material errors, fraudulent financial reporting, or misappropriation of assets that come to our attention. We will also inform the appropriate level of management of any violations of laws or governmental regulations that come to our attention, unless clearly inconsequential. Our responsibility as auditors is limited to the period covered by our audit and does not extend to any later periods for which we are not engaged as auditors.

Our procedures will include tests of documentary evidence supporting the transactions recorded in the accounts, and may include tests of physical existence of inventories, and direct confirmation of receivables and certain other assets and liabilities by correspondence with selected individuals, funding sources, creditors, and financial institutions. We will request written representations from your attorneys as part of the engagement, and they may bill you for responding to this inquiry. At the conclusion of our audit, we will also require certain written representations from you about the financial statements and related matters.

Ms. Jeanette Contreras, Library Director  
Placentia Library District  
May 10, 2019  
Page 3

### **Audit Procedures - Internal Control**

Our audit will include obtaining an understanding of the District and its environment, including internal control, sufficient to assess the risks of material misstatement of the financial statements and to design the nature, timing, and extent of further audit procedures. An audit is not designed to provide assurance on internal control or to identify deficiencies in internal control. However, during the audit, we will communicate to management and those charged with governance internal control related matters that are required to be communicated under AICPA professional standards.

### **Audit Procedures - Compliance**

As part of obtaining reasonable assurance about whether the financial statements are free of material misstatement, we will perform tests of the District's compliance with applicable laws, regulations, contracts, and agreements. However, the objective of our audit will not be to provide an opinion on overall compliance and we will not express such an opinion.

### **Other Services**

We will also assist in preparing the state controller's report (see separate engagement letter), and the financial statements of the District in conformity with U.S. generally accepted accounting principles based on information provided by you. We will perform the services in accordance with applicable professional standards. The other services are limited to the state controller's report and financial statement services previously defined. We, in our sole professional judgment, reserve the right to refuse to perform any procedure or take any action that could be construed as assuming management responsibilities.

### **Management Responsibilities**

Management is responsible for designing, implementing, and maintaining effective internal controls, including monitoring ongoing activities; for the selection and application of accounting principles; and for the preparation and fair presentation of the financial statements in conformity with U.S. generally accepted accounting principles.

Management is also responsible for making all financial records and related information available to us and for the accuracy and completeness of that information. You are also responsible for providing us with (1) access to all information of which you are aware that is relevant to the preparation and fair presentation of the financial statements, (2) additional information that we may request for the purpose of the audit, and (3) unrestricted access to persons within the District from whom we determine it necessary to obtain audit evidence. Because of the importance of oral and written management representations to the effective performance of our services, the District releases and indemnifies our firm and its personnel from any and all claims, liabilities, costs and expenses attributable to any misrepresentation by management and its representatives.



Ms. Jeanette Contreras, Library Director  
Placentia Library District  
May 10, 2019  
Page 4

### **Management Responsibilities (Continued)**

Your responsibilities include adjusting the financial statements to correct material misstatements and confirming to us in the representation letter that the effects of any uncorrected misstatements aggregated by us during the current engagement and pertaining to the latest period presented are immaterial, both individually and in the aggregate, to the financial statements taken as a whole.

You are responsible for the design and implementation of programs and controls to prevent and detect fraud, and for informing us about all known or suspected fraud affecting the District involving (1) management, (2) employees who have significant roles in internal control, and (3) others where the fraud could have a material effect on the financial statements. Your responsibilities include informing us of your knowledge of any allegations of fraud or suspected fraud affecting the District received in communications from employees, former employees, grantors, regulators, or others. In addition, you are responsible for identifying and ensuring that the District complies with applicable laws and regulations.

You agree to assume all management responsibilities for financial statement preparation and any other nonattest services we provide; oversee the services by designating an individual, preferably from senior management, with suitable skill, knowledge, or experience; evaluate the adequacy and results of the services; and accept responsibility for them.

With regard to the electronic dissemination of audited financial statements, including financial statements published electronically on your website, you understand that electronic sites are a means to distribute information and, therefore, we are not required to read the information contained in these sites or to consider the consistency of other information in the electronic site with the original document.

### **Engagement Administration, Fees, and Other**

Noted below is a listing of work required by District staff to assist in the audit.

1. Preparation of trial balances for all funds, after posting of all year-end journal entries.
2. Preparation of supporting schedules for all material balance sheet accounts, and selected revenue and expense accounts.
3. Typing of all confirmation requests.
4. Pulling and refileing of all supporting documents required for audit verification.

Ms. Jeanette Contreras, Library Director  
Placentia Library District  
May 10, 2019  
Page 5

**Engagement Administration, Fees, and Other (Continued)**

Our maximum annual fees as of and for the year ending June 30, 2019, are as follows:

|                          |                  |
|--------------------------|------------------|
| District Audit           | \$ 18,400        |
| GANN Limit Review Report | <u>550</u>       |
| Total (Not to Exceed)    | <u>\$ 18,950</u> |

The maximum annual fee stipulated herein contemplates that conditions satisfactory to the normal progress and completion of the examination will be encountered and the District's accounting personnel will furnish the agreed upon assistance in connection with the audit. However, if unusual circumstances are encountered which make it necessary for us to do additional work; we shall report such conditions to the responsible District officials and provide the District with an estimate of the additional accounting fees involved.

Billings become delinquent if not paid within 30 days of the invoice date. If billings are not paid within 60 days from the invoice date, at our election, we will stop all work until your account is brought current, or we will withdraw from this engagement. The District acknowledges and agrees that we are not required to continue work in the event of your failure to pay on a timely basis for services rendered as required by this engagement letter. The District further acknowledges and agrees that in the event we stop work or withdraw from this engagement as a result of your failure to pay on a timely basis for services rendered as required by this engagement letter, we shall not be liable to you for any damages that occur as a result of our ceasing to render services.

The audit documentation for this engagement is the property of White Nelson Diehl Evans LLP and constitutes confidential information. However, subject to applicable laws and regulations, audit documentation and appropriate individuals will be made available upon request and in a timely manner to grantor agencies or their designees. We will notify you of any such request. If requested, access to such audit documentation will be provided under the supervision of White Nelson Diehl Evans LLP personnel. Furthermore, upon request, we may provide copies of selected audit documentation to the aforementioned parties. These parties may intend or decide to distribute the copies or information contained therein to others, including other governmental agencies.

In accordance with our firm's current record retention policy, all of your original records will be returned to you at the conclusion of this engagement. Our audit documentation files will be kept for a period of seven years after the issuance of the audit report. All other files will be kept for as long as you retain us as your auditors. However, upon termination of our service, all records will be destroyed after a period of seven years. Physical deterioration or catastrophic events may further shorten the life of these records. The audit documentation files of our firm are not a substitute for your original records.

Ms. Jeanette Contreras, Library Director  
Placentia Library District  
May 10, 2019  
Page 6

**Engagement Administration, Fees, and Other (Continued)**

As a result of our services to you, we may be required or requested to provide information or documents to you or a third-party pursuant to a subpoena, court order or other administrative or legal process in connection with governmental regulations or activities, or a legal, arbitration or administrative proceeding, in which we are not a party. You agree that our efforts in complying with such request or demands will be deemed a part of this engagement and White Nelson Diehl Evans LLP shall be entitled to additional compensation for our time and reimbursement for our out-of-pocket expenditures (including legal fees) in complying with such request or demand.

Enclosed with this letter is a copy of our most recent external peer review report.

Ms. Daphnie Munoz, CPA, is the engagement partner and is responsible for supervising the engagement and signing the reports or authorizing another individual to sign them.

To ensure that White Nelson Diehl Evans LLP's independence is not impaired under the AICPA *Code of Professional Conduct*, you agree to inform the engagement partner before entering into any substantive employment discussions with any of our personnel.

We appreciate the opportunity to be of service to the Placentia Library District and believe this letter accurately summarizes the significant terms of our engagement. If you have any questions, please let us know. If you agree with the terms of our engagement as described in this letter, please sign the enclosed copy and return it to us.

Very truly yours,

WHITE NELSON DIEHL EVANS LLP

*White Nelson Diehl Evans LLP*

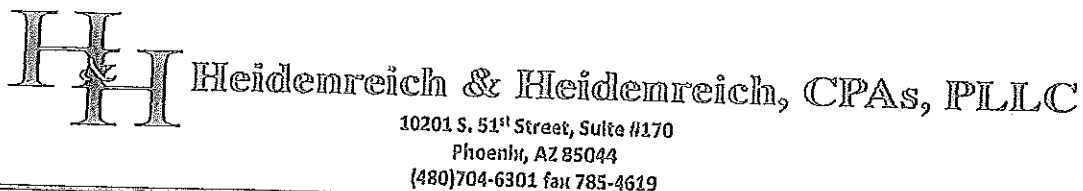
RESPONSE:

This letter correctly sets forth the understanding of the Placentia Library District.

By \_\_\_\_\_

Title \_\_\_\_\_

Date \_\_\_\_\_



**Report on the Firm's System of Quality Control**

August 15, 2018

To the Owners of  
White Nelson Diehl Evans LLP  
and the Peer Review Committee of the CA Society of CPAs

We have reviewed the system of quality control for the accounting and auditing practice of White Nelson Diehl Evans LLP (the firm) in effect for the year ended March 31, 2018. Our peer review was conducted in accordance with the Standards for Performing and Reporting on Peer Reviews established by the Peer Review Board of the American Institute of Certified Public Accountants (Standards).

A summary of the nature, objectives, scope, limitations of, and the procedures performed in a System Review as described in the Standards may be found at [www.aicpa.org/prsummary](http://www.aicpa.org/prsummary). The summary also includes an explanation of how engagements identified as not performed or reported in conformity with applicable professional standards, if any, are evaluated by a peer reviewer to determine a peer review rating.

**Firm's Responsibility**

The firm is responsible for designing a system of quality control and complying with it to provide the firm with reasonable assurance of performing and reporting in conformity with applicable professional standards in all material respects. The firm is also responsible for evaluating actions to promptly remediate engagements deemed as not performed or reported in conformity with professional standards, when appropriate, and for remediating weaknesses in its system of quality control, if any.

**Peer Reviewer's Responsibility**

Our responsibility is to express an opinion on the design of the system of quality control and the firm's compliance therewith based on our review.

**Required Selections and Considerations**

Engagements selected for review included an engagement performed under *Government Auditing Standards*, a compliance audit under the Single Audit Act and audits of employee benefit plans.

As a part of our peer review, we considered reviews by regulatory entities as communicated by the firm, if applicable, in determining the nature and extent of our procedures.

**Opinion**

In our opinion, the system of quality control for the accounting and auditing practice of White Nelson Diehl Evans LLP in effect for the year ended March 31, 2018, has been suitably designed and complied with to provide the firm with reasonable assurance of performing and reporting in conformity with applicable professional standards in all material respects. Firms can receive a rating of *pass*, *pass with deficiency(ies)* or *fail*. White Nelson Diehl Evans LLP has received a peer review rating of *pass*.

*Heidenreich & Heidenreich CPAs PLLC*

Heidenreich & Heidenreich, CPAs, PLLC



**WNDE**  
White Nelson Diehl Evans LLP  
CPAs | TAX | ADVISORY | AUDIT

May 10, 2019

Ms. Jeanette Contreras  
Library Director  
Placentia Library District  
411 E. Chapman Ave.  
Placentia, CA 92870

Dear Ms. Contreras:

We are pleased to confirm our understanding of the services we are to provide the Placentia Library District (the "District") for the year ending June 30, 2019. We will prepare the Special Districts Financial Transactions Report and Supplement to the Annual Report for the 2019 fiscal year and perform a compilation engagement with respect to these reports.

### **Our Responsibilities**

The objective of our engagement is to:

1. prepare the Special Districts Financial Transactions Report and Supplement to the Annual Report in accordance with the format prescribed by the California State Controller's Office based on information provided by you, and .
2. apply accounting and financial reporting expertise to assist you in the presentation of the Special Districts Financial Transactions Report and Supplement to the Annual Report without undertaking to obtain or provide any assurance that there are no material modifications that should be made to the Special Districts Financial Transactions Report and Supplement to the Annual Report in order for them to be in accordance with the format prescribed the California State Controller's Office.

We will conduct our compilation engagement in accordance with Statements on Standards for Accounting and Review Services ("SSARS") promulgated by the Accounting and Review Services Committee of the American Institute of Certified Public Accountants ("AICPA") and comply with the AICPA's *Code of Professional Conduct* including the ethical principles of integrity, objectivity, professional competence, and due care.

We are not required to, and will not, verify the accuracy or completeness of the information you will provide to us for the engagement or otherwise gather evidence for the purpose of expressing an opinion or a conclusion. Accordingly, we will not express an opinion or a conclusion nor provide any assurance on the Special Districts Financial Transactions Report and Supplement to the Annual Report.

Ms. Jeanette Contreras, Library Director  
Placentia Library District  
May 10, 2019  
Page 2

### **Our Responsibilities (Continued)**

Our engagement cannot be relied upon to identify or disclose any financial statement misstatements, including those caused by fraud or error, or to identify or disclose any wrongdoing within the District or noncompliance with laws and regulations.

We, in our sole professional judgment, reserve the right to refuse to perform any procedure or take any action that could be construed as assuming management responsibilities.

### **Your Responsibilities**

The engagement to be performed is conducted on the basis that you acknowledge and understand that our role is to assist you in the presentation of the Special Districts Financial Transactions Report and Supplement to the Annual Report in accordance with the format prescribed by the California State Controller's Office.

You have the following overall responsibilities that are fundamental to our undertaking the engagement in accordance with SSARS:

1. The selection of the format prescribed by the California State Controller's Office as the financial reporting framework to be applied in the preparation of the Special Districts Financial Transactions Report and Supplement to the Annual Report.
2. The preparation and fair presentation of the Special Districts Financial Transactions Report and Supplement to the Annual Report in accordance with the format prescribed by the California State Controller's Office.
3. The design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of the Special Districts Financial Transactions Report and Supplement to the Annual Report.
4. The prevention and detection of fraud.
5. To ensure that the District complies with the laws and regulations applicable to its activities.
6. The accuracy and completeness of the records, documents, explanations, and other information, including significant judgments, you provide to us for the engagement.

Ms. Jeanette Contreras, Library Director  
Placentia Library District  
May 10, 2019  
Page 3

### **Your Responsibilities (Continued)**

#### **7. To provide us with:**

- access to all information of which you are aware that is relevant to the fair presentation of the Special Districts Financial Transactions Report and Supplement to the Annual Report, such as records, documentation, and other matters.
- additional information that we may request from you for the purpose of the compilation engagement.
- unrestricted access to persons within the District of whom we determine it necessary to make inquiries.

You are also responsible for all management decisions and responsibilities and for designating an individual, preferably within senior management, with suitable skills, knowledge, and experience to oversee our preparation of your Special Districts Financial Transactions Report and Supplement to the Annual Report. You are responsible for evaluating the adequacy and results of the services performed and accepting responsibility for such services.

### **Our Report**

As part of our engagement, we will issue a report that will state that we did not audit or review the Special Districts Financial Transactions Report and Supplement to the Annual Report and that, accordingly, we do not express an opinion, a conclusion, or provide any assurance on them. If, for any reason, we are unable to complete the compilation of your Special Districts Financial Transactions Report and Supplement to the Annual Report, we will not issue a report on such annual reports as a result of this engagement.

Our report will disclose that the Special Districts Financial Transactions Report and Supplement to the Annual Report are presented in a prescribed form in accordance with the requirements of the California State Controller's Office and are not intended to be a presentation in accordance with accounting principles generally accepted in the United States of America.

You agree to include our accountants' compilation report in any document containing the Special Districts Financial Transactions Report and Supplement to the Annual Report that indicates we have performed a compilation engagement on such annual reports and, prior to inclusion of the report, to ask our permission to do so.

Ms. Jeanette Contreras, Library Director  
Placentia Library District  
May 10, 2019  
Page 4

**Other Relevant Information**

Ms. Daphnie Munoz, CPA, is the engagement partner and is responsible for supervising the engagement and signing the report or authorizing another individual to sign it.

Our fee for this service will be \$1,765. The fee estimate is based on anticipated cooperation from your personnel and the assumption that unexpected circumstances will not be encountered during the work performed. If significant additional time is necessary, we will discuss it with you and arrive at a new fee estimate before we incur the additional costs. Our invoices for these fees will be rendered each month as work progresses and are payable on presentation. You agree to hold us harmless and to release, indemnify, and defend us from any liability or costs, including attorney's fees, resulting from management's knowing misrepresentations to us.

To ensure that White Nelson Diehl Evans LLP's independence is not impaired under the AICPA *Code of Professional Conduct*, you agree to inform the engagement partner before entering into any substantive employment discussions with any of our personnel.

We appreciate the opportunity to be of service to you and believe this letter accurately summarizes the significant terms of our engagement. If you have any questions, please let us know. If you acknowledge and agree with the terms of our engagement as described in this letter, please sign the enclosed copy and return it to us.

Very truly yours,

WHITE NELSON DIEHL EVANS LLP

*White Nelson Diehl Evans LLP*

RESPONSE:

This letter correctly sets forth the understanding of the Placentia Library District.

By \_\_\_\_\_

Title \_\_\_\_\_

Date \_\_\_\_\_



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**PLACENTIA LIBRARY DISTRICT BOARD OF TRUSTEES**

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**TO:** Library Board of Trustees

**FROM:** Jeanette Contreras, Library Director

**SUBJECT:** Authorize the first change order to Project #PLD-2018-003 in the amount of \$46,593.23 with Vincor Construction, Inc., a California-based company, to provide additional construction services for the District's Renovation Project. This would result in an amended contract with a new total amount not to exceed \$1,241,000.

**DATE:** May 17, 2019

**BACKGROUND**

On March 5, 2019, the Library Board of Trustees awarded the contract for the Library Renovation Project to Vincor Construction, Inc., as the lowest responsible bidder in the amount of \$1,194,213.73.

Two site conditions have resulted in the need for the first change order to include relocation of the book drop and replacement of carpet in all staff work areas. These changes are necessary due to the relocation of an electrical panel in the lobby restroom, which required an expansion for ADA compliance. Additionally the carpet in the Administration and Circulation needed replacement due to its age and water damages from the energy efficiency project. As a result of this incident, staff recommends that carpet in all staff work areas be replaced to have a cohesive look throughout the building.

Attachment A is the signed Contract with Vincor Construction, Inc.

Attachment B is first change order dated April 17, 2019.

**FISCAL IMPACT:** \$46,593.23

**RECOMMENDATIONS**

1. Motion to authorize the first change order to Project #PLD-2018-003 in the amount of \$46,593.23, resulting in an amended contract with a new total not to exceed \$1,241,000, as presented; and,
2. Motion for a roll call vote.
3. Roll call vote.

**AGREEMENT FOR LIBRARY INTERIOR IMPROVEMENT PROJECT BETWEEN  
PLACENTIA LIBRARY DISTRICT AND VINCOR CONSTRUCTION, INC.**

The following agreement ("Agreement") is made and entered into, as of the date executed by the President of the Board of Directors of the Placentia Library District, by and between Vincor Construction, Inc., a California Corporation, hereinafter referred to as the "Contractor" and the Placentia Library District, hereinafter referred to as "District."

WHEREAS, District accepted the bid of Contractor as is further set forth in District's Contract Documents and Specifications for Project No. PLD-2018-03 and Addendum No. 1 dated February 6, 2019, and Addendum No. 2 dated February 25, 2019; and,

WHEREAS, District has authorized the President of the Board of Directors to execute a written contract with Contractor for furnishing labor, equipment and material for roofing services for the District.

NOW, THEREFORE, in consideration of the mutual covenants herein contained, it is agreed:

1. GENERAL SCOPE OF WORK: Contractor shall furnish all necessary labor, tools, materials, appliances, and equipment for and do the work for the Placentia Library Interior Improvement Project as is further set forth in District's Contract Documents and Specifications for Project No.: PLD-2018-03, which are hereby incorporated herein by reference and are collectively referred to herein as the "Scope of Services." All work to be performed under this Agreement shall be in accordance with the Scope of Services, and in accordance with the instructions of Erik Mar, District's Project Manager, hereafter referred to as "Project Manager".

2. INCORPORATED DOCUMENTS TO BE CONSIDERED COMPLEMENTARY/PRIORITY OF DOCUMENTS: The Scope of Services together with this Agreement and Contractor's Bid dated February 26, 2019, shall constitute the entire agreement between the parties. This Agreement is intended to require a complete and finished piece of work and anything necessary to complete the work properly and in accordance with the law and lawful governmental regulations shall be performed by the Contractor whether set out specifically in this Agreement or not. Should it be ascertained that any inconsistency exists between the aforesaid documents and this Agreement, the following order of precedence shall apply: (1) this Agreement; (2) the Scope of Services; and (3) Contractor's Bid. This Agreement may not be amended except in writing signed by the parties.

3. COMPENSATION: Contractor agrees to receive and accept the prices set forth in Contractor's Bid as full compensation for furnishing all materials, performing all work, and fulfilling all obligations hereunder. Said compensation in the amount of \$1,194,213.73 shall cover all expenses, losses, damages, and consequences arising out of the nature of the work during its progress or prior to its acceptance including those for well and faithfully completing the work and the whole thereof in the manner and time specified in this Agreement; and also including those arising from actions of the elements, unforeseen difficulties or obstructions encountered in the prosecution of the work, suspension or discontinuance of the work, and all other unknowns or risks of any description connected with the work. To the extent applicable, final payment to Contractor shall be withheld for 30 days after the time in which Contractor has verified to the District's

satisfaction that it has submitted all information to the Department of Industrial Relations required by Labor Code §1773.3.

4. TERM OF AGREEMENT: The time for completing the work is a material provision of this Agreement and time is of the essence. Contractor agrees to do all things reasonably necessary to complete the work within the time established in the Scope of Services and in coordination with the Project Manager.

5. INSURANCE:

- a. Contractor shall at all times during the term of this Agreement carry, maintain and keep in full force and effect, with an insurance company authorized to do business in the State of California the following insurance:
  - i. A policy of broad-form comprehensive general liability insurance written on an occurrence basis with minimum limits of \$2,000,000 combined single limit coverage against any injury, death or damage as a result of wrongful or negligent acts by Contractor, its officer, employees, agents and subcontractors in performing this Agreement.
  - ii. Property damage insurance with a minimum limit of \$500,000 per occurrence.
- b. Worker's Compensation insurance with a minimum limit of \$500,000 or the amount required by law, whichever is greater.

Contractor shall not commence work under this Agreement until it has obtained all insurance required hereunder in a company or companies acceptable to District nor shall the Contractor allow any sub-contractor to commence work on his sub-contract until all insurance required of the sub-contractor has been obtained. The Contractor shall take out and maintain at all times during the life of this contract the following policies of insurance:

- a. **Workers' Compensation Insurance:** Before beginning work, the Contractor shall furnish to the District a certificate of insurance as proof that he has taken out full workers' compensation insurance for all persons whom he may employ directly or through sub-contractors in carrying out the work specified herein, in accordance with the laws of the State of California. Such insurance shall be maintained in full force and effect during the period covered by this contract.

In accordance with the provisions of Section 3700 of the California Labor Code, every Contractor shall secure the payment of compensation to his employees. In executing this Agreement Contractor certifies as follows:

**"I am aware of the provisions of Section 3700 of the Labor Code which requires every employer to be insured against liability for workers' compensation or to undertake self insurance in accordance with the provisions of that Code, and I will comply with such provisions before commencing the performance of work of this contract."**

- b. Each such policy of insurance provided for in paragraph a. shall:
  - 1) Be issued by an insurance company which is authorized to do business in the State of California.

- 2) Name as additional insured the District, its officers, agents and employees;
  - 3) Specify it acts as primary insurance and that no insurance held or owned by the designated additional insured shall be called upon to cover a loss under the policy;
  - 4) Otherwise be in form satisfactory to the District.
- c. The Contractor shall, prior to performing any work under this Agreement, deliver to the Library Director or her designee the original policies of insurance required in paragraphs a. and b. hereof, or a certificate of the insurance company, showing the issuance of such insurance, and the additional insured and other provisions required herein.

6. PREVAILING WAGE: Notice is hereby given that in accordance with the provisions of California Labor Code, Division 2, Part 7, Chapter 1, Articles 1 and 2, the Contractor is required to pay not less than the general prevailing rate of per diem wages for work of a similar character in the locality in which the public works is performed, and not less than the general prevailing rate of per diem wages for holiday and overtime work. In that regard, the Director of the Department of Industrial Relations of the State of California is required to and has determined such general prevailing rates of per diem wages.

Contractor shall forfeit, as penalty to District, not more than two hundred dollars (\$200.00) for each laborer, workman or mechanic employed for each calendar day or portion thereof, if such laborer, workman or mechanic is paid less than the general prevailing rate of wages hereinbefore stipulated for any work done under this Agreement, by him or by any sub-contractor under him.

Contractor and any of its sub-contractors must be registered with the Department of Industrial Relations pursuant to Labor Code section 1725.5, which precludes the award of a contract for a public work on any public works project awarded after April 1, 2015 to a person not registered. This Agreement is subject to compliance monitoring and enforcement by the Department of Industrial Relations.

7. APPRENTICESHIP EMPLOYMENT: Contractor and sub-contractor under him shall comply with the requirements of Sections 1777.5 and 1777.6 in the employment of apprentices.

Information relative to apprenticeship standards, wage schedules and other requirements may be obtained from the Director of Industrial Relations, ex-officio the Administrator of Apprenticeship, San Francisco, California, or from the Division of Apprenticeship Standards and its branch offices.

8. LEGAL HOURS OF WORK: Eight (8) hours of labor shall constitute a legal day's work for all workmen employed in the execution of this Agreement, and the Contractor and any sub-contractor under him shall comply with and be governed by the laws of the State of California having to do with working hours set forth in Division 2, Part 7, Chapter 1, Article 3 of the Labor Code of the State of California as amended.

9. TRAVEL AND SUBSISTENCE PAY: Contractor agrees to pay travel and subsistence pay to each workman needed to execute the work required by this contract as such travel and subsistence payments are defined in the applicable collective bargaining agreements filed in accordance with Labor Code Section 1773.8.

10. CONTRACTOR'S LIABILITY: The District, its officers, agents and employees ("Indemnitees") shall not be answerable or accountable in any manner for any loss or damage that may happen to the work or any part thereof, or for any of the materials or other things used or employed in performing the work; or for injury or damage to any person or persons, either workers or employees of Contractor, of its sub-contractors or the public, or for damage to adjoining or other property from any cause whatsoever arising out of or in connection with the performance of the work. Contractor shall be responsible for any damage or injury to any person or property resulting from defects or obstructions or from any cause whatsoever.

Contractor will indemnify Indemnitees against and will hold and save Indemnitees harmless from any and all actions, claims, damages to persons or property, penalties, obligations or liabilities that may be asserted or claimed by any person, firm, entity, corporation, political subdivision, or other organization arising out of or in connection with the work, operation, or activities of Contractor, its agents, employees, sub-contractors or invitees provided for herein, whether or not there is concurrent passive negligence on the part of District.

Contractor's obligations under this section apply regardless of whether or not such claim, charge, damage, demand, action, proceeding, loss, stop notice, cost, expense, judgment, civil fine or penalty, or liability was caused in part or contributed to by an Indemnitee. However, without affecting the rights of District under any provision of this Agreement, Contractor shall not be required to indemnify and hold harmless District for liability attributable to the active negligence of District provided such active negligence is determined by agreement between the parties or by the findings of a court of competent jurisdiction.

11. NON-DISCRIMINATION: Pursuant to Labor Code Section 1735, no discrimination shall be made in the employment of persons in the work contemplated by this Agreement because of the race, color, sex, mental disability, physical disability, religion or other reason set forth in Government Code § 12940 of such person. Contractor agrees to post in conspicuous places available to employees and applications, a notice setting forth provisions of this non-discrimination clause. A violation of this section exposes the Contractor to the penalties provided for in Labor Code Section 1735.

12. BONDS: Contractor shall provide payment and performance bonds equaling 100% of the compensation amount set forth in Section 3 of this Agreement on forms reasonably acceptable to the District. The form of performance bond shall ensure Contractor's performance of the work set forth in this Agreement. The form of the payment bond shall ensure the payment of laborers, mechanics, materialmen and others as set forth in the California Civil Code.

13. TERMINATION: This Agreement may be terminated by the District for any reason upon the giving of a written "Notice of Termination" to Contractor at least fifteen (15) days prior to the date of termination specified in the notice. Upon receipt of such notice, Contractor shall immediately cease work, unless otherwise directed by the Notice of Termination. In the event of such termination, Contractor shall be paid for services satisfactorily rendered and expenses reasonably and necessarily incurred prior to the effective date of termination, unless the Notice of Termination is issued for cause, in which event the District may withhold any disputed compensation. Contractor shall not be entitled to any claim for lost profits.

14. CLAIMS FILING AND PROCESSING: The City and Bidder agree to attempt to orally resolve any disputes which may give rise to a claim (hereafter, "Claim") that falls within the

definition of Public Contract Code section 9204 (hereafter, "Section 9204"). If these efforts are unsuccessful, the City and Bidder shall process the Claim in accordance with Section 9204.

Contractor's License No. 763743, B - General Building Contractor

15. GOVERNING LAW/VENUE: This Agreement shall be interpreted, construed and enforced in accordance with the laws of the State of California. Should any legal action arise under this Agreement the County of Orange, Orange County Superior Court shall be the place of venue.

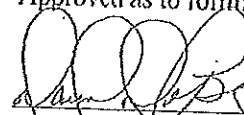
IN WITNESS WHEREOF, the parties hereto have executed this Agreement with all the formalities required by law on the respective dates set forth opposite their signatures.

Placentia Library District

  
Gayle Carline, Board President


Date: March 7, 2019

Approved as to form:

  
David DeBerry, Special Counsel

Date: March 7, 2019

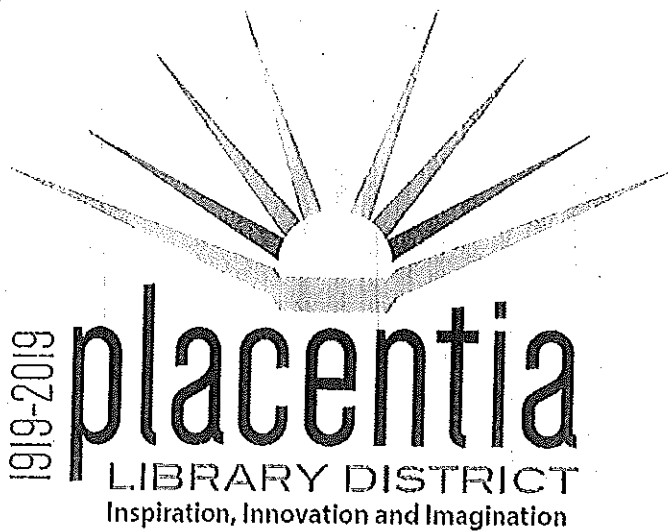
Vincor Construction, Inc.

  
Name: Vincent Cortes, President

Title: President

Date: 3/11/19, 2019





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**PLACENTIA LIBRARY DISTRICT BOARD OF TRUSTEES**

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**TO:** Library Board of Trustees

**FROM:** Jeanette Contreras, Library Director

**SUBJECT:** Discuss the Request for Proposal (RFP) for an Integrated Library System.

**DATE:** May 17, 2019

**BACKGROUND**

On July 20, 1993, the Placentia Library District entered into an Agreement for the City of Anaheim to provide an automated library service system, Dynix. The system included the following online services: circulation, catalog, batch services, electronic mail system, offline backup system, LC/MARC and Brodart databases.

The Agreement between the District and the City of Anaheim was renewed on June 28, 2017. During this time, the City of Anaheim, along with the District, reviewed proposals for an integrated library system (ILS). The outcome resulted in contract with SirsiDynix. The District's cost for the ILS service through the City of Anaheim is currently \$34,000.

The letter of termination from the Agreement was submitted on March 29, 2019. Representatives from the District and the City of Anaheim met on April 30, 2019 with a follow-up conference call on May 7, 2019 to discuss the planning, FAQs development, logistics, training, and messaging, moving forward with an independent ILS for the District. A May 23<sup>rd</sup> meeting is scheduled to finalize the messaging and FAQs.

On March 22, 2019, a RFP was issued with a closing date of April 29, 2019.

A total of six proposals were submitted.

Attachment A is the summary for the proposals.

Attachment B is auto-graphics proposal.

Attachment C is Biblion x proposal.

Attachment D is ByWater Solutions proposal.

Attachment E is Innovative Interfaces proposal.

Attachment F is SirsiDynix proposal.

Attachment G is TLC proposal.

Attachment H is the Technology Manager's recommendations.

**FISCAL IMPACT:** \$11,365 - \$56,050

**RECOMMENDATION**

To be determined by the Library Board of Trustees

**AUTO-GRAPHICS**

\*Denotes a Annual Discount

| ILS COST PROPOSAL  |                            |           |           |           |           |           |
|--|----------------------------|-----------|-----------|-----------|-----------|-----------|
| Description  | Initial/<br>Implementation | Year 1    | Year 2    | Year 3    | Year 4    | Year 5    |
| Required Modules<br>o Circulation<br>o Acquisitions<br>o Serials<br>o OPAC/Discovery<br>o Cataloging<br>o Reports (including<br>Admin/Statistics)<br>o Inventory & Authority Control | N/A                        | \$8,699   | \$8,960   | \$9,229   | \$9,506   | \$9,791   |
| Hosting  | N/A                        | \$2,987   | \$3,076   | \$3,169   | \$3,264   | \$3,362   |
| Training   | \$5,500                    | N/A       | N/A       | N/A       | N/A       | N/A       |
| Data Migration   | \$13,200                   | N/A       | N/A       | N/A       | N/A       | N/A       |
| Setup  | \$6,350                    |           |           |           |           |           |
| Subtotal   | \$25,050                   | \$11,686  | \$12,036  | \$12,398  | \$12,770  | \$13,153  |
| *Annual Discount   | (\$13,685)                 | (\$3,657) | (\$3,767) | (\$3,880) | (\$3,996) | (\$4,116) |
| Total  | \$11,365                   | \$8,029   | \$8,269   | \$8,518   | \$8,774   | \$9,037   |

| ILS COST PROPOSAL           |                            |         |         |         |         |         |
|-----------------------------|----------------------------|---------|---------|---------|---------|---------|
| Optional Modules            | Initial/<br>Implementation | Year 1  | Year 2  | Year 3  | Year 4  | Year 5  |
| iOS & Android App           | N/A                        | N/A     | N/A     | N/A     | N/A     | N/A     |
| Marketing Module            | N/A                        | N/A     | N/A     | N/A     | N/A     | N/A     |
| CRM Module                  | N/A                        | N/A     | N/A     | N/A     | N/A     | N/A     |
| Interlibrary Loan<br>Module | INC                        | \$1,500 | \$1,545 | \$1,591 | \$1,639 | \$1,688 |

# Biblionix

4/9/2019  
Q190409-22

## Quote

To: Jon Legree  
Placentia Library District  
411 E. Chapman Ave.  
Placentia, CA 92870

This quote is based on the following about your library:

|                     |         |
|---------------------|---------|
| Number of Items:    | 73,000  |
| Annual Circulation: | 250,000 |
| Previous ILS        | Horizon |
| Number of Locations | 1       |

| Annual Item:        | Description  | Price                       |
|---------------------|--|-----------------------------|
| Apollo ILS/LSP      | Hosted Service: Includes server capabilities and storage for all automation data, backups, upgrades, on-line training, customer service, and all current features except current and future extra cost options. As an Apollo customer this base price would be guaranteed for 3 years. (annual subscription) | \$5,600                     |
| One Time Item:      |  |                             |
| Migration Fee       | Fee to receive and import your data into Apollo. Including analysis, MARC format error correction, and one-on-one help for policy and options settings.  | \$11,200                    |
| Optional Items:     |  | Price                       |
| Gabble              | Two-way texting with renewal capability. Unlimited number of SMS messages. (annual subscription)   | \$280                       |
| Content Café 2      | Catalog enhancement on most titles from Baker & Taylor. Some mix of full-color jacket images, summaries, tables of contents, annotations, excerpts, bios, flap text. (annual subscription)   | \$300                       |
| Content Café 2 Plus | All catalog enhancements in Content Cafe 2, plus professional reviews. (annual subscription)   | \$500                       |
| Kids catalog        | Use of Apollo's public Kids Catalog. (annual subscription)   | Free                        |
| Auto-Calling        | Auto-calling feature for patron notifications. No phone line or hardware needed. Post-billed.  | \$0.10 per call post-billed |

**Terms:**

- o Data Ownership: Your data that is in Apollo belongs to your library. You can download all of it for free at any time. This might be for your own backup or to change systems. It is your data.
- o The total of the migration/setup fees, subscription fee, and option fees (if applicable), is billable at the time you begin using Apollo. Your test and trial time is free.
- o Payment terms are 30 days.
- o This quotation is valid for 90 days.
- o Cancellation: The library may cancel its subscription at any time by written notice. Biblionix may cancel the subscription with a 120-day written, certified mail notice to the library director. In either case, for the Apollo subscription (not for the options), a prorated refund will be made for any unused subscription term.
- o Security: The library is solely responsible for the creation, security, and management of its passwords. Biblionix maintains practices to otherwise ensure the security and confidentiality of the library's data.
- o Privacy: Each library is the sole owner and user of its total data set. Biblionix manages the data solely for library's own use and makes no other use of it. Biblionix may gather and report aggregate statistics across many libraries.
- o <https://biblionix.com/terms/>

Thank you for your consideration of Biblionix and Apollo.

Sincerely,

Cameron Charbonnet  
Biblionix, LLC

ByWater

*COST PROPOSAL*

| <i>Category</i>                          | <i>Year 1</i> | <i>Year 2</i> | <i>Year 3</i> | <i>Year 4</i> | <i>Year 5</i> | <i>Totals</i> |
|--|---------------|---------------|---------------|---------------|---------------|---------------|
|  |               |               |               |               |               |               |
| <b>Koha Implementation and Migration</b> | \$12,450.00   | \$0.00        | \$0.00        | \$0.00        | \$0.00        | \$12,450.00   |
|  |               |               |               |               |               |               |
| <b>Annual Support &amp; Hosting</b>      | \$7,800.00    | \$7,800.00    | \$8,190.00    | \$8,190.00    | \$8,600.00    | \$40,580.00   |
|  |               |               |               |               |               |               |
| <b>Training</b>                          | \$4,600.00    | Included      | Included      | Included      | Included      | \$4,600.00    |
|  |               |               |               |               |               |               |
| <b>Totals (ByWater Hosted)</b>           | \$24,850.00   | \$7,800.00    | \$8,190.00    | \$8,190.00    | \$8,600.00    | \$57,630.00   |



Placentia Library District  
 RFP for Integrated Library System  
 April 29, 2019

**Cost Proposal**

Cost quotes and payment terms should be included for all software and recommended equipment. Pricing should reflect a vendor-hosted solution for the system.

- o Please use the pricing sheet included in this section to indicate the costs for the various components.
- o Please feel free to add items to the cost table if you have items which do not fit into the specific categories.
- o Prices for the initial purchase, implementation and 5 years of maintenance should be included for each item.

| ILS COST PROPOSAL  |                        |   |          |          |          |          |
|--|------------------------|---|----------|----------|----------|----------|
| Description  | Initial/Implementation | Year 1  | Year 2   | Year 3   | Year 4   | Year 5   |
| <b>Required Modules</b><br>o Circulation<br>o Acquisitions<br>o Serials<br>o OPAC/Discovery<br>o Cataloging<br>o Reports (including Admin/Statistics)<br>o Inventory & Authority Control | \$20,500               | This is the cost included in the initial column to the left | \$21,525 | \$22,601 | \$23,731 | \$24,918 |
| Hosting  | \$3,600                |   | \$3,780  | \$3,969  | \$4,167  | \$4,375  |
| Training   | \$31,950               |   |          |          |          |          |
| Data Migration   | Included with Training |   |          |          |          |          |

| ILS COST PROPOSAL  |   |        |        |        |        |        |
|--|---|--------|--------|--------|--------|--------|
| Optional Modules   | Initial/Implementation                    | Year 1 | Year 2 | Year 3 | Year 4 | Year 5 |
| iOS & Android App  | Included in software subscription         |        |        |        |        |        |
| Marketing Module   | N/A                                       |        |        |        |        |        |
| CRM Module   | N/A                                       |        |        |        |        |        |
| Interlibrary Loan Module   | Included in software subscription         |        |        |        |        |        |
| <i>Include any other optional items described in your Proposal</i> | See attached sheet of included subsystems |        |        |        |        |        |

### OPTIONAL COST PROPOSAL: HORIZON HOSTED SOLUTION

SirsiDynix recognizes that staff of Placentia Library District are currently utilizing and familiar with our Horizon Integrated Library System. This cost proposal is for a Horizon hosted solution (instead of Symphony), which may allow for a smoother transition away from Anaheim Public Library and will require less data migration, implementation and training. A detailed training proposal can be customized based on additional input from PLD.

| ILS COST PROPOSAL  |                        |          |          |          |          |          |
|--|------------------------|----------|----------|----------|----------|----------|
| Description  | Initial/Implementation | Year 1   | Year 2   | Year 3   | Year 4   | Year 5   |
| <b>Required Modules</b><br><ul style="list-style-type: none"> <li>o Circulation</li> <li>o Acquisitions</li> <li>o Serials</li> <li>o OPAC/Discovery</li> <li>o Cataloging</li> <li>o Reports (including Admin/Statistics)</li> <li>o Inventory &amp; Authority Control</li> </ul> | \$13,690               | \$20,740 | \$20,740 | \$21,341 | \$21,960 | \$22,595 |
| Hosting  | Included               | Included | Included | Included | Included | Included |
| Training   | TBD                    |          |          |          |          |          |
| Data Migration   | \$6,390                |          |          |          |          |          |

| ILS COST PROPOSAL   |   |         |         |         |          |          |
|---|---|---------|---------|---------|----------|----------|
| Optional Modules  | Initial/Implementation  | Year 1  | Year 2  | Year 3  | Year 4   | Year 5   |
| IOS & Android App (BLUEcloud Mobile)                      | \$1,200   | \$4,730 | \$4,730 | \$4,865 | \$5,010  | \$5,150  |
| Marketing Module (Community Engagement – 20,000 contacts) | \$0   | \$9,650 | \$9,650 | \$9,930 | \$10,220 | \$10,515 |
| CRM Module  | <i>SirsiDynix quoted our Community Engagement Module on the previous line; it includes some CRM aspects as well.</i>  |         |         |         |          |          |
| Interlibrary Loan Module                                  | <i>SirsiDynix does not offer our own ILL module but integrates with 3<sup>rd</sup>-party systems. The RFP had no ILL functionality requirements so we have not quoted anything but welcome discussions on how we could meet your ILL needs.</i> |         |         |         |          |          |
| SaaS Hosted Test Environment                              | \$1,500   | \$1,415 | \$1,415 | \$1,455 | \$1,500  | \$1,540  |
| BLUEcloud Visibility                                      | \$1,500   | \$4,530 | \$4,530 | \$4,660 | \$4,795  | \$4,935  |

|  |         |         |         |         |         |         |
|--|---------|---------|---------|---------|---------|---------|
| Platinum Premier Services                  | \$0     | \$8,000 | \$8,000 | \$8,230 | \$8,470 | \$8,715 |
| Acquisitions Accounting System Integration | \$2,880 | \$0     | \$0     | \$0     | \$0     | \$0     |
| StackMap Configuration                     | \$1,120 | \$0     | \$0     | \$0     | \$0     | \$0     |

# Pricing

Cost proposal

| ILS COST PROPOSAL                            |                        |   |                 |                 |                 |                 |
|--|------------------------|---|-----------------|-----------------|-----------------|-----------------|
| Description                                  | Initial/Implementation | Year 1  | Year 2          | Year 3          | Year 4          | Year 5          |
| Required Modules                             | N/A                    | Year 1 cost is included in the Initial/Implementation cost. | N/A             | N/A             | N/A             | N/A             |
| Library Solution Integrated Software Package | \$29,999               | Included  | \$5,999         | \$5,999         | \$5,999         | \$5,999         |
| <i>Circulation</i>                           | Included               | Included  | Included        | Included        | Included        | Included        |
| <i>Acquisitions</i>                          | \$2,999                | Included  | \$799           | \$799           | \$799           | \$799           |
| <i>Serials</i>                               | Included               | Included  | Included        | Included        | Included        | Included        |
| <i>OPAC/Discovery</i>                        | \$1,733                | Included  | \$1,733         | \$1,733         | \$1,733         | \$1,733         |
| <i>Cataloging</i>                            | Included               | Included  | Included        | Included        | Included        | Included        |
| Reports (including Admin/Statistics)         | Included               | Included  | Included        | Included        | Included        | Included        |
| Inventory & Authority Control                | Included               | Included  | Included        | Included        | Included        | Included        |
| eIntegration for Borrower Services           | Included               | Included  | Included        | Included        | Included        | Included        |
| ITS/MARC                                     | Included               | Included  | \$1,995         | \$1,995         | \$1,995         | \$1,995         |
| SIP Software                                 | \$2,500                | Included  | \$500           | \$500           | \$500           | \$500           |
| Hosting                                      | \$4,800                | Included  | \$3,800         | \$3,800         | \$3,800         | \$3,800         |
| Training                                     | \$4,500                | N/A   | N/A             | N/A             | N/A             | N/A             |
| Data Migration                               | \$4,725                | N/A   | N/A             | N/A             | N/A             | N/A             |
| <b>Total</b>                                 | <b>\$51,256</b>        | <b>N/A</b>  | <b>\$14,826</b> | <b>\$14,826</b> | <b>\$14,826</b> | <b>\$14,826</b> |







Response to



REQUEST FOR PROPOSAL INTEGRATED LIBRARY SYSTEM

April 29, 2019

5:00PM PST

platform

search

share

10535 Foothill Blvd  
Suite 200  
Ontario, CA 91730  
Phone (800) 776-6939  
Fax (800) 595-3506  
[www.auto-graphics.com](http://www.auto-graphics.com)

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Section 3: Functionality

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*Active Alert Service for New Titles*

*API AGent VERSION 2.7, Auto-Graphics Web Services*

*Report Writer Output - Ad Hoc Reports*

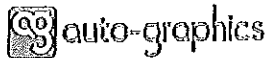
*Software Escalation*

*Training Guide Overview*

*VERSO Canned Reports*

*VERSO SmartReports*





10535 Foothill Blvd., Suite 200 • Rancho Cucamonga, CA 91730 • (800) 776-6939 • [www.auto-graphics.com](http://www.auto-graphics.com)

April 29, 2019

Mr. Jon Legree  
Technology Manager  
411 E. Chapman Avenue  
Placentia, CA 92870

Re: RFP – Integrated Library System

Dear Jon,

Auto-Graphics, Inc. (A-G) is pleased to propose VERSO as your next Integrated Library Solution to the residents of Placentia Library District. VERSO is a comprehensive public library solution that has its roots in one of the oldest library automation companies in the industry. Auto-Graphics is a Southern California based Company with development, management and support all within a short proximity to Placentia. What does this mean to you? Auto-Graphics will provide immediate field service, onsite sales support and a company that is committed to servicing you with local assets.

With A-G, you will know from day one of your implementation that you are special among our pool of libraries and we intend to keep it that way. It is critical for a library to feel its uniqueness is woven into the software, and that our support staff are available to maintain and personally know our customers. Our staff and management team have a single focus, which is a long-term relationship, founded in a product designed and maintained to meet your needs today and into the future.

We offer a product that is tailor-made and can grow alongside you without the need to purchase features and functions not contained in your RFP. A-G believes the general industry position that bundled ILS packages may enrich the company's bottom line, but do not address the library's needs in order to fulfill their mission. We have a deep commitment to Web services and APIs throughout our product. We see this as fundamental to how the industry is today, but looking into the future, API based services will propagate every aspect of the library automation field.

Our company has pioneered many firsts in the industry, that some of the largest companies, to this date, are still trying to accomplish. These include, first use of the Internet for online access to ILS systems housed remotely (hosted/SaaS as we call it today); first 100% web-based staff and patron access in the late 1990s; first use of single point of discovery within your ILS for all data needs not just in the bibliographic database.

In closing, we welcome you to join our family and feel that our company and customer base is an extension of the Auto-Graphics family. We understand as a library moving from a small consortia setting to a standalone implementation may bring challenges, but we are committed to work with the staff to ensure



Library  
Address  
Page 2 of 2

that transition is as smooth as possible. As I begin my 31<sup>st</sup> year at Auto-Graphics, I am reminded that we are unique in the industry with our staff having well over 20 years of direct experience with public library automation. We feel that in today's world of venture capital driven vendors, Auto-Graphics stands alone when it comes to its product diversity, customer service and relationship building. We will continue to focus on meeting the needs of public libraries across North America. We feel that our history and current standing is a testament to who we are, and how we will serve you, not only the day we install your system, but for many years to come. We are a company that was founded and remain family owned for 60 + years, which is a testament to our experience serving public libraries and our clear separation from venture capital owned entities in the industry. Should you have any questions, please feel free to direct them to me at [abf@auto-graphics.com](mailto:abf@auto-graphics.com).

Sincerely,

Albert Flores  
VP Sales

## Section A: Cost Proposal

\*Denotes a Annual Discount

| ILS COST PROPOSAL                         |                            |           |           |           |           |           |
|---|----------------------------|-----------|-----------|-----------|-----------|-----------|
| Description                               | Initial/<br>Implementation | Year 1    | Year 2    | Year 3    | Year 4    | Year 5    |
| Required Modules                          | N/A                        | \$8,699   | \$8,960   | \$9,229   | \$9,506   | \$9,791   |
| o Circulation                             |                            |           |           |           |           |           |
| o Acquisitions                            |                            |           |           |           |           |           |
| o Serials                                 |                            |           |           |           |           |           |
| o OPAC/Discovery                          |                            |           |           |           |           |           |
| o Cataloging                              |                            |           |           |           |           |           |
| o Reports (including<br>Admin/Statistics) |                            |           |           |           |           |           |
| o Inventory & Authority Control           |                            |           |           |           |           |           |
| Hosting:                                  | N/A                        | \$2,987   | \$3,076   | \$3,169   | \$3,264   | \$3,362   |
| Training                                  | \$5,500                    | N/A       | N/A       | N/A       | N/A       | N/A       |
| Data Migration                            | \$13,200                   | N/A       | N/A       | N/A       | N/A       | N/A       |
| Setup                                     | \$6,350                    |           |           |           |           |           |
| Subtotal                                  | \$25,050                   | \$11,686  | \$12,036  | \$12,398  | \$12,770  | \$13,153  |
| *Annual Discount                          | (\$13,685)                 | (\$3,657) | (\$3,767) | (\$3,880) | (\$3,996) | (\$4,116) |
| Total                                     | \$11,365                   | \$8,029   | \$8,269   | \$8,518   | \$8,774   | \$9,037   |

| ILS COST PROPOSAL           |                            |         |         |         |         |         |
|-----------------------------|----------------------------|---------|---------|---------|---------|---------|
| Optional Modules            | Initial/<br>Implementation | Year 1  | Year 2  | Year 3  | Year 4  | Year 5  |
| IOS & Android App           | N/A                        | N/A     | N/A     | N/A     | N/A     | N/A     |
| Marketing Module            | N/A                        | N/A     | N/A     | N/A     | N/A     | N/A     |
| CRM Module                  | N/A                        | N/A     | N/A     | N/A     | N/A     | N/A     |
| Interlibrary Loan<br>Module | INC                        | \$1,500 | \$1,545 | \$1,591 | \$1,639 | \$1,688 |

## Section B: Functionality

| OPAC Functionality                                       |          |   |
|--|----------|---|
| Intuitive functionality for patrons                      | Required | <p>A-G: One of VERSO's design goals has been to create a library catalog that looks familiar to patrons who understand other web services. We have avoided library jargon and have built our patron facing screens to emulate the types of interactions users have with retail web sites.</p> <p>See the following screens for examples of VERSO's patron interface in action.</p> <p>See Picture #1, OPAC, Intuitive 1<br/>See Picture #2, OPAC, Intuitive 2</p>   |
| Ability for patrons and staff to create and share lists  | Required | <p>A-G: Supported. Patrons can create an unlimited number of lists and add an unlimited number of titles to each list. Once titles are on a list, the patrons can:</p> <ul style="list-style-type: none"> <li>• Print any or all titles on the list</li> <li>• Email any or all titles on the list</li> <li>• Save (download) titles on the list in several formats</li> <li>• Place holds on titles on the list (subject to library policy)</li> <li>• Move titles from list to list, if needed.</li> <li>• Staff use lists to build the showcase (carousel) widgets that display on library splash pages.</li> </ul> <p>See Picture # 3, OPAC, My Lists</p> |
| Search includes keyword, browsing and advanced searching | Required | <p>A-G: Supported. VERSO supports 35 different indexes; libraries can select one set of indexes for patrons and a different – more complete set – for staff. Among these 35 indexes:</p> <ul style="list-style-type: none"> <li>• Keyword</li> <li>• Author</li> <li>• Title</li> <li>• Subject (and subject begins with, and subject phrase)</li> <li>• Series</li> <li>• Various numerical identifiers (ISBN, ISSN, UPC, OCLC Number, etc.)</li> </ul>  |



|   |                 |  |
|---|-----------------|--|
| <p>Display enhanced content: cover art, reviews, read-a-likes, etc.</p>                                   | <p>Required</p> | <p>A-G: Supported with services from three optional third-party products:</p> <ul style="list-style-type: none"> <li>◦ Syndetics Solutions -- offers 20 different enhanced data elements, ranging from cover art, book reviews, tables of contents, first chapters, character lists, etc.</li> <li>◦ Content Café -- competitive product to Syndetics; offers similar scope of data elements and enhanced information per title</li> <li>◦ Novelist Select -- integrated with VERSO full bibliographic record display using Novelist Select API; displays titles and cover art for "you might like this" recommendations, books in series, other books by this author, and similar recommendations.</li> </ul> <p>See Picture #4, OPAC, Enhanced Content</p> |
| <p>Limit searches by Lexile and Accelerated Reader</p>  | <p>Required</p> | <p>A-G: Supported both as facets (filters) and also as qualifiers in Advanced Search. Derived from MARC 521 and 526 fields.</p> <p>See Picture #5, OPAC, Lexile on Reading Level Results</p>   |
| <p>Display Lexile and Accelerated Reader data on bibliographic records</p>                                | <p>Required</p> | <p>A-G: Supported. Note that the display of MARC 521 and 526 data (reading program data) is managed in PAC Admin / Record Display Profiles. This enables the library to decide where to display Reading program data: at top of record? At bottom of record? -- and also what labels to use to identify the reading program in the full record display.</p>  |
| <p>Integration with OverDrive, including real-time updates of inventory</p>                               | <p>Required</p> | <p>A-G: Supported through use of OverDrive APIs for availability and circulation activities, and OAuth and SIP2 for authentication</p>   |
| <p>Integrated, intuitive online fine payment solution or ability to integrate with third party vendor</p> | <p>Required</p> | <p>A-G: Supported - PayPal can be used at no additional cost. Comprise's SmartPay payment system, which is has considerably more sophisticated functionality, is available at extra cost.</p>  |

|  |                 |  |
|--|-----------------|--|
| <p>Clear location &amp; availability on results screen</p>                             | <p>Required</p> | <p>A-G: Item Holdings, locations, and availability are displayed in a pop-up grid on the results screen, and in a wider grid on the full bibliographic record screen. The item holdings display also includes icons that enable the user to (a) place a hold on the item, (b) add the item to a personal list, and (3) send a SMS text message to him/herself with item and call number information.</p> <p>Picture #6a, OPAC, Item Holdings Display - Results<br/>         Picture #6b, OPAC, Item Holdings Display - Full Record</p>                       |
| <p>Customization of heading and other wording throughout the catalog</p>               | <p>Required</p> | <p>A-G: Supported in UX Admin and PAC Admin. Libraries can change/edit the following:</p> <ul style="list-style-type: none"> <li>• Index names (Keyword versus All Headings versus Search All)</li> <li>• Database names</li> <li>• Labelled fields in the full bibliographic record</li> <li>• Login and Password prompts</li> <li>• Names and order of facets</li> <li>• Group headings of external resources (Reference Databases, for example)</li> <li>• Search banner (logo, name of library, color scheme)</li> <li>• And numerous others.</li> </ul> |
| <p>Ability to design &amp; display customized library material carousels</p>           | <p>Required</p> | <p>A-G: Supported. Library configuration takes place in the UX Admin administrative module. The library uses VERSO's OPAC list feature to create a set of titles to include in the carousel; staff can use the VERSO component manager to decide on titles, color, background, size, and display speed.</p> <p>See Picture #7, OPAC, Carousels</p>   |
| <p>History of checked out items capability in "My Account" including digital usage</p> | <p>Required</p> | <p>A-G: Supported. Checkout transactions that are managed by VERSO using digital vendor APIs are displayed in the patron's My Account history.</p>   |

|   |                 |  |
|---|-----------------|--|
| <p>Ability to readily display new materials</p>   | <p>Required</p> | <p>A-G: Supported. Most libraries use the material carousels (mentioned above) and set parameters on the configuration – “most recent 4 weeks”, “most recent three months”, “books on order”. VERSO uses those configuration operators to determine with titles to display.</p> <p>VERSO also offers a Topic Search ‘widget’ that performs a search on the topic “New Books”, if that is what was assigned to the item.</p> <p>The difference between the two: Material Carousels display new items in a moving carousel display, while Topic searches perform an actual search and display the results in the OPAC.</p> <p>In addition, users can click the “Added In” button that displays a link, with separators for two months, three months, etc. - in order identify recently acquired titles only.</p> <p>See Picture #8a, OPAC, Display New Materials<br/>See Picture #8b, OPAC, Display New Materials Dropdown</p> |
| <p>Smart searching, including “Did you mean?”</p>   | <p>Required</p> | <p>A-G: Supported; in the event of a null search, VERSO applies logic to the search and returns five or more suggested alternate terms. These terms are derived from the library’s database. There are no blind suggestions made.</p> <p>See Picture #9, OPAC, Did You Mean and Zero Results Messaging</p>   |
| <p>Responsive mobile website design</p>   | <p>Required</p> | <p>A-G: Supported. VERSO ILS automatically sizes from a full-size desktop screen to a tablet-size, to a smart-phone screen without losing functionality.</p>   |
| <p>Ability to search and filter by level of material, relevance, availability, format, location</p> | <p>Required</p> | <p>A-G: Supported. VERSO offers more than 20 facets for filtering; these include all the ones noted above, plus:</p> <ul style="list-style-type: none"> <li>◦ Availability status</li> <li>◦ Series</li> <li>◦ Subject</li> <li>◦ Branch and Location</li> <li>◦ Genre</li> <li>◦ Awards</li> <li>◦ And several others</li> </ul> <p>See Picture #10, OPAC, Facets/Filter</p>  |

|   |          |  |
|---|----------|--|
| Website accessibility compliance  | Required | <p>A-G: Supported. The system supports the use of hardware and software to meet ADA requirements.</p> <p>The end user has access to text size adjusters on every screen; ADA-compliant text equivalents are provided for all significant page elements</p> <p>VERSO complies with Level A of the W3C Web Content Accessibility Guidelines 1.0, including all Priority 1 checkpoints defined in the Guidelines. You can view Auto-Graphics' most recent VPAT 508 Compliance document at <a href="http://www4.auto-graphics.com/learn-more-vpat.asp">http://www4.auto-graphics.com/learn-more-vpat.asp</a></p>   |
| Integrates with Google Analytics or equivalent  | Required | A-G: Google Analytics is supported.  |
| Ability of patron to manage notifications methods   | Required | <p>A-G: Patrons can manage their notification methods in the OPAC's My Account area:</p> <ul style="list-style-type: none"> <li>◦ Paper</li> <li>◦ Email</li> <li>◦ SMS message</li> <li>◦ Phone notification (if library has iTiva / Talking Tech third-party phone notification service)</li> </ul> <p>Patrons can choose one method for Hold Notifications and a different method for Overdues and fines notification.</p> <p>VERSO also supports two-way texting, with which the patron sends a message to VERSO's incoming SMS number (example: RENEW) and VERSO will perform the requested function and confirm that to the patron via a return SMS.</p> <p>See Picture #11, OPAC, Notif Methods</p> |
| Ability of patrons to submit suggestions for purchase   | Required | A-G: See section on widgets and components. The Feedback Widget (that sends patron information back to the library) can be configured as a Suggestion widget by the library.   |
| Discovery layer handles spell checking, dynamic predictive search results, and keyword or related search suggestions                  | Required | <p>A-G: Supported through the use three-level type-ahead. Letters are sent to the server as they are typed, and responses are used to narrow down to the search term(s) supplied.</p> <p>See Picture #12, Three level Type Ahead</p>   |
| Ability for patron to update approved contact information fields for their account and, optionally, for linked family member accounts | Optional | <p>A-G: Supported. Note that library staff can configure which fields in a patron record can be edited by the patron, and which will be read-only.</p> <p>See Picture #13, OPAC, Patron Update Profile</p>   |

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| <p>Ability to email patrons when new materials are added based on a profile set by the patron under their account</p> | <p>Optional</p> | <p>A-G: Supported. VERSO calls this service Active Alerts. A patron can select a day of the week to receive email notifications of newly acquired library items.</p> <p>Patrons can easily add new searches to the Active Alerts profile; the subscription and emails begin the following week. Emails contain the author, title, publisher, and publication date of each title, along with a URL that takes the patron directly to the title in the OPAC.</p> <p>See Picture #14, OPAC, Active Alerts</p> <p>See attached document: Active Alert Service for New Titles.</p> |
| <p>Catalog provides personal recommendations based on previous activity</p>   | <p>Optional</p> | <p>A-G: Patron history recommendations are *not supported at this time. VERSO supports the collection of a patron's historical checkouts, but these are not used for recommendations. (Note: this is a patron opt-in function)</p> <p>See Picture, #15 OPAC, Paton History</p>  |
| <p>If no search results found, offer other suggestions based on search term and/or reading history</p>                | <p>Optional</p> | <p>A-G: Supported. This is done through the "Did You Mean" capability. In the event of a null search, VERSO applies logic to the search and returns five or more suggested alternate terms. These terms are derived from the library's database. There are no blind suggestions made. VERSO does not base these on the patron's reading history.</p>  |
| <p>Personalized display for language (i.e. Japanese, Korean, Chinese)</p>   | <p>Optional</p> | <p>A-G: Supported through the use of Google Translate.</p>  |
| <p>Show custom messages for each patron within their account</p>  | <p>Optional</p> | <p>A-G: Supported to a degree. A patron can send messages to library staff in the context of placing a hold on an item. If staff replies to the patron message, that is shown in the patron's My Account as an individual message to the patron.</p>  |
| <p>Integration of location mapping to indicate the location of an item within the library</p>                         | <p>Optional</p> | <p>A-G: Not supported at this time.</p>   |
| <p>Ability for linked family accounts to renew items</p>  | <p>Optional</p> | <p>A-G: *Not supported; each individual must renew his/her own items. This is a planned future enhancement.</p>   |

| Circulation Functionality   |                 |  |
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| <p>Patron can update information &amp; manage own account including renewals, payment, cancel/freeze holds without staff intervention, download reading history</p> | <p>Required</p> | <p>A-G: All supported in OPAC / My Account. The following operations are supported:</p> <ul style="list-style-type: none"> <li>◦ Patron profile, change address, zip, phone, email address, notification preferences</li> <li>◦ Items Out -- patron can batch renew or renew individually</li> <li>◦ Items on Hold -- patron can batch suspend, batch cancel, individual suspend, individual cancel, send message to library</li> <li>◦ Active Alerts -- subscribe to current awareness email service</li> <li>◦ View Previous Checkouts -- enroll, download, print, and deactivate system tracking of previously checked out items</li> <li>◦ View and pay fines and fees</li> </ul> <p>See Picture #1, Circ, My Account, Items Out<br/>           See Picture #2, Circ, My Account, Items on Hold<br/>           See Picture #3, Circ, My Account, Active Alerts<br/>           See Picture #4, Circ, My Account, Patron Suspend Holds</p> |
| <p>Patron can self-register for a library account</p>   | <p>Required</p> | <p>A-G: Supported. Staff configures self-registration policies such as: patron type, duration of temporary registration, privileges.</p> <p>In the OPAC, patrons can choose to self-register by filling out the web form and selecting a password. Once complete, the patron receives an email with a registration number and login information.</p> <p>The patron's temporary circulation record bears a note "Patron needs to be validated", which is displayed when staff calls up the patron's record in Circulation.</p> <p>See Picture #5, Circ, Self Register 1<br/>           See Picture #6, Circ, Self Register 2</p>  |
| <p>Patron record includes field for option to receive publicity from library</p>  | <p>Required</p> | <p>A-G: VERSO's patron records include twenty Library Defined Fields (LDFs) that can be used by the library to store various demographic and configuration data.</p> <p>Many libraries have defined an LDF as described in the question, as a means of marking the patron record as a publicity subscriber.</p>  |
| <p>All fields searchable, including, but not limited to name, telephone, address &amp; email</p>  | <p>Required</p> | <p>A-G: Supported. The twenty LDFs (described above) are also fully searchable.</p>  |

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| <p>Ability to copy details from one patron registration to another</p>                           | <p>Required</p> | <p>A-G: Supported. The patron add/edit function includes a "COPY" command which can be used to create an additional patron record without the need to re-key data. Only the new patron's barcode and name need to be completed.</p> <p>See Picture #7, Circ, Copy Patron Rec</p>   |
| <p>Registration process provides alert for duplicate customer record based on defined fields</p> | <p>Optional</p> | <p>A-G: Patron Duplicate checking can be activated by the library on any or all the following patron fields:</p> <ul style="list-style-type: none"> <li>• Name</li> <li>• Address</li> <li>• Phone number(s)</li> <li>• Patron barcode</li> <li>• Email address</li> <li>• Birthdate</li> </ul> <p>If a duplicate is detected, VERSO identifies the potential duplicate, and gives staff the ability to reject or accept the new record, or to view the existing record for comparison.</p> <p>See Picture #8, Circ, User Duplic</p>   |
| <p>Ability to link membership of people in same family</p>                                       | <p>Optional</p> | <p>A-G: Supported in two ways:</p> <ul style="list-style-type: none"> <li>• Households members can be associated with one another. Parents will receive children's overdue notices, one blocked household member will cause the entire household to be blocked, and address changes update all associated records.</li> <li>• Patron proxies allow a patron to give complete permission for another person to act in the original person's place. For example: wife for husband, caregiver for elderly homebound patron, or TA for professor.</li> </ul> <p>See Picture #9, Circ, Family Members</p> |

| Financial Management   |          |  |
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| Ability to pay full and/or partial replacement cost of materials | Required | <p>A-G: Supported. Staff can accept full or partial payments for fines and fees. Each partial payment is logged individually.</p> <p>VERSO also handles waivers and adjustments, which are subtracted from the balance owed.</p> <p>Note that the replacement cost is based on the dollar amount stored in the item record; whether to charge full cost or depreciated cost is a library policy decision.</p> <p>See Picture #1, Circ, Pay All<br/>           See Picture #2, Circ, Pay by Item<br/>           See Picture #3, Circ, Pay Options</p> |
| Option for waiving & refunding                                   | Required | <p>A-G: Supported. VERSO supports both Waive All (in which all owed amounts are forgiven) or Waive Item functionality.</p> <p>Refunds are handled as 'Cash Out' transaction and are accounted for in that way on financial reports.</p>  |
| Option for Patron type to determine fines and fees               | Required | <p>A-G: Supported. Fines and Fees are calculated on the basis of a matrix that takes into account:</p> <ul style="list-style-type: none"> <li>• Patron type</li> <li>• Material type</li> <li>• Location / collection of the item</li> </ul>   |
| Option for Item type to determine fines and fees                 | Required | <p>A-G: Supported. Fines and Fees are calculated on the basis of a matrix that takes into account:</p> <ul style="list-style-type: none"> <li>• Patron type</li> <li>• Material type</li> <li>• Location / collection of the item</li> </ul> <p>See Picture #4, Circ, Fine Matrix</p>  |
| Collection account integrated with library software              | Required | <p>A-G: Supported: VERSO works with Unique Management collection service.</p>  |
| Ability to see fine history in the patron account                | Required | <p>A-G: Supported. Staff can see fine history in the staff view of the patron's account in Circulation. Patrons can see their fine history in My Account / Fines and Fees.</p> <p>See Picture #5, Circ, Fine History in Patron Account</p>   |



| Holds & Notifications  |          |   |
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| Notification for holds, overdues, courtesy notices including telephone, email and text messaging | Required | <p>A-G: Supported. The following notifications are available:</p> <ul style="list-style-type: none"> <li>◦ Overdues (1, 2, 3, 4)</li> <li>◦ Pre-overdue courtesy notices</li> <li>◦ Automatic Renewals</li> <li>◦ Fines / Billing</li> <li>◦ Cancelled holds</li> <li>◦ Holds ready for pickup</li> <li>◦ Library card about to expire</li> <li>- Infrequent patron ("we miss you") notice</li> </ul> <p>Notifications can be on paper, email, SMS, or telephone.</p> |
| Ability of patron & staff to cancel holds  | Required | <p>A-G: Supported. Patrons manage their holds in My Account / My Holds. Staff manages holds in Circulation / Patron name / Holds and Reserves.</p> <p>See Picture #1, Circ, Holds Cancel and Suspend</p>  |
| Ability of patron & staff to suspend or freeze holds   | Required | <p>A-G: Supported. Patrons manage their holds in My Account / My Holds. Staff manages holds in Circulation / Patron name / Holds and Reserves.</p>  |
| Records kept for notices sent  | Optional | <p>A-G: Supported. Notices are logged on the patron's Notification History tab.</p>   |

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| <b>Circulation &amp; Management</b>   |          |   |
| Detailed search ability for materials in the staff client, including ability to filter and search by numerous fields including, but not limited to keyword, title, author, ISBN/ISSN, age, collection | Required | A-G: Supported. Because VERSO is web-based (not client based) staff has complete access to the OPAC's search capabilities from any circulation screen.<br><br>If staff jumps to a PAC screen from a patron record, staff can easily return to that patron record without the need to reenter the patron's barcode.  |
| Mobile circulation inside building & outside library without need for offline circulation   | Required | A-G: Supported. VERSO is a web-based ILS; no clients are used. Real-time circulation can take place on any device (laptop, desktop, tablet) where an internet connection and a browser is available.  |
| Offline circulation   | Required | A-G: Supported. Offline Circulation is most frequently used when the library's internet connection has gone down but the library wishes to continue to check out items.<br><br>Staff opens the Offline Circ program and will scan patron and item barcodes to check in and out items. These transactions are temporarily stored on the staff workstation. Once the network comes back up, staff will upload the file(s) that were created by Offline Circ. VERSO produces reports of Offline Circ transactions because of the upload process.<br><br>See Picture #1, Circ, Offline Circ 1<br>See Picture #2, Circ, Offline Circ 2<br>See Picture #3, Circ, Offline Circ 3   |
| Customized receipt configuration  | Required | A-G: Receipts can be customized with the following data:<br><ul style="list-style-type: none"><li>◦ Library Header (address, city, phone number, etc.)</li><li>◦ Library logo image</li><li>◦ Type font and size on receipt</li><li>◦ Library footer (branding or similar message)</li><li>◦ Value calculator that adds the dollar value of the items charged out and displays a marketing message.</li></ul> In addition to the above, the library may configure receipts to include any or all the following:<br><ul style="list-style-type: none"><li>◦ Other items currently charged out</li><li>◦ Fines owed</li><li>◦ Lost items</li><li>◦ Items on Hold and their status</li></ul> See Picture #4, Circ, Customized Receipts |
| Ability to provide receipts via multiple options, including email, print & text messaging   | Required | A-G: Email and print receipts are supported. SMS receipts are planned for a future release.   |

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| Ability to customize wording and graphics for messages & notices  | Required   | A-G: Staff can customize the wording of all notifications.<br>See Picture #5, Circ, Custom Wording/Message   |
| Same record can be in use at multiple workstations  | Required 8 | A-G: Supported. Note that the last change that is saved is the one that prevails.  |
| Complete integration with RFID self-service functionality, including checkout, renewals, holds management and fines payment at self-checkout stations | Required   | A-G: Supported. VERSO handles communications with RFID self-check stations using the SIP2 communications protocol. We have libraries using 3M (Bibliotheca), Tech Logic, and Envisionware Self check stations. |
| Option to auto-renew materials based on set criteria  | Required   | A-G: Supported. Auto-renew follows the same circulation rules that a staff-based renewal would take, such as Renewal Limits and the ability to renew if another patron has the item on hold.                   |
| Digital product usage recorded as patron activity   | Optional   | A-G: Supported   |
| Digital product circulation activity visible and managed via patron account   | Optional   | A-G: Supported in My Account.  |

| Reports   |          |   |
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| Ability to export data in standard formats (e.g. text, CSV, Excel, PDF) | Required | <p>A-G: All list-type reports can be produced in CSV/Excel. The exception is some notices that are formatted for printing/mailing.</p> <p>Statistical reports available in PDF, Excel, or screen output suitable for page printing.</p>   |
| Ability to use report templates   | Required | <p>A-G: Report creation can take place in several ways.</p> <p>See attached documents: Report Writer Output – Ad Hoc Report, VERSO Canned Reports &amp; VERSO SmartReports; listing and describing system-created reports.</p> <p>All the system-created reports are based on a pop-up entry / parameter screen that accepts input configurations and options. The system queries the library database tables and narrows retrieval to only the requested parameters. Reports are produced in CSV/Excel format for manipulation by staff.</p> <p>See the next response for information about SmartReports, VERSO's ad-hoc custom report writer.</p> |

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| <p>Ability to create custom reports</p>                                   | <p>Required</p> | <p>A-G: SmartReports is a wizard-based module that can be used to develop sophisticated queries without the need for SQL or other specialized knowledge.</p> <p>First, staff will decide the general area of the report: Item, Bibliographic, Patron, Acquisitions, or a combination.</p> <p>Next, staff will build the query as shown in the attached screenshots. This process has three parts – the field to search for, the operator (equals, not equals, greater than, less than, etc.) and the value to compare.</p> <p>Example:<br/>         - Patron zip code (field)<br/>         - Equal to (operator)<br/>         - 39002 (data to look for)</p> <p>Staff can stack commands, meaning that they could do a complex search such as:<br/>         People in Zip Code 39002<br/>         Who checked out more than 5 items in 2017<br/>         Who are in patron category ADULT<br/>         Who were born in 1960</p> <p>Once the strategy is saved, staff can give the report a name, and schedule it to run.</p> <p>SmartReports output is always in Excel/CSV.</p> <p>See Picture #1, Reports, Report Writer 1<br/>         See Picture #2, Reports, Report Writer 2</p> |
| <p>Ability to schedule reports with an option to email or FTP results</p> | <p>Required</p> | <p>A-G: Scheduling reports with an option to mail – supported. FTP is not supported at this time.</p>  |
| <p>Ability to run reports for subject, DDC ranges and/or genres</p>       | <p>Required</p> | <p>A-G: Supported; specific reports allow specific selection criteria. For example, the Location Holdings report lists all items in a staff selected location or collection. By default, that report shows all title, all call numbers, all material types in that location.</p> <p>Staff can configure the report to narrow retrieval to: DDC 300 through DDC 358, Material type = Book.</p> <p>See Picture #1 &amp; #2, Reports, Report Writer 1 &amp; Report Writer 2</p>   |

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| Provides reports for which library materials are used and in which locations  | Required | <p>A-G: Several reports supply this information. The most useful would be the Item Circulation Report, which tallies:</p> <ul style="list-style-type: none"> <li>◦ # of checkouts, above or below a certain level (dusty book report or active book report)</li> <li>◦ By call number range</li> <li>◦ By location / collection</li> <li>◦ By material type</li> </ul>                              |
| Ability to identify patron inactivity   | Required | <p>A-G: Supported. The Inactive User report (which includes a notification message to the patron, if desired) is best suited for this query.</p> <p>In addition, staff can run a SmartReports query based on Last Activity Date for similar use.</p> <p>See Picture #3, Reports, Inactive Users</p>   |
| Ability to include cross-references between data sets   | Required | A-G: *Not currently supported   |
| Ability to produce reports on demographics  | Required | <p>A-G: Supported with several system reports. In addition, depending on the LDFs that were defined by the library, additional in-depth demographic analysis can take place.</p> <p>This capability is somewhat dependent on demographic information stored in the library's current system and how it is migrated to VERSO</p>   |
| Ability to report on and access any data within the database  | Required | A-G: Supported. VERSO stores its data in industry-standard SQL tables, and these can be queried, either with VERSO's reports, SmartReports, or with direct access to the tables, to derive reports.   |
| Reports having the ability to provide evidence-based collection analysis & evaluation functionality (similar to CollectionHQ) | Optional | <p>A-G: Supported with several different usage reports that can be derived by location, collection, call number range, material type, etc.</p> <p>Note: VERSO supports CollectionHQ as a third-party product.</p>   |
| Provides recommendations for withdrawal, including title, subject, author, DDC  | Optional | <p>A-G: Supported. The most appropriate report for this task is the Item Circulation Report (Dusty Book) report, that creates a list of titles by location / call number / material type that have circulated fewer than 'n' times per year.</p> <p>Other reports that may be useful are those that tally data based on the year of publication.</p> <p>See Picture #4, Item Circulation Report</p> |

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| Ability to track top search history | Optional | A-G: Supported. One of the numerous Statistics reports is called "Top 100 Searches". By default, it counts all searches (all Indexes); it can be subdivided to "Top Subject Searches", "Top Author Searches", etc. These reports can be narrowed to a particular time frame (one day, one month, one year), as desired. |
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| Cataloging   |          |   |
| RDA ability & compliance   | Required | A-G: Supported for cataloging, indexing, searching, and display.  |
| Tools are available to convert / upgrade MARC data to RDA or other future cataloging standards | Required | A-G: Supported. As mentioned elsewhere in this RFP, Auto-Graphics has a large array of MARC batch processing tools that can be used to improve, enhance, and updated the library's records.   |
| Ability to index all fields in MARC records  | Required | A-G: Supported.   |
| Ability to integrate digital content from third party vendors                                  | Required | A-G: Supported.   |
| Integration with Bibframe  | Required | A-G: VERSO is examining the still-evolving standards for BIBFRAME and other linked data projects that are just now being introduced to the ILS industry. We are in the process of converting our bibliographic data to be linked-data compatible; we are awaiting guidance from the Library of Congress, and consensus within the industry, before we fully move to a BIBFRAME-based catalog.   |
| Access and utilize MARC records from a variety of sources                                      | Required | A-G: Supported.<br><br>For batch MARC loads, VERSO accepts any incoming record in MARC format, regardless of the source of the record.<br><br>VERSO's Z39.50 capability enables the library to search any Z39.50 accessible library catalog (OCLC, Library of Congress, regional or statewide, or local libraries) and take a copy of the record for use in copy cataloging. In addition, Auto-Graphics sells access to MARCIt, a shared source of cataloging records like OCLC, as a source of up-to-date MARC records.<br><br>See Picture #1, Cat, Z39.50 Access Marc Rec |
| Ability to specify loading parameters for overlay  | Required | A-G: Supported. At the point of scheduling and running a batch MARC load, staff can instruct the system to overlay (or not overlay) individual fields or even the entire incoming record.   |



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| Ability to specify match-point in loading profiles  | Required | <p>A-G: VERSO's MARC loader enables the library to designate up to nine different indexes to be checked, to determine if the incoming record is a duplicate of record already in the bibliographic file, or if the incoming record is new.</p> <p>The library can select the order of matching points, as well. Potential match points include:</p> <ul style="list-style-type: none"> <li>◦ OCLC number (MARC 001)</li> <li>◦ ISBN (10 or 13 character)</li> <li>◦ LCCN</li> <li>◦ ISSN</li> <li>◦ UPC</li> <li>◦ EAN</li> <li>◦ Title</li> <li>◦ MARC 035 (system control number)</li> <li>◦ Match on locally assigned MARC tag</li> </ul> <p>See Picture #2, Cat, Match Points</p> |
| Ability to automatically create and populate item information during MARC loading process | Required | <p>A-G: Supported. VERSO's MARC Loader will use an Item Profile defined by the library. For example, the incoming record may send item information in a 947 field, with ^c as the call number, ^m as the material type, etc.</p> <p>The Item Profile is used to map the incoming item data into VERSO structures and item records.</p>  |
| Ability to make global changes to the system  | Required | <p>A-G: Supported by GSR (Global Search and Replace). Staff defines the words or phrases to be modified, the MARC records are changed, and the changed words reindexed.</p>   |
| Ability to integrate digital content from local library                                   | Required | A-G: Supported  |
| Ability to upgrade records to be discoverable on the internet                             | Optional | <p>Discoverability on the internet is an issue outside of the purview of the ILS. VERSO creates permanent links to bibliographic records that can be used externally; however the harvesting of these URLs is a policy decision made by Google, Bing, etc.</p>  |
| Spellcheck capability   | Optional | A-G: Supported in AGCat, VERSO's Cataloging client.   |

| Serials  |          |   |
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| Ability to automatically send claimed missing issues to vendor, as per configured parameters, with no staff intervention | Required | A-G: Claims reports can be run, however they are print reports and are not automatically sent to Serials vendors.   |
| Report of missing Issues automatically generated   | Required | A-G: Claims for missing issues, late issues, or unreceived new subscriptions are included on the claims report. Note that this is a manually run report.  |
| Ability to utilize frequency information from vendor to automatically create check in boxes and customize dates          | Required | A-G: Staff can set up prediction patterns for serials subscriptions and share them among branches -- they can be copied from branch to branch.<br><br>These are manually configured and not automatically created from MARC 891 fields. |
| Ability to create routing information  | Optional | A-G: Supported.   |
| Serials invoicing occurs automatically, with no staff intervention, and automatically connects into accounting software  | Optional | A-G: Not supported.   |

| Acquisitions  |          |   |
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| Ability to utilize EDI ordering   | Required | A-G: Supported messages:<br>850 Order<br>855 Order acknowledgment<br>810 Invoice<br><br>With the following vendors:<br>Ingram<br>Baker and Taylor<br>Midwest Tape   |
| Ability to create order records from imported vendor carts                        | Required | A-G: Supported. VERSO customers generally export from their book vendors using the MARC 995 field. Subfields (listed below) are parsed and used to build Selection Lists within VERSO. The library evaluates the selection list(s) and can submit the orders.<br>995 supported fields include:<br><br>^a location<br>^t material type<br>^p price<br>^q quantity<br>^f fund (budget #)<br>^e fiscal year<br>^n Acquisitions Note<br>^x Purchase order prefix<br>^s ship-to location<br><br>See Picture #1, Acquisitions, Vendor Carts                       |
| Claiming capability   | Required | A-G: Manual claims are supported  |
| Detailed fund reports for collection areas  | Required | A-G: Supported in several ways:<br><ul style="list-style-type: none"> <li>• First, depending on the library's fund structure, VERSO can do cross-fund reporting and totaling</li> <li>• Second, any fund can be assigned as many as five tags or descriptors, so that staff can extract purchasing information based on fund-based attributes.</li> <li>• Finally, because on-order items are considered 'regular' item holdings, all Circulation reporting that does item holding based analysis is available for looking at Acq items as well.</li> </ul> |
| Automated status changes from Ordered/Receive/Invoiced without staff intervention | Optional | A-G: Supported, based on the specific actions and the lifecycle of the order record and its receipt and payment.  |
| Invoices are integrated into accounting software, with no staff intervention      | Optional |   |

| Functionality   |          |   |
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| Ability to add and integrate APIs (provide an overview of available APIs)         | Required | A-G: Supported.<br>See attached document: API AGen Version 2.7, Auto-Graphics Web Services.   |
| Ability to distinctly brand and customize options for staff and public interfaces | Required | A-G: Supported. VERSO's UX (User Interface) Admin function enables the library to control the color scheme, most of the terminology being used, look, feel, and presentation of OPAC searches and results, and similar interface components. In addition, UX Admin is used to manage the library's splash (welcome) with components related to featured book collections, events, and other services offered by the library.<br><br>Further, PAC ADMIN enables the library to configure indexes, facets, index names, and related presentation components.<br><br>See Picture #1, System, Server & Software Functionality, UX Admin |
| Ability to access the ILS from anywhere   | Required | A-G: Supported. VERSO is a web-based application -- both for patrons and staff -- and can be accessed through the internet from anywhere on the planet.   |
| Automatic regular backups with no staff intervention                              | Required | A-G: Yes, we perform regular backups that happen automatically for all our SaaS customers. Should this system be remotely installed, backups are the responsibility of the customer, but A-G staff can help produce an automated function that will perform the necessary backups to file locations of the customers choosing to facility any backup requirements they may have.  |
| Software regularly updated and upgraded with no impact on service                 | Required | A-G: Supported. VERSO Software as a Service updates require no intervention by the library. Updates are scheduled after closing hours, usually on Monday or Tuesday nights as new releases are made available.<br><br>Significant updates and enhancement releases are announced and documentation provided at least two weeks in advance.  |
| Development cycle that is responsive to known issues and enhancements             | Required | A-G: Supported. VERSO managers constantly track bugs, enhancements, and feature requests, and we attempt to schedule these as rapidly as possible to meet library needs.<br><br>As a rule, defects (bugs) are handled first, and enhancements, which often take more time to develop, follow.   |

|   |          |   |
|---|----------|---|
| Notice of software update provided minimum 24 hours in advance of an update | Required | A-G: Supported. VERSO's service standard is to announce any new releases approximately fourteen days prior to release, and to distribute pre-release notes and documentation at that time.  |
| Availability/usage of SIP2 connections                                      | Required | A-G: VERSO supports SIP2 and various third-party based extensions. Among current SIP2 uses:<br><ul style="list-style-type: none"> <li>◦ Authentication for third party digital services</li> <li>◦ PC reservation systems</li> <li>◦ PC Print management systems</li> <li>◦ Self-check and materials handling systems</li> <li>◦ Payment processing (Comprise)</li> </ul>                             |
| Granular security that can be applied to each user account                  | Required | A-G: Supported.<br>Staff security is based on individual login and can be controlled down to the specific function, or in the case of Circulation, to a specific sub-function.<br><br>Patron security is password based; borrowing privileges are based on the patron's user category.  |
| Customer information and backups remain in the United States                | Required | A-G: Supported. Backups and servers are stored at our remote server locations in the USA.   |
| Ability to customize the staff interface                                    | Required | A-G: The staff interface allows color changes, and the permissions granted to the individual staff member control what can be seen and used by staff. Most staff screens can be customized at the library level for consistency, but not at the individual staff member. The major exception to that rule is QuickLinks, where each staff login can choose its own most frequently used menu choices. |
| Ability to customize the public interface                                   | Required | A-G: Supported through UX Admin and through PAC Admin, described elsewhere in this response.  |

|   |                 |   |
|---|-----------------|---|
| <p>Security measures are included to minimize chance of fraudulent activity or access</p> | <p>Required</p> | <p>A-G: The system and the solution are implemented and designed with security at the core. It follows strict principles of separation of concerns and the security and vulnerability is tested and managed at each layer. The broad approach to security secures and is tested for all avenues of malicious activity i.e. data layer – transactional, data at rest and data in flight, business logic layer, and front-end layer with a DMZ for only authenticated and authorized access. Following are the general and high-level guidelines that are followed:</p> <ul style="list-style-type: none"><li>• Customer data is stored on systems with no direct access to the Internet</li><li>• Access to application through the internet can be secured using https protocol</li><li>• Internet accessible systems are locked down to provide only the smallest number of services needed to service customers reducing their attack surface</li><li>• Intrusion detection and avoidance systems are installed at the edges of both our hosting provider and the corporate network</li><li>• All system level access to data is through required authentication parameters (no anonymous access)</li><li>• All systems are security patched to manufacturers specifications at the time those security patches are made available (no delay in security patching)</li><li>• Hosting vendors do not have access to decryption keys</li><li>• Auto-Graphics performs periodic risk assessments</li></ul> |
|---|-----------------|---|

| Migration, Support & Training   |          |   |
|---|----------|---|
| Complete migration of patron, bibliographic and Item data from SirsiDynix Horizon ILS | Required | A-G: The team at A-G has migrated multiple systems successfully from Millennium to the VERSO system.  |
| Documentation is provided in one place and is keyword accessible                      | Required | A-G: Supported  |
| Data migrated in a secure fashion, using industry standard encryption                 | Required | A-G: All data submitted for migration by the customer is stored as encrypted data on our servers. Should the library allow A-G to extract the data directly from their servers, we will encrypt the transmission of the data to our facility. |
| Regular updates on open tickets are provided to ticket creator                        | Required | A-G: Auto-Graphics ticketing system is available to the client so that they can search the system and receive updates as needed.  |
| Escalation process is provided for unresolved issues                                  | Required | A-G: See attached document: <b>VERSO Software Escalation</b>  |
| System allows staff to change their own password, password recovery by email          | Required | A-G: Supported. Staff with sufficient permissions can change their own staff password. In addition, the library's administrator can change any staff password.  |

|  |                 |  |
|--|-----------------|--|
| <p>Phone support during library open hours</p>   | <p>Required</p> | <p>A-G: We offer M-F 5 AM to 5 PM (PT) phone support and 24/7 electronic support. Other hours of direct support can be purchased but not under our traditional support structure. Please note that in our hosted (SaaS/Cloud) deployment we offer 24/7 support.</p> <p>Emergency support is available 24 hours per day, 7 days a week as follows:</p> <ul style="list-style-type: none"> <li>• Email Address: versosupport@auto-graphics.com</li> <li>• Structure your message as follows when emailing for emergency support:             <ol style="list-style-type: none"> <li>1. Email Subject Line: "VERSO System Down"</li> <li>2. Body of message:</li> <li>3. Library Name:</li> <li>4. Contact:</li> <li>5. Phone:</li> <li>6. VERSO URL:</li> </ol> </li> </ul> <p>This email address above should only be used in the event you cannot access your VERSO system and the subject line must say "VERSO System Down". If a message is received with a subject other than "VERSO System Down" it will not be responded to until the next available business day. This email address should NOT be used for general VERSO support. General requests should still be addressed to HelpDesk@auto-graphics.com</p> <p>Please note: Emergency assistance is limited to work in correcting problems which impact critical functionality of the System. Service calls that cannot be solved immediately will be referred to specialists within the Operations Center. Services performed by A-G beyond the scope of these services will be billable at the rate of \$200 an hour, with a minimum \$400 charge.</p> |
| <p>On-site training is provided for all functionality, including system administration and configuration</p> | <p>Required</p> | <p>A-G: See attached document: Training Guide Overview</p>   |



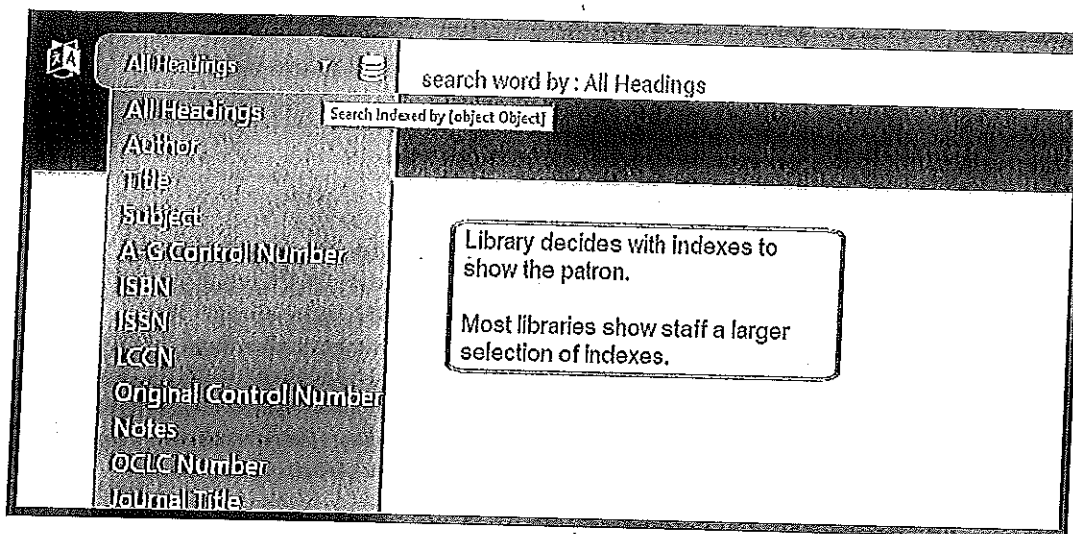
|   |                 |  |
|---|-----------------|--|
| <p>24/7 Phone Support</p>   | <p>Optional</p> | <p>A-G: We offer M-F 5 AM to 5 PM (PT) phone support and 24/7 electronic support. Other hours of direct support can be purchased but not under our traditional support structure. Please note that in our hosted (SaaS/Cloud) deployment we offer 24/7 support.</p> <p>Emergency support is available 24 hours per day, 7 days a week as follows:</p> <ul style="list-style-type: none"> <li>• Email Address: versosupport@auto-graphics.com</li> <li>• Structure your message as follows when emailing for emergency support:             <ol style="list-style-type: none"> <li>1. Email Subject Line: "VERSO System Down"</li> <li>2. Body of message:</li> <li>3. Library Name:</li> <li>4. Contact:</li> <li>5. Phone:</li> <li>6. VERSO URL:</li> </ol> </li> </ul> <p>This email address above should only be used in the event you cannot access your VERSO system and the subject line must say "VERSO System Down". If a message is received with a subject other than "VERSO System Down" it will not be responded to until the next available business day. This email address should NOT be used for general VERSO support. General requests should still be addressed to HelpDesk@auto-graphics.com</p> <p>Please note: Emergency assistance is limited to work in correcting problems which impact critical functionality of the System. Service calls that cannot be solved immediately will be referred to specialists within the Operations Center. Services performed by A-G beyond the scope of these services will be billable at the rate of \$200 an hour, with a minimum \$400 charge.</p> |
| <p>On-going separate test environment is provided to try and test settings and configuration, as well as training</p> | <p>Optional</p> | <p>A-G: Auto-Graphics does provide a test environment during the set-up and training of your system. The system is then updated to your current Circulation and the Library would go live. Auto-Graphics can supply and maintain an on-going second system for testing of settings and configuration and well as training. This option would be available at an additional cost.</p>   |

# ILS FUNCTIONAL REQUIREMENTS

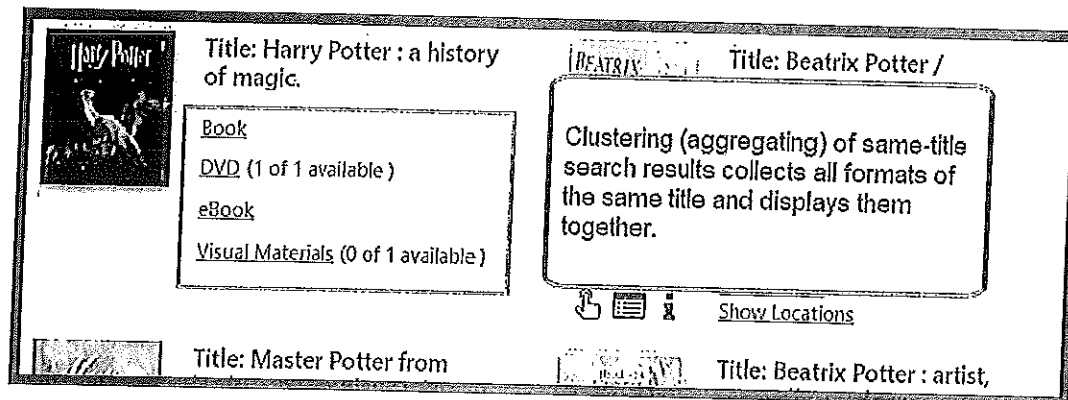
## SUPPORTING PICTURES

### OPAC

Picture #1, OPAC, Intuitive 1



Picture #2, OPAC, Intuitive 2



Picture #3, OPAC, My Lists

## Your Lists

Select a list or

Enter Name of New List

Movies I want to see (3)  
my new list (3)  
New Audiobooks (3)

Picture #4, OPAC, Enhanced Content

### More About this Title

**Summary**  
Retired FBI Special Agent William F. Flynn provides young would-be detectives with tips on how to investigate cases just like the Hardy Boys. Includes information on crime solving techniques and how investigations are conducted. Illustrations.

Terms of use Descriptive content provided by Syndica™, a Bowker service.

**Author Notes**  
Franklin W. Dixon Franklin W. Dixon is actually a pseudonym for any number of ghostwriters who have had the distinction of writing stories for the Hardy Boys series. The series was originally created by Edward Stratemeyer in 1926, the same mastermind of the Nancy Drew detective series, Tom Swift, the Rover Boys and other characters. While Stratemeyer created the outlines for the original series, it was Canadian writer Leslie McFarlane who breathed life to the stories and created the persona Franklin W. Dixon. McFarlane wrote for the series for over twenty years and is credited with (...read more)

Picture #5, OPAC, Lexile on Reading Level Results

**Title:** The scarlet slipper mystery / by Carolyn Keene.

**Publisher:** Grosset & Dunlap,

**Description:** 179 p. : ill. ; 20 cm.

**Series Title:** Nancy Drew mystery stories ; 32

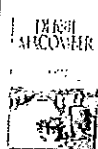

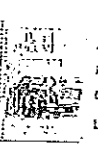
**Notes:** Nancy Drew comes to the aid of the owners of a local dancing

**Notes:** 760 Lexile.

**Subject:** Drew, Nancy (Fictitious character) Juvenile fiction.

**Subject:** Women detectives Juvenile fiction.

Picture #6a, OPAC, Item Holdings Display - Results

|   |  |                              |                                |                                 |  |                     |                  |             |  |  |
|---|--|------------------------------|--------------------------------|---------------------------------|--|---------------------|------------------|-------------|--|--|
|   | <b>Title:</b> Dakota Home /<br><b>Author:</b> Macomber, Debra<br><b>Publisher:</b> MIRA Books<br><b>Date:</b> 2007                 |                              |                                |                                 |  |                     |                  |             |  |  |
|   | <b>Book (1 of 1 available)</b><br><b>Location (1)</b><br>EML - Adult - Paperback   | <b>Format</b><br>Book        | <b>Call Number</b><br>PAPPEACK | <b>Barcode</b><br>0363002920029 | <b>Status</b><br><input type="radio"/> Available | <b>Details</b><br>1 | <b>Hold</b><br>8 | <b>List</b> | <b>SMS</b><br><input type="checkbox"/> |  |
|  | <b>Title:</b> 44 Cranberry Point /<br><b>Author:</b> Macomber, Debra<br><b>Publisher:</b> Mira<br><b>Date:</b> 2004                |                              |                                |                                 |  |                     |                  |             |  |  |
|   | <b>Book (1 of 1 available)</b><br><b>Location (1)</b><br>EML - Adult - Fiction   | <b>Format</b><br>Book        | <b>Call Number</b><br>MACOMBER | <b>Barcode</b><br>0363001485577 | <b>Status</b><br><input type="radio"/> Available | <b>Details</b><br>1 | <b>Hold</b><br>8 | <b>List</b> | <b>SMS</b><br><input type="checkbox"/> |  |
|  | <b>Title:</b> Heart of Texas, Volume 1<br><b>Author:</b> Macomber, Debra<br><b>Publisher:</b> Thorndike Press<br><b>Date:</b> 2007 |                              |                                |                                 |  |                     |                  |             |  |  |
|   | <b>Large Print (1 of 1 available)</b><br><b>Location (1)</b><br>EML - Large Print - Fiction  | <b>Format</b><br>Large Print | <b>Call Number</b><br>MACOMBER | <b>Barcode</b><br>0363001761802 | <b>Status</b><br><input type="radio"/> Available | <b>Details</b><br>1 | <b>Hold</b><br>8 | <b>List</b> | <b>SMS</b><br><input type="checkbox"/> |  |

Picture #6b, OPAC, Item Holdings Display – Full Bib Record


Back

Silva, Daniel

The other woman

Format: Book

Found in: Rolling Meadows...



| Location                           | Call Number | Barcode       | Status                              | SMS                      |
|------------------------------------|-------------|---------------|-------------------------------------|--------------------------|
| RMPL - Adult - NonFic              | ON-ORDER    | 0300059223537 | <input type="radio"/> Available     | <input type="checkbox"/> |
| RMPL - Checkout Desk - Holds Shelf | SILVA       | 0300059223930 | <input type="radio"/> Not available | <input type="checkbox"/> |
| RMPL - NEW - Fiction               | SILVA       | 0300059227417 | Due Date: 7/26/18                   | <input type="checkbox"/> |
| RMPL - NEW - Fiction               | SILVA       | 0300059227223 | Due Date: 7/26/18                   | <input type="checkbox"/> |
| RMPL - NEW - Fiction               | SILVA       | 0300059227439 | Due Date: 7/26/18                   | <input type="checkbox"/> |

Availability: 1 (of 5)

Details

Place Hold


ISBN: 9780052834922

ISBN: 0062834927

Author: Silva, Daniel, 1960- author

Picture #7, OPAC, Carousels

Recent U.S. Presidents

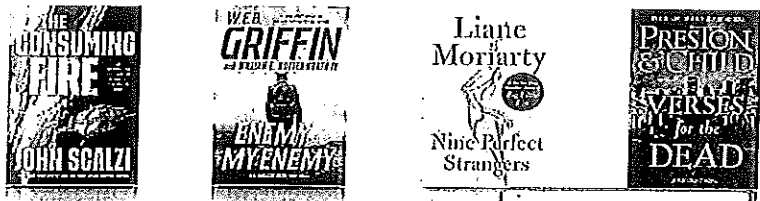


Nixon [videorecord... Being Nixon : a man ... The Roosevelts : an ... Eleanor Roosevelt / ... Theodore Roosevelt ... Franklin Delano Roo...

A&E Television Networks ;D... Thomas, Evan. Ward, Geoffrey C. Cook, Elincha Wierren. McCorn, Sean. Friedman, Russell. Clifton Books. c2007. ©1992- <2016> c2004. c1990.

Picture #8a, OPAC, Display New Materials

Fiction Coming Soon



The Consuming Fire  
Scalzi, John  
2018  
Book

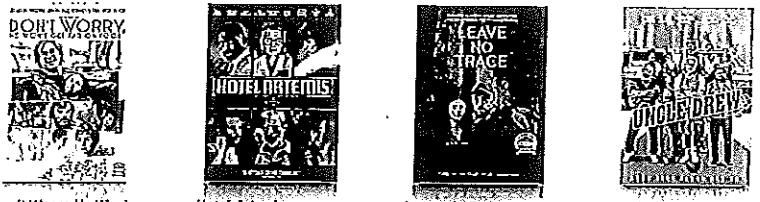
The Enemy of My Ena...  
Griffin, W. E. B / Butler...  
2018  
Book

Nine perfect  
Moriarty, Lian  
2018  
Book

Carousels displays of on-order and new items

Presion & Citid  
Fly Verses  
for the  
DEAD

DVDs Coming Soon



Don't Worry, He Won't...  
2018  
DVD

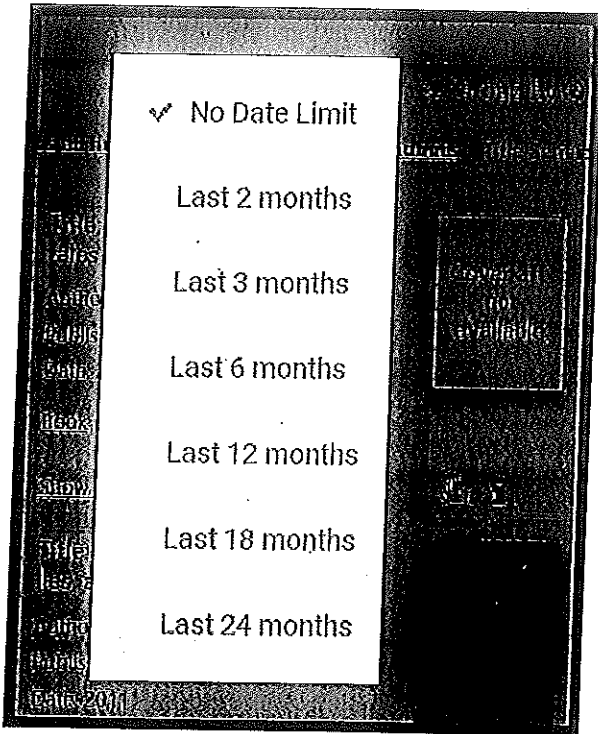
Hotel Artemis  
2018  
DVD

Leave No Trace  
2018  
DVD

Uncle Drew  
2018  
DVD

New In OverDrive

Picture #8b, OPAC, Display New Materials Dropdown



Picture #9, OPAC, Did You Mean and Zero Results Messaging

Did You Mean *psychology today; psychology today's; psychology todays; psycholog today; psychology torday;*  
We found no results for your search. Refine your search or here are some suggestions

A screenshot of a search results page. At the top, there is a search bar with the text 'psychology' and a dropdown menu set to 'Keyword'. To the right, there is a 'Deliberately spelled wrong' button. Below the search bar, the main message reads: 'VERSO was unable to find results for your search. You have several options:'. Below this, there is a paragraph of text: 'ing sure that you have spelled the term correctly, and that you have selected the right index. (Example: An ISBN search will not find anyt book number.)'. Then, there is a numbered list item: '2. Click this link <https://www.reference.library.org> to connect to a human who can help you (during library hours)'. At the bottom, there is another numbered list item: '3. Call the library Information Department at 770-924-0010.'. A small box at the bottom right contains the text: 'Library can create its own "No results" message'.

Picture #10, OPAC, Facets/filter

The image shows a screenshot of an OPAC (Online Public Access Catalog) facet menu. The menu is titled "Available" and lists various facets with expandable/collapsible arrows. The facets listed are:

- Subject
  - Juvenile Works. (100)
  - Fiction. (76)
  - Schools Fiction. (66)
  - Readers (Elementary) (41)
  - Elementary Schools... (35)
  - Friendship Fiction. (31)
  - Spanish Language... (27)
  - Friendship Juvenile... (24)
- Material Type
- Format
- Location
- Item S
- Librari
- Date
- Publisl
- Language
- Author
- Title

A callout box is overlaid on the "Date" facet, containing the following text:

VERSO offers 21 different facets. The top one is open by default.

Library configures facet sequence.

Picture #11, OPAC, Notif Methods

|                                   |                     |   |
|-----------------------------------|---------------------|---|
| Mobile Phone:                     | 6786574889          | Preferences and profile can be set by staff or patron |
| Mobile Provider:                  | T-Mobile            |   |
| Sign up for Two-way Text:         | NO                  |   |
| Notification Preferences:         | SMS                 |   |
| Reserve Notification Preferences: | SMS                 |   |
| DL LDF6 #:                        |                     |   |
| Expiration Date:                  | Mar 16 2021 11:59PM |   |

Picture #12, OPAC, Three-level Typeahead

Search word by: Keyword  
calif

**Welcom**

**Public Library**

**Title**

- Californication
- California's fading wildflowers
- California's central coast
- California workers' comp
- California wine for dummies

**Title Series**

- California/Milbank books on health and the public ; 22
- California studies in food and culture ; 3
- California natural history guides. Introductory guide ; 90
- California natural history guides. Introductory guide
- California natural history guides ; no. 66

**Author**

- California Police Officer Prep Team
- Califano, Joseph A.,
- Cooper, J. California.

space traveler's g... Adventure  
 Gibson, Mark Scott, Elaine



Picture #13, OPAC, Patron Update Profile

|                     |                          |                 |
|---------------------|--------------------------|-----------------|
| <b>Your Profile</b> | PIN                      | ....            |
|                     | First Name               | Yvo             |
|                     | Middle Initial           |                 |
|                     | Last Name                | Ree             |
|                     | Primary Address : Line 1 | 57113 Sela      |
|                     | Primary Address : Line 2 |                 |
|                     | City                     | Rolling Meadows |
|                     | State                    | NH              |
|                     | Zip                      | 09709           |

Patron profile - My Account area of OPAC.  
Library configures which fields are editable and which are not.

Picture #14, OPAC, Active Alerts

|  |                             |   |
|--|-----------------------------|---|
| <b>Active Alerts</b>                     | Search Term: Crafts         | <input type="button" value="Delete Alert"/> |
|  | Index Type: Subject         | <input type="button" value="Edit Alert"/>   |
| email me on: Saturday                    | Last Delivered: 07/14/2018  |   |
| <input type="button" value="Add Alert"/> | Published After: 01/01/2015 |   |

Picture, #15 OPAC, Patron History

### 5 Checkout History

Select Year: 2018 ▾

**Print**


**Download**

**Deactivate History**

Patron can opt in to save a list of previously checked-out items.

Patron can print or download their history.

History can be deactivated at any time.

|   |  |
|---|--|
| Cover art not available   | Title: Antidotes [sound recording]<br>Author: Foals (Musical group)<br>ISBN(s):<br>Barcode: 0380005669821<br>Call Number: POPULAR FOALS<br>Checkout Date: 4/16/2019 7:14:42 AM |
|  | Title: At last<br>Author: Shalvis, Jill.<br>ISBN(s): 9781455503742,1455503746<br>Barcode: 0380002480313<br>Call Number: PAPERBACK<br>Checkout Date: 4/16/2019 7:14:10 AM       |
| Cover art not available   | Title: Blak and Blu [sound recording]<br>Author: Clark, Gary<br>ISBN(s):<br>Barcode: 0380002772198<br>Call Number: POPULAR CLARK<br>Checkout Date: 4/16/2019 7:13:59 AM        |

## ILS FUNCTIONAL REQUIREMENTS

### SUPPORTING PICTURES

### CIRCULATION FUNCTIONALITY




Picture #1, Circ, My Account, Items Out

4 Items Out

FilterBy: All

SortBy: Title

[Renew All](#)

|  |  |                            |
|--|--|----------------------------|
|   | <p>Title: Antidotes (sound recording)<br/>Author: Foals (Musical group)<br/>call Number: POPULAR FOALS<br/>dateOut: 4/16/2019 7:14:42 AM<br/>dateDue: 4/30/2019<br/>fine: \$0.00<br/>status:</p> | <a href="#">Renew Item</a> |
|   | <p>Title: At Last<br/>Author: Shafer, Jill<br/>call Number: PAPERBACK<br/>dateOut: 4/16/2019 7:14:10 AM<br/>dateDue: 4/30/2019<br/>fine: \$0.00<br/>status:</p>                                  | <a href="#">Renew Item</a> |
|  | <p>Title: Blak and Blu (sound recording)<br/>Author: Clark, Gary<br/>call Number: POPULAR CLARK<br/>dateOut: 4/16/2019 7:13:59 AM<br/>dateDue: 4/30/2019<br/>fine: \$0.00<br/>status:</p>        | <a href="#">Renew Item</a> |

Picture #2, Circ, My Account, Items on Hold


1 Items On Hold

FilterBy: All

SortBy: Title

Select/Clear All

[Cancel Hold](#) | 4/17/2019 [Suspend Hold](#) [Unsuspend Hold](#)

|   |   |                             |
|---|---|-----------------------------|
|  | <p>Title: Hoover : an extraordinary life in extraordinary ti...<br/>Author: Whyte, Kenneth<br/>Reserve Date: 04/17/2019<br/>Place In Queue: 1<br/>Expires on: 04/27/2019<br/>Pickup Location: Circulation Desk: Holds Shelf</p> | <a href="#">Cancel Hold</a> |
|---|---|-----------------------------|

4/17/2019 [Suspend Hold](#)

Picture #3, Circ, My Account, Active Alerts

**Add Active Alert Search**

[Back to Active Alerts](#)

Search Type:     Contains ALL of these words ▾    All Headings ▾

Start Search When? (Date range):  ▾    Locations to Search:  ▾    Publication Year(Greater than):


Picture #4, Circ, My Account, Patron Suspend Holds

1 Items On Hold

Select/Clear All        4/17/2019           

FilterBy: All ▾

SortBy: Title ▾

 Title: Hoover: an extraordinary life by extraordinary li  
Author: Whyte, Kenneth,  
Reserve Date: 04/17/2019  
Place in Queue: 1  
Expires on: 04/27/2019  
Pickup Location: Circulation Desk Holds Shelf

4/17/2019   

Picture #5, Circ, Self Register 1

Login to your account. (Your Pin Number is the last 4 numbers of your library card the first time you login in. Please change your pin.)

Library Card #: \_\_\_\_\_

\_\_\_\_\_

Password or PIN: \_\_\_\_\_

Remember Me?    [Forgot Your Password](#)

[Don't have a library card?](#)

Picture #6, Circ, Self Register 2

**REGISTRATION**

Your Postal Code:  
Your Postal Code

Select a Country:  
United States

Screen 1 of 3 to self register

Please select a home Library:  
RMPL - RMPL - Not Assigned

Picture #7, Circ, Copy Patron Reg

### Edit User Account

Manage User Photo    Manage Proxies

**\*Fields identified by \*and red color must be filled in.**

*Auto Populate Form with Driver's License Data (needs a 2D scanner)*

|                        |   |
|------------------------|---|
| *Login Name or Barcode | <input type="text" value="28112340108692"/>   |
| *Home Location         | <input style="text-align: right; border-bottom: 1px solid black; border-right: 1px solid black; border-left: 1px solid black; border-top: 1px solid black; width: 100%;" type="text" value="Not Assigned"/> |
| *PIN                   | <input type="text" value="...."/>   |
| * Confirm Password     | <input type="text" value="...."/>   |
| Reminder Question      | <input type="text"/>  |
| *First Name            | <input type="text" value="AMANDA"/>   |
| Middle Initial         | <input type="text" value="L."/>   |

Picture #8, Circ, User Dupli

RMPL User Admin > User Registration Duplicate Checking

### User Registration Duplicate Checking Configuration

Enable Registration Dup. Checking   
  Disable Registration Dup. Checking

**When to Check:**

New Users Only   
  New Users and Edit Users

**Compare User Edit or Add User to existing user records by checking**

Username / Barcode  
 Name (First, Middle, Last)  
 Phone numbers (all)  
 Email Address  
 Street Address  
 Birth Date

Picture #9, Circ, Family Members

Warnings    Checkout    Patron Summary    Items Out(0+0)    Reserves(0)    Patron History

[Refresh](#)  
 [Patron Edit](#)  
 [Payments/Fines History](#)  
 [Notices History](#)  
 [Receipt](#)  
 [Ho Email Address](#)

User: Abi N. Mar Barcode: 1380001073597 Type: ADULT : Adult Patrons (Primary Household Member)

[Add To Household](#)

|                     |                       |                     |                       |                     |                       |
|---------------------|-----------------------|---------------------|-----------------------|---------------------|-----------------------|
| Name:               | Wil J. Dog            | Name:               | Bry T. Doh            | Name:               | Ron Doe               |
| Barcode:            | 1380001135984         | Barcode:            | 1380000925914         | Barcode:            | 1380000000140         |
| Category:           | ADULT : Adult Patrons | Category:           | ADULT : Adult Patrons | Category:           | ADULT : Adult Patrons |
| Phone Number:       |                       | Phone Number:       |                       | Phone Number:       |                       |
| Cell Phone:         |                       | Cell Phone:         |                       | Cell Phone:         |                       |
| Email:              |                       | Email:              |                       | Email:              |                       |
| Email Account Info: |                       | Email Account Info: |                       | Email Account Info: |                       |
| Comments:           |                       | Comments:           |                       | Comments:           |                       |
| Total Items Out:    | 0                     | Total Items Out:    | 0                     | Total Items Out:    | 0                     |

ILS FUNCTIONAL REQUIREMENTS  
SUPPORTING PICTURES  
FINANCIAL MANAGEMENT

Picture #1, Circ, Pay All

**Payments/Fines History**

User: Abi N. Mar Barcode: 1380001073597 Type: ADULT : Adult Patrons

Transaction Type:

Transaction Amount:

Comments:

Current Balance: \$ 36.00

| Date                    | Type      | Comments  | Rate | Amount  | Amount |
|-------------------------|-----------|---|------|---------|--------|
| 4/17/2019<br>9:08:53 AM | Fee Added | Staff can choose to pay lump sum (all). Funds are applied to oldest transactions. |      | \$35.00 | \$0.00 |
| 4/17/2019<br>9:08:40 AM | Fee Added |   |      | \$1.00  | \$0.00 |

Picture #2, Circ, Pay by Item

**Payments/Fines History**

User: Abi N. Mar Barcode: 1380001073597 Type: ADULT : Adult Patrons

Transaction Type:

Transaction Amount:

Comments:

Current Balance: \$ 36.00

Delete history from oldest to:

| Date                    | Type      | Comments           | Rate | Amount  | Amount | Amount P... | Add Comment | Latest Comment | Amount Due | Latest Checkout/Response Date |
|-------------------------|-----------|--------------------|------|---------|--------|-------------|-------------|----------------|------------|-------------------------------|
| 4/17/2019<br>9:08:53 AM | Fee Added | (Returned Check)   |      | \$35.00 | \$0.00 |             |             |                | \$35.00    |                               |
| 4/17/2019<br>9:08:40 AM | Fee Added | (Replacement Card) |      | \$1.00  | \$0.00 |             |             |                | \$1.00     |                               |





Picture #5, Circ, Fine History in Patron Account

You can pay your fines and fees using your PayPal account. Fines and fees will apply to your oldest transactions first.

Active ▾

Patron - My Account.  
 Can view active transactions or all historical fine transactions

### Detailed Transaction

| Date      | Type         | Comments   | Amount  | Amount Paid | Amount Due | Due Date   |
|-----------|--------------|--|---------|-------------|------------|------------|
| 9/27/2018 | Fee Added    | (Meeting room rental)                            | \$15.00 | \$0.00      | \$15.00    |            |
| 9/27/2018 | Overdue Fine | Using Microsoft FrontPage                        | \$21.00 | \$14.00     | \$7.00     | 08/09/2018 |
| 9/27/2018 | Overdue Fine | Oprah Winfrey                                    | \$7.50  | \$2.50      | \$5.00     | 08/23/2018 |
| 9/27/2018 | Overdue Fine | The wedding book : the big book for your big day | \$15.90 | \$0.00      | \$15.90    | 07/16/2018 |
| 9/27/2018 | Overdue Fine | Barack Obama                                     | \$10.50 | \$0.00      | \$10.50    | 08/09/2018 |
| 9/27/2018 | Overdue Fine | A dark matter : a novel                          | \$10.50 | \$0.00      | \$10.50    | 08/09/2018 |

ILS FUNCTIONAL REQUIREMENTS

SUPPORTING PICTURES

HOLDS & NOTIFICATIONS

Picture #1, Circ, Holds Cancel and Suspend

Users: Charles Norman McHugh Barcode: 1223 Type: ADULT

| Title                                      | Author              | Volume | Reserve Order | Staff can suspend or unsuspend, or delete holds | Priority Date         | Item Barcode | Staff Note | Notes | Reserves  |
|--|---------------------|--------|---------------|---|-----------------------|--------------|------------|-------|---|
| <u>Everybody sleeps (but not Fred) /</u>   | Schneider, Josh,    | 1      |               |   | 09/28/2017 05/25/2018 |              |            |       | <input type="button" value="Add Edit"/> <input type="button" value="Delete"/> |
| <u>Harry Potter collector's handbook /</u> | Silvester, William, | 1      |               |   | 08/29/2017 05/26/2018 |              |            |       | <input type="button" value="Add Edit"/> <input type="button" value="Delete"/> |
| <u>The kill artist : a novel /</u>         | Silva, Daniel,      | 1      |               |   | 09/05/2017 08/03/2018 |              |            |       | <input type="button" value="Add Edit"/> <input type="button" value="Delete"/> |
| <u>Musicians /</u>                         | Strudwick, Leslie,  | 1      |               |   | 11/05/2017 08/03/2018 |              |            |       | <input type="button" value="Add Edit"/> <input type="button" value="Delete"/> |
| <u>House of sples /</u>                    | Silva, Daniel,      | 1      |               |   | 03/21/2018 12/16/2018 |              |            |       | <input type="button" value="Add Edit"/> <input type="button" value="Delete"/> |
| <u>One for the money /</u>                 | Evanovich, Janet    | 1      |               |   | 03/22/2018 12/17/2018 |              |            |       | <input type="button" value="Add Edit"/> <input type="button" value="Delete"/> |

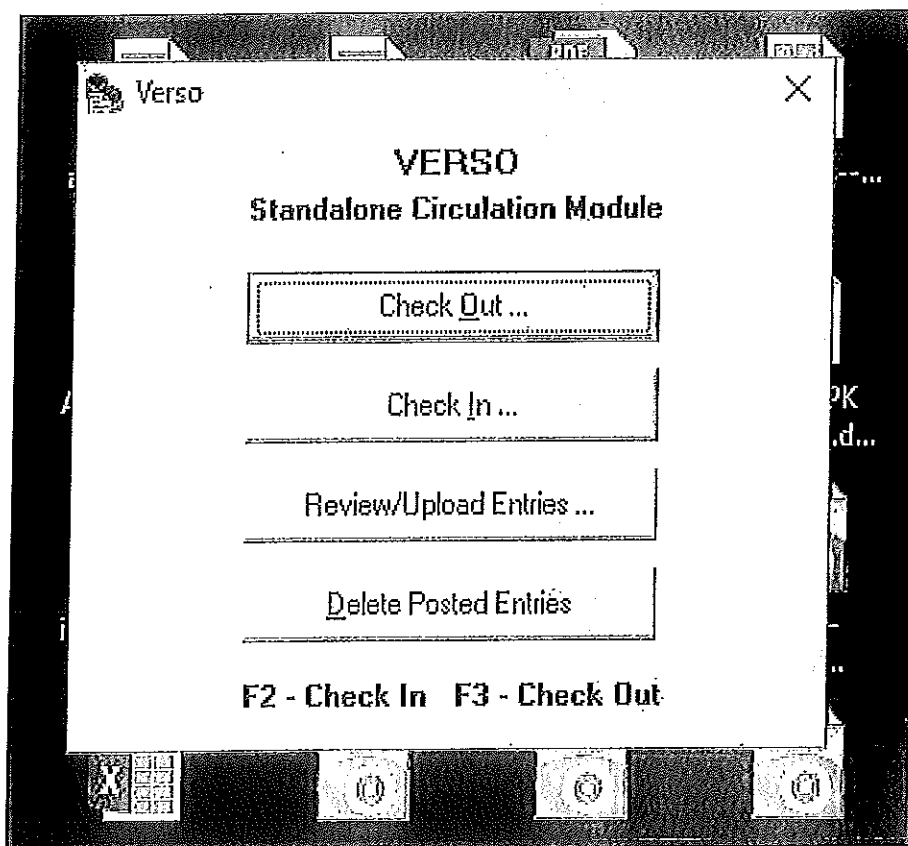
Additional UI elements visible in the screenshot include: 'Reset' and 'Suspend Reserves' buttons at the top right; a 'Staff Note' column with a star icon; and a 'Reserves' column with a star icon. A callout box points to the 'Staff Note' column with the text 'Staff can suspend or unsuspend, or delete holds'.

**ILS FUNCTIONAL REQUIREMENTS**

**SUPPORTING PICTURES**

**CIRCULATION & MANAGEMENT**

Picture #1, Circ, Offline Circ. 1



ILS FUNCTIONAL REQUIREMENTS

SUPPORTING PICTURES

HOLDS & NOTIFICATIONS

Picture #1, Circ, Holds Cancel and Suspend

User: Charles Norman McHugh Barcode: 1223 Type: ADULT

| Title                                      | Author              | Volume | Reserve Order | Copy Date  | Item Barcode | Staff Note | Notes | Reserves  |
|--|---------------------|--------|---------------|------------|--------------|------------|-------|---|
| <u>Everybody sleeps (but not Fred) /</u>   | Schneider, Josh,    | 1      |               | 05/28/2017 | 05/25/2018   |            |       | <input type="button" value="Add/Edit"/> <input type="button" value="Delete"/> |
| <u>Harry Potter collector's handbook /</u> | Silvester, William, | 1      |               | 08/29/2017 | 05/26/2018   |            |       | <input type="button" value="Add/Edit"/> <input type="button" value="Delete"/> |
| <u>The kill artist : a novel /</u>         | Silva, Daniel,      | 1      |               | 09/06/2017 | 06/03/2018   |            |       | <input type="button" value="Add/Edit"/> <input type="button" value="Delete"/> |
| <u>Musicians /</u>                         | Strudwick, Leslie,  | 1      |               | 11/06/2017 | 08/03/2018   |            |       | <input type="button" value="Add/Edit"/> <input type="button" value="Delete"/> |
| <u>House of spies /</u>                    | Silva, Daniel,      | 1      |               | 03/21/2018 | 12/16/2018   |            |       | <input type="button" value="Add/Edit"/> <input type="button" value="Delete"/> |
| <u>One for the money /</u>                 | Evanovich, Janet    | 1      |               | 03/22/2018 | 12/17/2018   |            |       | <input type="button" value="Add/Edit"/> <input type="button" value="Delete"/> |

Annotations:  
 - A box labeled "Staff can suspend or unsuspend, or delete holds" points to the "Reserve Order" column.  
 - A box labeled "Suspend Reserves" points to the "Reserves" column.  
 - A box labeled "Cancel" points to the "Reserves" column.

Picture #3, Circ, Offline Circ 3

**Rolling Meadows Public Library  
CIRCULATION BACKUP REPORT - UPLOAD #15**

**Circulation Backup Detail**

Total Number of Check In: 0  
 Total Number of Check Out: 32  
 Total Number of Rejected Items: 1  
 Total Number of Items with Exception: 4  
 Total Amount of Fines Posted: \$0  
 Total Amount of Check Out Fees: \$0  
 Total Number of Multiple Checked Out Items: 0  
 Total Number of Already Checked Out Items: 14

| POSTED ITEMS |                   |               |  |               |                |
|--------------|-------------------|---------------|--|---------------|----------------|
| Type         | Date              | Item Code     | Title                                    | Patron Code   | Patron Name    |
| CO           | 2/11/2019 2:56 PM | 0380002433890 | How I killed Pluto and why it had it com | 1380000999998 | Kramden, Ralph |
| CO           | 2/11/2019 2:56 PM | 0380001907969 | Alice In Wonderland [videorecording]     | 1380000999998 | Kramden, Ralph |
| CO           | 2/11/2019 2:56 PM | 0380001922984 | A Charile Brown Christmas [videorecordin | 1380000999998 | Kramden, Ralph |
| CO           | 2/11/2019 2:56 PM | 0380002433932 | As always, Julia : the letters of Julia  | 1380000999998 | Kramden, Ralph |

Picture #4, Circ, Customized Receipts

Circ Admin > Receipts and Notice Configuration

Receipts and Notice Configuration

Select a Location: Aspen Grove Library

Include Value Calculator on receipt?

Apply to ALL locations?

Use Generic Text Printer Driver? (If active, this will deactivate receipt Font and Graphics selections.)

Receipt Font and Size Selection

Receipt Header (Applicable to In transit and Hold/Pickup Receipts)

Receipt Section Headings

Receipt Text

Email Font and Size Selection (applies to all locations)

Email Text

Select Hold Receipt Format:

Receipt Headers

Receipts options:

- font and size
- logo
- public or non-public hold slips
- Value calculator
- Branding messages

Picture #15, Circ, Custom Wording/Message

**Overdue Notice Setup**

Select Location:

Notice Header  
Line 1:  
Line 2:  
Line 3:  
Line 4:  
Line 5:

**Circulation Admin - Notice Setup.**  
Staff can use library's own wording for text of print, email, or SMS messages

|                        |
|------------------------|
| Aspen Grove Library    |
| Circulation Department |
| 402 Yellowleaf Terrace |
| Aspen Grove, MI 03848  |
| (746) 732-1000         |

**First Notice Text**  
Library user:  
The items listed below are overdue at Aspen grove library. Please return them a soon as possible, so that others can take them and read them.  
Thank you for your consideration,  
Circulation Department

**Second Notice Text**  
Library user:

Print Notice  Yes  No  
Days overdue From  to   
Show anticipated fines  Yes  No  
Show book cost  Yes  No

ILS FUNCTIONAL REQUIREMENTS

SUPPORTING PICTURES

REPORTS

Picture #1, Reports, Report Writer 1

**Report Writer**

Create a New Report

Use an Existing Report

| Report Name                  | Created By                 | Created Date | Frequency | Next Run          |     |          |        |
|------------------------------|----------------------------|--------------|-----------|-------------------|-----|----------|--------|
| users                        | Auto-Graphics, Inc. Adm... | 03/21/2019   | Once      | 03/21/2019 6:5... | Edt | Schedule | Delete |
| 2018 purchases that circu... | Auto-Graphics, Inc. Adm... | 02/14/2019   | Once      | 02/25/2019 12:... | Edt | Schedule | Delete |
| Demographic                  | Dan Sul                    | 07/02/2018   |           |                   | Edt | Schedule | Delete |
| Kids Wedding tur             | Rob Rek                    | 03/13/2018   |           |                   | Edt | Schedule | Delete |
| Final W                      | Rob Rek                    | 03/07/2018   |           |                   | Edt | Schedule | Delete |
| Withdrawn Items              | Rob Rek                    | 03/07/2018   |           |                   | Edt | Schedule | Delete |
| Withdrawn                    | Rob Rek                    | 03/07/2018   |           |                   | Edt | Schedule | Delete |
| ITEMSFROTHOLDSEHF            | Auto-Graphics, Inc. Adm... | 09/12/2017   | Once      | 02/18/2019 7:4... | Edt | Schedule | Delete |
| test ted                     | Auto-Graphics, Inc. Adm... | 05/10/2017   |           |                   | Edt | Schedule | Delete |

Picture #2, Reports, Report Writer 2

**Demo VERSO Library** Enter search for : Keyword

Circ Reports > Report Writer

**Report Writer - Items -500 call nums**

wizard based query in Report Writer

WHAT TO SEARCH...

Choose starting search group:

Select field to search:

Value:

Choose starting search group:

Select field to search:

Value:

Picture #3, Reports, Inactive Users

BuildFrameset - Google Chrome  
Secure | https://prez-verso.auto-graphics.com/ils/BuildFrameset.aspx?w=RIUN&myses=1124...

### Infrequent Library User Notices

Submit Reset Help

Type of Notice: Output All

Limit By Patron Group: All

Sort By Patron Group: No

Suppress Notices with no address: Yes

Skip Email and only Print if Expired? Yes

Bundle Family Group notices: Yes

Home Location: Aspen Grove Library

Note that the number of days to be considered inactive is set by the library in the Circulation Administration function

Picture #4, Reports, Item Circulation Report

Item Circulation Report

RUN DATE: 10/16/2018

Clk Order: [Blank]  
Library Location: [Blank]  
Library: [Blank]  
Type: All ORDER  
BY: Top Start Date  
Date: 12/15/2018 Start  
Title: End Title  
ASIN: [Blank]

This is extracted from a report showing highly circulated items between January and October 2018

| Barcode          | Publication Date | Title                        | Author              | Call Number | Enumeration | Chronology | Circulation Count | Cost  | No of Bk Items | Library              | Collection                | Material Type | Date Acq'd | Last Accty      | Last Accty Type | Last Checked | Date Purchased |
|------------------|------------------|------------------------------|---------------------|-------------|-------------|------------|-------------------|-------|----------------|----------------------|---------------------------|---------------|------------|-----------------|-----------------|--------------|----------------|
| 33331922055517   | 2014             | 3 days to kill [Microform]   | [Blank]             | DVD FIVE    |             |            | 17                | 18.50 | 7              | Blod Central Library | ADJ - DVD - Fiction       | DVD Youth     | 03/11/2015 | 10/03/2018      | Shelf           | 09/15/2018   |                |
| 333335220302578  | 2015             | 8 rights up [Microform]      | Freeman, Megan      | DVD FIVE    |             |            | 5                 | 18.50 | 4              | Blod Central Library | Ce Desk - DVD Youth       | 05/06/2015    | 10/10/2018 | Hold for Return |                 | 05/05/2018   |                |
| 333335220554203  | 2016             | The Survivors [Microform]    | Bakerson, J.        | DVD FIFT    |             |            | 8                 | 5     | 7              | Blod Central Library | Young AdJ - DVD - Fiction | DVD Youth     | 09/19/2015 | 10/10/2018      | Check           | 12/10/2018   |                |
| 333335220592424  | 2013             | 8 action 8 pack [Microform]  | Hartson, Wendy      | DVD FISH    |             |            | 11                | 13.50 | 1              | Blod Central Library | ADJ - DVD - Fiction       | DVD           | 09/21/2015 | 09/11/2018      | Check           | 09/10/2018   |                |
| 3333352205922532 | 2009             | 8 to 8 [Microform]           | Higley, Celia       | DVD FIVE    |             |            | 5                 | 14.50 | 4              | Blod Central Library | ADJ - DVD - Fiction       | DVD Youth     | 05/01/2011 | 09/10/2018      | Shelf           | 09/10/2018   |                |
| 333335220593756  | 2018             | The 17th suspect [Microform] | Patterson, James    | MY FIFT     |             |            | 10                | 22    | 10             | Blod Central Library | ADJ - DVD - Fiction       | Book          | 03/21/2018 | 10/19/2018      | Shelf           | 10/19/2018   |                |
| 333335220594163  | 2003             | 21 [Microform]               | 21 (Motion picture) | DVD TWBI    |             |            | 6                 | 14.50 | 1              | Blod Central Library | ADJ - DVD - Fiction       | DVD Youth     | 09/10/2011 | 12/13/2018      | Check           | 12/13/2018   |                |
| 333335220595846  | 2018             | The 33rd year [Microform]    | [Blank]             | DVD FIVE    |             |            | 11                | 13.50 | 1              | Blod Central Library | ADJ - DVD - Fiction       | DVD           | 02/13/2018 | 10/02/2018      | Check           | 10/02/2018   |                |



## ILS FUNCTIONAL REQUIREMENTS

### SUPPORTING PICTURES

#### CATALOGING

Picture #1, Cat, Z39.50 Access Marc Rec

**Resources**

Clear All    
  Check All    
  Set Default    
  Compress All

Find in the RMPL

---

Rolling Meadows Public Library

---

Cataloging Resources

|   |   |
|---|---|
| <input type="checkbox"/> Cobb County GA | <input type="checkbox"/> District of Columbia Library |
| <input type="checkbox"/> Kansas Z3950   | <input type="checkbox"/> Library of Congress (direct) |
| <input type="checkbox"/> OCLC ZCAT      |   |

---

Electronic Resources

|  |                                    |
|--|------------------------------------|
| <input type="checkbox"/> Axis360       | <input type="checkbox"/> OverDrive |
| <input type="checkbox"/> Recorded Book | <input type="checkbox"/> ZInfo     |

---

Research Resources

|   |  |
|---|--|
| <input type="checkbox"/> EBSCO MasterFILE Premier     | <input type="checkbox"/> EBSCO Newspaper Source    |
| <input type="checkbox"/> ProQuest ABI/Inform Complete | <input type="checkbox"/> ProQuest Research Library |

Picture #2, Cat, Match Points

Edit a Matching Criteria

**Matching Set Names:**

|   |   |   |
|---|---|---|
| <ul style="list-style-type: none"> <li>0 Match ISSN (8 chars &lt;022&gt;\$a)</li> <li>Validate Author</li> <li>Validate Title</li> <li>Validate Publisher Name</li> <li>Validate Publication Date</li> <li>Validate Form of Item</li> <li>Validate Medium</li> <li>1 Match ISBN (13 chars &lt;020&gt;\$a)</li> <li>Use Advanced ISBN Matching method</li> <li>Validate Author</li> <li>Validate Title</li> <li>Validate Publisher Name</li> <li>Validate Publication Date</li> <li>Validate Form of Item</li> <li>Validate Medium</li> <li>2 Match &lt;035&gt;\$a Control Number (30 chars)</li> <li>Validate Author</li> <li>Validate Title</li> <li>Validate Publisher Name</li> <li>Validate Publication Date</li> <li>Validate Form of Item</li> <li>Validate Medium</li> </ul> | <ul style="list-style-type: none"> <li>3 Match LCCN (14 chars &lt;010&gt;\$a)</li> <li>Validate Author</li> <li>Validate Title</li> <li>Validate Publisher Name</li> <li>Validate Publication Date</li> <li>Validate Form of Item</li> <li>Validate Medium</li> <li>0 Match TITLE (250 chars &lt;245&gt;\$a\$b\$n\$p)</li> <li>Validate Author</li> <li>Validate Pub</li> <li>Validate Pub</li> <li>Validate For</li> <li>Validate Me</li> <li>ALWAYS Valid</li> <li>Staff can determine a sequence of up to 9 checks and additional validations.</li> <li>0 Match &lt;</li> <li>Validate Author</li> <li>Validate Title</li> <li>Validate Publisher Name</li> <li>Validate Publication Date</li> <li>Validate Form of Item</li> <li>Validate Medium</li> </ul> | <ul style="list-style-type: none"> <li>0 Match UPC (20 chars &lt;024&gt; ind 1=1 \$a)</li> <li>Validate Author</li> <li>Validate Title</li> <li>Validate Publisher Name</li> <li>Validate Publication Date</li> <li>Validate Form of Item</li> <li>Validate Medium</li> <li>0 Match EAN (13 chars &lt;024&gt; ind 1=3 \$a)</li> <li>Validate Author</li> <li>Validate Title</li> <li>Validate Publisher Name</li> <li>Validate Publication Date</li> <li>Validate Form of Item</li> <li>Validate Medium</li> <li>4 Match AGCN with Incoming tag \$ss (data from</li> <li>Validate Author</li> <li>Validate Title</li> <li>Validate Publisher Name</li> <li>Validate Publication Date</li> <li>Validate Form of Item</li> <li>Validate Medium</li> </ul> |
|---|---|---|

**Validation rules:**

Validate Author (25 characters from <100>\$a, <110>\$a, OR <111>\$a)

Validate Title (25 characters from <245>\$a)

Validate Publisher Name (first 3 words (20 characters) from <260>\$b OR <264>\$b)

**Advanced ISBN Matching Method:**  
If incoming ISBN-13 does not match, try to match as ISBN-10 by re "978".

ILS FUNCTIONAL REQUIREMENTS  
 SUPPORTING PICTURES  
 ACQUISITIONS

Picture #1, Acquisitions, Vendor Carts

Acquire View > Selection Lists

Title Management - Program 2018 February Hard Processing 2

Update Entries Apply Criteria Clear View Show Query View

Sort By: Title #  
 Selection List: Program 2018 February Hard Processing 2  
 Owned By: Dept. 2018  
 Include Previously Ordered: /  
 Order Item Previously Ordered: /  
 Add Titles to Selection List: Search Group

Status: Building  
 Created: 3/21/2018  
 Expired: 3/21/2018

Selection List data with bibliographic information loaded from Vendor MARG records

Results 1 - 242 of 242

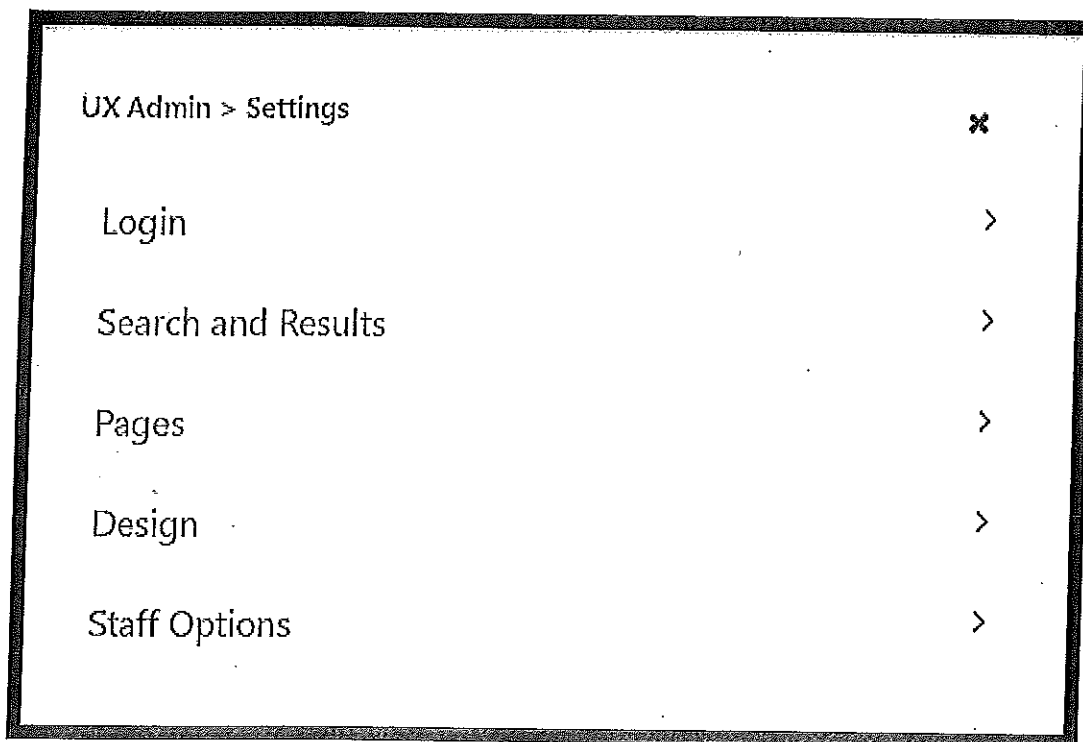
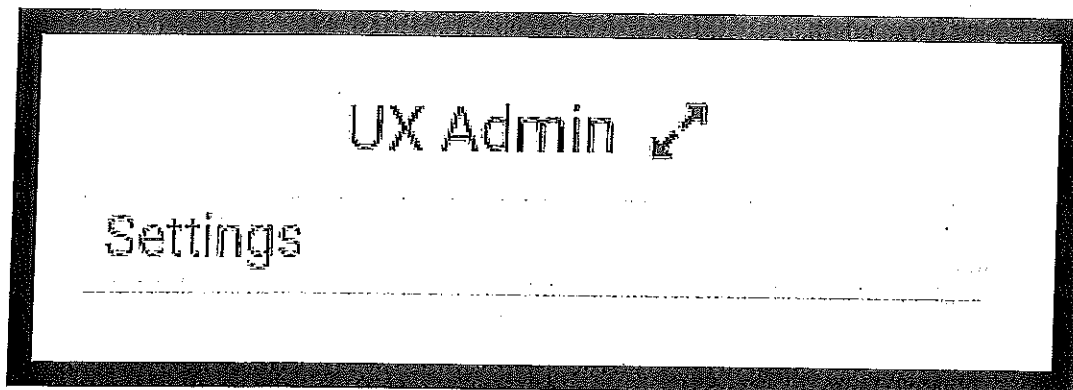
| Title                              | Author             | ISBN/UPC                    | Publisher                            | Fixed Year / Ed. # / Material Type / Location / Title | Branch / Copies / Price | Orig Item Check All Clear All | Prev | Next      | Last         |
|------------------------------------|--------------------|-----------------------------|--------------------------------------|---|-------------------------|-------------------------------|------|-----------|--------------|
| 4 Little Pigs                      | Cottage Door Press | 9781532621535<br>1075221535 | Cottage Door Press                   | 2018 *<br>GENS *:<br>Book                             | Mobile Library<br>4.63  |                               |      | 3/21/2018 | Delete Entry |
| 5 Worlds Book 2: The Cobalt Prince | Siegel, Mark       | 9781010135557<br>1161535952 | Random House Books for Young Readers | 2018 *<br>GENS *:<br>Book                             | Mobile Library<br>32.99 |                               |      | 3/21/2018 | Delete Entry |

## ILS FUNCTIONAL REQUIREMENTS

### SUPPORTING PICTURES

#### SYSTEM, SERVER & SOFTWARE FUNCTIONALITY

Picture #1, System, Server & Software Functionality – UX Admin



## ACTIVE ALERT SERVICE FOR NEW TITLES

Hi Cammy Flaue,

Presidential Public Library is pleased to inform you that the following items have been added to Presidential Public Library's collection in the past week. These titles were identified because of the library's automated current awareness service.

Author: Patterson, James.

Title: 17th Shooter [text (large print)].

Publisher: Hachette/Center Point,

Date: 2018.

VERSO:

<http://prez-verso.auto-graphics.com/mvc/command=search?query=agcn=386325&lid=prez>

Author: Patterson, James,

Title: Home sweet murder : true-crime thrillers / James Patterson.

Publisher:

Date:

VERSO:

<http://prez-verso.auto-graphics.com/mvc/command=search?query=agcn=386047&lid=prez>

Author: Patterson, James,

Title: Murder, interrupted : true-crime thrillers / James Patterson.

Publisher:

Date:

VERSO:

<http://prez-verso.auto-graphics.com/mvc/command=search?query=agcn=386057&lid=prez>

Author: Patterson, James,

Title: 16th Seduction [electronic resource] / James Patterson ; Maxine Paetro.

Publisher:

Date:

VERSO:

<http://prez-verso.auto-graphics.com/mvc/command=search?query=agcn=384181&lid=prez>

Author: Patterson, James.

Title: 16th seduction [electronic resource] / James Patterson and Maxine Paetro.

Publisher: Blackstone Audio ; [Distributed by] OneClick Digital,

Date: 2017, p2017.

VERSO:

<http://prez-verso.auto-graphics.com/mvc/command=search?query=agcn=384225&lid=prez>



Author: Patterson, James,  
Title: Avalanche [electronic resource] / James Patterson with David English.  
Publisher:  
Date:  
VERSO:  
<http://prez-verso.auto-graphics.com/mvc/command=search?query=agcn=386303&lid=prez>

Author: Patterson, James,  
Title: Big words for little geniuses / Susan and James Patterson ; illustrated by Hsin ...  
Publisher:  
Date:  
VERSO:  
<http://prez-verso.auto-graphics.com/mvc/command=search?query=agcn=388264&lid=prez>

Author: Patterson, James,  
Title: The Black Book [electronic resource] / James Patterson ; David Ellis.  
Publisher:  
Date:  
VERSO:  
<http://prez-verso.auto-graphics.com/mvc/command=search?query=agcn=388986&lid=prez>

Author: Patterson, James,  
Title: Count to ten / James Patterson and Ashwin Sanghi.  
Publisher:  
Date:  
VERSO:  
<http://prez-verso.auto-graphics.com/mvc/command=search?query=agcn=388008&lid=prez>

Author: Patterson, James,  
Title: Count to ten [videorecording] : a Private novel / James Patterson and Ashwin ...  
Publisher:  
Date:  
VERSO:  
<http://prez-verso.auto-graphics.com/mvc/command=search?query=agcn=388574&lid=prez>

Author: Patterson, James,  
Title: Detective cross [electronic resource] / James Patterson.  
Publisher:  
Date:  
VERSO:  
<http://prez-verso.auto-graphics.com/mvc/command=search?query=agcn=384418&lid=prez>





# AGent Version 2.7

## Product Information Bulletin

# Auto-Graphics Web Services



AGENT-015  
2019

 a-g canada ltd.  
Software that Powers the Library

## Scope and Purpose

The AGent Search API application is a Web Services-based product developed by Auto-Graphics, Inc. for the purpose of providing users an interface to authentication, searching and statistics from a wide variety of information resources. The purpose of this document is to describe the application interface and define its service points.

The AGent Search API is based on a core set of standards that describe the syntax and semantics of software communication:

- XML provides the common syntax for representing data
- Simple Object Access Protocol (SOAP) provides the semantics for data exchange
- Web Services Description Language (WSDL) provides a mechanism to describe the capabilities of a Web service

## Supported Services

### 1. AgentLogin

AgentLogin facilitates logging into the Web Service. The user must establish a session *before* any searching can occur. A minimum of **CustomerID** and **Librarycode** are required to establish a session. Depending on the type of authentication being used, a **Username** and **Password** *may* be required.

AgentLogin input parameters are:

- CustomerID (required)
- Librarycode (required)
- Username (optional)
- Password (optional)

An example of the <AgentLogin> element is shown below:

```
- <s:element name="AgentLogin">
- <s:complexType>
- <s:sequence>
  <s:element minOccurs="0" maxOccurs="1" name="customerid" type="s:string" />
  <s:element minOccurs="0" maxOccurs="1" name="libraryCode" type="s:string" />
  <s:element minOccurs="0" maxOccurs="1" name="userName" type="s:string" />
  <s:element minOccurs="0" maxOccurs="1" name="password" type="s:string" />
</s:sequence>
</s:complexType>
</s:element>
```

### AgentLoginResponse

AgentLoginResponse is returned as a result of the AgentLogin operation. The returned **Status** is used to determine success or failure of the operation. If successful, a **SessionID** and **CustomerServer** are returned. These values are required by *all* other service calls.

AgentLoginResponse output parameters are:

- Status
- ErrorMessage

*Auto-Graphics Web Services*

- SessionID
- IsAdmin
- CustomerServer

An example of the <AgentLoginResponse> element is shown below:

```
- <s:element name="AgentLoginResponse">
- <s:complexType>
- <s:sequence>
  <s:element minOccurs="0" maxOccurs="1" name="AgentLoginResult"
    type="tns:LoginResult" />
  </s:sequence>
</s:complexType>
</s:element>
- <s:complexType name="LoginResult">
- <s:sequence>
  <s:element minOccurs="1" maxOccurs="1" name="Status" type="s:int" />
  <s:element minOccurs="0" maxOccurs="1" name="ErrorMessage" type="s:string" />
  <s:element minOccurs="1" maxOccurs="1" name="SessionId" type="s:int" />
  <s:element minOccurs="1" maxOccurs="1" name="IsAdmin" type="s:boolean" />
  <s:element minOccurs="0" maxOccurs="1" name="CustomerServer" type="s:string" />
</s:sequence>
</s:complexType>
```

## 2. GetASession

GetASession establishes a valid session. Once a valid session has been established, the contents of that session can be retrieved.

GetASession input parameters are:

- SessionID (required)
- CustomerID (required)
- CustomerServer (required)

An example of the <GetASession> element is shown below:

```
- <s:element name="GetASession">
- <s:complexType>
- <s:sequence>
  <s:element minOccurs="1" maxOccurs="1" name="sessionId" type="s:int" />
  <s:element minOccurs="0" maxOccurs="1" name="customerId" type="s:string" />
  <s:element minOccurs="0" maxOccurs="1" name="customerServer" type="s:string" />
</s:sequence>
</s:complexType>
</s:element>
```

## GetASessionResponse

GetASessionResponse is returned as a result of the GetASession operation. The returned Status is used to determine success or failure of the operation.

GetASessionResponse output parameters are:

- Status
- ErrorMessage
- CustomerProfileKey
- LibraryProfileKey



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---

- o UserID
- o LibraryTypeKey
- o HasLibraryType
- o AuthenticationType
- o CustomerName
- o LibraryName

An example of the <GetASessionResponse> element is shown below:

```
- <s:element name="GetASessionResponse">
- <s:complexType>
- <s:sequence>
  <s:element minOccurs="0" maxOccurs="1" name="GetASessionResult"
    type="tns:SessionResult" />
  </s:sequence>
</s:complexType>
- <s:complexType name="SessionResult">
- <s:sequence>
  <s:element minOccurs="1" maxOccurs="1" name="Status" type="s:int" />
  <s:element minOccurs="0" maxOccurs="1" name="ErrorMessage" type="s:string" />
  <s:element minOccurs="1" maxOccurs="1" name="CustomerProfileKey" type="s:int" />
  <s:element minOccurs="1" maxOccurs="1" name="LibraryProfileKey" type="s:int" />
  <s:element minOccurs="1" maxOccurs="1" name="UserId" type="s:int" />
  <s:element minOccurs="1" maxOccurs="1" name="LibraryTypeKey" type="s:int" />
  <s:element minOccurs="1" maxOccurs="1" name="HasLibraryType" type="s:boolean" />
  <s:element minOccurs="0" maxOccurs="1" name="AuthenticationType" type="s:string" />
  <s:element minOccurs="0" maxOccurs="1" name="CustomerName" type="s:string" />
  <s:element minOccurs="0" maxOccurs="1" name="LibraryName" type="s:string" />
  </s:sequence>
</s:complexType>
```

### 3. GetResourceInfo

GetResourceInfo is used to obtain a list of all resources available for the user, including the level of authentication associated with each resource.

GetResourceInfo input parameters are:

- o SessionID (required)
- o CustomerID (required)
- o CustomerServer (required)

An example of the <GetResourceInfo> element is shown below:

```
- <s:element name="GetResourceInfo">
- <s:complexType>
- <s:sequence>
  <s:element minOccurs="1" maxOccurs="1" name="sessionId" type="s:int" />
  <s:element minOccurs="0" maxOccurs="1" name="customerId" type="s:string" />
  <s:element minOccurs="0" maxOccurs="1" name="customerServer" type="s:string" />
  </s:sequence>
</s:complexType>
</s:element>
```

## GetResourceInfoResponse

GetResourceInfoResponse is returned as a result of the GetResourceInfo operation. The returned Status is used to determine success or failure of the operation. One or more resources may be returned as the result of a successful operation.

GetResourceInfoResponse output parameters are:

- Status
- ErrorMessage
- ArrayofResources
  - DatabaseName
  - LibraryDBPoolKey
  - AuthLevel
  - SourceURL

An example of the <GetResourceInfoResponse> element is shown below:

```
- <s:element name="GetResourceInfoResponse">
- <s:complexType>
- <s:sequence>
  <s:element minOccurs="0" maxOccurs="1" name="GetResourceInfoResult"
    type="tns:GetResourceInfoResult" />
  </s:sequence>
  </s:complexType>
  </s:element>
- <s:complexType name="GetResourceInfoResult">
- <s:sequence>
  <s:element minOccurs="1" maxOccurs="1" name="Status" type="s:int" />
  <s:element minOccurs="0" maxOccurs="1" name="ErrorMessage" type="s:string" />
  <s:element minOccurs="0" maxOccurs="1" name="ArrayOfResources"
    type="tns:ArrayOfResource" />
  </s:sequence>
  </s:complexType>
- <s:complexType name="ArrayOfResource">
- <s:sequence>
  <s:element minOccurs="0" maxOccurs="unbounded" name="Resource" nillable="true"
    type="tns:Resource" />
  </s:sequence>
  </s:complexType>
- <s:complexType name="Resource">
- <s:sequence>
  <s:element minOccurs="0" maxOccurs="1" name="DatabaseName" type="s:string" />
  <s:element minOccurs="1" maxOccurs="1" name="LibraryDBPoolKey" type="s:int" />
  <s:element minOccurs="0" maxOccurs="1" name="AuthLevel" type="s:string" />
  <s:element minOccurs="0" maxOccurs="1" name="SourceURL" type="s:string" />
  </s:sequence>
  </s:complexType>
```

## 4. Query

Query is used to submit a query of an available resource. The LibraryDBPoolKey is obtained from a successful return of the GetResourceInfo operation.

Query input parameters are:

- SearchTerm (required)
- LibraryDBPoolKey (required)

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---

- PageSize (optional)
- NavigationId (optional)
- SortBy (required)  
Choose from:
  - DEFAULT
  - NEWEST\_PUBDATE\_FIRST
  - NEWEST\_PUBDATE\_LAST
  - NEWEST\_RECORD\_FIRST
  - NEWEST\_RECORD\_LAST
  - ALPHABETICALLY\_BY\_TITLE
  - ALPHABETICALLY\_BY\_AUTHOR
  - RELEVANCY
- SessionID (required)
- CustomerID (required)
- CustomerServer (required)

An example of the <Query> element is shown below:

```
- <s:element name="Query">
- <s:complexType>
- <s:sequence>
  <s:element minOccurs="0" maxOccurs="1" name="searchTerm" type="s:string" />
  <s:element minOccurs="1" maxOccurs="1" name="libraryDBPoolKey" type="s:int" />
  <s:element minOccurs="1" maxOccurs="1" name="pageSize" type="s:int" />
  <s:element minOccurs="0" maxOccurs="1" name="navigationId" type="s:string" />
  <s:element minOccurs="1" maxOccurs="1" name="sortBy" type="tns:SORTBY" />
  <s:element minOccurs="1" maxOccurs="1" name="sessionId" type="s:int" />
  <s:element minOccurs="0" maxOccurs="1" name="customerId" type="s:string" />
  <s:element minOccurs="0" maxOccurs="1" name="customerServer" type="s:string" />
  </s:sequence>
</s:complexType>
</s:element>
- <s:simpleType name="SORTBY">
- <s:restriction base="s:string">
  <s:enumeration value="DEFAULT" />
  <s:enumeration value="NEWEST_PUBDATE_FIRST" />
  <s:enumeration value="NEWEST_PUBDATE_LAST" />
  <s:enumeration value="NEWEST_RECORD_FIRST" />
  <s:enumeration value="NEWEST_RECORD_LAST" />
  <s:enumeration value="ALPHABETICALLY_BY_TITLE" />
  <s:enumeration value="ALPHABETICALLY_BY_AUTHOR" />
  <s:enumeration value="RELEVANCY" />
  </s:restriction>
</s:simpleType>
```

### QueryResponse

QueryResponse is returned as a result of a Query operation. The returned **Status** is used to determine success or failure of the operation. Zero or more hits may be returned as the result of a successful operation. After a successful Query, **PrevSetId** and **NextSetId** are provided, and must be moved to **NavigationId** to obtain result records that exceed **PageSize**.



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```
<s:element minOccurs="0" maxOccurs="1" name="PubYear" type="s:string" />
<s:element minOccurs="0" maxOccurs="1" name="Publisher" type="s:string" />
<s:element minOccurs="0" maxOccurs="1" name="Lexile" type="s:string" />
<s:element minOccurs="0" maxOccurs="1" name="ResultURL" type="s:string" />
<s:element minOccurs="1" maxOccurs="1" name="IsMarcRecord" type="s:boolean" />
</s:sequence>
</s:complexType>
```

**5. GetResourceAuthInfo**

GetResourceAuthInfo is used to obtain authentication information of all available resources for the user, including the level of authentication associated with each resource.

GetResourceAuthInfo input parameters are:

- o SessionID (required)
- o CustomerID (required)
- o CustomerServer (required)

An example of the <GetResourceAuthInfo> element is shown below:

```
- <s:element name="GetResourceAuthInfo">
- <s:complexType>
- <s:sequence>
  <s:element minOccurs="1" maxOccurs="1" name="sessionId" type="s:int" />
  <s:element minOccurs="0" maxOccurs="1" name="customerId" type="s:string" />
  <s:element minOccurs="0" maxOccurs="1" name="customerServer" type="s:string" />
  </s:sequence>
  </s:complexType>
</s:element>
```

**GetResourceAuthInfoResponse**

GetResourceAuthInfoResponse is returned as a result of a GetResourceAuthInfo operation. The returned **Status** is used to determine success or failure of the operation. Authentication information for one or more resources may be returned as the result of a successful operation.

GetResourceAuthInfoResponse output parameters are:

- o Status
- o ErrorMessage
- o ArrayofResourceAuthInfo
  - o LibraryDBPoolKey
  - o NativeUserName
  - o NativePassword
  - o NativeGroupID
  - o AuthLevel

An example of the <GetResourceAuthInfoResponse> element is shown below:

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```

- <s:element name="GetResourceAuthInfoResponse">
- <s:complexType>
- <s:sequence>
  <s:element minOccurs="0" maxOccurs="1" name="GetResourceAuthInfoResult"
    type="tns:GetResourceAuthInfoResult" />
  </s:sequence>
</s:complexType>
</s:element>
- <s:complexType name="GetResourceAuthInfoResult">
- <s:sequence>
  <s:element minOccurs="1" maxOccurs="1" name="Status" type="s:int" />
  <s:element minOccurs="0" maxOccurs="1" name="ErrorMessage" type="s:string" />
  <s:element minOccurs="0" maxOccurs="1" name="ArrayOfResourceAuthInfo"
    type="tns:ArrayOfResourceAuthInfo" />
  </s:sequence>
</s:complexType>
- <s:complexType name="ArrayOfResourceAuthInfo">
- <s:sequence>
  <s:element minOccurs="0" maxOccurs="unbounded" name="ResourceAuthInfo"
    nillable="true" type="tns:ResourceAuthInfo" />
  </s:sequence>
</s:complexType>
- <s:complexType name="ResourceAuthInfo">
- <s:sequence>
  <s:element minOccurs="1" maxOccurs="1" name="LibraryDBPoolKey" type="s:int" />
  <s:element minOccurs="0" maxOccurs="1" name="NativeUserName" type="s:string" />
  <s:element minOccurs="0" maxOccurs="1" name="NativePassword" type="s:string" />
  <s:element minOccurs="0" maxOccurs="1" name="NativeGroupId" type="s:string" />
  <s:element minOccurs="0" maxOccurs="1" name="AuthLevel" type="s:string" />
  </s:sequence>
</s:complexType>

```

6. SetResourceAuthInfo

SetResourceAuthInfo is used to set authentication information for one or more available resources for the user.

SetResourceAuthInfo input parameters are:

- SessionID (required)
- ArrayofResourceAuthInfo (required)
- CustomerID (required)
- CustomerServer (required)

An example of the <SetResourceAuthInfo> element is shown below:

```

- <s:element name="SetResourceAuthInfo">
- <s:complexType>
- <s:sequence>
  <s:element minOccurs="1" maxOccurs="1" name="sessionId" type="s:int" />
  <s:element minOccurs="0" maxOccurs="1" name="arrayofResourceAuthInfo"
    type="tns:ArrayOfResourceAuthInfo" />
  <s:element minOccurs="0" maxOccurs="1" name="customerId" type="s:string" />
  <s:element minOccurs="0" maxOccurs="1" name="customerServer" type="s:string" />
  </s:sequence>
</s:complexType>
</s:element>

```

SetResourceAuthInfoResponse

SetResourceAuthInfoResponse is returned as a result of a SetResourceAuthInfo operation. The returned Status is used to determine success or failure of each authentication update.

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---

SetResourceAuthInfoResponse output parameters are:

- o Status
- o ErrorMessage
- o ArrayofResourceAuthInfoResult
  - o LibraryDBPoolKey
  - o Status
  - o ErrorMessage

An example of the <SetResourceAuthInfoResponse> element is shown below:

```
- <s:element name="SetResourceAuthInfoResponse">
- <s:complexType>
- <s:sequence>
  <s:element minOccurs="0" maxOccurs="1" name="SetResourceAuthInfoResult"
    type="tns:SetResourceAuthInfoResult" />
  </s:sequence>
</s:complexType>
</s:element>
- <s:complexType name="SetResourceAuthInfoResult">
- <s:sequence>
  <s:element minOccurs="1" maxOccurs="1" name="Status" type="s:int" />
  <s:element minOccurs="0" maxOccurs="1" name="ErrorMessage" type="s:string" />
  <s:element minOccurs="0" maxOccurs="1" name="ArrayOfResourceAuthInfoResult"
    type="tns:ArrayOfResourceAuthInfoResult" />
  </s:sequence>
</s:complexType>
- <s:complexType name="ArrayOfResourceAuthInfoResult">
- <s:sequence>
  <s:element minOccurs="0" maxOccurs="unbounded" name="ResourceAuthInfoResult"
    nillable="true" type="tns:ResourceAuthInfoResult" />
  </s:sequence>
</s:complexType>
- <s:complexType name="ResourceAuthInfoResult">
- <s:sequence>
  <s:element minOccurs="1" maxOccurs="1" name="LibraryDBPoolKey" type="s:int" />
  <s:element minOccurs="1" maxOccurs="1" name="Status" type="s:int" />
  <s:element minOccurs="0" maxOccurs="1" name="ErrorMessage" type="s:string" />
  </s:sequence>
</s:complexType>
```

## 7. GetTopSearchTerms

GetTopSearchTerms is used to obtain the TopNTerms for one or more libraries within a specified StartDate and EndDate. If the LibraryCode parameter is not provided, all libraries are included in the query. LibraryCode can also contain comma delimited values if more than one library but less than all libraries are desired.

GetTopSearchTerms input parameters are:

- o TopNTerms (required)
- o LibraryCode (optional)
- o Category (required)  
Choose From:
  - o ALL\_HEADINGS
  - o AUTHOR

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- o TITLE
- o SUBJECT
- o StartDate (required)
- o EndDate (required)
- o CustomerID (required)
- o CustomerServer (required)

An example of the <GetTopSearchTerms> element is shown below:

```
- <s:element name="GetTopSearchTerms">
- <s:complexType>
- <s:sequence>
  <s:element minOccurs="1" maxOccurs="1" name="topNTerms" type="s:int" />
  <s:element minOccurs="0" maxOccurs="1" name="libraryCode" type="s:string" />
  <s:element minOccurs="1" maxOccurs="1" name="category" type="tns:CATEGORY" />
  <s:element minOccurs="0" maxOccurs="1" name="startDate" type="s:string" />
  <s:element minOccurs="0" maxOccurs="1" name="endDate" type="s:string" />
  <s:element minOccurs="0" maxOccurs="1" name="customerID" type="s:string" />
  <s:element minOccurs="0" maxOccurs="1" name="customerServer" type="s:string" />
</s:sequence>
</s:complexType>
</s:element>
- <s:simpleType name="CATEGORY">
- <s:restriction base="s:string">
  <s:enumeration value="ALL HEADINGS" />
  <s:enumeration value="AUTHOR" />
  <s:enumeration value="TITLE" />
  <s:enumeration value="SUBJECT" />
</s:restriction>
</s:simpleType>
```

### GetTopSearchTermsResponse

GetTopSearchTermsResponse is returned as a result of a GetTopSearchTerms operation. The returned Status is used to determine success or failure of the operation.

GetTopSearchTermsResponse output parameters are:

- o Status
- o ErrorMessage
- o ArrayofTopSearchTermsResult
  - o SearchTerm
  - o Frequency
  - o Librarycode
  - o Libraryname

An example of the <GetTopSearchTermsResponse> element is shown below:

```
- <s:element name="GetTopSearchTermsResponse">
- <s:complexType>
- <s:sequence>
  <s:element minOccurs="0" maxOccurs="1" name="GetTopSearchTermsResult"
    type="tns:GetTopSearchTermsResult" />
</s:sequence>
</s:complexType>
</s:element>
- <s:complexType name="GetTopSearchTermsResult">
```



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```

- <s:sequence>
  <s:element minOccurs="1" maxOccurs="1" name="Status" type="s:int" />
  <s:element minOccurs="0" maxOccurs="1" name="ErrorMessage" type="s:string" />
  <s:element minOccurs="0" maxOccurs="1" name="ArrayOfTopSearchTermsResult"
    type="tns:ArrayOfTopSearchTermsResult" />
  </s:sequence>
</s:complexType>
- <s:complexType name="ArrayOfTopSearchTermsResult">
- <s:sequence>
  <s:element minOccurs="0" maxOccurs="unbounded" name="TopSearchTermsResult"
    nillable="true" type="tns:TopSearchTermsResult" />
  </s:sequence>
</s:complexType>
- <s:complexType name="TopSearchTermsResult">
- <s:sequence>
  <s:element minOccurs="0" maxOccurs="1" name="SearchTerm" type="s:string" />
  <s:element minOccurs="1" maxOccurs="1" name="Frequency" type="s:int" />
  </s:sequence>
</s:complexType>

```

**8. GetUserResourceAuthInfo**

GetUserResourceAuthInfo is used to obtain authentication information of all user authenticated resources for the user.

GetUserResourceAuthInfo input parameters are:

- o SessionID (required)
- o CustomerID (required)
- o CustomerServer (required)

An example of the <GetUserResourceAuthInfo> element is shown below:

```

- <s:element name="GetUserResourceAuthInfo">
- <s:complexType>
- <s:sequence>
  <s:element minOccurs="1" maxOccurs="1" name="sessionId" type="s:int" />
  <s:element minOccurs="0" maxOccurs="1" name="customerId" type="s:string" />
  <s:element minOccurs="0" maxOccurs="1" name="customerServer" type="s:string" />
  </s:sequence>
</s:complexType>
</s:element>

```

**GetUserResourceAuthInfoResponse**

GetUserResourceAuthInfoResponse is returned as a result of a GetUserResourceAuthInfo operation. The returned **Status** is used to determine success or failure of the operation. Authentication information for one or more resources may be returned as the result of a successful operation.

GetUserResourceAuthInfoResponse output parameters are:

- o Status
- o ErrorMessage
- o ArrayofUserResourceAuthInfo
  - o LibraryDBPoolKey
  - o NativeUserName
  - o NativePassword
  - o NativeGroupID
  - o DeletedFlag

An example of the <GetUserResourceAuthInfoResponse> element is shown below:

```
- <s:element name="GetUserResourceAuthInfoResponse">
- <s:complexType>
- <s:sequence>
  <s:element minOccurs="0" maxOccurs="1" name="GetUserResourceAuthInfoResult"
    type="tns:GetUserResourceAuthInfoResult" />
  </s:sequence>
</s:complexType>
</s:element>
- <s:complexType name="GetUserResourceAuthInfoResult">
- <s:sequence>
  <s:element minOccurs="1" maxOccurs="1" name="Status" type="s:int" />
  <s:element minOccurs="0" maxOccurs="1" name="ErrorMessage" type="s:string" />
  <s:element minOccurs="0" maxOccurs="1" name="ArrayOfUserResourceAuthInfo"
    type="tns:ArrayOfUserResourceAuthInfo" />
  </s:sequence>
</s:complexType>
- <s:complexType name="ArrayOfUserResourceAuthInfo">
- <s:sequence>
  <s:element minOccurs="0" maxOccurs="unbounded" name="UserResourceAuthInfo"
    nillable="true" type="tns:UserResourceAuthInfo" />
  </s:sequence>
</s:complexType>
- <s:complexType name="UserResourceAuthInfo">
- <s:sequence>
  <s:element minOccurs="1" maxOccurs="1" name="LibraryDBPoolKey" type="s:int" />
  <s:element minOccurs="0" maxOccurs="1" name="NativeUserName" type="s:string" />
  <s:element minOccurs="0" maxOccurs="1" name="NativePassword" type="s:string" />
  <s:element minOccurs="0" maxOccurs="1" name="NativeGroupId" type="s:string" />
  <s:element minOccurs="1" maxOccurs="1" name="DeletedFlag" type="s:boolean" />
  </s:sequence>
</s:complexType>
```

## 9. SetUserResourceAuthInfo

SetUserResourceAuthInfo is used to set authentication information for one or more user authenticated resources for the user. The DeletedFlag should be set to "True" if the user resource record is to be deleted.

SetUserResourceAuthInfo input parameters are:

- SessionID (required)
- ArrayofUserResourceAuthInfo (required)
- CustomerID (required)
- CustomerServer (required)

An example of the <SetUserResourceAuthInfo> element is shown below:

```
- <s:element name="SetUserResourceAuthInfo">
- <s:complexType>
- <s:sequence>
  <s:element minOccurs="1" maxOccurs="1" name="sessionId" type="s:int" />
  <s:element minOccurs="0" maxOccurs="1" name="arrayofUserResourceAuthInfo"
    type="tns:ArrayofUserResourceAuthInfo" />
  <s:element minOccurs="0" maxOccurs="1" name="customerId" type="s:string" />
  <s:element minOccurs="0" maxOccurs="1" name="customerServer" type="s:string" />
  </s:sequence>
</s:complexType>
</s:element>
```

## SetUserResourceAuthInfoResponse

SetUserResourceAuthInfoResponse is returned as a result of a SetUserResourceAuthInfo operation. The returned Status is used to determine success or failure of each authentication update.

SetUserResourceAuthInfoResponse output parameters are:

- o Status
- o ErrorMessage
- o ArrayofUserResourceAuthInfoResult
  - o LibraryDBPoolKey
  - o Status
  - o ErrorMessage

An example of the <SetUserResourceAuthInfoResponse> element is shown below:

```
- <s:element name="SetUserResourceAuthInfoResponse">
- <s:complexType>
- <s:sequence>
  <s:element minOccurs="0" maxOccurs="1" name="SetUserResourceAuthInfoResult"
    type="tns:SetUserResourceAuthInfoResult" />
  </s:sequence>
  </s:complexType>
  </s:element>
- <s:complexType name="SetUserResourceAuthInfoResult">
- <s:sequence>
  <s:element minOccurs="1" maxOccurs="1" name="Status" type="s:int" />
  <s:element minOccurs="0" maxOccurs="1" name="ErrorMessage" type="s:string" />
  <s:element minOccurs="0" maxOccurs="1" name="ArrayOfUserResourceAuthInfoResult"
    type="tns:ArrayOfUserResourceAuthInfoResult" />
  </s:sequence>
  </s:complexType>
- <s:complexType name="ArrayOfUserResourceAuthInfoResult">
- <s:sequence>
  <s:element minOccurs="0" maxOccurs="unbounded" name="UserResourceAuthInfoResult"
    nillable="true" type="tns:UserResourceAuthInfoResult" />
  </s:sequence>
  </s:complexType>
- <s:complexType name="UserResourceAuthInfoResult">
- <s:sequence>
  <s:element minOccurs="1" maxOccurs="1" name="LibraryDBPoolKey" type="s:int" />
  <s:element minOccurs="1" maxOccurs="1" name="Status" type="s:int" />
  <s:element minOccurs="0" maxOccurs="1" name="ErrorMessage" type="s:string" />
  </s:sequence>
  </s:complexType>
```

## Contacting Auto-Graphics

### How To Contact Auto-Graphics

If you have any questions, you can use any of the following methods to contact us:

#### U. S. Customers

Contact Auto-Graphics Technical Support by e-mail to [HelpDesk@auto-graphics.com](mailto:HelpDesk@auto-graphics.com) or fax to (909) 595-3506.

Telephone: (800) 852-8686 5am ~ 5pm Pacific Time

#### Canadian Customers

Contact the A-G Canada Help Desk by e-mail to [support@ag-canada.com](mailto:support@ag-canada.com) or fax to (416) 236-7489.

Telephone: (800) 225-8534 (press 4) 8am ~ 6pm Eastern Time

### Comments

This is one of a series of bulletins designed to cover a level of information not generally found in other sources of hardcopy or online documentation. We welcome and encourage your comments. If there are any topics you would like to see addressed in a Product Information Bulletin or if you have suggestions as to how this bulletin could be improved, please send e-mail to: [bulletins@auto-graphics.com](mailto:bulletins@auto-graphics.com)



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| Circ Year - | Author                   | Title   | Barcode        | Call Number        | Call Number Prefix  | Current Library Branch Loc |
|-------------|--------------------------|---|----------------|--------------------|---------------------|----------------------------|
|             | Condon, Dave.            | Notre Dame football, the golden tradition   | 020100005565   | I 796.332 Co       | Main - Adult        |                            |
|             | Brand, Max               | Thunder Moon's challenge  | 020100007538   | W BRAND            | Main - Adult        |                            |
|             | Clarke, Arthur C.        | 2010 : a space odyssey. vol. 02   | 020100008312   | SF CLARKE          | Main - Adult        |                            |
|             | Orlev, Uri               | The island on Bird Street   | 0201101217309  | J Or               | Main - Youth        |                            |
|             | Pyle, Howard             | The story of King Arthur and his knights  | 020100096994   | j398.2 Py          | Main - Youth        |                            |
|             | Kraus, Robert            | Leo the late bloomer  | 0201107434031  | KRA                | Coolspring - Youth  |                            |
|             | Kraus, Robert            | Leo the late bloomer  | 02012000980816 | KRA                | Main - Temp         |                            |
|             | Pyle, Howard             | The story of the champions of the Round table   | 0201000173801  | j398.2 Py          | Main - Youth        |                            |
|             | Wigginton, Eliot.        | The Foxfire book: hog dressing; log cabin building; mountain crafts and foods; planting by the signs; snake lore, hunting tales, faith healing; moonshining; and other. | 0201106125754  | 917.58 Wi          | Main - Adult        |                            |
|             | Steinbeck, John          | The red pony  | 0201107837688  | J St               | Main - Temp         |                            |
|             | Taylor, Mildred D.       | Roll of thunder, hear my cry  | 0201000190425  | J Ta               | Union Mills - Youth |                            |
|             | Woodress, James Leslie.  | Booth Tarkington : gentleman from Indiana.  | 0201000192793  | I B TARKINGTON     | Main - Adult        |                            |
|             | Cheong, Colin.           | China   | 0201103349761  | j394.2 Ch          | Main - Temp         |                            |
|             | Kovel, Ralph M.          | The Kovel's antiques & collectibles price list  | 02012001413270 | 745.10287 KO 2015  | Main - Adult        |                            |
|             | Bianco, Margery Williams | The velveteen rabbit  | 0201107037099  | BIA                | Main - Youth        |                            |
|             | Hinton, S. E.            | That was then, this is now  | 0201000197255  | J Hi               | Main - Youth        |                            |
|             | Tepper, Michael.         | Passengers to America : a consolidation of ship passenger lists from the New England histori  | 0201100160401  | GC 929.373 Pa      | Main - Adult        |                            |
|             | Thomas, Robert Bailey    | The Old farmer's almanac  | 02012001370298 | 051.02 OL 2015     | Main - Adult        |                            |
|             | Roy, Claude              | Modigliani  | 0201000220388  | OVERSIZE 759.5 Ro  | Main - Adult        |                            |
|             | Bauer, Eddy.             | Physicians' desk reference  | 02011008942610 |                    | Main - Adult        |                            |
|             |                          | The history of World War II   | 0201000251235  | OVERSIZE 940.53 Ba | Coolspring - Adult  |                            |



| Author                  | Title  | Barcode        | Call Number   | Call Number Prefix        | Current Library Branch Loc |
|-------------------------|--|----------------|---------------|---------------------------|----------------------------|
| Chilton Book Company.   | Chilton's truck and van repair manual.           | 0201103213637  | 629.28 Ch     | Coolspring - Adult        |                            |
| Chilton Book Company.   | Chilton's truck and van repair manual.           | 0201103213629  |               | Main - Adult              |                            |
| Chilton Book Company.   | Chilton's truck and van repair manual.           | 0201104173129  |               | Main - Adult              |                            |
| Chilton Book Company.   | Chilton's truck and van repair manual.           | 0201105426880  |               | Main - Adult              |                            |
| Chilton Book Company.   | Chilton's truck and van repair manual.           | 0201105579662  |               | Main - Adult              |                            |
| Chilton Book Company.   | Chilton's truck and van repair manual.           | 0201102640780  |               | Main - Adult              |                            |
| Foley, Erin             | Chilton's truck and van repair manual.           | 0201102640822  |               | Main - Adult              |                            |
| Krause, Chester L.      | Puerto Rico                                      | 0201103350066  | j394.2 Fo     | Main - Adult              |                            |
| Krause, Chester L.      | Standard catalog of world coins.                 | 02012000887961 | 737.4 KR 2014 | Main - Temp               |                            |
| Evans, Arthur J.        | Standard catalog of world coins.                 | 02012001364051 | 737.4 KR 2015 | Main - Adult              |                            |
| Klee, Paul              | Reading and thinking                             | 0201100858491  | 372.414 EV    | Main - Adult              |                            |
| Furlong, Patrick Joseph | Paul Klee  | 0201000274815  | OVERSIZE      | Main - Adult              |                            |
| Pyle, Howard            | Indiana : an illustrated history.                | 0201000276158  | 759.9494 KLEE | Main - Adult              |                            |
| Wilder, Laura Ingalls   | The story of the Grail and the passing of Arthur | 0201000277610  | 1 977.2 Fu    | Main - Adult              |                            |
| Pierce, Patricia        | By the shores of Silver Lake                     | 0201107161279  | j398.2 Py     | Main - Youth              |                            |
| Sewall, Marcia.         | The Larousse book of fairy tales                 | 0201000319677  | J LIB         | Coolspring - Youth        |                            |
| Opie, Iona Archibald.   | The pilgrims of Pilmoth                          | 0201104698232  | j398.2 Pi     | Main - Youth              |                            |
| Wilson, William E.      | The Oxford nursery rhyme book                    | 0201100076128  | j974.48202 Se | Main - Youth              |                            |
| Wilson, William E.      | Indiana : a history                              | 0201000351563  | 398 Op        | Main - Adult              |                            |
| D'Aulaire, Ingrid       | Indiana : a history                              | 0201100630932  | 1 977.2 Wi    | Kingsford Heights - Adult |                            |
| D'Aulaire, Ingrid       | Abraham Lincoln                                  | 0201101031353  | 977.2 Wi      | Main - Adult              |                            |
|                         | Abraham Lincoln                                  | 0201100954548  | JB LINCOLN    | Kingsford Heights - Youth |                            |
|                         |  |                | JB LINCOLN    | Main - Youth              |                            |



## SOFTWARE ESCALATION

| PRIORITY | INCIDENT TYPE    | RESOLUTION TARGET | FIRST CONTACT WITHIN               | DEFINITION   |
|----------|------------------|-------------------|------------------------------------|--|
| P0       | Critical Event   | 1 - 4 hours       | 60 minutes via mailing list        | Multiple Customer; Critical Infrastructure Event - Service interruption of critical infrastructure, Incident is worked until service is restored.  |
| P1       | Major Event      | 1 - 4 hours       | 90 minutes                         | Single Customer; Critical Infrastructure Event - Service interruption of critical infrastructure, Incident is worked until service is restored.  |
| P2       | Impaired Event   | 1 - 6 hours       | within 90 minutes via mailing list | Infrastructure Impairment Event - Significant degradation of service impacting daily operations of multiple users or business critical functions. Incident worked till degradation resolved. |
| P3       | Expedited        | 1 - 6 hours       | 90 minutes                         | Escalated Single end user with critical operations impacted or single critical function unavailable - Incident worked until resolved.  |
| P4       | Moderate         | 3 business days   | 6 business hours                   | Single end user limited degradation of function affected - Business process can continue, or non-mission critical applications.  |
| P5       | De-escalation    | driven by need    | N/A                                | Scheduled timeline or corrective action driven, dependent and led by customer.   |
| P6       | General Question | driven by need    | 3 business days                    | Request that are submitted to the Help Desk that are general how to questions.   |

Note 1: Software, Network, Hardware, and all related systems are monitored 24/7/365. Spare hardware and redundancy of hardware provides for the ability to repair" or return system to an operational status as noted above.

Note 2: Software issues are addressed 8am to 5pm Pacific Monday-Friday (except holidays), by A-G Engineering Team. If P0 or P1 software events occur in off hours, A-G Director of Engineering is informed, and all efforts are made to resolve the problem within hours following the identification of the problem. The software is updated and sent to QA who will release said corrected software as soon as adequately tested. The target for such software correction, QA and release is 8 hours or less. Please note the company and the staff understand that time is of the essence and such fixes will be treated as critical. With that understanding, the engineering team must first be able to replicate the problem, apply a fix to the code, and then the software must be tested before it can be released.

Note 3: Persistent data is backed up onsite with copies stored offsite for additional disaster recovery options. Auto-Graphics' hosting environment is housed in a secure data center in Las Vegas, NV that has multiple redundant feeds both in terms of internet access, utility power delivery, environmental controls and equipment. Backups are performed daily and are managed by the hosting provider.

Note 4: Auto-Graphics policy pertaining to data breach is to notify affected customers via phone and email within eight (8) hours of Auto-Graphics becoming aware of such breach.



## TRAINING GUIDE OVERVIEW

| Topic                                       | Subject  | Duration |
|---|--|----------|
| Pre-Project Consultation                    | Implementation, policy files creation, data migration issues, project planning and system administration.  | 2 days   |
| General VERSO Application Training/Overview | Searching & circulation with hands-on exercises.   | 3 hours  |
| *Search                                     | Search methods and hands-on exercises  | 1 hour   |
| *Search                                     | Keyword, Browse, Advanced and Recent Items search techniques and Hands-on Exercises  | 2 hours  |
| *Search Administration                      | Admin for individual logins, library-specific function and system-wide functions   | 1 hour   |
| *Circulation Administration                 | Circ Parameters, Circ Options, Material Types, Locations and Collections, and Patron Categories/Groups. Review templates & options, Locations, and Header/Footer Text and the Library Fees   | 2 hours  |
| *Circulation                                | Check-in, Express Check-in, Express Renewal, Manage Reserves, Check Item Status, Standalone Circulation installation/usage and Hands-on exercises  | 4 hours  |
| *Cataloging and Authority Control           | Download the AGCat MARC record editor, manage bib and item records, import and export MARC records, perform a/c function, inventory, print spine, pocket and barcode labels, Global Search and Replace (GSR) function and Hands-on exercises | 3 hours  |
| *Reports                                    | How to view, print or download reports and Hands-on exercises  | 1 hour   |
| *Administration and Statistics              | Cover the statistics data that are available for Circulation, Patrons and the Database. Review how to download the VERSO user guides for each module.  | 2 hours  |
| *Splash Page Admin                          | How to configure the VERSO splash page in UX Admin for staff access; and Kids' Catalog (if applicable)   | 3 hours  |
| *Serials                                    | How to setup vendors, subscriptions and routing lists. Check in issues and how to claim for missing issues and Hands-on exercises  | 3 hours  |
| *Acquisitions                               | File maintenance, fund account maintenance, selection lists, ordering, receiving, claiming, invoices and payments, reports and Hands-on exercises  | 4 hours  |
| *Individual staff consultations             | Work one on one with staff addressing their specific job duties  | 2 hours  |
| VERSO ILS Application Consultation          | Workflow Consultation and Analysis on Technical Services   | 1 day    |





|                                    |  |        |
|------------------------------------|--|--------|
| VERSO ILS IT System Administration | VERSO IT System Administration Interface for locally installed systems | 1 day  |
| VERSO Go-Live Consultation         | On-Site "Go-Live" Assistance   | 2 days |

Note: \* Detailed training needed. Times listed do not include breaks or lunch or general Q&A at the end of each session. Allot 15-30 minutes for Q&A.

Topics listed above can be delivered via on-site training or via webinars and can be requested as refresher training as library staff change. Charges for training will be at contract rates and minimums may apply. Times listed are suggested times and can be altered to meet the needs of the library. Each training agenda is customized for the library.



Canned Reports

| NAME OF REPORT                                | FUNCTIONAL SUMMARY  | PARAMETERS OR INPUT                                   | OUTPUT                  |
|---|---|---|-------------------------|
| <b>ACQUISITIONS</b>                           |   |   |                         |
| Order Listing                                 | Lists all orders in system  | Order type, order status, vendor, start and end dates | Spreadsheet             |
| Order Item Listing                            | List of all orders in system, include items (units) for each one  | Fiscal year, fund, vendor, dates to include           | Spreadsheet             |
| Invoice Listing                               | Lists all invoices in system  | Invoice status, vendor, start and end dates           | Spreadsheet             |
| Invoice Detail Listing                        | Lists all invoices in system, and includes which titles are associated with which invoices  | Invoice status, vendor, start and end dates           | Spreadsheet             |
| OverSpent Funds                               | Lists funds that are above or below user-designated thresholds  | Fiscal year, above/below operator, percentage, sort   | Spreadsheet             |
| Order History                                 | History of activity relating to an order (audit trail)  | Order type, user, start and end dates                 | Spreadsheet             |
| Fund History                                  | List of all manual changes to a fund  | Fiscal year, fund, user, start and end dates          | Spreadsheet             |
| Claimed                                       | List of claims produced and sent to vendors   | Claim status, vendor, start and end dates             | Spreadsheet             |
| EDI Doc Report                                | Archive of all EDI messages receive from book vendor or send to book vendor. Includes 850 (order), 855 (Order Acknowledgement) and 810 (Invoice) messages. Includes list of title(s) included in messages | Start and end dates, EDI message type                 | Screen                  |
| Branch Distribution List                      | List of BDLs and their contents (i.e. distribution patterns)  | Name of branch distribution list                      | Spreadsheet             |
| <b>CIRCULATION STATISTICS - QUICK REPORTS</b> |   |   |                         |
| Patron Category                               | Checkout Activity by patron category  | Library, month/day/year                               | PDF, HTML, Email, graph |
| Patron Group                                  | Checkout activity by patron group   | Library, month/day/year                               | PDF, HTML, Email, graph |
| Item Material Type                            | Checkout activity by material type  | Library, month/day/year                               | PDF, HTML, Email, graph |
| Item Location                                 | Checkout activity by item location  | Library, month/day/year                               | PDF, HTML, Email, graph |
| Item Category                                 | Checkout activity by item category  | Library, month/day/year                               | PDF, HTML, Email, graph |
| Intra-Library                                 | (Consortia) Checkout activity between and among libraries in the consortium   | Library, month/day/year                               | PDF, HTML, Email, graph |
| Patron Activity                               | User Activity by User category  | Library, month/day/year                               | PDF, HTML, Email, graph |
| Fine Activity                                 | Fine summary report   | Library, month/day/year                               | PDF, HTML, Email, graph |
| Item Activity                                 | Count of item records added, deleted, or edited   | Library, month/day/year                               | PDF, HTML, Email, graph |
| Patron Categories                             | Count number of users per category  | Current status  | Screen                  |
| Patron Groups                                 | Count number of users per group   | Current status  | Screen                  |



Canned Reports

| NAME OF REPORT  | FUNCTION/SUBGROUP   | PARAMETERS ON INPUT   | OUTPUT                       |
|---|---|---|------------------------------|
| <b>CIRCULATION STATISTICS - QUICK REPORTS (continued)</b> |   |   |                              |
| Library Defined Criteria                                  | Checkout activity by Library Defined Fields in user record                              | Library, month/day/year   | PDF, HTML, Email, graph      |
| Bib Activity  | Number of bib records added, edited, and deleted, by media type                         | Library, month/day/year   | PDF, HTML, Email, graph      |
| Item Exceptions   | Count and list of Exception statuses  | Current status  | Screen                       |
| In Transit Items  | Count In-transit Items by destination   | Library, month/day/year   | PDF, HTML, Email, graph      |
| Floating Items added                                      | Counts and reports the number of floating items added                                   | Library, month/day/year   | PDF, HTML, Email, graph      |
| Floating Items removed                                    | Counts and reports the number of floating items removed                                 | Library, month/day/year   | PDF, HTML, Email, graph      |
| Floating Items Material types                             | Counts floating items by material type  | Library, month/day/year   | PDF, HTML, Email, graph      |
| Database Index Stats                                      | Number of bib record field types in file (# titles, # ISSNs, # subject headings, etc.)  | Library code, library name, qualifier, current status   | Screen, Email, Save File     |
| Database Field Stats                                      | Number of MARC tags and subfields in library database                                   | Library code, library name. Current status  | Screen, Email, Save File     |
| Locations Collections                                     | List all branches, locations, collections,  | Current status  | Screen, Email, Save File     |
| System Activities   | Counts number of logins, searches, actions per library                                  | start date and time, end date and time, library   | Screen, Email, Save File     |
| Statistics Report   | Many different stats: type of search, type of index, top 100 search terms, etc.         | start date and time, end date and time, library, type of statistic, output desired, fields to include | Screen, Save file            |
| Graphical Statistics Report                               | Many different stats: type of search, type of index, top 100 search terms, etc.         | start and end date, library, type of statistic, fields to include                                     | PDF, HTML, Email             |
| Graphical Webstats  | Graphical web log analysis - hits, hits by month, day, hour, IP address, browser, etc.  | Month   | Screen                       |
| Material Types  | List of material types, cost, value (used for calculating monetary value of collection) | Current status  | Screen, Email, Save File     |
| <b>CIRCULATION BATCH REPORTS</b>                          |   |   |                              |
| Patron Listing  | List of all users by category   | start and end date, modified or created, sort by  | Spreadsheet                  |
| Patron Check-Out Listing                                  | List of all item checked out to all users   | User category and group   | Spreadsheet                  |
| Overdue Items   | List of all overdue items   | min/max days overdue, location, types of transactions to include                                      | Spreadsheet                  |
| Global Reserve pickup notices                             | Generate reserve pickup notices (paper and email) for all libraries in consortium       | Notice type, location, group, start-end dates, other  | HTML (print-ready) and email |
| Reserve pickup notices                                    | Generate reserve pickup notices (paper and email) for individual library                | Notice type, location, group, start-end dates, other  | HTML (print-ready) and email |
| Indefinite Items  | List of all items circulating with indefinite due date                                  | Location  | Spreadsheet                  |



Canned Reports

| NAME OF REPORT                               | FUNCTIONAL SUMMARY   | PARAMETERS ON INPUT  | OUTPUT                       |
|--|--|--|------------------------------|
| <b>CIRCULATION BATCH REPORTS (continued)</b> |  |  |                              |
| Expired Patrons                              | Users whose registrations have expired as of <cutoff date>                                   | User category, cutoff date, user group   | Spreadsheet                  |
| Global Notice Generation                     | Generates combined notice run for all notice types for all libraries in a consortium         | Start-end range, notice output type, patron group, library location, envelope size, other                          | HTML (print-ready)           |
| Overdue Notices                              | Generates overdue notices  | Notice sequence number, start-end range, notice output type, patron group, library location, other                 | HTML (print-ready)           |
| Item Due Notices                             | Item due (i.e. pre-overdue) advisory notices   | Number of days, notice output type, patron group, library location, other  | HTML (print-ready)           |
| Fines/Fees Notices                           | Fines and fees owed notices  | Min/max fees, start-end dates, user category, user group, library, other   | HTML (print-ready)           |
| Remove Overdue Items                         | Assigns 'Patron List' exception when item is overdue more than <n> days                      | Min. days overdue, default book cost, user category, user group  | Spreadsheet                  |
| Infrequent User Notice                       | Sends message if user last activity date is more than <n> days ago                           | Patron type, home location, notice type, # of days   | HTML (print ready) and email |
| Library Card Expiration notice               | Sends message if library card will expire in less than <n> days                              | Patron type, home location, notice type, # of days   | HTML (print ready) and email |
| Circulation Turnover rate                    | Measures collection use (checkouts / collection size)  | Start and end date, location, call number range  | Spreadsheet                  |
| Lib2Home Users Report                        | List Lib2Home users with various categories of transactions                                  | Select transactions  | Spreadsheet                  |
| Bibs Without Items                           | List of bib records in catalog that do not have item holdings attached                       | sort sequence  | Spreadsheet                  |
| Delete Bibs Without Items                    | Identify (and optionally delete) bib records in system that have no item holdings attached   | cutoff date, action  | Spreadsheet                  |
| Brief Bibs from Circulation                  | List all briefly (on the fly) bib records created during circulation                         | start and end date, record type (circ or ILL)  | Spreadsheet                  |
| Item Exception Listing                       | List of all items assigned to item exception(s)  | exception type, start and end date, library  | Spreadsheet                  |
| Delete Item Exceptions                       | Deletes item records with a specified exception, generates report                            | exception type, start and end date, library  | spreadsheet                  |
| Location Holdings                            | Lists all item records assigned to a location  | location, current or permanent, material type, call number range   | Spreadsheet                  |
| New Item Activity                            | List of items added in date range,   | location, start and end date   | Spreadsheet                  |
| New Titles                                   | List of new titles added to the system   | start and end date   | Spreadsheet                  |
| Changed Titles                               | List of titles that have been changed/edited   | start and end date   | Spreadsheet                  |
| Temporary Transfer Listing/Return            | List of all items at temporary location (option: batch move them back to permanent location) | location, action   | Spreadsheet                  |
| Item Circulation Report                      | Dusty book report; list of items with more/less circulations than 'n' in time frame          | circulation type, location, threshold, start and end dates, call number range, material type, add item cutoff date | Spreadsheet                  |



Canned Reports

| NAME OF REPORT                               | FUNCTION SUMMARY   | PARAMETERS ON INPUT   | OUTPUT      |
|--|--|---|-------------|
| <b>CIRCULATION BATCH REPORTS (continued)</b> |  |   |             |
| Reserve Listings                             | List of all existing reserves (holds)  | Sort type   | Spreadsheet |
| Expired Reserves Pull List                   | Lists reserves that have not been picked up and are on hold shelf                | Number of days item has been on hold shelf without pickup   | Spreadsheet |
| Reserve Deletion                             | List (and optionally delete) reserves (holds)                                    | Action (list or list&delete), cutoff dte  | Spreadsheet |
| Reserves Ratio Report                        | List of titles on hold where the number of holds exceeds owned copies by a ratio | Ratio   | Spreadsheet |
| Database Activity                            | Calculate database size: bibs, items, users, circulations                        | File to calculate   | Screen      |
| Publication Date Listing                     | List of all titles in file between range of publication dates                    | Publication year range, location, material type, call number range  | Spreadsheet |
| Publication Date Summary Report              | Summary report of all bib records in file, totalled by publication year          | none  | Screen      |
| In Transit Items                             | Lists items in transit   | Transit type (normal or reserve in transit), location   | Spreadsheet |
| Temporary vs Permanent Locations             | Lists all items in temporary or permanent location                               | Choice (temporary or permanent), location   | Spreadsheet |
| Cataloging Transactions Audit                | Cataloging Transaction type, start and end dates                                 | Login, transaction type, timestamp, title, author   | Spreadsheet |
| Circulation Transactions Audit               | Circulation Transaction type, start and end dates                                | Login, staff name, location of transaction, patron barcode, patron name, item barcode, item title, checkout date, due date, return date | Spreadsheet |
| Reports Transactions Audit                   | Report type, start and end dates   | Login, report type, report name, timestamp  | Spreadsheet |
| User Admin Transactions Audit                | User admin action, start and end dates   | Login, action type, user barcode, user name, timestamp  | Spreadsheet |
| Fines/Fees Transaction Register              | Lists all fines/fees collected in time frame (itemized)                          | Start and end dates, transaction type   | Spreadsheet |
| Fines/Fees Summary                           | Totals of fines/fees collected, by category                                      | Start and end dates   | Spreadsheet |
| Fees, by Fee Type                            | Fees collected, by fee type  | Start and end dates   | Spreadsheet |
| Patrons with Outstanding Fines               | List of all users with outstanding fines, in date range                          | user category, upper and lower dollar limits  | Spreadsheet |

# **verso SmartReports**

The enhanced SmartReports module by Auto-Graphics, provides library staff with the ability to create, edit and produce user-defined reports by selecting a combination of data elements from item information, user information and bibliographic records. The intuitive web-based interface allows library staff to efficiently generate reports, ranging from simple to complex, using table joins to combine two or more data tables without any prior knowledge of SQL query language. Reports are saved under user-assigned names, and can be rerun unchanged, or the query can be edited and adjusted and rerun at any time. A library staff user can create a report by selecting the output parameters by clicking on the edit button, and then saving that report definition. If desired, the report can be scheduled to run once or on a regular basis. Any existing parameters and queries attached to that report remain in effect.

**Report Writer**

Create a New Report

Use an Existing Report

| Report Name                | Created By     | Created Date | Frequency | Next Run          | Edit                                | Schedule                                | Delete                                |
|----------------------------|----------------|--------------|-----------|-------------------|-------------------------------------|---|---------------------------------------|
| author list                | Auto- Graphics | 08/02/2011   | Once      | 09/28/2015 3:36PM | <input type="button" value="Edit"/> | <input type="button" value="Schedule"/> | <input type="button" value="Delete"/> |
| bbs added after Nov 1 2010 | ALA STAFF USER | 01/10/2011   |           |                   | <input type="button" value="Edit"/> | <input type="button" value="Schedule"/> | <input type="button" value="Delete"/> |
| > 15 Items                 | Auto- Graphics | 02/02/2011   | Once      | 10/09/2014 8:21AM | <input type="button" value="Edit"/> | <input type="button" value="Schedule"/> | <input type="button" value="Delete"/> |
| Missing Items              | Auto- Graphics | 02/11/2011   | Weekly    | 08/25/2015 8:45AM | <input type="button" value="Edit"/> | <input type="button" value="Schedule"/> | <input type="button" value="Delete"/> |
| Jan                        | Auto- Graphics | 03/04/2011   |           |                   | <input type="button" value="Edit"/> | <input type="button" value="Schedule"/> | <input type="button" value="Delete"/> |
| users who used Sponsor     | Auto- Graphics | 03/16/2012   |           |                   | <input type="button" value="Edit"/> | <input type="button" value="Schedule"/> | <input type="button" value="Delete"/> |
| ted's report               | Auto- Graphics | 09/22/2011   |           |                   | <input type="button" value="Edit"/> | <input type="button" value="Schedule"/> | <input type="button" value="Delete"/> |
| brantford                  | Auto- Graphics | 10/31/2011   |           |                   | <input type="button" value="Edit"/> | <input type="button" value="Schedule"/> | <input type="button" value="Delete"/> |
| Zip codes                  | Auto- Graphics | 01/05/2012   |           |                   | <input type="button" value="Edit"/> | <input type="button" value="Schedule"/> | <input type="button" value="Delete"/> |
| LDS patron report          | Auto- Graphics | 02/23/2012   | Once      | 07/21/2015 2:49PM | <input type="button" value="Edit"/> | <input type="button" value="Schedule"/> | <input type="button" value="Delete"/> |
| LDS bib report             | Auto- Graphics | 02/23/2012   |           |                   | <input type="button" value="Edit"/> | <input type="button" value="Schedule"/> | <input type="button" value="Delete"/> |
| LDS "Paterson" report      | Auto- Graphics | 02/23/2012   |           |                   | <input type="button" value="Edit"/> | <input type="button" value="Schedule"/> | <input type="button" value="Delete"/> |
| New DVDs                   | Auto- Graphics | 03/14/2012   |           |                   | <input type="button" value="Edit"/> | <input type="button" value="Schedule"/> | <input type="button" value="Delete"/> |
| home branch                | Auto- Graphics | 03/28/2012   |           |                   | <input type="button" value="Edit"/> | <input type="button" value="Schedule"/> | <input type="button" value="Delete"/> |
| Times Circulated           | Auto- Graphics | 03/30/2012   |           |                   | <input type="button" value="Edit"/> | <input type="button" value="Schedule"/> | <input type="button" value="Delete"/> |

SmartReports User Console lets staff create, edit, and schedule reports.

**Report Writer - Bibliographic - author list**

WHAT TO SEARCH...

Select fields to search:  
Value:    
Greater Than

Select fields to search:  
Value:    
Between

**Report Writer - Items** [Back to Report Parameters] [Save Report]

Select fields and click the add / remove buttons to add or remove them

| List of Available Fields         | Selected Fields         |
|----------------------------------|-------------------------|
| Bibliographic                    | Title                   |
| Data Bib Record Added            | Author                  |
| Date of Publication              | ISSN                    |
| ISBN                             | AGCN                    |
| Control Number (001)             | Barcode                 |
| Items                            | Call Number             |
| Alternate Item ID                | Call Number Prefix      |
| Call Number Suffix               | Current Branch Loc Coll |
| Comments                         |                         |
| Current Library Branch Loc       |                         |
| Current Library Loc              |                         |
| Date Item Added                  |                         |
| Date Item Modified               |                         |
| Date Invented                    |                         |
| Item Exception Type              |                         |
| Item Notes                       |                         |
| Last Activity Date               |                         |
| Last Checkout Date               |                         |
| Material Type                    |                         |
| Number of Circ All Items Last Yr |                         |

Output will be sorted by the first Selected Field above (Title)

Allow duplicates    Unique (distinct) fields



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# Biblion X

4/9/2019  
Q190409-22

## Quote

To: Jon Legree  
Placentia Library District  
411 E. Chapman Ave.  
Placentia, CA 92870

This quote is based on the following about your library:

Number of Items: 73,000  
Annual Circulation: 250,000  
Previous ILS: Horizon  
Number of Locations: 1

| <u>Annual Item:</u>    | Description  | Price                          |
|------------------------|--|--------------------------------|
| Apollo ILS/LSP         | Hosted Service: Includes server capabilities and storage for all automation data, backups, upgrades, on-line training, customer service, and all current features except current and future extra cost options. As an Apollo customer this base price would be guaranteed for 3 years. (annual subscription) | \$5,600                        |
| <u>One Time Item:</u>  |  |                                |
| Migration Fee          | Fee to receive and import your data into Apollo. Including analysis, MARC format error correction, and one-on-one help for policy and options settings.  | \$11,200                       |
| <u>Optional Items:</u> |  |                                |
| Gabble                 | Two-way texting with renewal capability. Unlimited number of SMS messages. (annual subscription)   | \$280                          |
| Content Café 2         | Catalog enhancement on most titles from Baker & Taylor. Some mix of full-color jacket images, summaries, tables of contents, annotations, excerpts, bios, flap text. (annual subscription)   | \$300                          |
| Content Café 2 Plus    | All catalog enhancements in Content Café 2, plus professional reviews. (annual subscription)   | \$500                          |
| Kids catalog           | Use of Apollo's public Kids Catalog. (annual subscription)   | Free                           |
| Auto-Calling           | Auto-calling feature for patron notifications. No phone line or hardware needed. Post-billed.  | \$0.10 per call<br>post-billed |

Terms:

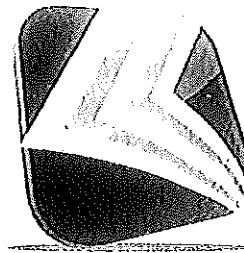
- o Data Ownership: Your data that is in Apollo belongs to your library. You can download all of it for free at any time. This might be for your own backup or to change systems. It IS your data.
- o The total of the migration/setup fees, subscription fee, and option fees (if applicable), is billable at the time you begin using Apollo. Your test and trial time is free.
- o Payment terms are 30 days.
- o This quotation is valid for 90 days.
- o Cancellation: The library may cancel its subscription at any time by written notice. Biblionix may cancel the subscription with a 120-day written, certified mail notice to the library director. In either case, for the Apollo subscription (not for the options), a prorated refund for will be made for any unused subscription term.
- o Security: The library is solely responsible for the creation, security, and management of its passwords. Biblionix maintains practices to otherwise ensure the security and confidentiality of the library's data.
- o Privacy: Each library is the sole owner and user of its total data set. Biblionix manages the data solely for library's own use and makes no other use of it. Biblionix may gather and report aggregate statistics across many libraries.
- o <https://biblionix.com/terms/>

Thank you for your consideration of Biblionix and Apollo.

Sincerely,

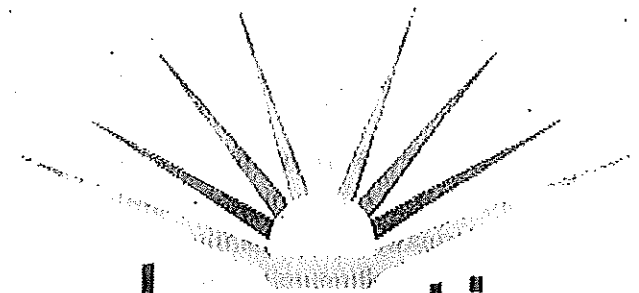
Cameron Charbonnet  
Biblionix, LLC





**ByWater**  
SOLUTIONS

## Koha Implementation and Support



1919-2019

**placentia**  
LIBRARY DISTRICT

**koha**

**FREE LIBRARY SYSTEM**

<http://bywatersolutions.com>

Headquarters: Santa Barbara, CA

East Coast Office: Redding, CT

Phone/Fax: 888-900-8944

[sales@bywatersolutions.com](mailto:sales@bywatersolutions.com)

### *EXECUTIVE SUMMARY*

ByWater Solutions was created with the express goal of changing the way libraries interact with their software systems and the vendors who support them. We are a small grass roots company made up of librarians, technology specialists and customer service fanatics who believe that libraries deserve the freedom to own their software and to decide who supports it. We believe that an LSP vendor needs to constantly work to keep their customers happy, and not rely on long contract terms to maintain a strong customer base. Libraries stay with ByWater because they want to, not because they are legally bound. We believe that libraries deserve to have access to a personalized, comprehensive support system at a reasonable cost. Our service solutions are all inclusive and are tailored to take the complexity out of interacting with an LSP vendor. Because the support package covers essentially everything, your staff will never have to worry if a question or problem will carry an extra price to fix. We fully understand that because Koha is an open source product, our partners can pick and choose from many different companies to support their software.

We take the same approach when conducting the initial migration of a new partner to Koha. The entire migration process is tailored to minimize disruption to your staff and patrons and includes the creation of a Koha test system that is used for training and testing leading up to your go live date. Having this system populated with your own data strengthens your staff's understanding of the system and keeps the excitement level up during what is always a stressful time. We understand the importance of a smooth transition to the initial buy-in of both your staff and patrons and take this responsibility very seriously.

ByWater is a company of librarians supporting a product that was created by librarians for librarians. We use high levels of communication to ensure that your needs are being met and that we are living up to the reputation we have come to be known for.

ByWater Solutions is thrilled to have the opportunity to reply to the Placentia Library District's request for proposal and we appreciate the opportunity to be involved in your exploration of possible library systems. We hope to have the chance to partner with the Placentia Library District and look forward to coming developments. Thank you very much for your consideration.

Adam Brooks: [adam@bywatersolutions.com](mailto:adam@bywatersolutions.com) 361-249-7185

**ByWater Solutions LLC**

PO Box 1346

Santa Barbara, CA 93102

## *COMPANY BACKGROUND*

ByWater Solutions is a privately owned and funded company founded in March of 2009 by CEO Brendan A. Gallagher and CRO Nathan A. Curulla. We have offices in Portland, Oregon and Redding, Connecticut and have grown to support over 1000 libraries worldwide since our inception. Being self funded, we have no financial affiliations with other corporate entities and no debt. This allows us to always have the interests of our customers and the open source community at the forefront without having to deal with outside pressures compelling us to do otherwise. In realizing that our clients' satisfaction is the most meaningful measurement of our continued success, we pride ourselves in providing complete customer fulfillment in all we do.

ByWater Solutions is unique for an organization of our size and range of services. We have a long held commitment to open standards and open source technologies. We advocate these technologies and philosophies to our clients. Our company strategy is to leverage this commitment, and our achievements, to ensure we remain the preeminent Koha solutions provider in the world. ByWater is made up of 22 full time employees, most of whom take part in the support of our customer base. Being an open source system, innovation and new feature development is shared over the 50+ companies that support this product worldwide, making it easy for ByWater to invest most of its infrastructure in support services.

ByWater Solutions has a proven track record in first rate implementation processes with library systems of all sizes. Our partners range from small special library collections to large academic consortiums ranging from 7 to 75 member groups. Our current partners are 32% public libraries, 31% academic libraries, 23% special libraries, 9% schools and 5% consortia. Our proven processes have led to ByWater Solutions being consistently ranked amongst the top 4 LSP companies in the United States for overall satisfaction and quality of support for Public Libraries in Marshall Breeding's annual Perceptions Survey on LSP Software Systems.

Because of recurring support and hosting contracts, ongoing development agreements, and the addition of an average of 4 new customer contracts per month, ByWater Solutions is a highly profitable organization. We strengthen our stability by minimizing overhead and maximizing quality of staff members. We currently work in a virtual office environment, which eliminates the need for a traditional office building, and increases the range of our support coverage hours. ByWater Solutions' business practices focus on new and innovative ways of offering a collaborative environment for our staff while minimizing traditional overhead line items, allowing us to keep costs low and pass those savings on to our customers.

***ILS CONNECTED SERVICES***

| Service                                   | Products   | Compatibility   |
|---|--|-----------------|
| Computer Reservations and Patron Printing | Envisionware PC Reservation, LPT:One, and eCommerce                    | YES             |
| Self-Check Machines                       | Bibliotheca  | YES             |
| Databases/E-content                       | EBSCO, Gale, ReferenceUSA, Hoopla, Freegal, OverDrive, Enki using SIP2 | YES, using SIP2 |
| Acquisition Vendors                       | Baker & Taylor, Midwest Tape, Ingram                                   | YES             |
| Telephone Notices and Renewals            | ITiva Talking Tech   | YES             |
| Receipt printers                          | Epson Thermal Receipt Printers with Windows Drivers                    | YES             |

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**COST PROPOSAL**

| <i>Category</i>                          | <i>Year 1</i> | <i>Year 2</i> | <i>Year 3</i> | <i>Year 4</i> | <i>Year 5</i> | <i>Totals</i> |
|--|---------------|---------------|---------------|---------------|---------------|---------------|
|  |               |               |               |               |               |               |
| <b>Koha Implementation and Migration</b> | \$12,450.00   | \$0.00        | \$0.00        | \$0.00        | \$0.00        | \$12,450.00   |
|  |               |               |               |               |               |               |
| <b>Annual Support &amp; Hosting</b>      | \$7,800.00    | \$7,800.00    | \$8,190.00    | \$8,190.00    | \$8,600.00    | \$40,580.00   |
|  |               |               |               |               |               |               |
| <b>Training</b>                          | \$4,600.00    | Included      | Included      | Included      | Included      | \$4,600.00    |
|  |               |               |               |               |               |               |
| <b>Totals (ByWater Hosted)</b>           | \$24,850.00   | \$7,800.00    | \$8,190.00    | \$8,190.00    | \$8,600.00    | \$57,630.00   |

## OPAC

Koha is the ideal LSP for libraries who believe in the importance of their end user's experience. If a customer's experience through a library's technological interfaces are sub-par, the library could risk losing them to the many other alternatives that exist for the gathering of information. Utilizing Koha puts the control of that user experience in the hands of the librarian rather than in the hands of a disconnected vendor. The Koha OPAC was developed by librarians for librarians with the positive experience of the customer and the importance of flexibility in mind. Being open source, Koha will seamlessly interact with any third party products that utilize a SIP2, NCIP, LDAP, IP Authentication or Z39.50 connection without licensing restrictions. We are currently in the finishing stages for the integration of e-book search, discovery and circulation functionality for Overdrive, Baker and Taylor and Recorded Books. All APIs are open and freely accessible through the Koha-Community.Org website. All of these connections are included in part of ByWater's implementation of Koha, and unlike most vendors ByWater does not charge an annual fee for their maintenance. Enhanced content settings are system-wide settings but holdings can be filtered by branch.

The flexibility of Koha's OPAC is unmatched by any LSP on the market. Most preferences for OPAC functionality are configurable by library staff through an easy to use toggle switch interface found under Koha's global system preferences. From here librarians can configure book cover images, turn on and off tagging capabilities, create public lists, and even enter HTML code for the look of the home page, including embedded videos, visual display of new materials. Koha also has the ability to take a picture of an item and use that image for the cover image of the record, or to upload images or PDFs to be cataloged within Koha as a digital image repository. This is particularly useful for special collections and non-bibliographic items within the library. Koha uses CSS and XSLT to allow libraries to create any look with any content that they would like to display, including new releases, news items, widgets, library specific (spotlights, program announcements, services, etc.) or even links to demo videos about how to use the catalog. Koha allows for a preferred location item ranking through its OPAC as well. By choosing the preferred branch, patrons can filter the results to show only items from that particular branch. ByWater will also customize the display and resources display by individual library, and provide the ability to reach this display based on the referring URL.

Koha has a very configurable and flexible holds system which includes a transport cost matrix that allows libraries to configure which branches come up first in a holds cue based parameters determined by the library staff. Koha's holds system gives your patrons the ability to place holds for multiple titles under a single login, place holds for

on-order titles if the library allows, place holds for on-shelf titles if the library allows, suspend holds and enter a "date no longer needed", change pickup locations, and clearly distinguishes between a hold and an ILL. Koha will also send a notification to staff of patron-canceled holds through the discovery interface. Staff also have the option for "search to hold" through the staff interface. This allows staff to choose a patron and put multiple items on hold for them without having to assign the hold for each item.

Koha's OPAC allows for keyword searching on all fields and the browsing of author, popular titles and subject and can be set to sort by ascending or descending titles and allows for tolerance for various abbreviations and dates. Koha's advanced search limits are extensive and include searching on indexes such as: Keyword, subject, title, title phrase, series title, call number, title location, author, notes/comments, curriculum, publisher, publisher location, ISBN, ISSN, call number, and barcode. ByWater can also add any other indexes to the advanced search table that your Library requests. Koha also searches based on multiple boolean operators, item types, location codes, publication date range, languages, subtypes such as audience, content, and format, location, availability and library groups.

Sorting options include: availability, relevance, popularity (most to least or least to most), author (A-Z or Z-A), call numbers, dates (acquisition or publication) and titles. Sorting options may also be listed on the results screen of the OPAC and are user configurable.

Koha first searches on the "exact" term entered into the search. Based on those results, the most relevant returns are sent to the top of the list. This allows one-word titles and common word titles such as "IT" and "Bud not Buddy" to bring back the most relevant results. Misspelled words are handled by the "fuzzy searching" capability found in Koha. Typing in, for example, Hary Poter, will automatically return relevant results as they relate to Harry Potter. With the power of accurate relevancy ranking with Koha, stop words are not needed to get the accurate results that professional librarians and customers who are comfortable with Google search results expect. Koha also contains a "did you mean" feature. The OPAC display also shows copies on order by location as well as availability by location.

Koha's OPAC offers faceted searching. The specific facets are configurable by the library system and are located on the left side of the OPAC results screen. Examples of facets available include availability, author, libraries, series, places, and topics. Koha also displays on-order records within the OPAC.

Once logged in, patrons will have the ability to perform many functions within the Koha OPAC to manage and track their library account. All of the elements available to the patrons have an on/off switch so that library administrators can choose which features to allow. Koha allows for patrons to renew materials, create, edit, sort, print, or email personal or public reading lists, view fines and payment history, including what each fine was applied for, see items currently checked out and which of those items are overdue, manage pending holds, including the ability to suspend, cancel, or modify the holds, manage privacy, manage notifications for items checked out and advance notices, and allows for the ability for patrons to request changes to their password. Koha allows for the ability to pay fines online via credit card with the use of a third party product such as FIS and PayPal. Koha will also integrate with Library Elf, however most of the functionality contained in Library Elf is already built into Koha.

Koha will work with all enhanced content services that utilize SIP2 or the APIs found in Koha. Built in connectors exist for Amazon, Babletheque, Baker and Taylor, Coce Cover Images, Google, IDream Libraris, LibraryThing, Novelist Select, OCLC, Open Library, Syndetics, and Koha allows for Tagging. The flexibility of the features available makes Koha's OPAC an ideal discovery tool for any library. Koha can also link to third party databases such as WorldCat and other library defined targets through the OPAC. Koha also integrates with Twitter, Facebook, LinkedIn and Delicious. Patrons have the ability to export search results in BIBTEX, RIS, Dublin Core (XML), MARC (Unicode or UTF-8) and MODS (XML). Patrons can also easily view availability of items by location or department, copies on order by location, and serial holdings by location including issues recently received.

Koha offers complete integration with the Ebsco EDS discovery layer as well. Unlike most Discovery systems that sit on top of the library OPAC, Koha's integration with EDS uses the Koha OPAC as the front end with EDS feeding data into that interface. This allows libraries to choose between which interface they prefer, and provide a unified LMS interface without the need for using one company for all aspects of the solution. The EDS service comes as a separate charge through Ebsco, but the integration aspect with Koha is offered free of charge.

Koha's OPAC allows for the display of call numbers, shelving locations with the ability to integrate graphical maps provided by outside sources, and inks to digital resources. Koha's OPAC will work on all modern web browsers including IE, Firefox, Chrome, and Safari and does not use any proprietary plugins for access. Koha's OPAC is ADA Compliant (via web browser) and comes with a responsive mobile view for both a tablet and smartphone. Koha has been translated into over 20 languages. URL link validation is also included in Koha free of charge.



|   |  |
|---|--|
| <b>OPAC Functionality</b>   |  |
| Intuitive functionality for patrons   | Included   |
| Ability for patrons and staff to create and share lists   | Included   |
| Search includes keyword, browsing and advanced searching  | Included   |
| Display enhanced content: cover art, reviews, read-a-likes, etc.  | Included   |
| Limit searches by Lexile and Accelerated Reader   | Included   |
| Display Lexile and Accelerated Reader data on bibliographic records   | Available, using XSLT  |
| Integration with OverDrive, including real-time updates of inventory  | Included   |
| Integrated, intuitive online fine payment solution or ability to integrate with third party vendor                                    | Included   |
| Clear location & availability on results screen   | Included   |
| Customization of heading and other wording throughout the catalog   | Included   |
| Ability to design & display customized library material carousels   | Included   |
| History of checked out items capability in "My Account" including digital usage   | History of checked out items available, but does not include digital usage |
| Ability to readily display new materials  | Included   |
| Smart searching, including "Did you mean?"  | Included   |
| Responsive mobile website design  | Included   |
| Ability to search and filter by level of material, relevance, availability, format, location  | Included   |
| Website accessibility compliance  | Included   |
| Integrates with Google Analytics or equivalent  | Included   |
| Ability of patron to manage notifications methods   | Included   |
| Ability of patrons to submit suggestions for purchase   | Included   |
| Discovery layer handles spell checking, dynamic predictive search results, and keyword or related search suggestions                  | Included   |
| Ability for patron to update approved contact information fields for their account and, optionally, for linked family member accounts | Included for patron, but not linked accounts                               |

The holds functionality in the circulation interface of Koha is fully featured and allows for a wide variety of granularity between branches. Koha has the ability to automatically expire holds based on library determined criteria, generate hold pickup notifications, print vertical holds slips for patron pickup, and staff have the ability to modify hold suspensions. Koha also contains a transport cost matrix which allows libraries to create a matrix to rank which items get sent to which library in what order. Other holds features include placing holds from the OPAC, placing multiple holds at once, the ability to suspend holds for a certain amount of time, and choose a "hold not needed after" date. Staff can also use Koha's "search to hold" feature to find items within the catalog from the patron detail page while still "remembering" that patron to easily place a hold for them. The ability to automate basic transactions for each individual library, such as auto-renewal of all checked out items that are eligible for renewal is also included in the base Koha functionality.

Payments and fines are clearly displayed in the patron detail page. From the fines detail page, staff and patrons can see the fines history, which includes details as to what the fines were for as well as the amount of payments made. Staff with the proper permissions have the ability to undo or void charges within the fines detail page. ByWater Solutions has experience in dealing with Unique Management for debt collection services and will provide them with the necessary information on a monthly basis or as requested. Koha also has "claims returned" functionality that library staff can manage and modify.

If a staff member has the appropriate permissions, they can also override many blocks and messages within Koha. When a block on a patron account exists, or any message alerts staff to something, a larger orange box appears with the details of the alert, along with a sound. Sounds exist in Koha for many functions including checkin, checkout, and alerts. Koha also allows for the application of age restriction to DVD items. For example, if a child (with a birthdate that makes them under the age of 13) checks out a PG13 DVD, Koha can alert the staff member to the fact that the child is under the age of 13, and will ask if they would like to check the DVD out regardless. Koha also allows for links to family member's cards, and staff have easy access to view any relative's current checkouts from the parent or child detail page.

Koha's circulation and fines matrix allows for granular control over all aspects of circulation, holds and fines. Each library in the system can set circulation and fines rules in patron and item type combinations making it very easy, for example, to allow your resident patrons more freedoms than your non resident, or your adults more DVDs than your children. You also have the ability to limit holds and circulation across the system should you choose and set specific types of items to float throughout your branches.

|   |  |
|---|--|
| <b>Circulation Functionality</b>  |  |
| Patron can update information & manage own account including renewals, payment, cancel/freeze holds without staff intervention, download reading history  | Included   |
| Patron can self-register for a library account  | Included   |
| Patron record includes field for option to receive publicity from library   | Available  |
| All fields searchable, including, but not limited to name, telephone, address & email   | Included   |
| Ability to copy details from one patron registration to another   | Included   |
| Registration process provides alert for duplicate customer record based on defined fields   | Included   |
| Ability to link membership of people in same family   | Included   |
| <b>Financial Management</b>   |  |
| Ability to pay full and/or partial replacement cost of materials  | Included   |
| Option for waiving & refunding  | Included   |
| Option for patron type to determine fines and fees  | Included   |
| Option for item type to determine fines and fees  | Included   |
| Collection account integrated with library software   | Available via third party integration                |
| Ability to see fine history in the patron account   | Included   |
| <b>Holds &amp; Notifications</b>  |  |
| Notification for holds, overdues, courtesy notices including telephone, email and text messaging  | Included, telephone requires third party integration |
| Ability of patron & staff to cancel holds   | Included   |
| Ability of patron & staff to suspend or freeze holds  | Included   |
| Records kept for notices sent   | Included   |
| <b>Circulation &amp; Management</b>   |  |
| Detailed search ability for materials in the staff client, including ability to filter and search by numerous fields including, but not limited to keyword, title, author, ISBN/ISSN, age, collection | Included   |

|   |                |
|---|----------------|
| Mobile circulation inside building & outside library without need for offline circulation   | Included       |
| Offline circulation   | Included       |
| Customized receipt configuration  | Included       |
| Ability to provide receipts via multiple options, including email, print & text messaging   | Included       |
| Ability to customize wording and graphics for messages & notices  | Included       |
| Same record can be in use at multiple workstations  | Included       |
| Complete integration with RFID self-service functionality, including checkout, renewals, holds management and fines payment at self-checkout stations | Included       |
| Option to auto-renew materials based on set criteria  | Included       |
| Digital product usage recorded as patron activity   | In Development |
| Digital product circulation activity visible and managed via patron account   | Included       |

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## *REPORTS*

Collection development and statistical reports are built into cataloging, reporting, and circulation. All data that is recorded in the system is easily accessed and any report that is needed can be custom written and designed by ByWater Solutions staff. Reports can be generated on any circulation material, borrower data (including item use), most requested books, recent additions and withdrawals by branch, historical data on circulation, item holdings, overdues, items added or deleted with a granularity of one day and many more. Librarians with the appropriate credentials can easily generate patron, item, and bibliographic lists as well as record counts. Koha's reporting tool allows for libraries to run and create any report they need at any time throughout the day on all functions including but not limited to circulation, cataloging, acquisitions, and ILL. Koha's reporting allows for the capacity to track and reconcile accounting by payment library, bill reason, and payment type (cash, check, credit) and has the ability to produce cataloging and database statistics including counts of records modified, added, or deleted by cataloger login.

Available outputs for statistical data include home library, location, item type, time of day, and many more. Literally any information contained in Koha is retrievable through reports. The Koha reporting module also has the capability to produce real-time statistics online, allowing librarians to print or email these reports as needed. ByWater will also migrate any historical data imported from Horizon that is provided.

Reports can be run by using the built in report wizard or by writing an SQL query. Reports can be downloaded as a CSV which can then be opened in a spreadsheet application of your choice (XLS, XLSX etc..). In most cases, Koha allows for the ability to run reports while libraries are open and without degrading response time. However, some reports, such as Overdues, may use large amounts of system resources and are labeled in the system as such. These reports are best run after hours. We can also host your reports on a different server to add an additional layer between reports and circulation functions to prevent slowing down system response times if necessary. Custom report generation is part of the ByWater Solutions support package, but there is a very substantial online database of written SQL reports that has been created by other librarians using Koha. This collaborative database can be viewed here: [http://wiki.koha-community.org/wiki/SQL\\_Reports\\_Library](http://wiki.koha-community.org/wiki/SQL_Reports_Library)

| <b>Reports</b>  |                                      |
|---|--------------------------------------|
| Ability to export data in standard formats (e.g. text, CSV, Excel, PDF)   | Included                             |
| Ability to use report templates   | Included                             |
| Ability to create custom reports  | Included                             |
| Ability to schedule reports with an option to email or FTP results  | Included                             |
| Ability to run reports for subject, DDC ranges and/or genres  | Included                             |
| Provides reports for which library materials are used and in which locations  | Included                             |
| Ability to identify patron inactivity   | Included                             |
| Ability to include cross-references between data sets   | Included                             |
| Ability to produce reports on demographics  | Available, if that data is collected |
| Ability to report on and access any data within the database  | Included                             |
| Reports having the ability to provide evidence-based collection analysis & evaluation functionality (similar to CollectionHQ) | Available                            |
| Provides recommendations for withdrawal, including title, subject, author, DDC  | Included                             |
| Ability to track top search history   | Available                            |

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## *CATALOGING*

Koha's cataloging module allows for cataloging of MARC records using either a basic or an advanced cataloging interface. Using these interfaces librarians can perform original, copy and imported cataloging. Both editors can handle the addition of any fields, including new fields for RDA and expanded fields for OCLC numbers. The basic editor offers clear labels to new catalogers, simple validation such as checking for non repeatable and/or missing required fields and built in help links for each field and subfield. The advanced editor allows for the use of macros to automate the addition and population of commonly used fields, keyboard shortcuts to prevent the need for a mouse and simple validation such as checking for non repeatable and/or missing required fields. MARC records can be brought in to Koha in many ways. Koha does support the OCLC Connexion Gateway which allows catalogers to click export in Connexion and automatically send the record to their Koha system. You can also import batches of MARC records from OCLC, book vendors or any other source and Koha will use matching rules that you have defined to prevent the addition of duplicate records. Koha offers built in Z39.50 searching for copy cataloging and allows the library to open up their Z39.50 port should they wish to share records with other libraries. NCIP functionality is currently in the contract phase. Finally the library can originally catalog records using Koha's cataloging module. All of the above functions will offer prompts to prevent the addition of duplicate records using rules set by the library. These records can be suppressed (or shadowed) on the bibliographic and/or item level.

Koha allows the library to define any number of material/item types. This means that a library's collection can easily be made up of (and searched by) digital resources, print materials, videos, audio discs and much more. For digital resources, user-friendly links will appear on both the search results and the bibliographic detail page making it clear that the item is electronic and making it easy to access.

Koha's label maker allows the library to define custom templates and layouts to allow for the printing of spine, bookplate and barcode labels. This can be done in batches or one by one via the bibliographic detail page.

Should edits need to be made, in addition to individual editing capabilities, Koha allows for the batch modification (and deletion) of items and bibliographic records. Bibliographic records can also be merged together should duplication occur. Merged records retain all holds (ordered by date of hold) and circulation history from both records and items.

Koha does offer a searchable authority file. Authorities can be added by batch import, via original cataloging or by importing records using Z39.50. Koha's authority linker will maintain links between bibliographic and authority records.

| <b>Cataloging</b>  |                                       |
|--|---------------------------------------|
| RDA ability & compliance   | Included                              |
| Tools are available to convert/upgrade MARC data to RDA or other future cataloging standards | Included                              |
| Ability to index all fields in MARC records  | Included                              |
| Ability to integrate digital content from third party vendors                                | Included                              |
| Integration with Bibframe  | In development                        |
| Access and utilize MARC records from a variety of sources                                    | Included                              |
| Ability to specify loading parameters for overlay  | Included                              |
| Ability to specify match-point in loading profiles   | Included                              |
| Ability to automatically create and populate item information during MARC loading process    | Included                              |
| Ability to make global changes to the system   | Included                              |
| Ability to integrate digital content from local library                                      | Included                              |
| Ability to upgrade records to be discoverable on the internet                                | Available via third party integration |
| Spellcheck capability  | Included                              |

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**SERIALS**

Subscriptions in Koha are defined in the Serials module. First the library enters in a bibliographic record for the title and then attaches a subscription to it. The subscription defines the prediction pattern (which is completely customizable) for this particular serial, allows the library to link the serial to a purchasing agency, includes a grace period before the item is assumed late or missing, and allows for the automatic prediction and generation of future issues.

Once subscriptions are entered they can be searched by title and ISSN from the serials page and by bibliographic number (and many more fields) via the catalog search. Each library can have their own subscription to the serial and all issues can be received at once by clicking 'Receive Serial' on the search results. If the libraries choose to attach barcodes to serials at receipt Koha will generate an item record with pre-filled values based on the subscription.

A claims report can be run at any time to pull up all missing and late issues and will allow the library to generate emails to the appropriate vendors.

| Serials  |                |
|--|----------------|
| Ability to automatically send claimed missing issues to vendor, as per configured parameters, with no staff intervention | In development |
| Report of missing issues automatically generated   | Included       |
| Ability to utilize frequency information from vendor to automatically create check in boxes and customize dates          | Included       |
| Ability to create routing information  | Included       |
| Serials invoicing occurs automatically, with no staff intervention, and automatically connects into accounting software  | In development |

## *ACQUISITIONS*

Vendors in Koha can include as much or as little information as you choose. Vendors can include complete contact information or can just be a list of names. Each vendor will have their own accounting settings such as tax rate, discounts and average delivery time.

Budgets are entered in to Koha via administration and can be made as granular as the library chooses. Each budget has at least one fund and then funds can be broken down further in to children funds if needed/wanted. Budgets and funds can be branch specific if the library system so chooses. Koha will track all expenditures and encumbrances against these budgets as orders are placed in the acquisitions module. At the end of the year a budget can be duplicated to easily create the same breakdown for the following year.

Koha's acquisitions module allows for creating orders in many different ways. All orders are put into 'baskets' where library staff can choose to load in MARC records in batches from vendors, to use a purchase suggestion from a patron, to order from an existing record in your catalog, to enter in a brief record or to search another library via Z39.50 to find a full record. Depending on the library's wishes, on-order items can be created at the time of acquisitions to allow holds to be placed both by staff and patrons. Ordering and Invoicing using EDI functionality is now being tested on some production servers and will be available by time of Go Live. There is an additional one time fee for the configuration of the EDI protocols per-vendor but ongoing use is included.

Koha's reporting module allows for complete access to any data stored in the system; as long as the data is stored a report can be written. This means that the library can generate any number of custom reports including, but not limited to, lists of items not received, orders that are late and/or outstanding, vendor payment history and orders based on fund (including special funds). Reports can also be used to keep track of monies spent with each vendor, encumbered with each vendor and still outstanding in each budget or fund.

To receive orders staff will search either by vendor, order number, order line or invoice. From the search results simply click the 'Receive shipment' button and enter in the necessary information about the invoice (shipping, invoice number, etc). When receiving orders staff can easily cancel/delete order lines that have been cancelled on the invoice which will automatically refund the money to the related fund. Once received invoices can be searched at any time.

|  |  |
|--|--|
| <b>Acquisitions</b>  |  |
| Ability to utilize EDI ordering  | Available                              |
| Ability to create order records from imported vendor carts                         | Included                               |
| Claiming capability  | Included                               |
| Detailed fund reports for collection areas   | Included                               |
| Automated status changes from Ordered/Received/Invoiced without staff intervention | Available with EDI                     |
| Invoices are integrated into accounting software, with no staff intervention       | Available with third party integration |

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### *SYSTEM, SERVER & SOFTWARE FUNCTIONALITY*

The Koha LSP is unmatched in its customization and flexibility. One of the main tools which allows for this flexibility is the Koha Administration page. Because Koha is a product that has been developed by thousands of contributors world-wide, it needs to be adoptable by any library in any country regardless of their policies and preferences. As such, every feature in Koha contains an on/off switch to allow for widespread adoption. This means that each library can tailor the functional elements contained in the software to meet the needs of their particular institution. All of these controls are located in the Koha Administration page, where libraries have the ability to set their defaults and parameters for branch and group settings; item types, authorized values, patron and circulation rules, cataloging, acquisitions, Z39.50 targets, security protocols, task scheduling and many more.

The Koha Administration page also contains all of the Global System Preferences settings which control the look and feel of the OPAC, Enhanced Content settings such as connections to OCLC Connection Gateway, Novelist Enhanced Content, Syndetics, E-Book vendor APIs and other third party content that may be used by your library. All of the settings contained in the Global System Preferences section are gone through and set up during your training so as to ensure your Koha system is configured to meet the needs of your staff and patrons.

The Tools subsystem within Koha allows for many additional administrative functions within Koha. From Tools, staff members have the ability to globally edit groups of data within Koha (this can also be done by ByWater as part of our support offering) globally establish calendar settings and backdate due dates for unscheduled closures, and import, export, and batch load different types of records. From Tools, staff members can also customize and define notices, upload patron images in batches, schedule tasks and cron jobs, create barcodes and much more.

Patron Permissions are used to allow staff members access to the staff client. Once the patron or staff member is loaded, you can configure that member's permissions according to their use of the system. ByWater Solutions recommends the use of both individual and specific accounts for users. In most cases, our customers utilize an individual login for each staff member, while using a group login for the circulation desk. This will allow staff members to jump from computer to computer as needed without having to log out and log back in.

Koha has completely open APIs and your Library will have the freedom to create custom scripts (Koha is written in PERL) for use with their system. ByWater will also assist with this free of charge as part of our support offering. Backups of the Koha software and the

MySQL Koha database are supplied free of charge. If ByWater is hosting your library's Koha installation, we will automate weekly, daily, or monthly backups to an on-site server at no additional cost. If your library elects to host their system internally, ByWater will provide an offsite cloud hosted backup upon request for an additional charge. At all times, your library will maintain ownership of all data and can export this data at any time at no additional charge.

The only required maintenance activities performed on your server include updates and upgrades to your Koha system, all of which occur during off hours. Updates are conducted directly in line with the current community release schedule. Minor Koha releases are applied to customer servers automatically on a monthly basis. These updates typically contain minor functionality enhancements and bug fixes to existing functionality. Major releases occur twice per year and contain new modules or interfaces, as well as major structural improvements. Major upgrades are scheduled with customers and are applied to their system during off hours. Updates and upgrades are applied free of charge, and operating system upgrades to the server will be conducted by ByWater staff as needed. Hardware maintenance is the responsibility of the library for all self hosted installations of Koha.

ByWater Solutions recommends a 15 - 20 Mbps internet connection for all Koha installations hosted by ByWater Solutions. For self hosted installations, we would suggest the same amount of internet speed. Regarding the amount of traffic typically seen with installations similar in size and activity to your library, an average input/output would be 0.62 Gb in, 1.83 Gb out.

| Functionality   |   |
|---|---|
| Ability to add and integrate APIs (provide an overview of available APIs)         | Included  |
| Ability to distinctly brand and customize options for staff and public interfaces | Included  |
| Ability to access the ILS from anywhere   | Included, access requires Internet accessibility. |
| Automatic regular backups with no staff intervention                              | Included  |
| Software regularly updated and upgraded with no impact on service                 | Included  |
| Development cycle that is responsive to known issues and enhancements             | Included  |
| Notice of software update provided minimum 24 hours in advance of an update       | Included  |
| Availability/usage of SIP2 connections  | Included  |

|  |          |
|--|----------|
| Granular security that can be applied to each user account                         | Included |
| Customer information and backups remain in the United States                       | Included |
| Ability to customize the staff interface   | Included |
| Ability to customize the public interface  | Included |
| Security measures are included to minimize chance of fraudulent activity or access | Included |

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## *MIGRATION, SUPPORT & TRAINING*

### Implementation/Migration

Skilled manipulation of library data is the key to a successful migration. Because it is the most important representation of a library's collection, we take the time to proficiently manage your data prior to your go live. Our Installation and Migration fee includes but is not limited to:

- Creation of test system for training and testing
- Transfer of all data from legacy LSP to Koha
- Data cleanup that contains if/then statements (for example, if an item has no bib record attached, then delete it)
- Installation and customization of staff and public interfaces
- Administrative configuration and consultation on system preferences setup
- Creation of requested custom reports prior to go live
- OPAC customization
- Import of patron data, fines, fees, checkouts, holds, lists, and any other data that is provided
- Assistance with the import/configuration of authority records
- External device setup such as those using SIP2, NCIP and LDAP connections
- Assistance with exporting data from legacy LSP when possible

All services listed above are included in one low implementation cost as quoted in the pricing section of this RFP. If additional services are needed ByWater staff will do everything in their power to help without any additional cost. We look at the implementation of Koha as your first impression of us and take this part of the relationship very seriously.

ByWater Solutions also offers customizations that can be written in javascript, and perl. In addition to application scripting ByWater also offers customized report scripting written in SQL. All of these services are provided without additional cost to the library.

ByWater Solutions' Koha implementation involves a two step data migration process that allows your library staff to test the system with your own data before final implementation. The first data extraction and delivery is installed onto a test system for the library to screen and sign off on before the final production transfer takes place. This will contain any data brought over from the current system. This is the system your libraries will be trained on and will conduct subsequent pre go live testing on. The second data dump is conducted directly before the proposed go-live date so as to bring

over any changes in database content that were added since our initial test load. The ultimate goal in conducting this process is to avoid the need to run dual systems during your migration, and to minimize downtime. The final changeover is completed by our staff during hours in which your libraries will be closed so as not to disrupt any day to day activities. Providing your libraries with a test system also allows for testing and training refreshers throughout the migration process so that your staff will be comfortable and confident with your new system on the day of your go-live. During this process, all integration with third party services, as well as SIP2 and LDAP connections will be completed and maintained as part of the implementation fee. The migration also includes the customization of the responsive themed mobile OPAC as well as the administrative configuration within the system according to the parameters given to us during training. Upon request, ByWater can also provide data clean up services free of charge. These services must fall under a command line capability and have an "if/then" statement. An example would be: "If a bibliographic record does not have an item attached, then delete it". Documentation available to customers includes the following:

- ByWater Solutions Migration Handbook (PDF)
- Koha Manual: <http://koha-community.org/documentation/> (viewable online or via PDF download)
- Testing plan for post training testing: <http://bywatersolutions.com/koha-testing-plan/>
- ByWater Solutions Tutorial Training Videos: <http://bywatersolutions.com/section/tutorial-videos/>
- Release notes for updates and upgrades (viewable online or via PDF download)

ByWater Solutions works very closely with our customers during the data mapping and migration process. Before even starting work on the migration ByWater has a kickoff call with all customers to identify potential speed bumps in the migration process and address any concerns our library partners may have. Additionally, a new customer will meet with both our Operations Manager, Migration Specialist, and/or our Director of Migrations to analyze your data and make recommendations to the library in order to fully maximize koha's potential. This process involves meetings with circulation and cataloging staff to determine how the data is used in your current system to match workflows as closely as possible if that is what the library would like. If, however, the staff in your library would like to change elements of your data we would be more than happy to work with your team and advise them accordingly based on the functionality available within Koha. Because of Koha's flexibility and ByWater's commitment to going above and beyond during the data migration process we can adapt your data to fit whatever end goal you and your staff have.



Additionally, our education team meets with your library during the migration process to discuss policies and workflows in order to help identify key areas of the data that need special attention. This policy discussion also helps inform the educators as to training needs, both initial and ongoing. Our Systems Department also works closely with your library in order to set up the appropriate system configurations for any external products and devices that need to be linked to the catalog.

Support:

Quality of support is the most important focus of our company and we pride ourselves on the implementation of this key feature. ByWater Solutions has the lowest customer to support personnel ratio in the business.

Our support package includes, but is not limited to:

- Technical consulting and problem solving
- Training questions
- Consultation with network configuration
- Customizations and "tweaking" to the OPAC and staff side interfaces
- Custom Report generation
- Bug-fixes and the application of community released bug fix enhancements as they become available
- Management and updating of community or customer sponsored enhancements.
- Training for all major updates to Koha's functionality via webinar to your team at no additional cost.
- 24/7 monitoring of your hosted server
- Maintenance of 3rd Party connections within Koha
- Regular updates to your Koha system as new functionality becomes available to you, as well as the application of new releases to your system as they are made available (usually every 4-6 months)

If you are having an issue with your system, our support team will help to solve the problem. Our support package is completely comprehensive and ensures the best possible Koha experience for our customers.

Methods of interface for our support include:

- 24/7 toll free calling
- Ticketing system with report generation
- Staff email

- Live chat during business hours via Koha Community IRC
- Access to administrative contact information for escalation of support issues

We also ensure all of our customers have the tools to be plugged into the wealth of knowledge and expertise available within the Koha community.

ByWater Solutions' method for support interface includes the following: For any support issues our customers may fill out an online ticket via our online system and will receive a response by email (standard) or phone (for more critical issues) within twenty minutes. The online ticketing system also logs all support needs that your library has entered for further review and consultation at any point in time. For all other issues customers may access our toll free number 24/7 as well as direct email contact with key support project leaders. You will receive a response within thirty minutes if there is no immediate availability of a support representative on our 24/7 phone support line. In addition to the modes mentioned, we also have live chat during business hours on the Koha Community IRC channel. Our 24/7 service is included in our support package at no additional cost. ByWater Solutions also has a monitoring system in place that alerts us to any internal system issues with regard to connectivity and performance for our hosted customers.

With regard to specific problem resolution timeframes; our staff will make every effort to supply an expedient solution to your problem. However, the time it takes to fix an issue completely depends on the severity and complexity of that issue. Regardless of the time it takes to fix a particular issue, your staff will be updated and informed about the progress of its resolution. Our rigorous update schedule ensures all bug fixes and patches will be applied to your system on a regular basis. This drastically reduces the occurrence of any major issues originating from the Koha software.

ByWater Solutions believes that one of the greatest benefits to adopting an open source LSP is the ever growing functionality of the software. Koha is an LSP that will never become out dated because of the constant development and innovation that goes into the project. As your support company, it is our job to ensure that you get the most out of this benefit by ensuring your libraries are running the most current release of Koha. Customers who sponsor custom development will be actively involved in the testing of their code. Many ByWater customers are very involved in the community and are thus more active when it comes to testing patches and bug fixes. Upon request, ByWater will set up a test installation of Koha on a locally hosted system free of charge. A particular library's involvement is entirely up to them.

Updates are conducted directly in line with the current global open source community release schedule. All new development, bug fixes and patches written by ByWater or

other community members are submitted to the community for QA testing and are incorporated into the next release. Minor Koha releases are applied to customer servers automatically on a monthly basis. These updates typically contain minor functionality enhancements and bug fixes to existing functionality. Major releases occur twice per year and contain new modules or interfaces, as well as major structural improvements. Updates and upgrades to both the staff and discovery interfaces are scheduled with customers and are applied to their system during off hours, resulting in zero downtime for their system. Updates and upgrades are applied free of charge. A significant benefit to adopting open source software is that the product has no shelf life and will never become obsolete or outdated because of the frequency of releases. Operating system upgrades are not necessary because Koha is a web based application.

### Training

ByWater Solutions requires onsite training for all new Koha implementations. ByWater Solutions' training prices are the lowest in the industry and its staff is the most qualified of all Koha providers in the United States. Training typically takes place over the course of three days and the schedule is made according to your staffing needs. Below is a sample training schedule for your review:

#### Day 1:

- OPAC
- Patron Management
- Circulation
- Related Tools

#### Day 2:

- Cataloging
- Serials
- Acquisitions
- Related Tools

#### Day 3 (1/2 day):

- Reports
- Administration
- Related Tools

The day to day breakdown will be as follows:

- Administration/Parameters and Preferences 1-2 hours -- Managers only
- Cataloging 1.5-3 hours -- Tech Services
- Serials 1-2 hours -- Tech Services

- OPAC 1 hour -- Everyone
- Circulation/Patrons 1.5-2 hours -- Everyone
- Acquisitions 1.5-2.5 hours -- Tech Services
- Reporting 1-2 hours -- Managers only
- Additional tools 2-3 hours -- Managers only

The pre-go live training takes place on a test server which will be populated with the your Library's own data and configuration to ensure greater familiarity and comfort with your new system.

Ongoing training occurs with the release of major upgrades and is done via webinar. Training refreshers for existing or new staff can also be scheduled on a one on one webinar basis upon request at no additional cost.

| <b>Migration, Support &amp; Training</b>   |                              |
|--|------------------------------|
| Complete migration of patron, bibliographic and item data from SirsiDynix Horizon ILS                          | Included                     |
| Documentation is provided in one place and is keyword accessible   | Included                     |
| Data migrated in a secure fashion, using industry standard encryption  | Included                     |
| Regular updates on open tickets are provided to ticket creator   | Included                     |
| Escalation process is provided for unresolved issues   | Included                     |
| System allows staff to change their own password, password recovery by email                                   | Included                     |
| Phone support during library open hours  | Included                     |
| On-site training is provided for all functionality, including system administration and configuration          | Included                     |
| 24/7 phone support   | Included                     |
| On-going separate test environment is provided to try and test settings and configuration, as well as training | Available at additional cost |

**REFERENCES**

**Roseville Public Library-CA**  
Chris Rohde  
916-746-1216  
[crohde@roseville.ca.us](mailto:crohde@roseville.ca.us)  
Ex-SirsiDynix Horizon Customer

**Los Gatos Public Library-CA**  
Carol Corrales  
408-354-6891  
[ccorrales@losgatosca.gov](mailto:ccorrales@losgatosca.gov)  
Ex-SirsiDynix Horizon Customer

**Ottumwa Public Library-IA**  
Ron Houk  
641-682-7563  
[rhouk@ottumwapubliclibrary.org](mailto:rhouk@ottumwapubliclibrary.org)  
Ex-SirsiDynix Horizon Customer

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**Placentia Library District**  
Request for Proposal  
Integrated Library System  
April 29, 2019  
CONFIDENTIAL COST PROPOSAL

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RFP for Integrated Library System  
April 29, 2019

**Cost Proposal**

Cost quotes and payment terms should be included for all software and recommended equipment. Pricing should reflect a vendor-hosted solution for the system.

- Please use the pricing sheet included in this section to indicate the costs for the various components.
- Please feel free to add items to the cost table if you have items which do not fit into the specific categories.
- Prices for the initial purchase, implementation and 5 years of maintenance should be included for each item.

| ILS COST PROPOSAL   |                        |   |          |          |          |          |
|---|------------------------|---|----------|----------|----------|----------|
| Description   | Initial/Implementation | Year 1  | Year 2   | Year 3   | Year 4   | Year 5   |
| <b>Required Modules</b> <ul style="list-style-type: none"> <li>• Circulation</li> <li>• Acquisitions</li> <li>• Serials</li> <li>• OPAC/Discovery</li> <li>• Cataloging</li> <li>• Reports (including Admin/Statistics)</li> <li>• Inventory &amp; Authority Control</li> </ul> | \$20,500               | This is the cost included in the initial column to the left | \$21,525 | \$22,601 | \$23,731 | \$24,918 |
| Hosting   | \$3,600                |   | \$3,780  | \$3,969  | \$4,167  | \$4,375  |
| Training  | \$31,950               |   |          |          |          |          |
| Data Migration  | Included with Training |   |          |          |          |          |

| ILS COST PROPOSAL  |   |        |        |        |        |        |
|--|---|--------|--------|--------|--------|--------|
| Optional Modules   | Initial/Implementation                    | Year 1 | Year 2 | Year 3 | Year 4 | Year 5 |
| iOS & Android App  | Included in software subscription         |        |        |        |        |        |
| Marketing Module   | N/A                                       |        |        |        |        |        |
| CRM Module   | N/A                                       |        |        |        |        |        |
| Interlibrary Loan Module   | Included in software subscription         |        |        |        |        |        |
| <i>Include any other optional items described in your Proposal</i> | See attached sheet of included subsystems |        |        |        |        |        |







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**Polaris Success Bundle**

Acquisitions with EDI ordering

- Includes Titles to Go

Cataloging with Authority Control

- Export Express

Circulation including classic Inventory ILL

- Collection Agency Offline Circulation Notices
- SIP 2 Interface – 1 license SMS Alerts
- Volume Level Holds Patron Images
- SIP 2 -- 5 License
- Self Check – 5 License Homebound
- RFID Integration
- eContent Integration (Overdrive, Cloud Library, Axis 360)

Polaris Response PowerPAC Kids OPAC

- Patron Self Registration FeatureIT
- Remote Patron Authentication Carousel Toolkit
- Community Profiles

Serials Control

Polaris Simply Reports Web-based Reporting

MSSQL Reporting

Polaris Telephone Notification





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### Success Bundle Services Description

Innovative utilizes a five (5) stage Implementation Process to ensure a smooth & successful implementation that incorporates the learning experience of over 9,500 implementations for libraries in 66 countries around the world. The Methodology incorporates all of the necessary components for a successful project including:

Project planning and staffing

- Project planning templates (schedules, requirements documents, budgets, etc.)
- Industry best practices for system setup
- Client communications including project plans, status reports, and status meetings.
- Use of a client collaboration tool
- Techniques, tools, and deliverables to accelerate implementations
- Quality assurance & testing
- Training & Change Management services

The Scope of the project includes the following set of professional services:

- **Setup the software and hosting environment** for the Client to access the Polaris ILS.
  - Polaris Success Bundle
    - Acquisitions
      - EDI - Electronic Ordering
      - EDI - Electronic Invoicing
      - Titles to Go
      - Selection Lists
    - Cataloging
      - Automatic Authority Control
      - Export Express
      - Z39.50 Client, Broadcast & Server
    - Circulation
      - Classic Inventory Control
      - Collection Agency / Debt Collection (Unique Management)
      - Digital Signatures
      - eCommerce - PowerPAC (Payflow Link)
      - Self-Check using Express Check
      - Floating Collections
      - Held Item Delivery
      - Outreach
      - Interlibrary Loan
      - RFID Integration
      - Notices
      - Offline Circulation
      - Patron Images- Internal
      - SIP2 Interface for Self Check
      - SMS Alerts
      - Volume Level Holds



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- eContent Integration
  - Unlimited PowerPAC Users
    - Carousel Toolkit
    - Community Profiles w/ Campaigns
    - Children's PAC
    - Did you mean? (spellcheck)
    - Feature It
    - Location-based Profiles & PowerPAC Localization
    - Patron Self-Registration
    - Remote Patron Authentication against Polaris patron DB
    - RSS Feed Builder
    - URL Detective
  - Serials
    - Claiming
  - Polaris REST APIs
  - Polaris Canned Reports
  - Simply Reports
  - SQL query access with Microsoft reporting services
- **Project Management Services** to manage the Innovative services team, coordination of the technical services required to configure the software, delivery of project plans with periodic updates, project budgets tracking both hours and costs incurred, client communications and status reports and management of change orders as required.  
SOW covers:
    - Up to 2 days of onsite profiling services
  - **Software Configuration** services to adapt the fully functional out of box software to the clients' unique needs.
  - **Data Migration Services** to migrate the client's data from their existing ILS into the Polaris ILS. These services include extraction, analysis, mapping and loading of data into the Polaris Test Database. Revisions to the Polaris Test Database will be made, when possible, as issues are reported during the evaluation period. Includes Consulting, Profiling, Loading for: Bibliographic, Authority, Item, Patrons, Serials Holdings, Circulation Checkouts, Holds, Fines and Vendor records. Includes up to 2 data loads.
  - **Training Services** to be delivered through a combination of on-site visits and web-based sessions. Training topics will be detailed in the schedule during the preparation phase based on library go-live priorities and target dates.  
SOW covers:
    - Up to 10 days of training onsite at the library's location
      - 4 Days of Patron Services Training (Onsite)
      - 2 Days of Acquisitions Training (Onsite)
      - 1 Day of Serials Training (Onsite)



Placentia Library District  
RFP for Integrated Library System  
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- Up to 23 hours of instructor led online training
  - System Administration
  - Simply Reports
  - Community Profiles
  - Outreach Services
  - Export Express
  - Feature IT
  - ILL





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Integrated Library System  
April 29, 2019

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April 29, 2019

Jon Legree  
Technology Manager  
Placentia Library District  
[jlegree@placentialibrary.org](mailto:jlegree@placentialibrary.org)

Dear Jon,

Innovative Interfaces is pleased to respond to Placentia Library District's Request for Proposal for Integrated Library System. We have carefully reviewed your document and are proposing Innovative Interface's Polaris ILS as for your future system. Polaris has been designed for, and is primarily focused on, the needs of public libraries. Polaris is designed from the ground up to provide a robust and scalable solution with powerful staff tools and an intuitive experience for patrons. Your hallmark as a public library revolves around serving your customers – and you can expect the same commitment to your customers from Innovative Interfaces. Service has always been a cornerstone at Innovative. We understand why and how service is important to you; we feel the same way.

The Polaris ILS includes a number of significant capabilities beyond what you have now:

- **A mobile patron services tool** – full mobile circulation features coupled with the ability to provide excellent patron service *wherever* your patrons are.
- **Full access to your data** – Your staff can create reports/queries on any data in your database, using full SQL queries or SimplyReports, our web-based, point-and-click report writer.
- **Powerful APIs** – open your Polaris system to a myriad of third-party integrations or create your own tools and interfaces.
- **Comprehensive discovery** – Patrons can find more of what the library has to offer within the native Polaris PowerPAC. The PowerPAC includes the ability to feature material, databases, events, clubs and organizations. This information is featured within the same search that patrons use to find both print and electronic material.

Innovative has years of experience migrating libraries from Horizon to Polaris. We're proud of our reputation for implementing systems efficiently and on-schedule and a key component to our approach is collaboration. Your new ILS implementation is the first step in what we hope is a long and valuable partnership.

As you look at a new ILS partner, this will be a long-term relationship – and you need to know that your partner has a solid product for today as well as a vision for the future. With Innovative you will receive that. As we look to the future we will provide solutions which will re-imagine the library and help you provide the same experience that your patrons have with tools and technology that they use every day

We look forward to working with you through this process. If you have any questions, please do not hesitate to reach me at 281-251-9289 or [carrie.pearson@iii.com](mailto:carrie.pearson@iii.com).

Best regards,



Carrie Pearson  
Sales Executive





World Headquarters  
5850 Shellmound Way  
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### Executive Summary

We have carefully reviewed your RFP for a vendor hosted web based ILS. We are proposing our flagship product for public libraries – Polaris.

We recognize the significance of projects like the one Placentia Public Library is about to undertake because we have converted hundreds of libraries similar to the size and demographic of yours. We have extensive experience moving libraries from BOTH Horizon and Symphony to Polaris, and can provide a complete client list if that would be helpful.

The advantages of choosing Innovative's Polaris ILS solution are outlined below:

- **Extend your Library.** The Polaris web client enables you to serve your patrons wherever they are – in the stacks or out in the community. It allows staff to get out from behind the desk and still have access to vital data and functionality with flexible, intuitive workflows, enabling staff to assist patrons quickly and confidently.
- **Developed for public libraries** – all the development that has gone into Polaris is with a single focus in mind – meeting the needs of public libraries. This is evident in everything from our support model to the product.
- **Full Access to Your Data.** Your staff can create reports/queries on any data in your database, using full SQL queries or SimplyReports, our web-based, point and click report writer.
- **Powerful APIs.** The Polaris API allows external systems to access Polaris-defined functionality, opening your Polaris system to a myriad of third-party integrations or allowing you to create your own tools and interfaces.
- **Comprehensive Discovery.** Polaris PowerPAC provides your patrons with an intuitive discovery tool for all of the resources your libraries have available. Whether the information your patrons are looking for is in the form of an ebook, digital image/document, electronic database, or a monograph, Polaris PowerPAC can provide a look into all of those resources. From placing holds, creating lists, interacting with other patrons, paying fines, to purchasing materials that are not available for checkout at the moment, the Polaris PowerPAC solution provides your patrons with the tools they are looking for in this age of immediate access to information.

### About Polaris

The Polaris ILS is designed from the ground up to provide a robust and scalable software solution for public libraries, with powerful staff tools and an intuitive experience for patrons. Built on a Microsoft SQL server database platform with documented APIs, the Polaris ILS is open to connections: with your patrons and their social media, with third-party vendors, and with resources beyond your walls.



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### About Innovative

Since 1978, we have routinely introduced new technology to the library industry. The lessons we've learned, the ways we've grown and expanded, and the tenets we stand by have made us the leader in library management solutions.

As the world's only independent library solution provider, our possibilities are boundless.

- One of the broadest and most complete portfolios of library automation products on the market, including hardware, consulting, and data services.
- More than 2,400 library systems installed in 9,500 libraries in 66 countries.
- A workforce of dedicated experts of which 25% have knowledge and appreciation for what it means to manage a library—because they have.
- The industry's largest network of solution partners and software integrations.
- A robust customer community, working independently and in collaboration with our product developers to improve library outcomes.

As we celebrate our 40th anniversary, we work with renewed commitment to helping libraries embrace the digital age and thrive. A major re-evaluation and investment in the research, technology, and partnerships that produce our ideas and solutions ensures our continued support of libraries for another forty years.

### Thank You

Innovative recognizes the importance this process and project represents to PPL. It is understood that you are looking for a long-term partner that can grow with you and provide the unique services, software and technology that you need now and well into the future. Innovative Interfaces has uniquely positioned itself and made substantial investments in infrastructure, development and personnel in order to be a trusted long-term technology partner for libraries the world over, and we look forward to partnering with you.



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**ILS Connected Services**

The Library currently utilizes the following third party vendors and expects that the products offered by these vendors can be seamlessly integrated into the ILS functionality:

|   |   |
|---|---|
| Computer Reservations and Patron Printing | Envisionware PC Reservation, LPT:One, and eCommerce |
|---|---|

iii innovative

Yes, computer reservation and patron printing products from Envisionware PC Reservation, LPT: One, and eCommerce can be seamlessly integrated into Polaris. In fact, Polaris has implemented several extensions to SIP2 to facilitate a rich user experience. We have also implemented individual vendor profiles to help service the specific needs of EnvisionWare (among others).

|                        |             |
|------------------------|-------------|
| Self Checkout Machines | Bibliotheca |
|------------------------|-------------|

iii innovative

Yes, Bibliotheca self-checkout machines can be seamlessly integrated into Polaris via SIP2.

|                     |  |
|---------------------|--|
| Databases/E-content | EBSCO, Gale, ReferenceUSA, Hoopla, Freegal, OverDrive, Enki using SIP2 |
|---------------------|--|

iii innovative

Yes, databases/E-content within EBSCO, Gale, Reference USA, Hoopla, Freegal, OverDrive, and Enki can be seamlessly integrated into Polaris via SIP2 and API.

|                     |                                      |
|---------------------|--------------------------------------|
| Acquisition Vendors | Baker & Taylor, Midwest Tape, Ingram |
|---------------------|--------------------------------------|

iii innovative

Yes, products from acquisition vendors like Baker and Taylor, Midwest Tape and Ingram can be seamlessly integrated into Polaris.

|                                |                    |
|--------------------------------|--------------------|
| Telephone Notices and Renewals | iTiva Talking Tech |
|--------------------------------|--------------------|

iii innovative

Yes, telephone notices and renewals products from iTiva Talking Tech can be seamlessly integrated into Polaris via SFTP transfer to iTiva and a SIP integration from iTiva back to Polaris. However, as part of our cost proposal, Innovative has proposed our native Polaris Telephone Notification.

|                  |   |
|------------------|---|
| Receipt printers | Epson Thermal Receipt Printers with Windows Drivers |
|------------------|---|

iii innovative

Yes, Receipt printer products like Epson Thermal Receipt Printers with Windows Drivers can be seamlessly integrated into Polaris.



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**Cost Proposal**

Innovative's Cost Proposal is confidential and, therefore, separately attached.



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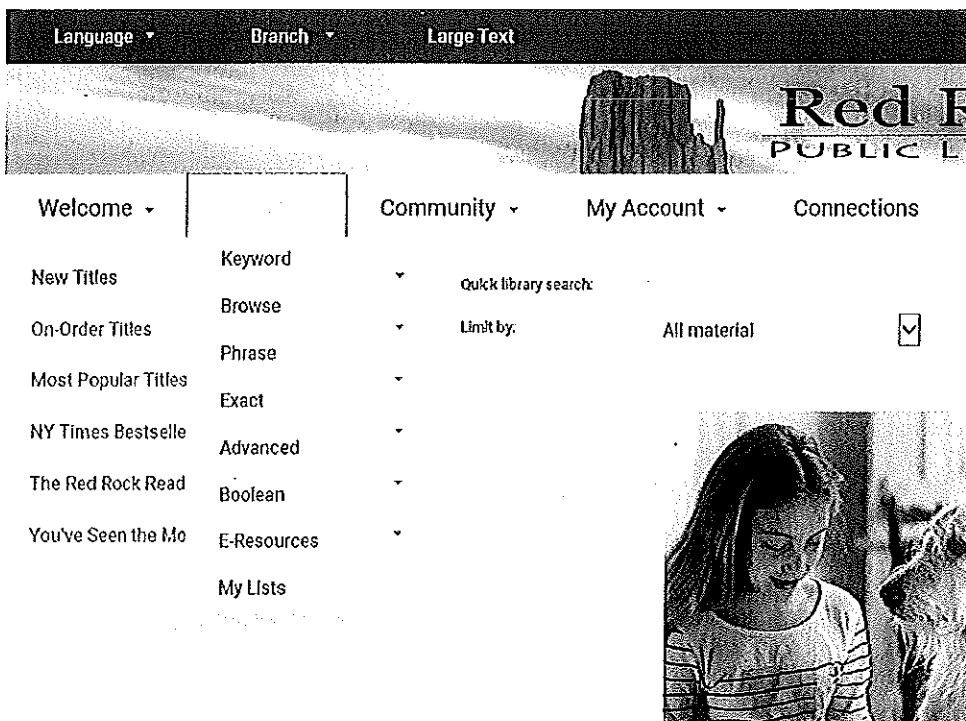
| OPAC                                |          |
|-------------------------------------|----------|
| <b>OPAC Functionality</b>           |          |
| Intuitive functionality for patrons | Required |

iii innovative

Yes, the Polaris PowerPAC provides intuitive functionality for your patrons and includes discovery of all of the resources your libraries have available. Whether the information your patrons are looking for is in the form of an ebook, digital image/document, electronic database, or a monograph, Polaris PowerPAC can provide a look into all of those resources. From placing holds, creating lists, interacting with other patrons, paying fines, to purchasing materials that are not available for checkout at the moment, the Polaris PowerPAC solution provides your patrons with the tools they are looking for in this age of immediate access to information.

The PowerPAC offers patrons these powerful search capabilities through an easy-to-use interface:

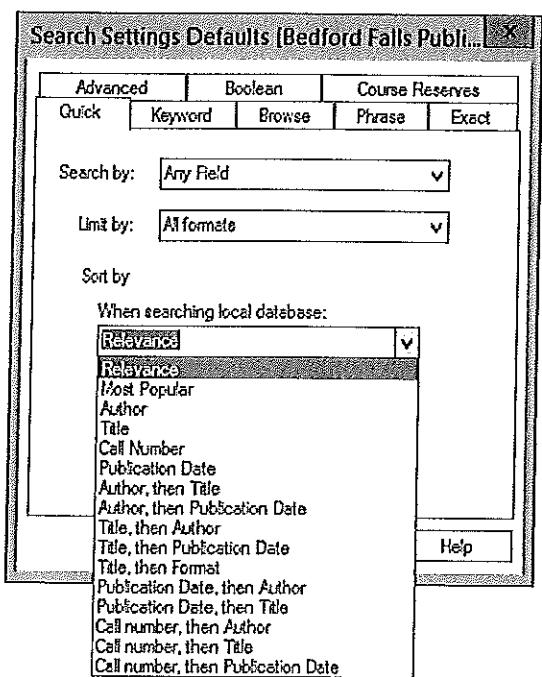
- Keyword searching by title, author, subject, general not, publisher, genre and series
- Browse searching by author, subject, series, or call number
- Exact searching by author, title, subject, or series
- Advanced searching using Boolean operators





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The Polaris PowerPAC includes both basic and advanced search capabilities. Each library determines the default for display order of search results. This default can be set at the system, library, branch or individual workstation level through Polaris ILS System Administration.



|   |          |
|---|----------|
| Ability for patrons and staff to create and share lists | Required |
|---|----------|

iii innovative

Yes, the Polaris ILS and PowerPAC provide the ability for patrons and staff to create and share lists.

1. Patrons

Using title lists, patrons can place titles selected from their search results into a formatted title list that can be printed, saved, or sent by email. As the patron selects titles, those titles are placed in a working list. In Polaris PowerPAC, the working list remains in the dashboard for the duration of the session.



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Welcome - Search - Community - My Account - Connections Help -

Save Search

My Lists

Working List

- The great invasion of 1863 ; or, General Lee in Pennsylvania
- Four years with General Lee.
- Recollections and letters of General Robert E. Lee
- Clear list
- Show list details...

Keyword search: general lee

Search by: Any Field

Limit by: All material

Using: My

Select

More Search Options

Include related words (16 more titles)

1 - 10 of 28 10 PER PAGE

Narrow your search

Format

- Book (25)
- Electronic Resources (2)
- Archival/Mixed Materials (1)
- Digital Collection (1)
- Projected Media (1)

More>>

Availability

Library Location



1992

[Rate or review](#)

1. The great invasion of 1863 ; or, *General Lee* in Pennsylvania  
by Hoke, Jacob, 1825-1893.

Copies Available at THIS Library: 0 (of 0)

Copies Available at ALL Libraries: 1 (of 1)

Current Holds: 0





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Registered library patrons can create and save multiple title lists in association with their patron accounts. Whenever the patron logs in, she can see and work with her saved lists. The patron can move or copy titles from a working list to a saved list, and print, send, or save to disk any list saved in the patron account. The available formats are brief records, full records, and APA or Chicago style citation formats.

The screenshot shows the Red Rock Public Library website interface. At the top, there is a navigation bar with links for Language, Branch, and Large Text. Below this is a header for Red Rock Public Library. The main content area is titled 'Civil War' and shows a list of titles. The titles are:

- 1. The sacrificial years : a chronicle of Wa's Whitman's experiences in the Civil War**  
by Whitman, Walt, 1814-1892.  
Copies Available at T-ES Library: 0 (of 0)  
Copies Available at ALL Libraries: 1 (of 1)  
Current Holds: 0
- 2. Reluctant witnesses : children's voices from the Civil War**  
by Meyer, Emily E.  
Copies Available at T-ES Library: 0 (of 0)  
Copies Available at ALL Libraries: 2 (of 2)  
Current Holds: 0
- 3. For country, cause & leader : the Civil War journal of Charles B. Hayden**  
by Hayden, Charles B., 1834-1884

The interface also includes a sidebar with 'My Account' and 'My Lists' sections, and a 'Format' dropdown menu set to 'Full Bibliographic'.

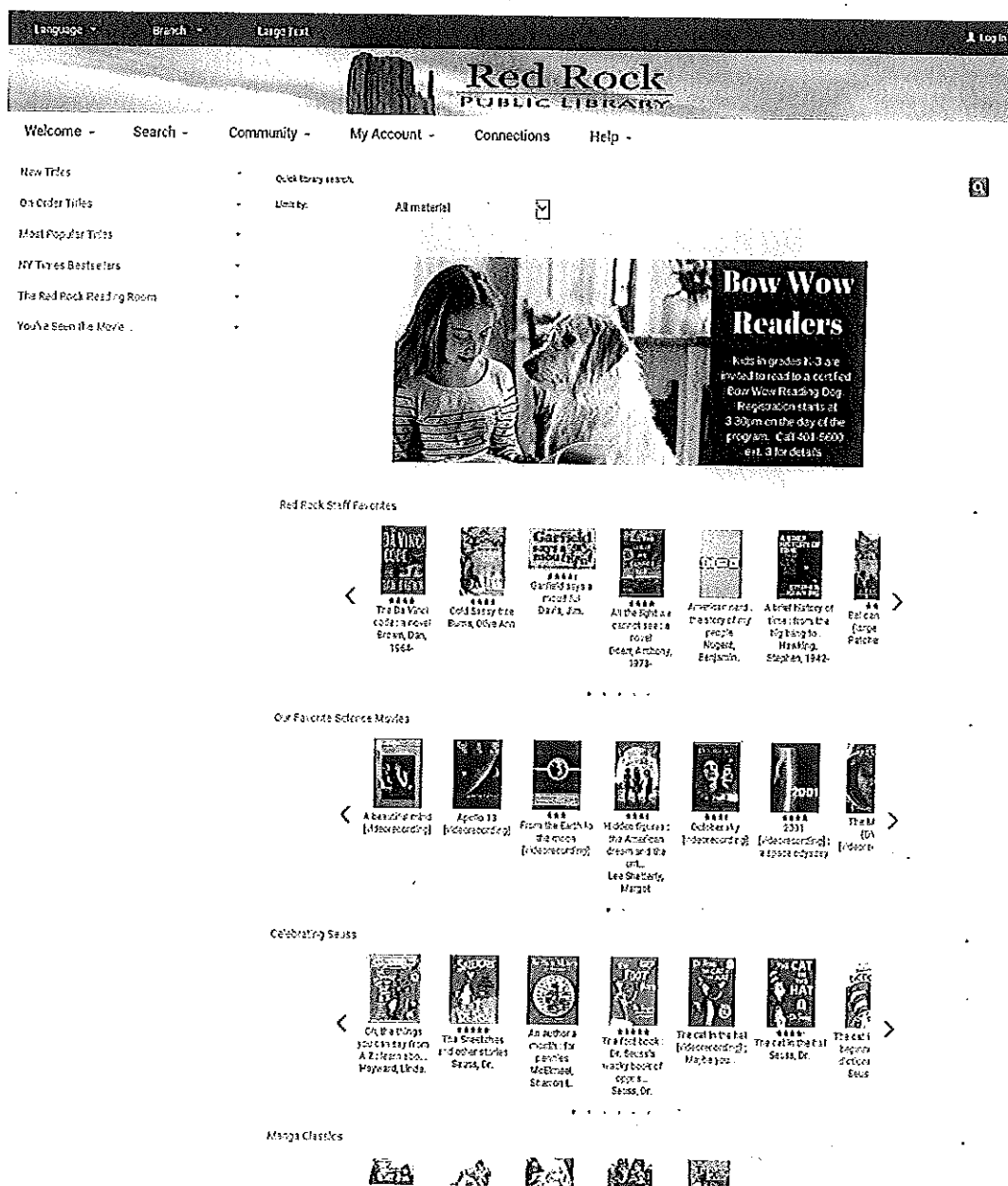


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2. Staff

As noted above, the Polaris ILS and PowerPAC also provides the ability for staff to create and share lists.

Using Content Carousels, the staff can create and display lists of new library materials in graphic form. This allows any patron the ability to click any title in the carousel to launch a search in the catalog.





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|  |          |
|--|----------|
| Search includes browsing, keyword & advanced searching | Required |
|--|----------|


iii innovative

Yes, the Polaris ILS and PowerPAC offers search functionality that includes browsing, keyword and advanced searching.

|  |          |
|--|----------|
| Display enhanced content: cover art, reviews, read-a-likes, etc. | Required |
|--|----------|

iii innovative

Yes, the Polaris ILS and PowerPAC can display enhanced and enriched cover art content, reviews, and read-a-likes. Polaris can display content from Syndetic Solutions, ChiliFresh and Content Café -- all of which provide cover art.

Keyword search: arctic drift 

Search by: Any Field  Using: My Library Database

Limit by: All material  Select Databases







**Arctic drift: a Dirk Pitt novel**  
by Cussler, Clive


... *Arctic drift: a Dirk Pitt novel* / Clive Cussler and Dirk Cussler...

Summary:  
When a series of unexplained deaths and international hostilities occur in the wake of a breakthrough discovery to reverse global warming, NUMA director Dirk Pitt and his children investigate a mysterious silvery mineral with links to a fabled Northwest Passage expedition.

Publisher, Date:  
New York : G.P. Putnam's Sons


Description:  
... international hostilities occur in the wake of a breakthrough discovery to reverse global warming. NUMA director Dirk Pitt and his children investigate a mysterious silvery mineral with links to a fabled Northwest Passage expedition. ... and Dirk Cussler. ...

SHARE      

 **CLIVE CUSSLER**

2002

User rating: **★★★★☆**  
2 reviews



WHERE IS IT?

TELL ME MORE!

PLACE REQUEST

[Add to My List](#)



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Polaris also supports elegant integration with NovelList, NovelList Select, ChiliFresh, LibraryThing for Libraries, Syndetic Solutions, Content Care, and other third party enhanced content.

Suggestions and more

#### Reader Ratings and Reviews

Goodreads is the largest social network for readers. Members provide ratings and reviews of books to express their personal opinions and to help others determine if they would like a book. Goodreads respects the right of individuals to express themselves, but does not tolerate abusive behavior.

Reader Rating: **4.44** (46871 reviews)

[Read reviews on Goodreads](#)

#### You Might Also Like These...

##### ▼ Titles



Great expectations  
by Dickens, Charles  
[Why this match?](#)



Breakfast at  
Tiffany's  
by Capote, Truman  
[Why this match?](#)



##### ▼ Authors

Ellis, Bret Easton  
[Why this match?](#)

Pessl, Marisha  
[Why this match?](#)

Brookner, Anita  
[Why this match?](#)

Baylan, Jennifer Finney, 1955-  
[Why this match?](#)



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|   |          |
|---|----------|
| Limit searches by Lexile and Accelerated Reader | Required |
|---|----------|

iii innovative

Polaris ILS can limit searches by Lexile but not by Accelerated Reader.

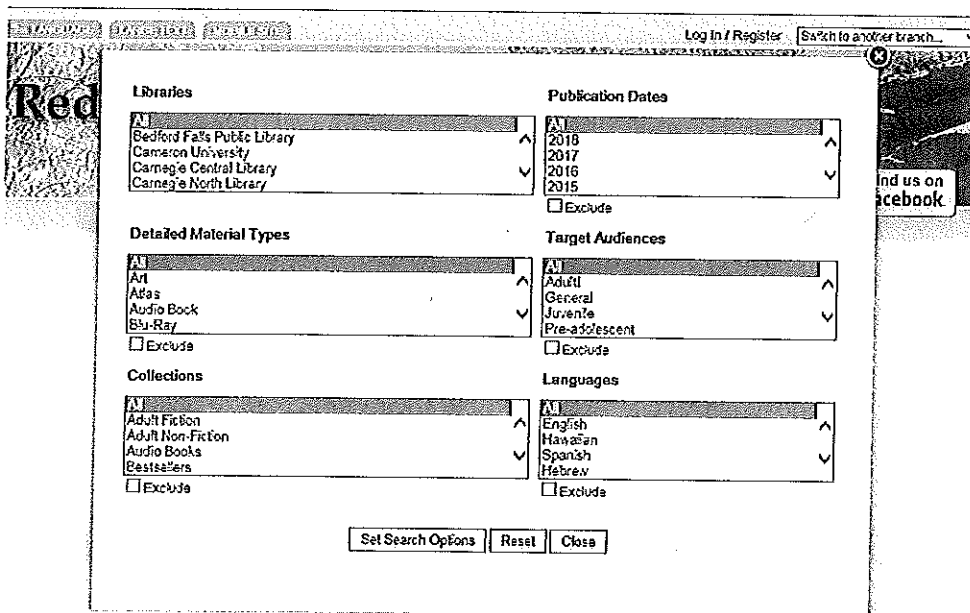
PowerPAC patrons can filter their search results by Lexile reading level range.

The screenshot shows the Red Rock Public Library website search interface. The search term is "dyslexia children". The results are filtered to show 1 of 6 items, with 10 items per page. The first result is "Fish in a tree" by Hux, Lynda Murray, with a Lexile reading level of 550. The second result is "Turnabout children: overcoming dyslexia and other learning". The left sidebar shows filters for Lexile Reading Level, with "500-599 (1)" selected. Other filters include Format, Availability, Library Location, Publication Date, and Audience.



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Patrons can also set search options prior to running the search.



|   |          |
|---|----------|
| Display Lexile and Accelerated Reader data on bibliographic records | Required |
|---|----------|

iii innovative

Yes, Polaris ILS can display both Lexile and Accelerated Reader data on bibliographic records.

If the Lexile or Accelerated Reader data is already in the Bib record, then it would convey during the data migration. If the data is not in the Bib record, then the services of a third-party vendor such as Backstage can be used to add that data. Polaris PowerPAC users can then filter their search results by Lexile reading level range. The Lexile number for a title is derived from the 521 tag in the MARC record, subfield \$a. When multiple tags exist in the bibliographic record, all tags meeting the criteria are considered. The system normalizes the data from the MARC tag and groups the facets into Lexile ranges; for example, 521 \$a 1150 is included in the displayed range facet 1100-1195.

|   |          |
|---|----------|
| Integration with OverDrive including real-time updates of inventory | Required |
|---|----------|

iii innovative

Yes, Polaris allows for integration with Overdrive including real-time updates of inventory.

The Polaris ILS can integrate EContent from the following eContent vendor applications: Bibliotheca's cloudLibrary (formerly 3M Cloud Library), Baker & Taylor's Axis 360, OverDrive, and Recorded Books' RBdigital. When integrated eContent features are configured in Polaris and the library has purchased the eContent titles, patrons can search for, place holds on, and check out the vendor's eContent directly



from the PAC. In addition, all associated circulation processing and tracking for integrated eContent occurs in Polaris.

Once the library has a subscription with OverDrive and the required Polaris license, the library creates an item template, an integrated vendor account, and an import profile in Polaris. The Vendor Account is in Polaris Administration, not in Acquisitions, and it is used during automatic importing to create resource entities for the bibliographic records.

As a result of this integration, patrons can search for, place holds on, and check out OverDrive eContent directly from the PAC. All associated circulation processing and tracking for these integrated eContent occurs in Polaris.

OverDrive eContent may be in one of the following formats:

- EPUB ebook
- PDF ebook
- WMA Audiobook
- MP3 Audiobook

Availability and holds counts for OverDrive eContent are driven by the status of the items in the OverDrive repository, not the status of the items in the Polaris database. When patrons check out, check in, or place holds on OverDrive eContent from the PAC, the synchronization between Polaris and the OverDrive repository takes place in real time.

When a library purchases a new OverDrive title, it is identified by the library's collection and contract. The Polaris API consumer service queries the OverDrive database daily to find and fetch the metadata for titles identified as those the library has purchased. After fetching the OverDrive metadata, the API consumer service identifies duplicates by matching on the object identifier or title ID.

If the title is new to the catalog, the OverDrive XML metadata is converted to MARC XML, and the file is automatically added to the Polaris import queue to be imported. OverDrive imports are done once daily, around midnight. The Integrated ebook Bibs read-only PolarisExec import profile, which is selected by default in the OverDrive Vendor Account workform, provides the processing specifics for this automatic process.

When a library purchases added copies for eContent titles already in the database, or when copies expire because of publisher restrictions, Polaris is updated automatically with the vendor's information. For OverDrive, the synchronization process runs once daily, around midnight.



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2. *The Goldfinch* [electronic resource]  
by Tartt, Donna

WINNER OF THE PULITZER PRIZE \* *The Goldfinch* is a rarity that comes along perhaps half a dozen times per decade, a smartly written literary novel that connects with the heart as well as the mind... Donna Tartt has delivered an extraordinary work of fiction. — Stephen King, *The New York Times* Book Review  
Theo Decker, a 13-year-old New Yorker, miraculously survives an accident that kills his mother. Abandoned by his father, Theo is taken in by the family of a wealthy friend. Bewildered by his strange new home on Park Avenue, disturbed by schoolmates who don't know how to talk to him, and tormented above all by his longing for his mother, he clings to the one thing that reminds him of her: a small, mysteriously captivating painting that ultimately draws Theo into the underworld of art. As an adult, Theo moves sickly between the drawing rooms of the rich and the dusty labyrinth of an antiques store where he works. He is alienated and in love—and at the center of a narrowing, ever more dangerous circle. *The Goldfinch* is a mesmerizing, stay-up-all-night and tell-all-your-friends triumph, an old-fashioned story of loss and obsession, survival and self-invention, and the ruthless machinations of fate.

... store where he works. He is alienated and in love—and at the center of a narrowing, ever more dangerous circle. *The Goldfinch* is a mesmerizing, stay-up-all-night and tell-all-your-friends ...

Available: 2 (of 2)  
Current Holds: 0

- WHERE IS IT?
- TELL ME MORE!
- CHECK OUT
- Add to My List

|  |          |
|--|----------|
| Integrated, intuitive online fine payment solution or ability to integrate with third party vendor | Required |
|--|----------|

iii innovative

Yes., the Polaris ILS integrates with Comprise or EnvisionWare for an integrated PCI compliant solution.

- My Account
- Fowler, Amy Farrah
- Items overdue
- \$22.15 owed on your account
- My Record
- Connectors
- Items On (11)
- Requests (9)
- Fines & Fees (\$22.15)
- Checked out List (7)
- Reading History (75)
- Saved Searches (8)
- Log Out
- My Lists
- Saved Title Lists
- Flag Research (7)
- Harry Bosch novels (4)
- Shogun iPhone To Read (10)

Fowler, Amy Farrah

more information

Fines & Fees

| <input type="checkbox"/> | Title  | Amount | Balance | Transaction Date | Type   | Reason       |
|--------------------------|--|--------|---------|------------------|--------|--------------|
| <input type="checkbox"/> | A symphony in the brain : the evolution of the new brain wave biofeedback                                  | \$5.00 | \$5.00  | 3/25/2018        | Charge | Overdue Item |
| <input type="checkbox"/> | Weddings for grownups : everything you need to know to plan your wedding your way                          | \$5.00 | \$5.00  | 3/25/2018        | Charge | Overdue Item |
| <input type="checkbox"/> | The elegant wedding and the budget-savvy bride : how to have the wedding of your dreams for half the price | \$5.00 | \$5.00  | 3/25/2018        | Charge | Overdue Item |
| <input type="checkbox"/> | Harry Potter and the chamber of secrets [sound recording]  | \$1.50 | \$1.50  | 3/7/2018         | Charge | Overdue Item |
| <input type="checkbox"/> | The Biology of the brain : from neurons to networks : readings from Scientific American                    | \$0.65 | \$0.65  | 3/7/2018         | Charge | Overdue Item |
| <input type="checkbox"/> | The Biology of the brain : from neurons to networks : readings from Scientific American                    | \$5.00 | \$5.00  | 1/21/2018        | Charge | Overdue Item |

Charges: \$22.15    Deposits: \$0.00    Credits: \$0.00

Estimate Overdue Fines

Pay Fines Now






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|   |          |
|---|----------|
| Clear location & availability on results screen | Required |
|---|----------|

iii innovative

Yes.

Keyword search:  

Search by:

Using:

Limit by:

[Select Databases](#)

[More Search Options](#)

1 - 1 of 1  PER PAGE



2003  
User rating  
★★★★  
2 reviews



1. *Arctic drift*: a Dirk Pitt novel  
by Cussler, Clive.

When a series of unexplained deaths and international hostilities occur in the wake of a breakthrough discovery to reverse global warming, NUMA director Dirk Pitt and his children investigate a mysterious silvery mineral with links to a fabled Northwest Passage expedition.

... *Arctic drift*: a Dirk Pitt novel / Clive Cussler and Dirk Cussler. ...

Copies Available at THIS Library: 0 (of 2)  
Copies Available at ALL Libraries: 1 (of 3)  
Current Holds: 0

- WHERE IS IT?
- TELL ME MORE!
- PLACE REQUEST
- [Add to My List](#)

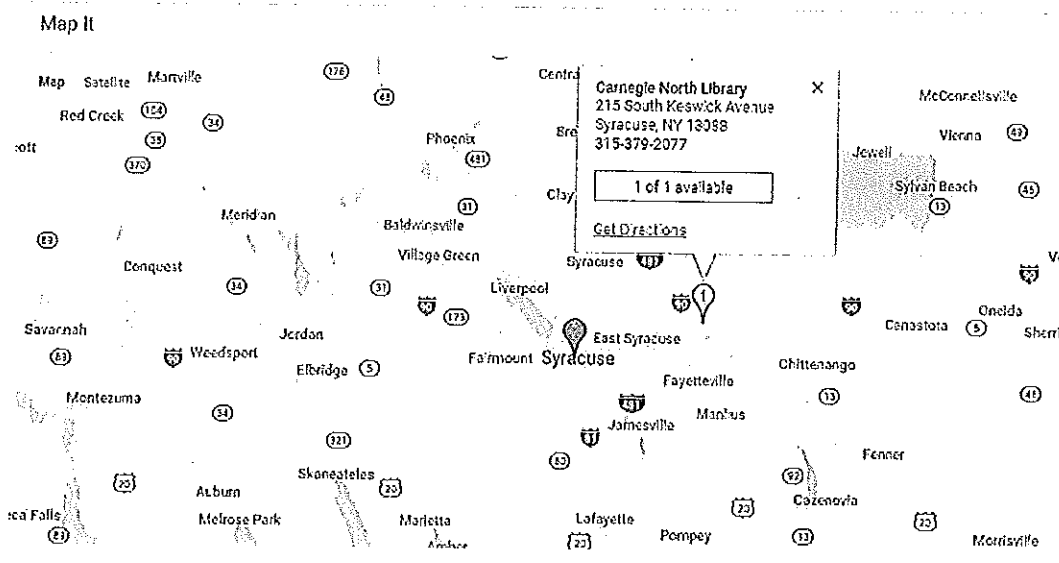


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1. Arctic drift : a Dirk Pitt novel, Cussler, Clive. (2008)

| Call Number   | Status   | Type |
|---|----------|------|
| ▼ Pottersville Public Library<br>(0 of 2 available) |          |      |
| ▼ Adult Fiction                                     |          |      |
| <input type="checkbox"/> On-Order                   | On-Order | Book |
| <input type="checkbox"/> On-Order                   | On-Order | Book |
| ▼ Carnegie North Library<br>(1 of 1 available)      |          |      |
| ▼ Adult Fiction                                     |          |      |
| <input type="checkbox"/> Fic Cussler                | In       | Book |

[Close](#)





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|   |          |
|---|----------|
| Customization of heading and other wording throughout the catalog | Required |
|---|----------|

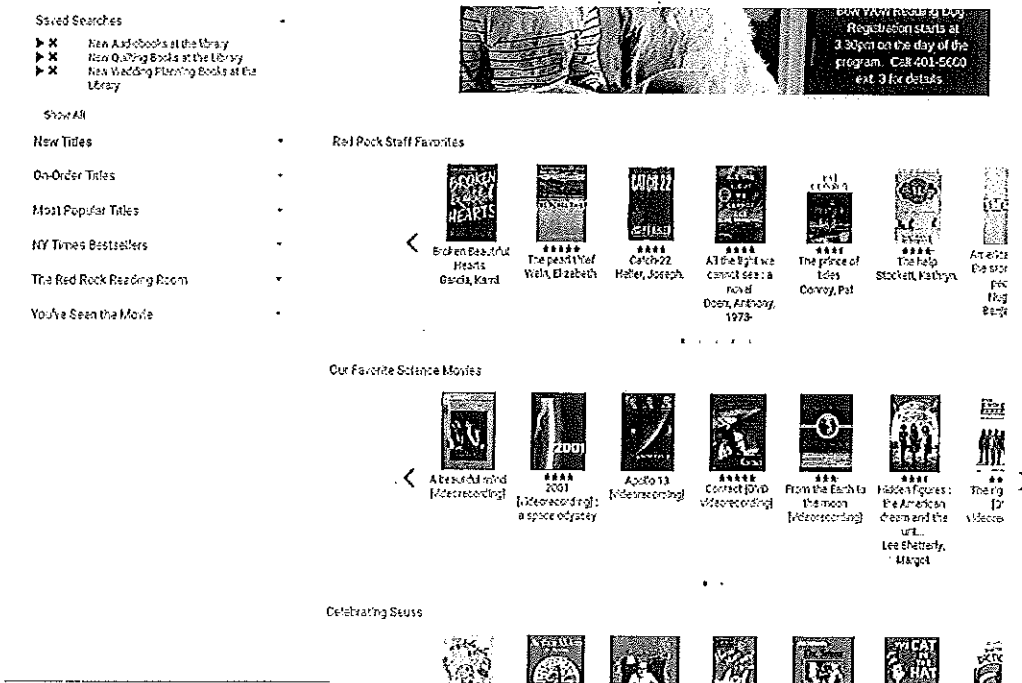
iii innovative

Yes, there is an easy to use web interface that allows you to change any of the wording in the PAC.

|   |          |
|---|----------|
| Ability to design & display customized library material carousels | Required |
|---|----------|

iii innovative

Yes, the PowerPAC supports a content carousel, a rotating graphical representation of a list of materials in the local library catalog, displayed on the PowerPAC portal page. The PowerPAC user can click any title in the carousel to launch a search for the title in the library catalog.





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|   |          |
|---|----------|
| History of checked out items capability in "My Account" including digital usage | Required |
|---|----------|

iii innovative

Yes, current items out and, if a patron opts in, a Reading history are available. This includes digital usage.

The screenshot shows the 'My Account' page for user LOCKE, JOHN. The 'Items Out' section contains the following table:

| Item | Format | Due Date  | Title  | Renewals Left | Call Number | Assigned Branch         |
|------|--------|-----------|--|---------------|-------------|-------------------------|
| 0    | EP     | 6/23/2017 | Dr. Holland's nurse                              | 0             | AD FIC CON  | Cemegle Central Library |
| 0    | EP     | 7/22/2017 | The Audubon Society field guide to the night sky | 0             | 523 D456a   | Red Rock Public Library |
| 0    | EP     | 8/2/2017  | Cat & mouse                                      | 0             | PD PATT     | Hayes Public Library    |

Buttons: [Expires Overdue Fines](#) [Refresh eCopies](#)

Message: No items are eligible for renewal.



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Language ▾ Branch ▾ Large Text
Welcome, John (Log Out)

Welcome ▾ Search ▾ Community ▾ My Account ▾ Connections Help ▾

**My Account**  
LOCKE, JOHN

3 Items overdue

\$35.60 owed on your account

**My Record**

Connections

Items Out (0)

Requests (13)

Fines & Fees (\$25.00)

Disturbed/out

Reading History (7)

Saved Searches

Log Out

**My Lists**

Saved Title Lists

CHI War (0)

Cooking (0)

Gr. Reading (0)

Black Reads by the PL

**LOCKE, JOHN**

**Reading History**

| Format | Title   | Author          | Check Out Date | Lending Library         |
|--------|---|-----------------|----------------|-------------------------|
|        | The Last Symbol [electronic resource]                           | Brown, Dan      | 5/15/2018      | Red Rock Public Library |
|        | EPUB 3 Best Practices [electronic resource]                     | Gylling, Markus | 6/14/2018      | Red Rock Public Library |
|        | Orange Is the New Black [electronic resource]                   | Kerman, Piper   | 7/19/2018      | Red Rock Public Library |
|        | Fighting Raymond [electronic resource]                          | Grisham, John   | 6/20/2018      | Red Rock Public Library |
|        | The Redletter [electronic resource]                             | Grisham, John   | 6/13/2018      | Red Rock Public Library |
|        | Fighting Raymond [electronic resource]                          | Grisham, John   | 6/13/2018      | Red Rock Public Library |
|        | The Innocent Man [electronic resource]                          | Grisham, John   | 6/13/2018      | Red Rock Public Library |
|        | Sycamore Row [electronic resource]                              | Grisham, John   | 6/13/2018      | Red Rock Public Library |
|        | The Invisibles: A novel   | Oringer, Julie  | 6/12/2018      | Red Rock Public Library |
|        | Curious George at the Parade (Read-aloud) [electronic resource] | Rey, H. A.      | 5/18/2018      | Red Rock Public Library |
|        | The Pound House [electronic resource]                           | Erdich, Louise  | 4/17/2018      | Red Rock Public Library |
|        | Sycamore Row [electronic resource]                              | Grisham, John   | 3/29/2018      | Red Rock Public Library |

|  |          |
|--|----------|
| Ability to readily display new materials | Required |
|--|----------|

iii innovative

Yes.

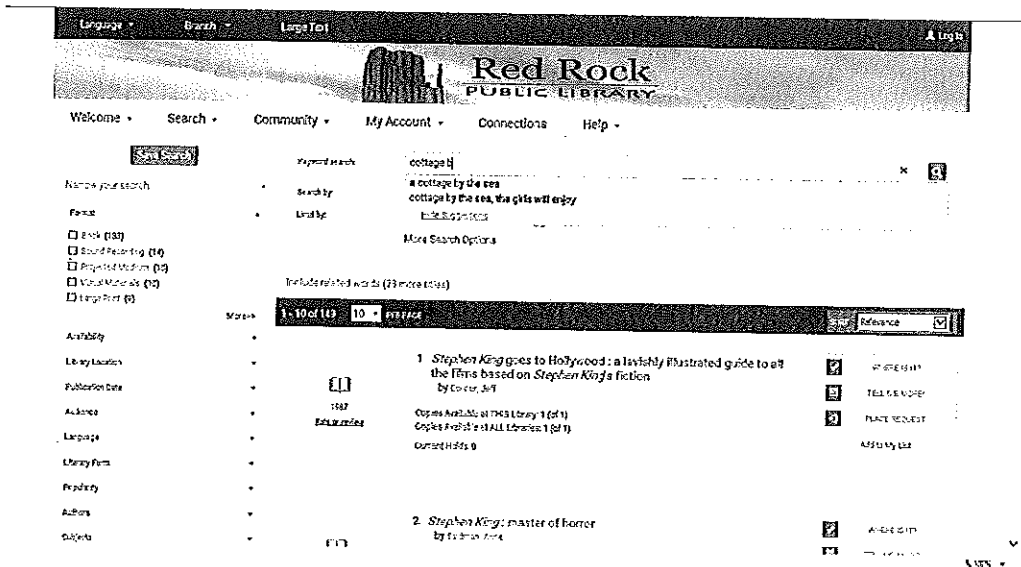


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|  |          |
|--|----------|
| Smart searching, including "Did you mean?" | Required |
|--|----------|

iii innovative

Yes, the Polaris PowerPAC offers auto-suggest functionality. As a user begins to enter in a search, Polaris will provide suggestions as to what is in the database (ala Google). It is context-sensitive to author, title, subject and keyword searches.



The Polaris PowerPAC also offers a "Did you mean?" feature to help with misspellings. With every search term it checks spelling and local headings; if it finds other possibilities it will ask whether you meant another search term. "Did you mean" can be enabled to be active regardless of whether there are hits for the entered search term, but it can also be set to offer suggestions only when there are no hits returned.

Keyword search:

Search by:

Limit by:

[More Search Options](#)

Using:

Set:

Did you mean houses or horses or courses?

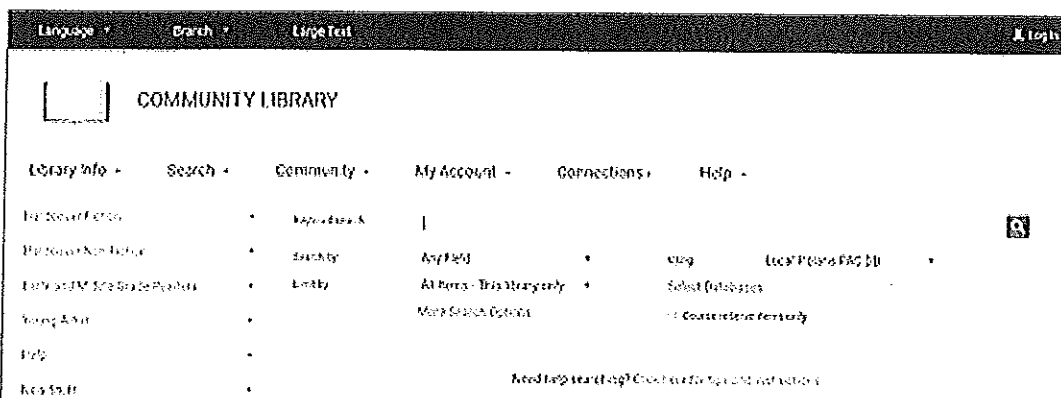


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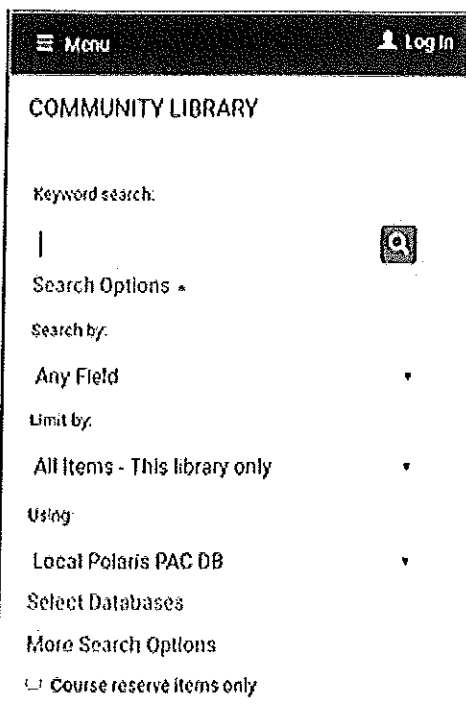
|                                  |          |
|----------------------------------|----------|
| Responsive mobile website design | Required |
|----------------------------------|----------|

iii innovative

Yes, Polaris PowerPAC uses responsive web design so your patrons can enjoy ALL PowerPAC features on desktop computer screens, tablets, or phones.



PowerPAC on desktop computer screen



PowerPAC on Phone



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|  |          |
|--|----------|
| Ability to search and filter by level of material, relevance, availability, format, location | Required |
|--|----------|

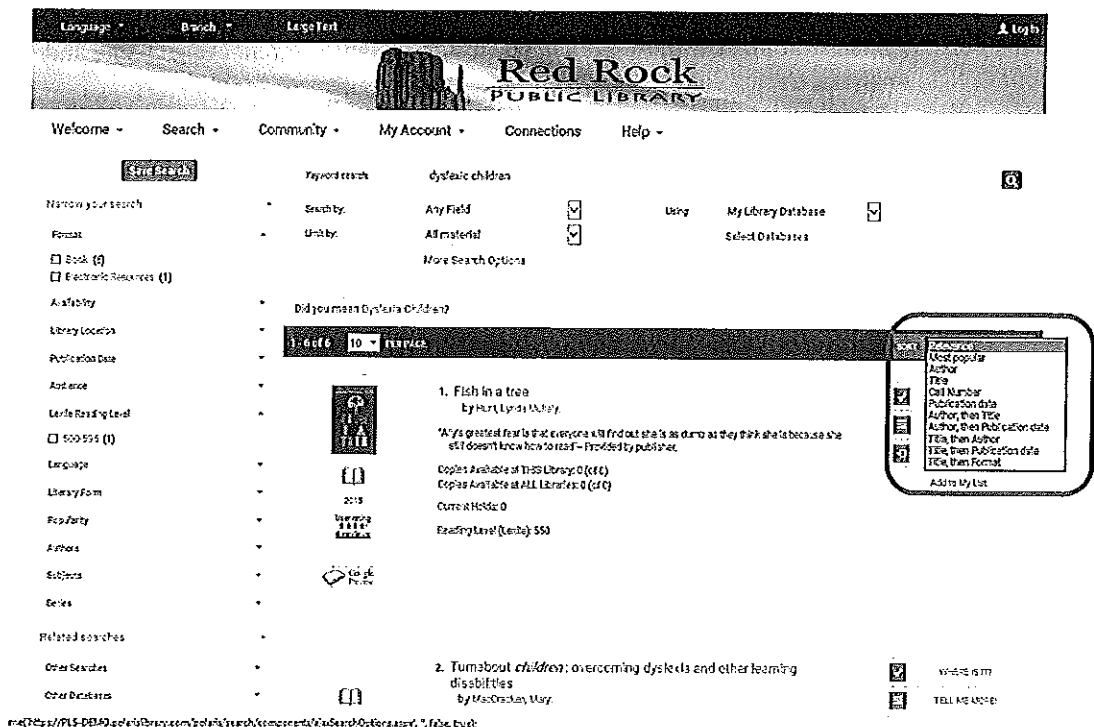
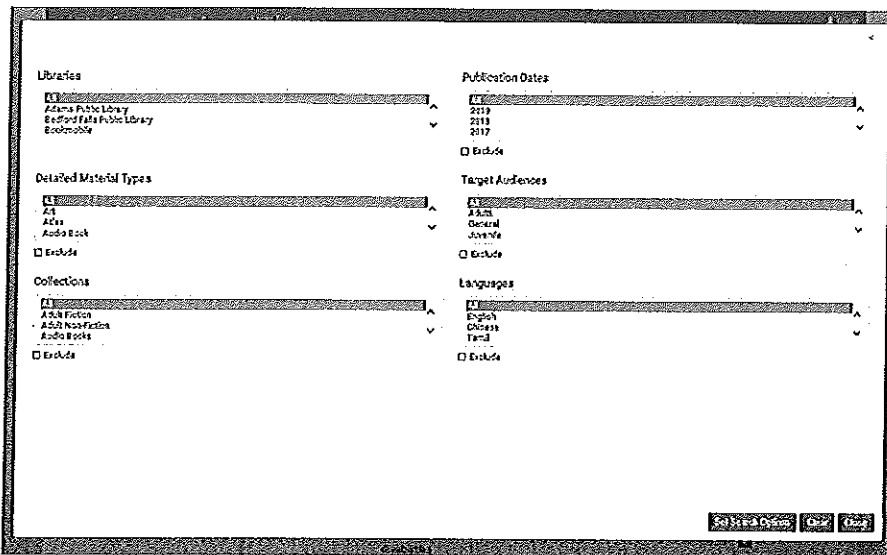
iii innovative

Yes.





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|                                  |          |
|----------------------------------|----------|
| Website accessibility compliance | Required |
|----------------------------------|----------|

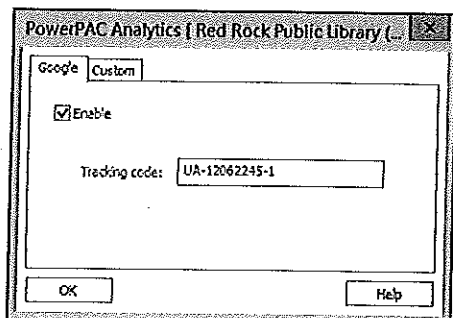
iii innovative

Yes, as a company, Innovative Interfaces is mindful of local, national and international accessibility standards. The design and execution of Innovative's public-facing products are guided by the standards and recommendations of the World Wide Web Consortium's standards on Web Content Accessibility (WCAG) and Section 508 of the United States Federal Rehabilitation Act, among others. Innovative is fully committed to ensuring that its products are accessible to all users. Please see the *Accessibility Conformance Report – Polaris PowerPAC* separately attached.

|  |          |
|--|----------|
| Integrates with Google Analytics or equivalent | Required |
|--|----------|

iii innovative

Yes, analyzing PowerPAC usage is available with Google Analytics. Google Analytics is a free tool from Google that allows Web site administrators to record and analyze traffic on their sites. Polaris PowerPAC includes the JavaScript code for Google Analytics in the page footer. The library can enable Google Analytics in the Polaris Administration PowerPAC Profile 'PowerPAC Analytics' by checking Enable and providing your Google Analytics tracing code.





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|   |          |
|---|----------|
| Ability of patron to manage notifications methods | Required |
|---|----------|

iii innovative

Yes.

Preferences:

My preference for receiving library notices

Email Address

Language preference

English

Phone number for TXT messages

Phone 1

Carrier

AT&T

E-receipts:

Email & TXT

Maintain reading history

Send e-mail notices in:

Basic, plain text

Full, HTML format

Send e-mail reminder notices:

Almost overdue/auto-renew reminder notices

Patron record expiration reminder notices

Inactive patron reminder notices

|                                 |          |
|---------------------------------|----------|
| Submit suggestions for purchase | Optional |
|---------------------------------|----------|

iii innovative

Yes.

|  |          |
|--|----------|
| Discovery layer handles spell checking, dynamic predictive search results, and keyword or related search suggestions | Required |
|--|----------|

iii innovative

Yes, PowerPAC features a number of search aids such as: Predictive searching and spell checking "Did You Mean." We recently added "fuzzy" searching to PowerPAC. Search results offer patrons the ability to broaden their search to "Related Words" which adds searching word variants (e.g., plurals and singulars), nicknames, numerals vs spelled-out numbers, etc.



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|   |          |
|---|----------|
| Ability for patron to update approved contact information fields for their account and, optionally, for linked family member accounts | Optional |
|---|----------|

iii innovative

Partially supported.

Patrons can update all information for their account, but the ability to updated the associated patron account information is not currently supported, but will be in the future.

Contact Information and Preferences

Please verify your contact information.

Address Information

Address Type  Home

Street one  
321 First Street

Street two  
Apt. 3D

City  
PASADENA

State/Province  
CA

Postal code  
91121

Zip plus four

County  
LOS ANGELES

Country  
USA

Contact Information

Email address  
amyfarrahfowler@gmail.com

Alt. E-mail Address

Phone 1  
213-555-1243

Phone 2

Phone 3

Additional Information

Drivers License: \_\_\_\_\_

Newsletter: Yes

Book Club:  
Jole de Livres

**Submit Change Request**



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|  |          |
|--|----------|
| Ability to email patrons when new materials are added based on a profile set by the patron under their account | Optional |
|--|----------|

iii innovative

Yes.

Fowler, Amy Farrah

Search name: New Wedding Planning Books at the Library

Note:

Search command: FIND KW={(freetext)wed\* plan\*/(freetext)}

Search options were applied.

Email results to: anyfarrahfowler@gmail.com

Email format: HTML

Email if no results

Search frequency: Weekly

Number of times to run: 25

Need help? [Click here for tips and instructions](#)

#### RSS Feeds (What is RSS?)

Subscribe to our RSS (Really Simple Syndication) feeds to get new title information delivered directly to your desktop!

Copy URL to RSS Reader

#### New Books

<http://PLS-DEMO.polarislibrary.com/polaris/rss/NewTitles.aspx?type=1&branchid=14>

#### New Movies

<http://PLS-DEMO.polarislibrary.com/polaris/rss/NewTitles.aspx?type=2&branchid=14>

#### New Sound Recordings

<http://PLS-DEMO.polarislibrary.com/polaris/rss/NewTitles.aspx?type=3&branchid=14>

#### New Large Print

<http://PLS-DEMO.polarislibrary.com/polaris/rss/NewTitles.aspx?type=4&branchid=14>



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|  |          |
|--|----------|
| Catalog provides personal recommendations based on previous activity | Optional |
|--|----------|

iii innovative

Yes, this is supported with Polaris Social with ChiliFresh ChiliPAC.

Innovative's Inspire Discovery will also support this. Please see *Inspire Discovery* on page 30 for details.

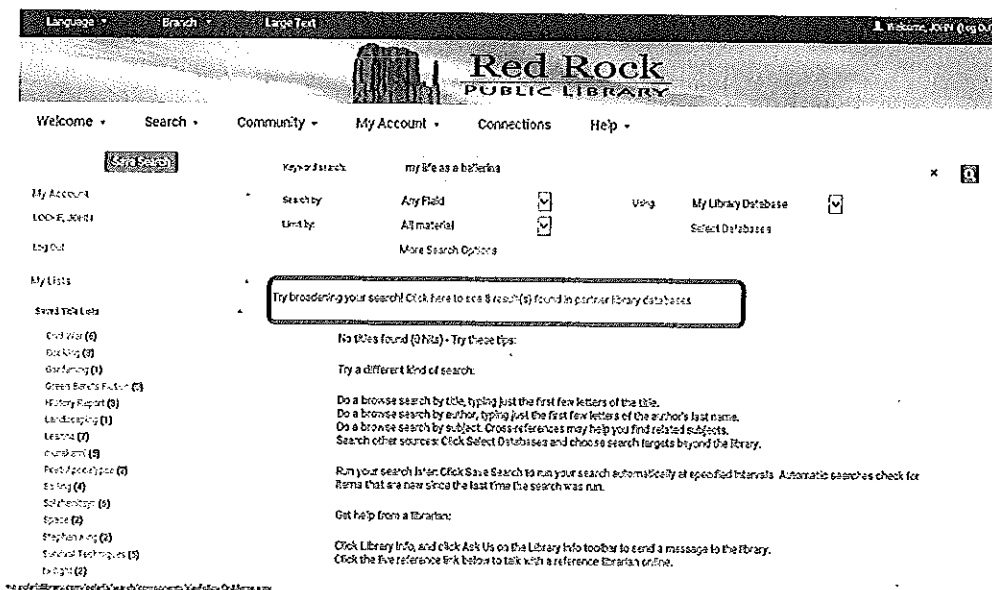
|   |          |
|---|----------|
| If no search results found, offer other suggestions based on search term and/or reading history | Optional |
|---|----------|

iii innovative

Supported.

Yes, the Polaris PowerPAC offers a "Did you mean?" feature. With every search term it checks spelling and local headings; if it finds other possibilities it will ask whether you meant another search term. "Did you mean" can be enabled to be active regardless of whether there are hits for the entered search term, but it can also be set to offer suggestions only when there are no hits returned.

The library can also enable follow-on searching and set specific databases for the follow-on search. These are suggested automatically if a search of the local database yields no results.





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|  |          |
|--|----------|
| Personalized display for language (i.e. Japanese, Korean, Chinese) | Optional |
|--|----------|

iii innovative

Yes.

|   |          |
|---|----------|
| Show custom messages for each patron within their account | Optional |
|---|----------|

iii innovative

Yes.

Staff can post a library-assigned or free text message for communication with patrons.

Staff can also add free text blocking or non-blocking notes to the patron record for staff view only.

Message

Notes



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|  |          |
|--|----------|
| Integration of location mapping to indicate the location of an item within the Library | Optional |
|--|----------|

iii innovative

Yes, integration with StackMap for shelving location is supported. This allows the library to create a map of the internal library floor plan. Innovative can integrate this service, but we are not a reseller for the software.

|   |          |
|---|----------|
| Ability for linked family accounts to renew items | Optional |
|---|----------|

iii innovative

This is not currently supported. From the Polaris PowerPAC, linked patrons can see that they are linked, but further functionality must be done by staff.





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## Inspire Discovery

**\*\*ROADMAP INFORMATION – PLEASE TREAT AS PROPRIETARY AND CONFIDENTIAL\*\***

In addition to continuing to make advances with Polaris, Innovative realizes that people's daily digital experiences have created high expectations for their interactions online and offline – including their experiences with the library. To be successful, your library must provide the same ease and delight that people have with tools and technology that they use every day. In addition, you want to create positive impacts for the community you serve.

Our mission at Innovative is to help libraries thrive in a world of fierce competition for people's time and attention, and Innovative libraries are in a great position to keep pace with new technology. Polaris is an industry-leading and robust tool; when combined with libraries who have decades worth of curated records and rich resources a great foundation is laid. The challenge is that MARC data is not easily compatible with today's web technology, so it will take a change to unlock the potential of that data and create experiences that are fun, fast, and modern. With tools Innovative is developing, our libraries can use their data to create even more meaningful experiences for staff and patrons.

After extensive research and development, Innovative has launched the Inspire platform. **Inspire is a state-of-the-art solution that delivers library experiences designed to meet people's expectations of modern media and software.**

Delivering this next-level value for patrons requires something that is not available in a MARC-based system today: context, which is the basis for the Inspire platform and modules. Context is the relationship between resources, people, and concepts – it's something libraries and librarians are experts at providing, but traditional ILS solutions are not good at surfacing. **Inspire leverages the investment in MARC-based descriptions but utilizes native linked data to maximize its value. Inspire operates directly on the BIBFRAME data model to reveal multi-dimensional relationships and uncover new, unexpected connections and ideas, and deliver more meaningful experiences to patrons.** With Inspire, your library can relate physical collections, commercial (licensed) content, programs/events, digital objects, and more into one intuitive, visual interface that feeds exploration creates moments of serendipitous discovery. By shifting from relevance to context, the library helps to inspire curiosity and guide the user more effectively on his or her knowledge journey.

With Inspire our goals are for your library to:

- **Increase and Optimize Library Use.** Keep patrons using the library more – physically and virtually – because you're viewed as an easy to use and indispensable resource. Help staff be a responsible steward of the collection and library resources to maximize budgets in support of your community's needs.
- **Invest Wisely in Library Technology.** Invest in technology that adapts to your library's growing and changing needs without having to implement new systems frequently or use outdated technology for extended periods due to technical or financial upgrade constraints.
- **Demonstrate Value.** From free resources to life-changing access to knowledge, libraries are cornerstones of communities. Exposing the depth and breadth of your library's resources demonstrates the obvious value you provide.



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With Inspire, some key outcomes you can expect for your library include:

- **Frictionless, intuitive experiences for staff and patrons.** The interfaces are intuitive, responsive, and accessible to almost any skill level. We are not giving up ease of use to provide added context for users. These well-designed user experiences are important because they allow people to focus on their goal of finding information instead of struggling to figure out a tool. Because at the end of the day, all the library's work, from cataloging to discovery, serves one objective: giving patrons what they need, when they need it.
  - All interfaces are web responsive and built with accessibility at the core.
  - The Innovative staff is a mix of technologists and librarians – our rich history combined with cutting edge technology experience and best practices from outside the library make this type of product design possible.
- **Future-proof technology.** Inspire is designed for scalability and extensibility to meet your evolving needs. Built from the ground up using best practices in modern software development, Inspire operates on the same type of “microservices” architecture that powers other modern services that people use today. This enables quick application deployment to library staff and patrons and is designed for easy configuration and maintenance.
  - Inspire is a native linked data platform. This is a significant differentiator because when people go to the library, they want information, not documents, and Inspire is better at delivering information – regardless of format – to better serve staff and patron needs. Without building a solution from the ground up like Innovative is doing with Inspire, it would not be possible to have a successful native linked data structure.
  - Inspire is the only tool being built now from scratch for library needs, so only Innovative libraries will be able to offer these reimagined experiences.
- **Actionable data.** Inspire will deliver insights at the point of need, with the ability to take immediate, in-context action.

Inspire complements and extends our existing products because Innovative has adopted an evolutionary approach to product development that enables our libraries to leverage their existing investments in technology and metadata. *Note that the latest release of Polaris is foundational to these new offerings, as the new multi-tenant cloud platform integrates with Polaris, both to exchange MARC data between the ILS and the Context Engine and to facilitate patron empowerment features using parameters maintained in the ILS.*

Inspire modules are coming out soon that work with Polaris – the first is Inspire Discovery for public libraries.

Inspire Discovery is the most advanced discovery tool in the market. Inspire Discovery is a revolutionary solution that gives users the most comprehensive and contextual search results ever available. At the root of the technology, Inspire Discovery takes valuable library data and transforms it to deliver contextually relevant information, displaying results in an intuitive, visual interface. Currently in its first



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release, Discovery works with our Sierra product for the Academic Market. In mid-2019, Inspire Discovery for Public Libraries will be released, and it will work with Polaris.

Inspire Discovery extends the search experience from a traditional relevance-based search-and-find model to a more visual, context-based approach, revealing unseen connections between all resources and assets stewarded by the library. By shifting from relevance to context, your library helps to inspire curiosity and guide patrons more effectively.

Innovative's Context Engine, a native linked data platform for libraries, powers Innovative Discovery and enables this context-based experience. Based on BIBFRAME 2.0, the Context Engine ingests metadata from libraries, publishers, content providers, registries, and more, providing access to all types of library knowledge resources and assets – not only bibliographic and article content, but digital resources, library programs and events, artifacts and realia, archival content, and much, much more. In addition to ingest of MARC data and other traditional library schemas, Innovative is extracting and ingesting concepts from full-text resources and to leveraging context-enriching data from the publication and sales lifecycle for print and electronic resources.

Through the Innovative Discovery interface, a user can execute a search against the Context Engine's metadata:

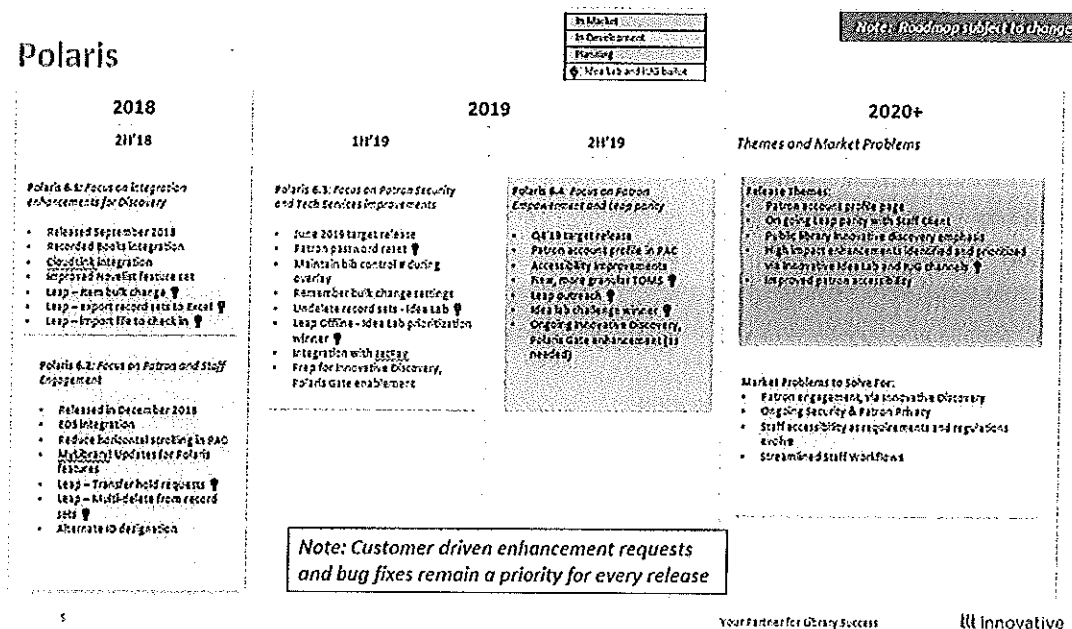
- Using a variety of search indexes and traditional discovery capabilities
- With context-based extensions that allow further exploration of resources, concepts, and agents. These extended capabilities express knowledge relationships in intuitive, visual ways for users, allowing them to explore intellectual connections across content types.
- By browsing library-defined "showcases", collections of curated content designed to quickly connect users to resources of current interest.





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Please see the following Polaris Development roadmap outlining our short term Polaris specific development efforts.



\*\* END OF CONFIDENTIAL ROADMAP INFORMATION \*\*

Innovative strives for transparency and accountability with our library partners, and we would be happy to discuss more detail related to the functional highlights and specific milestones we have planned during the next five years.



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| Circulation  |          |
|--|----------|
| Circulation Functionality  |          |
| Patron can update information & manage own account including renewals, payment, cancel/freeze holds without staff intervention, download reading history | Required |

iii innovative

Yes.

Fowler, Amy Farrah

[more information](#)

Items Out

| <input type="checkbox"/> | Format | Due Date  | Title  | Renewals Left | Call Number     | Assigned Branch             |
|--------------------------|--------|-----------|--|---------------|-----------------|-----------------------------|
| <input type="checkbox"/> |        | 2/23/2018 | The opera lover's guide to Europe  | 1             | 782.1 Pla       | Denton Campus Library       |
| <input type="checkbox"/> |        | 3/28/2018 | Half a brain is enough : the story of Nico   | 0             | 611.81 Batt.A   | Denton Campus Library       |
| <input type="checkbox"/> |        | 4/4/2018  | The Biology of the brain : from neurons to networks : readings from Scientific American                    | 2             | 612.82 B615b    | Pottersville Public Library |
| <input type="checkbox"/> |        | 4/4/2018  | Harry Potter and the chamber of secrets [sound recording]  | 0             | CD Fic Rowling  | Carnegie Central Library    |
| <input type="checkbox"/> |        | 4/15/2018 | Bride's shortcuts and strategies for a beautiful wedding   | 0             | 395.22 Bri 1    | Harris Campus Library       |
| <input type="checkbox"/> |        | 4/15/2018 | The elegant wedding and the budget-savvy bride : how to have the wedding of your dreams for half the price | 0             | 395.22 M131e    | Vineyard Campus Library     |
| <input type="checkbox"/> |        | 4/15/2018 | The story of a bad boy   | 0             | 153.3/5         | Montana Avenue Branch       |
| <input type="checkbox"/> |        | 4/15/2018 | Subject to debate : sense and dissents on women, politics, and culture                                     | 0             | 305.42 POL 2001 | Foster Branch Library       |
| <input type="checkbox"/> |        | 4/15/2018 | A symphony in the brain : the evolution of the new brainware biofeedback                                   | 0             | 616.8046 R634s  | Bookmobile                  |
| <input type="checkbox"/> |        | 4/15/2018 | Weddings for grownups : everything you need to know to plan your wedding your way                          | 1             | 395.22 STO 1    | Tyler Public Library        |
| <input type="checkbox"/> |        | 4/22/2018 | Music of the spheres; the material universe, from atom to quasar, simply explained.                        | 0             | QB500 .M8 1967  | Cameron University          |



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Fowler, Amy Farrah

[i - more information](#)

Fines & Fees

| <input type="checkbox"/> | Title   | Amount | Balance | Transaction Date | Type   | Reason       |
|--------------------------|---|--------|---------|------------------|--------|--------------|
| <input type="checkbox"/> | <a href="#">i</a> A symphony in the brain: the evolution of the new brainwave biofeedback                                   | \$5.00 | \$5.00  | 3/25/2018        | Charge | Overdue Item |
| <input type="checkbox"/> | <a href="#">i</a> Weddings for grownups: everything you need to know to plan your wedding your way                          | \$5.00 | \$5.00  | 3/25/2018        | Charge | Overdue Item |
| <input type="checkbox"/> | <a href="#">i</a> The elegant wedding and the budget-savvy bride: how to have the wedding of your dreams for half the price | \$5.00 | \$5.00  | 3/25/2018        | Charge | Overdue Item |
| <input type="checkbox"/> | <a href="#">i</a> Harry Potter and the chamber of secrets [sound recording]   | \$1.50 | \$1.50  | 3/7/2018         | Charge | Overdue Item |
| <input type="checkbox"/> | <a href="#">i</a> The Biology of the brain: from neurons to networks: readings from Scientific American                     | \$0.65 | \$0.65  | 3/7/2018         | Charge | Overdue Item |
| <input type="checkbox"/> | <a href="#">i</a> The Biology of the brain: from neurons to networks: readings from Scientific American                     | \$5.00 | \$5.00  | 1/21/2018        | Charge | Overdue Item |

Charges: \$22.15

Deposits: \$0.00

Credits: \$0.00

[Estimate Overdue Fines](#)

[Pay Fines Now!](#)

Fowler, Amy Farrah

[i - more information](#)

[i# - additional note](#)

Requests

| <input type="checkbox"/> | Format | Title   | Status                       | Pickup Library          | Hold Position |
|--------------------------|--------|---|------------------------------|-------------------------|---------------|
| <input type="checkbox"/> |        | Images of mind<br>by Posner, Michael L.   | Pending<br>(as of 1/17/2018) | Red Rock Public Library | 1 of 1        |
| <input type="checkbox"/> |        | In search of Schrödinger's cat: quantum physics and reality<br>by Gribbin, John R.  | Pending<br>(as of 2/28/2018) | Red Rock Public Library | 1 of 1        |
| <input type="checkbox"/> |        | In search of the big bang: quantum physics and cosmology<br>by Gribbin, John R.   | Pending<br>(as of 2/28/2018) | Red Rock Public Library | 1 of 1        |
| <input type="checkbox"/> |        | Emily Post's complete book of wedding etiquette<br>by Post, Elizabeth L.  | Pending<br>(as of 3/25/2018) | Red Rock Public Library | 1 of 1        |
| <input type="checkbox"/> |        | Principles of neural science  | Active<br>(since 10/4/2017)  | Red Rock Public Library | 1 of 1        |
| <input type="checkbox"/> |        | Cognitive neuroscience: the biology of the mind<br>by Gazzaniga, Michael S.   | Active<br>(since 1/17/2018)  | Red Rock Public Library | 1 of 1        |
| <input type="checkbox"/> |        | The impact of attachment: developmental neuroaffective psychology<br>by Hart, Susan, psychologist.                              | Active<br>(since 1/17/2018)  | Red Rock Public Library | 1 of 1        |
| <input type="checkbox"/> |        | Relativistic quantum physics: from advanced quantum mechanics to introductory quantum field theory<br>by Ohlsson, Tommy, 1973-  | Active<br>(since 2/28/2018)  | Red Rock Public Library | 1 of 2        |
| <input type="checkbox"/> |        | Star wave: mind, consciousness, and quantum physics<br>by Wolf, Fred Alan.  | Active<br>(since 2/28/2018)  | Red Rock Public Library | 1 of 1        |
| <input type="checkbox"/> |        | Let's elope: the definitive guide to eloping, destination weddings, and other creative wedding options<br>by Shaw, Scott, 1960- | Cancelled<br>(on 3/25/2018)  | Red Rock Public Library |               |

[Change Pickup Location](#)

[Cancel Selected](#)

[Suspend/Reactivate Selected](#)














[Refresh eContent](#)



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Fowler, Amy Farrah

Reading History

| <input type="checkbox"/> | Title   | Author                  | Check Out Date | Loaning Library         | Format  |
|--------------------------|---|-------------------------|----------------|-------------------------|---|
| <input type="checkbox"/> |  Anatomy of a Misfit [electronic resource]                     | Portes, Andrea          | 3/12/2019      | Red Rock Public Library |    |
| <input type="checkbox"/> |  Night Sky [electronic resource]                               | Brockmann, Suzanne      | 3/12/2019      | Red Rock Public Library |    |
| <input type="checkbox"/> |  Night Sky [electronic resource]                               | Brockmann, Suzanne      | 3/7/2019       | Red Rock Public Library |    |
| <input type="checkbox"/> | Bride's book of etiquette   |                         | 1/23/2019      | Red Rock Public Library |    |
| <input type="checkbox"/> |  The Adventures of Sherlock Holmes [electronic resource]      | Doyle, Sir Arthur Conan | 1/16/2019      | Red Rock Public Library |   |
| <input type="checkbox"/> |  Where the crawdads sing                                     | Owens, Delia            | 11/8/2018      | Red Rock Public Library |  |
| <input type="checkbox"/> |  Leverage in Death—An Eve Dallas Novel [electronic resource] | Robb, J. D.             | 11/6/2018      | Red Rock Public Library |  |

|   |          |
|---|----------|
| Patron can self-register for a library account (with notification for staff action) | Required |
|---|----------|

iii innovative

Yes, Polaris offers self-registration for patrons via the PowerPAC, with no re-registration by staff required.

When the registration process is complete, the system provides an acknowledgement message that includes a temporary barcode. The patron can immediately use this barcode to enter Patron Access, place a hold request, or other on-line activity. The library can curtail use of the temporary barcode by





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setting up the self-registration default patron code to a highly restricted code. The patron code can be changed when the real barcode is assigned. Unlike other self-registration packages available, Polaris registers patrons directly into the patron database as temporary cards and does NOT require any rekeying of information the patron has already submitted.

When patrons self-register they select a "registered" library and once the registration is successful, they're granted a temporary patron code and barcode. They must come into the library to receive a permanent library card at which time library staff validate their residence and other patron information.

---

**Personal Information:**

First name:  Middle name:  Lastname:

Gender:  Birth date:  MM DD YYYY

**Address Information**

Street 1:  Street 2:

City/Town: **BAYBERRY** State/Province: **NY**

Postal Code: **13090** Registered at: **Red Rock Public Library**

**Contact Information**

Email address:  Alt. E-mail Address:

Phone 1:  Phone 2:

Phone 3:

**Preferences:**

My preference for receiving library notices:  
 Mailing Address   
 Phone number for TXT messages:  (None)   
 Receipts: (None)

Language preference:  English  *Notices are sent in English or Spanish*

Carrier:  <Select a carrier>

**Additional Information:**

Drivers License:

Book Club:

Voting District:

Newsletter:

Internet Enabled:

**Login information:**

Username:

Password:

Verification:



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|   |          |
|---|----------|
| Patron record includes field for option to receive publicity from library | Required |
|---|----------|

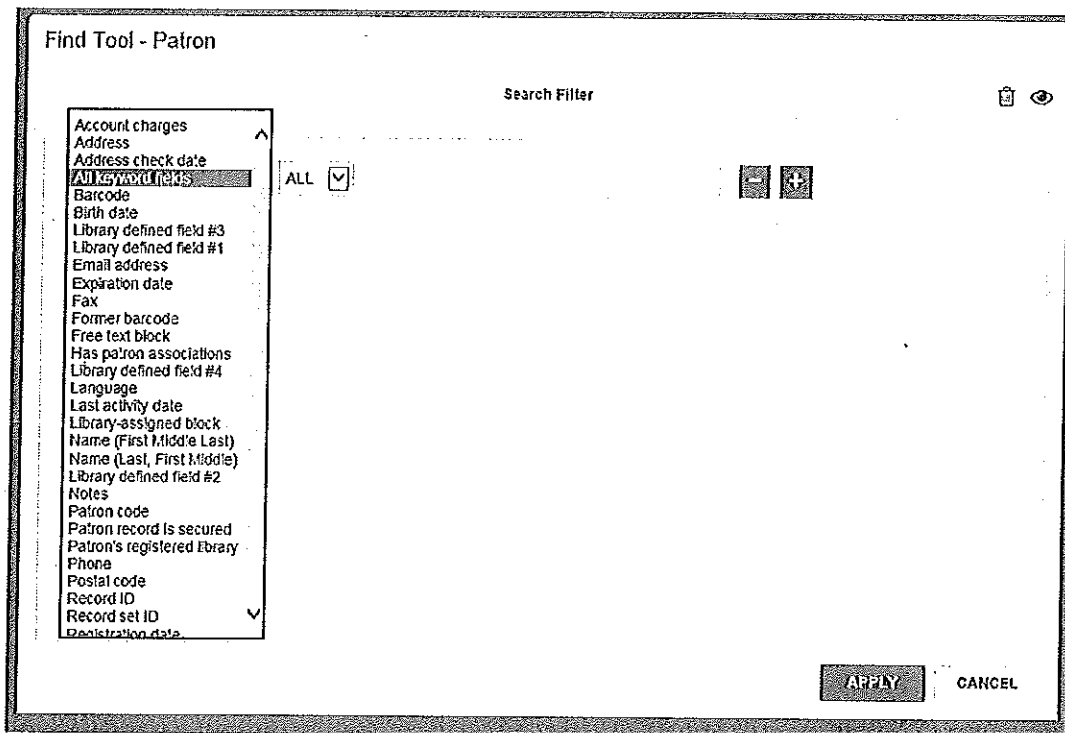
iii innovative

Yes.

|   |          |
|---|----------|
| All fields searchable, including, but not limited to name, telephone, address & email | Required |
|---|----------|

iii innovative

Yes, Polaris has many search access points and filters depending on the type of record being searched.





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|   |          |
|---|----------|
| Ability to copy details from one patron registration to another | Required |
|---|----------|

iii innovative

Yes.

|   |          |
|---|----------|
| Registration process provides alert for duplicate customer record based on defined fields | Optional |
|---|----------|

iii innovative

Yes, duplicate detection ensures that patron barcode numbers are unique and that each patron is registered only once. When you attempt to save the patron record, it is automatically checked for duplicate barcodes. After checking the barcode, the patron's full name (first, middle, and last name and birth date (if present) are checked for duplicates. Your library may specify additional fields for patron duplicate detection.



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|   |          |
|---|----------|
| Ability to link membership of people in same family | Optional |
|---|----------|

iii innovative

Yes, associations between two or more patron records can be created so that when one record is open, all records associated with it are conveniently accessible. For example, you might associate all members of a family, so when checking out items to parents, you can quickly renew items or pay fines for their children.

|  |          |
|--|----------|
| <b>Financial Management</b>                                      |          |
| Ability to pay full and/or partial replacement cost of materials | Required |

iii innovative

Yes, when a patron must be charged to replace a lost, damaged, or long overdue item, Polaris can use the original price of the item or a default cost set by library policy. If the item's original price is unknown (the Price box on the Item Record workform is blank), the default replacement cost is used. (If the item's price was \$0.00, no replacement cost is charged.) You may choose to use the default replacement cost for every item, whether the original price is known or not. In addition, you can specify a processing fee that is added to the replacement cost. You can set separate replacement costs and processing fees for each material type.

You can elect to accept full payment or a specified amount.

|          |   |
|----------|---|
| Balance: | \$25.50   |
| Amount:  | <input type="text" value="\$25.50"/>                                  |
| Method:  | <input type="text" value="Cash"/> <input checked="" type="checkbox"/> |
| Note:    | <input type="text"/>  |



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|                                |          |
|--------------------------------|----------|
| Option for waiving & refunding | Required |
|--------------------------------|----------|

iii innovative

Yes.

CLINTON PUBLIC LIBRARY    BLOCKS    NOTES  


---

 Check Out (0)    Out (2) / Overdue (2)    Account (\$55.50)    Claims (0) / Lost (1)

|                  |                                      |
|------------------|--------------------------------------|
| Balance:         | \$25.50                              |
| Amount to waive: | <input type="text" value="\$25.50"/> |
| Note:            | <input type="text"/>                 |

|                   |                                     |
|-------------------|-------------------------------------|
| Balance:          | \$5.00                              |
| Amount to refund: | <input type="text" value="\$5.00"/> |
| Note:             | <input type="text"/>                |

| <input type="checkbox"/>            | DATE                 | TYPE | REASON       | TITLI           |
|-------------------------------------|----------------------|------|--------------|-----------------|
| <input checked="" type="checkbox"/> | 3/25/2018 6:21:00 PM | Pay  | Overdue Item | Subje<br>cultur |

|  |          |
|--|----------|
| Option for Patron type to determine fines and fees | Required |
|--|----------|

iii innovative

Yes.



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|  |          |
|--|----------|
| Option for Item type to determine fines and fees | Required |
|--|----------|

iii innovative

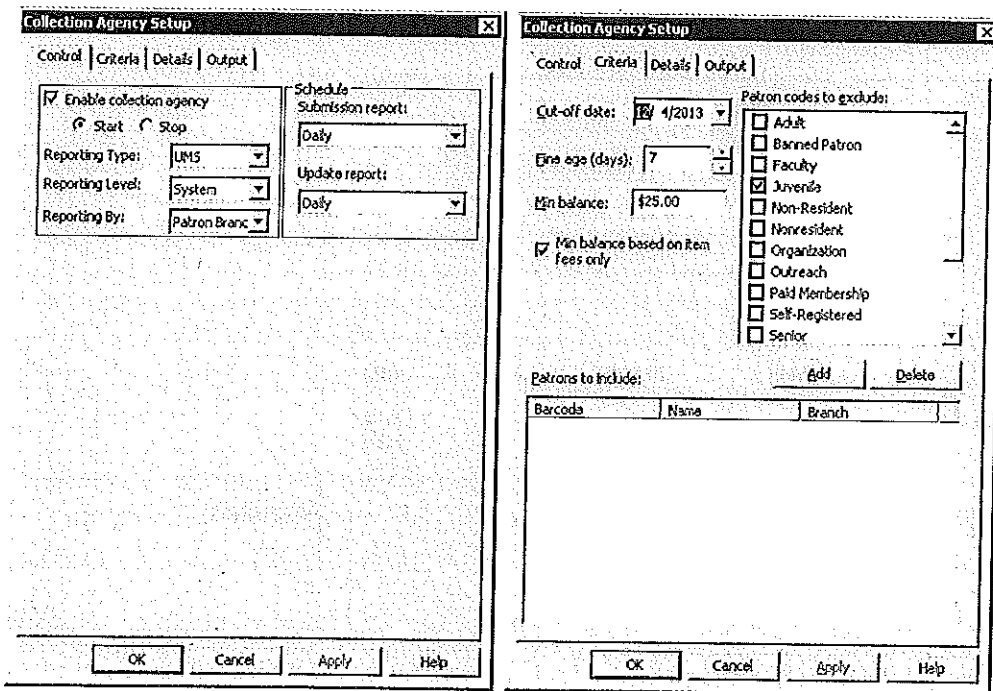
Yes.

|   |          |
|---|----------|
| Collection account integrated with library software | Required |
|---|----------|

iii innovative

Yes, Polaris collection agency functions were designed in conjunction with Unique Management Services and to their specifications.

The Collection Agency Interface allows Polaris libraries to identify and list patrons who are delinquent with material returns or fine payments. The Collection Agency's functions are invoked when a patron owes an amount over a library-defined threshold and for over a library defined period of time. Once Polaris creates a list of these patrons, this list can be sent to Unique Management Services, a materials recovery service. For a per account fee, this library-industry specific firm handles all collection activities to ensure the return of library materials or payment of fines. However, Unique Management Services does not collect material or money; they encourage patrons to settle their accounts with their respective library by mailing notices, making phone calls or notifying credit agencies, if necessary.





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**Collection Agency Setup**

Control | Criteria | Details | Output

Collection agency fees:

|                   |               |              |
|-------------------|---------------|--------------|
| 1. From: \$100.00 | To: \$49.99   | Amt: \$5.00  |
| 2. From: \$50.00  | To: \$99.99   | Amt: \$10.00 |
| 3. From: \$100.00 | To: \$9999.99 | Amt: \$15.00 |

User defined fields to include:

- Drivers License
- Newsletter
- Book Club
- Internet Enabled
- Voting District

OK Cancel Apply Help

**Collection Agency Setup**

Control | Criteria | Details | Output

Email:

Send email

To: nstala.varvoggen@placentalibrary.com

From: jesse.jensen@placentalibrary.com

Send summary email only

FTP:

Enable FTP  Set mods to Active FTP

FTP Server: \_\_\_\_\_

Default Folder: \_\_\_\_\_

Default Port: 21

User Name: \_\_\_\_\_

Password: \_\_\_\_\_

Use External Service

Executable: \_\_\_\_\_ Browse...

Parameters: \_\_\_\_\_

Note: Be sure to specify (FTPFILE) (with brackets) to denote the file substitution in the parameters box. For more information, see help.

Number of days to keep reports: 365

OK Cancel Apply Help

|   |          |
|---|----------|
| Ability to see fine history in the patron account | Required |
|---|----------|

iii innovative

Yes.

MR. JOHN LOCKE 210297252345  
RED ROCK PUBLIC LIBRARY 8 BOOKS 0 NOTES

REGISTRATION ACTIONS REFRESH RESULTS

[Home](#)
[Out \(0\)](#)
[Overdue \(0\)](#)
[Account \(0\)](#)
[Orders \(0\)](#)
[List \(0\)](#)
[Fines \(0\)](#)
[Holds \(0\)](#)
[List \(0\)](#)
[Holds \(0\)](#)
[Reading history](#)
[Associations](#)
[Notes](#)
[Messages](#)
[Books](#)
[Notes](#)
[Patron Info](#)

File Transfer

View Information For

| DATE                | TYPE   | REASON           | TITLE   | BARCODE         | AMOUNT  | NOTE |
|---------------------|--------|------------------|---|-----------------|---------|------|
| 19/02/18 2:01:44 PM | Pay    | Replacement Cost | The Audubon Society Bird guide to the night sky | 32263005020114  | \$2.04  |      |
| 19/02/18 2:02:37 PM | Pay    | Overdue fine     | The Audubon Society Bird guide to the night sky | 32263006280314  | \$2.04  |      |
| 19/02/18 2:02:37 PM | Pay    | Overdue fine     | The Audubon Society Bird guide to the night sky | 32263005030314  | \$2.04  |      |
| 19/02/18 2:02:37 PM | Pay    | Overdue fine     | Along came a spider                             | 32574212142119  | \$12.00 |      |
| 19/02/18 7:08:20 AM | Pay    | Overdue fine     | Call & message                                  | 34574214342290  | \$5.00  |      |
| 19/02/18 7:08:27 AM | Pay    | Overdue fine     | Miscy   | 32262005417260  | \$5.00  |      |
| 19/02/18 7:07:45 AM | Charge | Overdue fine     | Call & message                                  | 34574214342290  | \$5.00  |      |
| 19/02/18 7:07:33 AM | Pay    | Overdue fine     | Dr. Nostrud's name                              | 314320001904643 | \$5.00  |      |
| 19/02/18 7:07:33 AM | Charge | Overdue fine     | Dr. Nostrud's name                              | 322620001904643 | \$5.00  |      |
| 19/02/18 7:07:25 AM | Pay    | Overdue fine     | The Audubon Society Bird guide to the night sky | 32263005030314  | \$2.00  |      |
| 19/02/18 7:07:25 AM | Charge | Overdue fine     | The Audubon Society Bird guide to the night sky | 32263005020114  | \$5.00  |      |



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| Holds & Notifications  |          |
|--|----------|
| Notification for holds, overdues, courtesy notices including telephone, email and text messaging | Required |

iii innovative

Yes, Polaris offers the following types of notices:

- Overdue notices (1-3)
- Bills
- Fine notices
- Request pick-up notices, and cancelled request notices
- Reminders (e-mail only, with optional additional text message) -- these include almost overdue and auto-renewal
- Combined notices that can include overdue, bill, and request notices going to the same patron
- Serial claim notices
- Routing notices
- Patron billing statements that list all the outstanding charges on a patron's account

Notification options are set in Polaris System Administration at the system, library, or branch level. These settings specify the types of notices the library sends, the delivery methods (print, e-mail, text message to mobile phone, telephone, or patron preference), the notice intervals, the notice language, and other options.

The library can customize notices so that they include specific data elements and can use the Polaris Language Editor to customize the notice text. In addition, because notices are generated with Polaris Reports, the library can customize the standard Polaris notice formats and any system-generated information using Report Manager and Visual Studio.net.





The image displays four screenshots of the 'Notification options' dialog box, each showing a different notification method selected in the 'General' tab.

- Top Left Screenshot (Email notice):** Shows options for 'Print', 'Export', 'Email', and 'Phone'. The 'Email notice' section is active, with fields for 'From' (PLSDENVO@plsdlibrary.com), 'Reply-to', 'Email address to user' (Use both Email and AIT), and 'Send report for e-mail notice processing'. There are also fields for 'Export' (Print, FTP Server URL: 10.12.12.12, Logon name: pelon, Password: \*\*\*\*\*), 'Phone' (FTP Server URL: plsdplsdlibrary.com, Logon name: pelon, Password: \*\*\*\*\*), and a 'Save a local copy' checkbox.
- Top Right Screenshot (Overdue):** Shows options for 'First overdue', 'Second overdue', and 'Third overdue'. Each section has a 'Notice interval' (1, 7, and 14 days respectively) and a 'Send additional TXT message' checkbox. The 'Notification method' is set to 'Patron preference' and the 'Notification library' is 'Patron's branch'.
- Bottom Left Screenshot (Request):** Shows options for 'Request' and 'Cancelled request'. The 'Request' section is active, with a 'Notice interval (days)' of 1. The 'Notification method' is 'Patron preference'.
- Bottom Right Screenshot (Fine):** Shows options for 'User defined field for overdue' (none) and 'Minimum balance (\$)' (\$5.00). The 'Fine age (days)' is 1. A note states: 'If fine notices are used in conjunction with collection agency functionality, the Fine age value entered here should be less than the corresponding value specified for collection agency reporting in order to ensure that the patron receives the fine notice before being reported.'



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|   |          |
|---|----------|
| Ability of patron & staff to cancel holds | Required |
|---|----------|

iii innovative

Yes, staff and patrons can cancel selected holds.

**AMY FARRAH FOWLER** 29999000525073  
RED ROCK PUBLIC LIBRARY 0 BLOCKS

REGISTRATION

Check Out (0) In Out (11) Overdue (2) Account (\$52.55) Claims (2) / Lost (0) Holds (11) / Held (0) BILL (2) / Held (0)

Cancel Convert To ILL More

| AUTHOR                              | TITLE  | FORMAT | CALL NUMBER   | ACTIVATION DATE | STATUS  | PICKUP BY          |
|-------------------------------------|--|--------|---------------|-----------------|---------|--------------------|
| <input checked="" type="checkbox"/> | Principles of neural science   | Book   |               | 10/4/2017       | Active  | Red Rock I Library |
| <input checked="" type="checkbox"/> | Gazzaniga, Michael S. Cognitive neuroscience: the biology of the mind          | Book   |               | 1/17/2015       | Active  | Red Rock I Library |
| <input type="checkbox"/>            | Gibbin, John R. In search of Schrödinger's cat: quantum physics and reality    | Book   | 539 I203 G546 | 2/28/2015       | Pending | Red Rock I Library |
| <input type="checkbox"/>            | Gibbin, John R. In search of the big bang: quantum physics and cosmology       | Book   | 533 I2 GR1    | 2/28/2015       | Pending | Red Rock I Library |
| <input type="checkbox"/>            | Hart, Susan. The impact of attachment: developmental neuroaffective psychology | Book   |               | 1/17/2015       | Active  | Red Rock I         |

Hold Cancellation for staff



Placentia Library District  
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Fowler, Amy Farrah

- more information  
 - additional note

Requests

| <input type="checkbox"/>            |  | Format | Title  | Status (?)                   | Pickup Library          | Hold P. |
|-------------------------------------|--|--------|--|------------------------------|-------------------------|---------|
| <input type="checkbox"/>            |  |        | Images of mind<br>by Posner, Michael I.  | Pending<br>(as of 1/17/2018) | Red Rock Public Library | 1 of    |
| <input type="checkbox"/>            |  |        | In search of Schrödinger's cat : quantum physics and reality<br>by Gribbin, John R.  | Pending<br>(as of 2/28/2018) | Red Rock Public Library | 1 of    |
| <input type="checkbox"/>            |  |        | In search of the big bang : quantum physics and cosmology<br>by Gribbin, John R.   | Pending<br>(as of 2/28/2018) | Red Rock Public Library | 1 of    |
| <input type="checkbox"/>            |  |        | Emily Post's complete book of wedding etiquette<br>by Post, Elizabeth L.   | Pending<br>(as of 3/25/2018) | Red Rock Public Library | 1 of    |
| <input checked="" type="checkbox"/> |  |        | Principles of neural science   | Active<br>(since 10/4/2017)  | Red Rock Public Library | 1 of    |
| <input checked="" type="checkbox"/> |  |        | Cognitive neuroscience : the biology of the mind<br>by Gazzaniga, Michael S.   | Active<br>(since 1/17/2018)  | Red Rock Public Library | 1 of    |
| <input type="checkbox"/>            |  |        | The impact of attachment : developmental neuroaffective psychology<br>by Hart, Susan, psychologist.                              | Active<br>(since 1/17/2018)  | Red Rock Public Library | 1 of    |
| <input type="checkbox"/>            |  |        | Relativistic quantum physics : from advanced quantum mechanics to introductory quantum field theory<br>by Ohlsson, Tommy, 1973-  | Active<br>(since 2/28/2018)  | Red Rock Public Library | 1 of    |
| <input type="checkbox"/>            |  |        | Star wave : mind, consciousness, and quantum physics<br>by Wolf, Fred Alan.  | Active<br>(since 2/28/2018)  | Red Rock Public Library | 1 of    |
| <input type="checkbox"/>            |  |        | Let's elope : the definitive guide to eloping, destination weddings, and other creative wedding options<br>by Shaw, Scott, 1960- | Cancelled<br>(on 3/25/2018)  | Red Rock Public Library |         |

- 

Hold Cancellation Through PowerPAC (Patron)

|  |          |
|--|----------|
| Ability of patron & staff to suspend or freeze holds | Required |
|--|----------|

iii innovative

Yes.



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|                               |          |
|-------------------------------|----------|
| Records kept for notices sent | Optional |
|-------------------------------|----------|

iii innovative

Yes.

| AMY FARRAH FOWLER  |   |              |         |         |
|--|---|--------------|---------|---------|
| 23950000000073<br>RED ROCK PUBLIC LIBRARY  CLOCKS  |   | REGISTRATION | ACTIONS | REFRESH |
| <a href="#">Check Out (0)</a> <a href="#">In Out (11) / Overdue (7)</a> <a href="#">By Account (552/0)</a> <a href="#">Orders (0) / List (0)</a> <a href="#">Fines (12) / Hold (0)</a> <a href="#">ILL (2) / Hold (0)</a> <span style="float: right;">GENESIS</span> |   |              |         |         |
| TITLE  | TYPE                                      | DATE         | METHOD  | AMOUNT  |
| The opera lover's guide to Europe  | E3  | 3/27/2019    | Email   | \$20.00 |
| Half a brain is enough: the story of Nico  | Almost overdue! Multiple notices reminder | 3/26/2019    | Email   |         |
| Darknet sky (Microrecording)   | 2nd Hold                                  | 3/21/2019    | Email   |         |
| Alice (podcast)  | Cancel                                    | 3/15/2019    | Email   |         |
| Subject to debate: issues and debates on women, politics and culture   | E3  | 3/6/2019     | Email   | \$40.00 |
| Bride's shortcuts and strategies for a beautiful wedding   | E3  | 3/5/2019     | Email   | \$53.50 |
| The Biology of the brain: from neurons to networks; readings from Scientific American  | 3rd Overdue                               | 3/5/2019     | Email   |         |
| The elegant wedding and the budget savvy bride: how to bring the wedding of your dreams for half the price   | E3  | 3/5/2019     | Email   | \$24.95 |
| Asymphony in the brain: the evolution of the new brainwave: boldback   | E3  | 3/5/2019     | Email   | \$29.00 |
| Weddings for your money: everything you need to know to plan your wedding your way   | E3  | 3/5/2019     | Email   | \$50.00 |

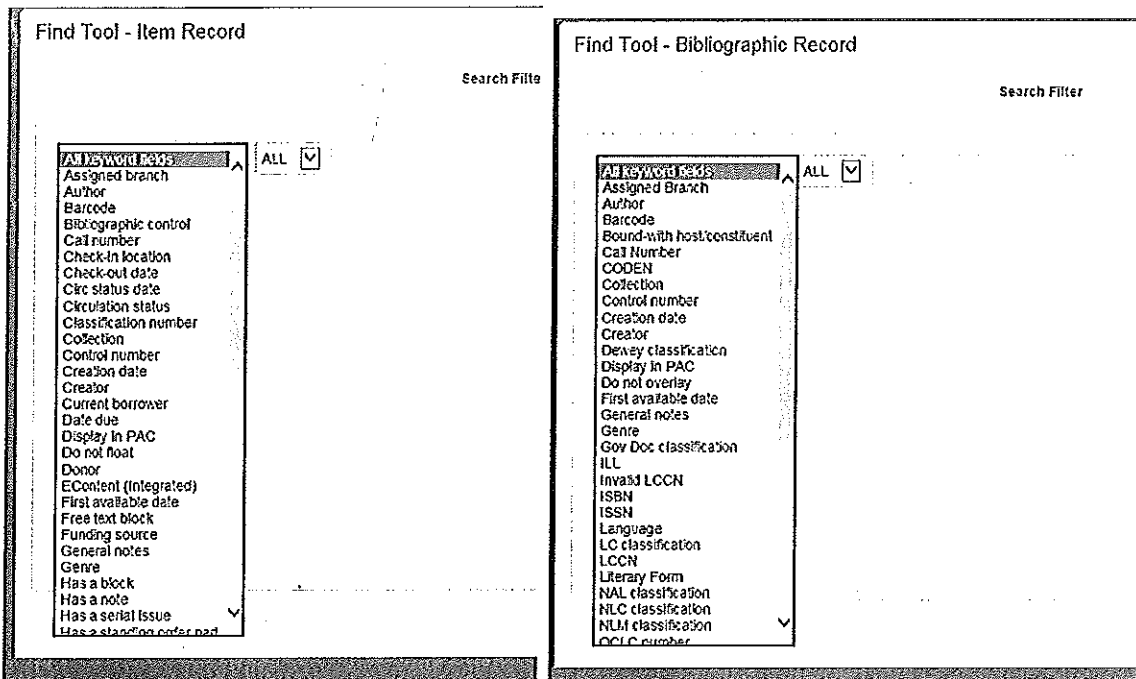


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|   |          |
|---|----------|
| <b>Circulation &amp; Management</b>   |          |
| Detailed search ability for materials in the staff client, including ability to filter and search by numerous fields including, but not limited to keyword, title, author, ISBN/ISSN, age, collection | Required |

iii innovative

Yes, the Polaris Find Tool is used to search for records with a variety of methods and filters.



|   |          |
|---|----------|
| Mobile circulation inside building & outside library without need for offline circulation | Required |
|---|----------|

iii innovative

Yes, using Leap with a tablet and WIFI hotspot or tablet with WIFI built in requires very little bandwidth and connects to the live system. Offline is not required. The Polaris Web Application, Leap, was designed with mobile in mind – the functionality is the same on a tablet as on a PC. All the functionality available inside the library is available outside the library.



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|                     |          |
|---------------------|----------|
| Offline circulation | Required |
|---------------------|----------|

iii innovative

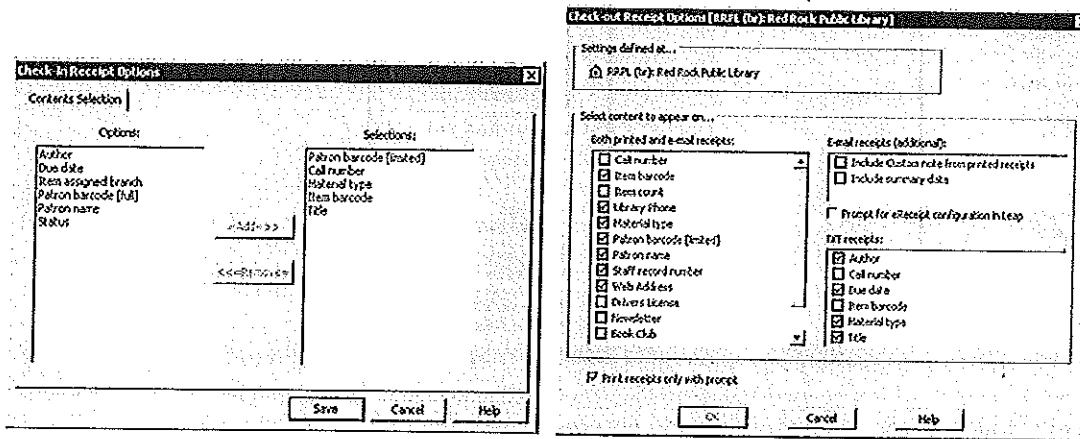
Yes, Offline Polaris provides for the off-line recording of circulation transactions, including battery-powered laptops. Transactions for check-out, check-in, renewal, fine charge, and patron registration can all be recorded for later transmission to the Polaris ILS. In addition, the library has the option of storing some or all of the patron file locally to ensure that patrons are trapped.

Offline can also be accommodated using Leap with a tablet and WIFI hotspot or table with WIFI built in. This requires very little bandwidth and connects to the live system.

|                                  |          |
|----------------------------------|----------|
| Customized receipt configuration | Required |
|----------------------------------|----------|

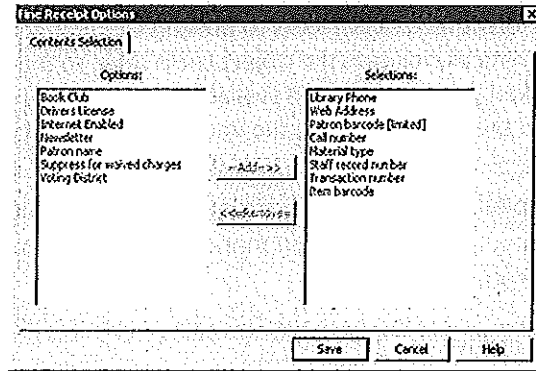
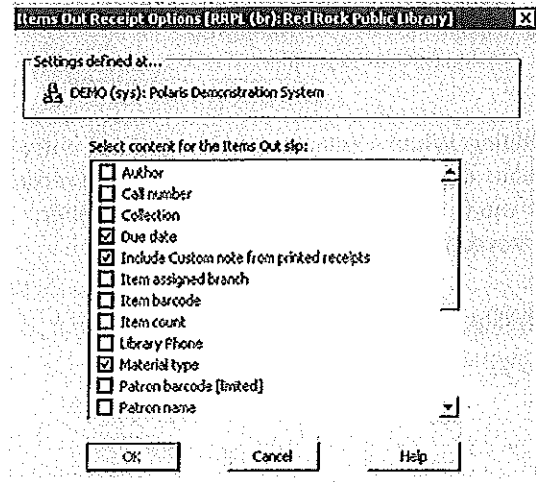
iii innovative

Yes, receipts can be customized in Polaris Administration at the branch level. Text can be customized using the Polaris Language Editor.





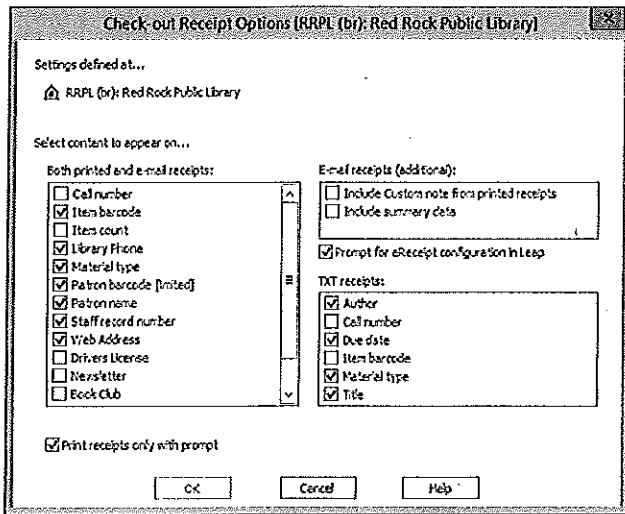
Placentia Library District  
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|   |          |
|---|----------|
| Ability to provide receipts via multiple options, including email, print & text messaging | Required |
|---|----------|

iii innovative

Yes, eReceipts can be sent to patrons for check-outs, renewals, and paid fines.



|  |          |
|--|----------|
| Ability to customize wording and graphics for messages & notices | Required |
|--|----------|

iii innovative

Yes.



Placentia Library District  
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|  |          |
|--|----------|
| Same record can be in use at multiple workstations | Required |
|--|----------|

iii innovative

Yes, Polaris uses object locks to prevent simultaneous editing. When a Polaris record is open, an entry is automatically made in the Object Locks table so that no one else can change the record. When a record is locked, however, it is still available in 'read' or 'access' mode for viewing by another staff member. When the record is closed, the entry is automatically removed from the Object Locks table.

|   |          |
|---|----------|
| Complete integration with RFID self-service functionality, including checkout, renewals, holds management and fines payment at self-checkout stations | Required |
|---|----------|

iii innovative

Yes, Polaris interfaces based on SIP2 with the following RFID vendors.

- 3M
- Bibliotheca ITG, LLC
- Checkpoint
- Libramation
- Library Automation Technologies
- TechLogic

|  |          |
|--|----------|
| Option to auto-renew materials based on set criteria | Required |
|--|----------|

iii innovative

Yes.





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|   |          |
|---|----------|
| Digital product usage recorded as patron activity | Optional |
|---|----------|

iii innovative

Yes, electronic resource usage is recorded along with other item usage.

Fowler, Amy Farrah

### Reading History

| Format | Title  | Author                  |
|--------|--|-------------------------|
|        | The opera lover's guide to Europe                                  | Plantamura, Carol       |
|        | Harry potter and the chamber of secrets (DVD) [DVD videorecording] |                         |
|        | Abraham Lincoln [electronic resource]                              |                         |
|        | The Life of Abraham Lincoln [electronic resource]                  | Ketcham, Henry          |
|        | Abraham Lincoln [electronic resource]                              |                         |
|        | Anatomy of a Misfit [electronic resource]                          | Portes, Andrea          |
|        | The Adventures of Sherlock Holmes [electronic resource]            | Doyle, Sir Arthur Conan |
|        | Night Sky [electronic resource]                                    | Brockmann, Suzanne      |
|        | Eat, Pray, Love [electronic resource]                              | Gilbert, Elizabeth      |
|        | The Adventures of Sherlock Holmes [electronic resource]            | Doyle, Sir Arthur Conan |
|        | Anatomy of a Misfit [electronic resource]                          | Portes, Andrea          |

|   |          |
|---|----------|
| Digital product circulation activity visible and managed via patron account | Optional |
|---|----------|

iii innovative

Yes.

LOCKE, JOHN

- more tr

### Items Out

| Format | Due Date  | Title  | Renewals Left | Call Number              |
|--------|-----------|--|---------------|--------------------------|
|        | 6/23/2017 | Dr. Holland's nurse                              | 0             | AD FIC CON C             |
|        | 7/22/2017 | The Audubon Society field guide to the night sky | 0             | 523 C486a R              |
|        | 8/2/2017  | Cat & mouse                                      | 0             | PB PATT H                |
|        | 3/30/2018 | Sycamore Row [electronic resource]               |               | Downloadable eResource D |

[Estimate Overdue Fines](#) [Refresh Content](#)



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| Reports   |          |
|---|----------|
| Ability to export data in standard formats (e.g. text, CSV, Excel, PDF) | Required |

iii innovative

Yes, Polaris ILS reports provide the ability to export data in standard formats like text, CSV, Excel, and PDF.

Due to the open nature of the Polaris ILS database, and use of standard formats, reporting in Polaris provides for unlimited access and detail. There are multiple ways to access reporting information -- from standard staff searching to SQL queries.

The Polaris ILS Reports return data in either pre-defined reports or via Microsoft Reporting Services and may be exported in the following formats:

- Adobe pdf
- CSV
- Excel
- HTML 4.0
- MHTML
- TIFF
- Web archive
- XML

For SimplyReports list, count and statistical report types, you can select the following output file types.

- Excel
- Text - When you select Text, you can select the delimiter type: Comma and quote, Tab, Semi-colon, Colon, or Pipe.

If your library has Export Express in addition to SimplyReports, you can also select the following formats for exporting records from the Item and Bibliographic list reports tabs:

- MARC file - If you select this file type, you select No holdings or Include holdings in the Holdings type box.
- MARC file - custom. If you select this option, you choose a custom export profile in the Profile box.
- Other formats - If you select this option, you choose Dublin Core, MARC XML, or LibraryThing

If your library uses Item or Patron history reports, you can specify the following report output types after entering the report criteria and previewing the history:

- Excel
- Word



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|                                 |          |
|---------------------------------|----------|
| Ability to use report templates | Required |
|---------------------------------|----------|

iii innovative

Yes.

Please see Polaris Reports Overview on page 59.

|                                  |          |
|----------------------------------|----------|
| Ability to create custom reports | Required |
|----------------------------------|----------|

iii innovative

Yes.

|  |          |
|--|----------|
| Ability to schedule reports with an option to email or FTP results | Required |
|--|----------|

iii innovative

Yes.

|  |          |
|--|----------|
| Ability to run reports for subject, DDC ranges and/or genres | Required |
|--|----------|

iii innovative

Yes.

|  |          |
|--|----------|
| Provides reports for which library materials are used and in which locations | Required |
|--|----------|

iii innovative

Yes.

|                                       |          |
|---------------------------------------|----------|
| Ability to identify patron inactivity | Required |
|---------------------------------------|----------|

iii innovative

Yes.

|   |          |
|---|----------|
| Ability to include cross-references between data sets | Required |
|---|----------|

iii innovative

Yes.



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|  |          |
|--|----------|
| Ability to produce reports on demographics | Required |
|--|----------|

iii innovative

Yes.

|  |          |
|--|----------|
| Ability to report on and access any data within the database | Required |
|--|----------|

iii innovative

Yes.

|   |          |
|---|----------|
| Reports having the ability to provide evidence-based collection analysis & evaluation functionality (similar to CollectionHQ) | Optional |
|---|----------|

iii innovative

Yes.

Polaris provides various standard reports to help address collection development needs, including inventory, floating collections reports, circulating items by collection, collection disposition by material type, and holds purchase alert reports.

Various assessment tools are also available from within Polaris, including those that can be tailor-made using Polaris SimplyReports. For example, the standard report Holds Purchase Alert is useful in making purchasing decisions because it allows the library to see what their patrons are trying to borrow by way of holds ratios, including those grouped or ungrouped by type of material.

#### Holds Purchase Alert

##### Book

| # of Holds | # of Items | Control # | Call Number | Title  | Author                  | ISBN / UPC                |
|------------|------------|-----------|-------------|--|-------------------------|---------------------------|
| 83         | 0          | 873079    | 158.1       | Grit : the power of passion and perseverance                   | Duckworth, Angela       | 9781501111105 (hardcover) |
| 45         | 3          | 871812    | FICTION     | The girl on the train : A novel                                | Hawkins, Paula          | 9781594633660             |
| 43         | 0          | 872684    | 813/.6      | The fireman : a novel  | Hill, Joe               | 9780092200631 (hardcover) |
| 33         | 0          | 872308    | 823/.92     | The versions of us   | Barnett, Laura, 1982-   | 9780544634244 (hardcover) |
| 15         | 0          | 872690    | 813/.6      | Redemption road  | Hart, John, 1965-       | 9780312380368 (hardcover) |
| 10         | 1          | 658554    | 815/.4      | Mark Twain : Plymouth Rock and the Pilgrims and other speeches | Twain, Mark, 1835-1910. | 0815411049 (gbk) :        |
| 6          | 0          | 872681    | 813         | Born on a Tuesday : a novel                                    | John, Elnathan, 1982-   | 9780802124821             |



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Using SimplyReports, the library can create custom reports to report on such collection development requirements as the amount of money the library has spent based on the publication year of the material or the amount spent at a particular branch broken down by collection and vendor. Certain Polaris customers use the services of CollectionHQ (or other). These third parties help the library fine-tune their collection development policies. To work with the third parties, the Polaris customer uses Export Express and SimplyReports

|  |          |
|--|----------|
| Provides recommendations for withdrawal, including title, subject, author, DDC | Optional |
|--|----------|

iii innovative

Yes.

|                                     |          |
|-------------------------------------|----------|
| Ability to track top search history | Optional |
|-------------------------------------|----------|

iii innovative

Yes, all searches are logged in the transaction database and reports of top search terms can be generated.



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**Polaris Reports Overview**

Polaris provides a variety of powerful reporting tools to meet the data-gathering needs of libraries of any size and type. Additionally, the options within Polaris provide reporting tools at various skill levels that suit the reporting needs of different users with different requirements.

| Library Needs                    | Reporting Tool  |
|----------------------------------|---|
| Standard reporting               | Polaris Toolbar Reports                                     |
| Basic data mining                | Polaris Find Tool   |
| Basic custom reports without SQL | SimplyReports   |
| Complex data mining              | Polaris Find Tool w/ embedded SQL queries<br>Query Analyzer |
| Complex custom reports           | Reporting Services  |

**Polaris Toolbar Reports**

Polaris Toolbar Reports are designed for use by all library staff. They can be displayed onscreen, or exported to PDF, Excel, and other file formats. The user interface for Polaris Toolbar Reports is the Polaris staff client. No additional interface is required. This capability is included in the licensing for the Polaris staff client and is available on any workstation that supports a staff client. More than a hundred predefined toolbar reports are included with the Polaris staff client.

Aside from the standard Polaris staff client training, no training is required to use Polaris Toolbar Reports and no additional cost is incurred. Toolbar reports run against the live Polaris database, so all data access is real-time. Toolbar reports can be customized through the use of tools inherent with reporting in Microsoft SQL Reporting Services. Familiarity with SQL and the Polaris database schema is necessary in order to make changes to the report content.

Toolbar reports, by their very nature, provide highly abstracted, and highly restricted, access to the database. Each report is designed to extract and present one defined set of data in a predefined format. Display criteria are limited by the existing format and columns in the Polaris workflow.

Polaris uses Microsoft's SQL Reporting Services (described later) to organize and return information in formal, formatted reports. The more than 100 predefined toolbar reports, organized by subsystem, are available from the Polaris Shortcut Bar in the Polaris staff client. Standard reports are developed and added on a regular basis.

Polaris also supports the ability for authorized library users to create new custom reports using Reporting Services and place them on the toolbar as toolbar reports. Through this mechanism, the library has the ability to access data not accessible using the predefined toolbar reports. However, as noted above, familiarity with SQL and the Polaris database schema is required.



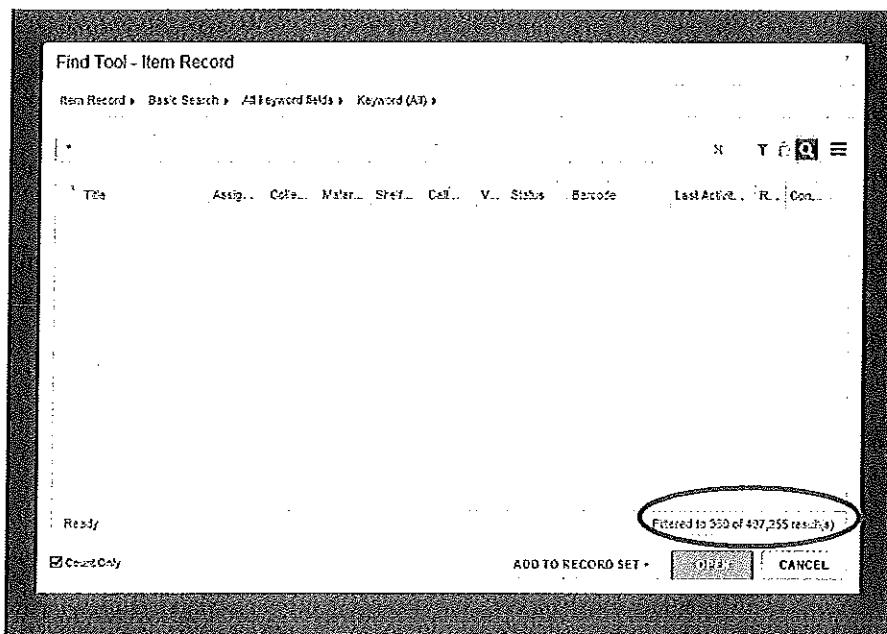
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### Polaris Find Tool

The Polaris Find Tool is intended for all Polaris library staff members as well. All output is in the form of the tabular, result-set workflow that is inherent in Polaris. Access to this tool is through the standard Find Tool interface that is inherent in the Polaris staff client. Anyone who has been trained in the functionality of the Polaris staff client is able to use the Find Tool effectively.

The Find Tool provides access to a vast amount of data in the Polaris database. The user interface provides for access to all commonly used data without the need for building custom indices, as would be required in some competitor's systems. The Find Tool accesses the live Polaris database, so all data access is in real-time. The cost for this function is included in the cost of the Polaris staff client license.

In the Polaris staff client, the Polaris Find Tool can be used to search for records with a variety of methods and filters. The Find Tool can also be used for quick snapshots of the library's data. For example, if the library simply needs a count of items last circulated in 2017, the user can run this search and set the Find Tool to show only the record count in the search results.



### SimplyReports

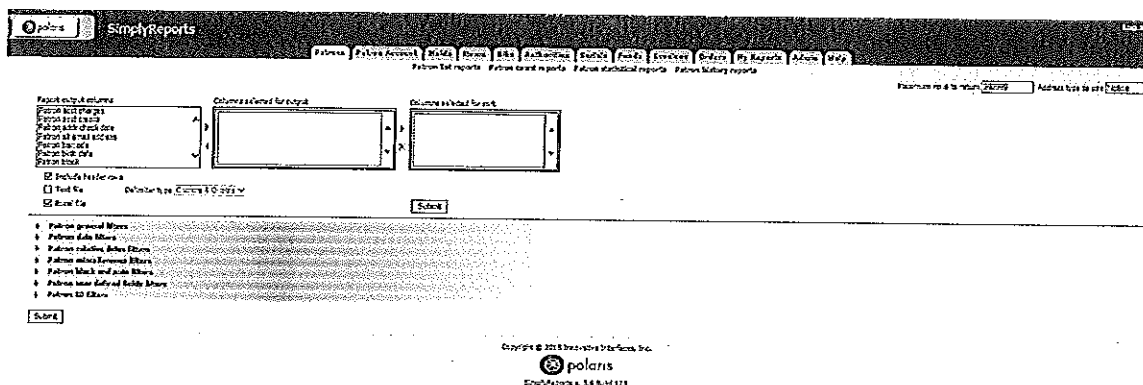
Polaris SimplyReports opens up the power of the Polaris database management system to all users, regardless of technical skill. Users without knowledge of SQL or Microsoft SQL Reporting Services can create custom reports with a simple Web-based interface. The web-based application can be accessed through any modern web browser.



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SimplyReports closely resembles the reporting applications provided by "second generation" ILS products. As such, it provides a fixed number of tables and columns that can be accessed, along with appropriate scoping and filtering criteria that can be applied against those data elements. It allows reports to be scheduled for one-time execution, or scheduled execution on a daily, weekly, monthly, or annual basis. Groups of reports can be defined and executed together. Delivery of scheduled reports is limited to storing the resulting report in a network drive as an Excel spreadsheet.

To use SimplyReports, you select list, count, or statistical reports in categories such as patrons, patron accounts, holds, items, bibs, and serials. Then you simply select report output columns, sorting options, and filters for the report. Various combinations can produce close to 60,000 custom reports.



Polaris SimplyReports offers these additional functions:

- Generate report output files in a variety of file formats
- Save custom report parameters
- Schedule and run reports or groups of reports
- Administer user security and various configuration options
- Manage saved report output files
- Publish reports to the toolbar, using Advanced Publishing and Report Builder

#### Polaris Find Tool with SQL

This capability is intended for use by technically-oriented Polaris line staff, system administrators, directors, and branch managers who have some training in SQL and a basic understanding of the Polaris database. All output is in the form of the tabular result-set workflow that is inherent in Polaris. Access to this tool is through the standard Find Tool interface that is inherent in the Polaris staff client. Use of this functionality requires training in basic SQL, and a basic understanding of the common tables and columns in the Polaris database.

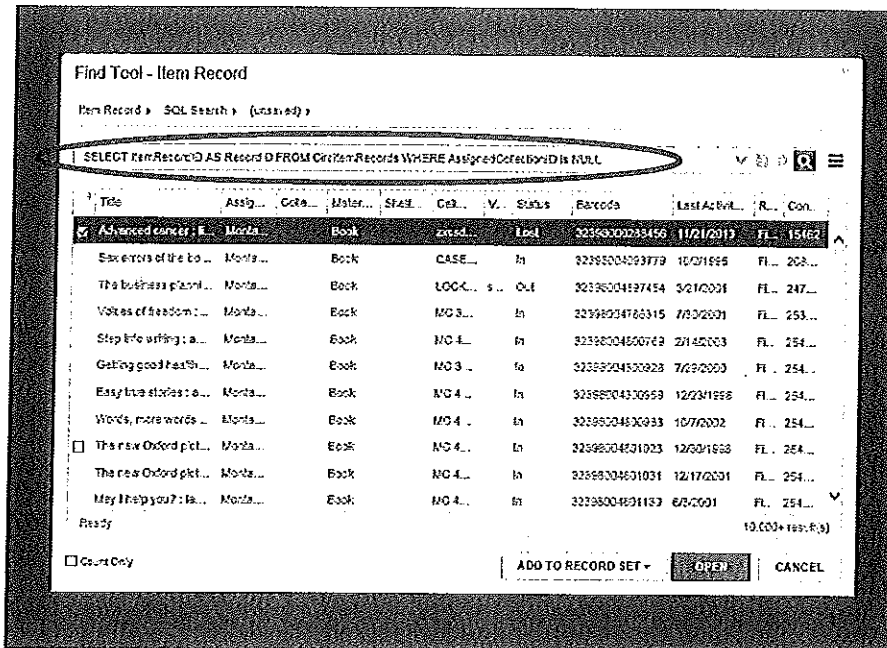
This capability is included in the licensing for the Polaris staff client and its cost is included in the cost of the Polaris staff client license. Functionality is available on any workstation that supports the Polaris staff client and data access is in real-time. Selection criteria for returned data are essentially unlimited. However, display criteria are limited by the existing format and columns in the Polaris workflow.





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If a quick look at specific data is needed, the user can enter a Structured Query Language (SQL) query directly in the Polaris Find Tool.



Text can be saved as a rough SQL template. The template can be used as a basis for searching and the search edited without saving the changes to the template. The results of these informal “reports” are displayed in the Find Tool results list, which can be printed. The results can also be saved to a record set. These reports are unformatted, but are very convenient if a quick look at specific aspects of the library’s database is needed.

#### Microsoft Reporting Services

Reporting Services is suitable for users who have training in, and are proficient with, SQL, and who have been trained with an understanding of the Polaris database schema (structure). This generally means system administrators, as opposed to library line staff, directors, and branch managers. It supports output to SQL tables, flat files, PDF, HTML, Excel, and a wealth of other forms. Reporting Services is not a single application, but rather a technical infrastructure provided by the SQL Server DBMS and the Windows operating system. To access the functions provided through Reporting Services, you must develop reports through the use of a development tool, such as Visual Studio.

Reports can be delivered through a wide range of mechanisms, including email, local or networked storage, presentation in a web browser, and automatic publication to an Intranet or other web server. Reports can be scheduled to run unattended on a fixed schedule. With SQL Server Enterprise, reports can be “data driven”. In this mode, the report automatically runs when user-defined data criteria are met, such as “run this report when total outstanding fines and fees exceed \$100”.



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Reporting Services runs against the live database, so all data are accessed in real-time. Because the license to use Reporting Services is already included in SQL Server, the only cost associated with Reporting Services is the purchase of the development tool (typically Visual Studio) used to build custom reports.

10:16 AM

Demo SQL Server Reporting Services  
Polaris

X Delete | Move | Report Builder | Folder Settings | Tile View

| Type   | Name ↓          | Description | Last Run | Modified Date       | Modified By    |
|--------|-----------------|-------------|----------|---------------------|----------------|
| Folder | Acquisitions    |             |          | 5/2/2014 1:07 PM    | GIS Corner     |
| Folder | Cataloging      |             |          | 5/2/2014 1:07 PM    | GIS Corner     |
| Folder | Circulation     |             |          | 6/22/2013 2:52 PM   | WebSiteCorner  |
| Folder | Custom          |             |          | 10/21/2016 11:59 AM | Ilindaria.todd |
| Folder | Notices         |             |          | 10/3/2014 3:01 PM   | GIS Corner     |
| Folder | PAC             |             |          | 5/2/2014 1:08 PM    | GIS Corner     |
| Folder | Public Services |             |          | 5/2/2014 1:08 PM    | GIS Corner     |
| Folder | Serials         |             |          | 5/2/2014 1:08 PM    | GIS Corner     |
| Folder | System          |             |          | 5/2/2014 1:08 PM    | GIS Corner     |

When a report is generated, the user can choose an output format: PDF, HTML 4.0, MHTML, Excel, or Comma Separated Value (CSV). The report can be printed or e-mailed from the Report Preview window.

If the user is familiar with SQL, you can create new reports or customize existing reports and notices with Microsoft's Visual Studio.Net. Reports are available in the Custom folder of the Polaris Reports Manager and are protected from being overwritten when Polaris is updated.



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| Cataloging               |          |
|--------------------------|----------|
| Cataloging               |          |
| RDA ability & compliance | Required |

iii innovative

Yes, Polaris contains all the changes to the MARC21 formats that have been made to accommodate RDA. You can load records with RDA and they can coexist with non-RDA records in the same database. We do not require you to retrospectively convert your bibliographic records for RDA.

|  |          |
|--|----------|
| Tools are available to convert / upgrade MARC data to RDA or other future cataloging standards | Required |
|--|----------|

iii innovative

Yes.

|   |          |
|---|----------|
| Ability to index all fields in MARC records | Required |
|---|----------|

iii innovative

Yes, please see *Polaris Indexing* on page 79.

|   |          |
|---|----------|
| Ability to integrate digital content from third party vendors | Required |
|---|----------|

iii innovative

Yes, eContent integration is available through the Polaris ILS and the following eContent vendor applications: Bibliotheca's cloudLibrary (formerly 3M Cloud Library), Baker & Taylor's Axis 360, OverDrive, and Recorded Books' RBdigital. When integrated eContent features are configured in Polaris and the library has purchased the eContent titles, patrons can search for, place holds on, and check out the vendor's eContent directly from the PAC. In addition, all associated circulation processing and tracking for integrated eContent occurs in Polaris.

OverDrive

Libraries using the Polaris ILS can catalogdisplay in PAC, manage access, and circulate eContent from OverDrive.

Once the library has a subscription with OverDrive and the required Polaris license, the library creates an item template, an integrated vendor account, and an import profile in Polaris. The Vendor Account is in Polaris Administration, not in Acquisitions, and it is used during automatic importing to create resource entities for the bibliographic records.



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As a result of this integration, patrons can search for, place holds on, and check out OverDrive eContent directly from the PAC. All associated circulation processing and tracking for these integrated eContent occurs in Polaris.

OverDrive eContent may be in one of the following formats:

- EPUB ebook
- PDF ebook
- WMA Audiobook
- MP3 Audiobook

Availability and holds counts for OverDrive eContent are driven by the status of the items in the OverDrive repository, not the status of the items in the Polaris database. When patrons check out, check in, or place holds on OverDrive eContent from the PAC, the synchronization between Polaris and the OverDrive repository takes place in real time.

When a library purchases a new OverDrive title, it is identified by the library's collection and contract. The Polaris API consumer service queries the OverDrive database daily to find and fetch the metadata for titles identified as those the library has purchased. After fetching the OverDrive metadata, the API consumer service identifies duplicates by matching on the object identifier or title ID.

If the title is new to the catalog, the OverDrive XML metadata is converted to MARC XML, and the file is automatically added to the Polaris import queue to be imported. OverDrive imports are done once daily, around midnight. The Integrated ebook Bibs read-only PolarisExec import profile, which is selected by default in the OverDrive Vendor Account workform, provides the processing specifics for this automatic process.

When a library purchases added copies for eContent titles already in the database, or when copies expire because of publisher restrictions, Polaris is updated automatically with the vendor's information. For OverDrive, the synchronization process runs once daily, around midnight.

|                           |          |
|---------------------------|----------|
| Integration with Bibframe | Required |
|---------------------------|----------|

iii innovative

Yes.

|   |          |
|---|----------|
| Access and utilize MARC records from a variety of sources | Required |
|---|----------|

iii innovative

Yes.



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|   |          |
|---|----------|
| Ability to specify loading parameters for overlay | Required |
|---|----------|

iii innovative

Yes, when you import bibliographic or authority records using Polaris, you can specify whether the records are saved as provisional or final; how duplicate and incorrectly-formatted records are handled; and how item records are created from embedded holdings data in the bibliographic records. You can also specify record sets for the incoming records.

**Polaris Import Profiles**

Polaris provides a set of read-only import profiles with importing options already set. You can use these import profiles as they are, copy the Polaris import profiles and save them with different names so you can modify them, or create your own profiles.

Each Polaris import profile is designed to perform specific automatic processing. The default profile for importing bibliographic records checks MARC format and identifies duplicate records, while another profile creates item records from embedded holdings data in the imported bibliographic records. Other import profiles are designed to facilitate acquisitions tasks like importing brief bibliographic records with 970 tags to create purchase orders, or importing full MARC records with embedded holdings data to update on-order items to shelf-ready items. If your library uses the Polaris Authorities Weekly service, the updated authority records can be imported using a pre-set import profile.

Polaris provides many options for importing bibliographic and authority records, and for creating item records from embedded holdings data in imported bibliographic records. You can set permissions so that some staff members can change these options when they import records, while other staff members can import records but not change the settings.

**Import Options for Bibliographic Records**

When you import bibliographic records, you can set options to save records as final or provisional; check MARC format; check for duplicates using system-defined or profile-defined duplicate detection rules; reject incoming duplicates or save the record with the higher encoding level; retain system-defined or profile-defined tags when records are overlaid; perform authority control; and create a record set for the imported records.

If the library has a subscription to the Polaris ZMARC or OCLC authority database and has purchased the Polaris Automated Authority Control service, the headings in the incoming bibs are matched to authority records in the remote database if no matching authority records are found in the local database. The authority records from the remote database are automatically saved to the local database and linked to the incoming bibs as the records are imported.



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**Polaris Import Setup - Full**

Profile setup | Bibliographic Records | Item Records | Authority Records | Record Sets

**Bibliographic Save Options**

Save all records as final  
 Save all records as provisional  
 Do not save any records

Display in PAC  
 Do not overlay

Delete MARC Tags on incoming record  
 System defined deletion tags  
 Profile defined deletion tags

Record owner: Polaris Demonstration System (sys)

**When Saving Bibliographic Records as Final**

Perform MARC 21 Validation  
If validation errors are found:  
 Save record as provisional  
 Ignore errors; save record as final

Perform Authority Control  
If no matching heading is found:  
 Automatically create new authority record; save bibliographic record as final  
 Do not create authority record; save bibliographic record as final  
 Do not create authority record; save bibliographic record as provisional

Perform Duplicate Detection  
 Use system defined duplicate detection rules  
 Use profile defined duplicate detection rules

If a suspected duplicate is found:  
 Save incoming record as provisional  
 Save incoming record as final; do not replace database record  
 Save incoming record as final; replace database record  
 Save record with highest encoding level. If encoding levels match:  
 Save incoming record as final; replace database record  
 Reject incoming record  
 Save incoming record as provisional (ignore keep MARC tags)  
 Reject incoming record; add MARC retention tags to database record

Keep MARC Tags  
 System defined overlay retention tags  
 Profile defined overlay retention tags

Import Cancel Help



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### Import Options for Item Records (embedded holdings)

If you opt to create item records from embedded holding tags in the imported bibliographic records, you can open the Item Records tab to specify the tag number and subfields to map to the fields in the item record. You can also specify an item record template to use to fill in any fields that might be missing from the embedded holdings information.

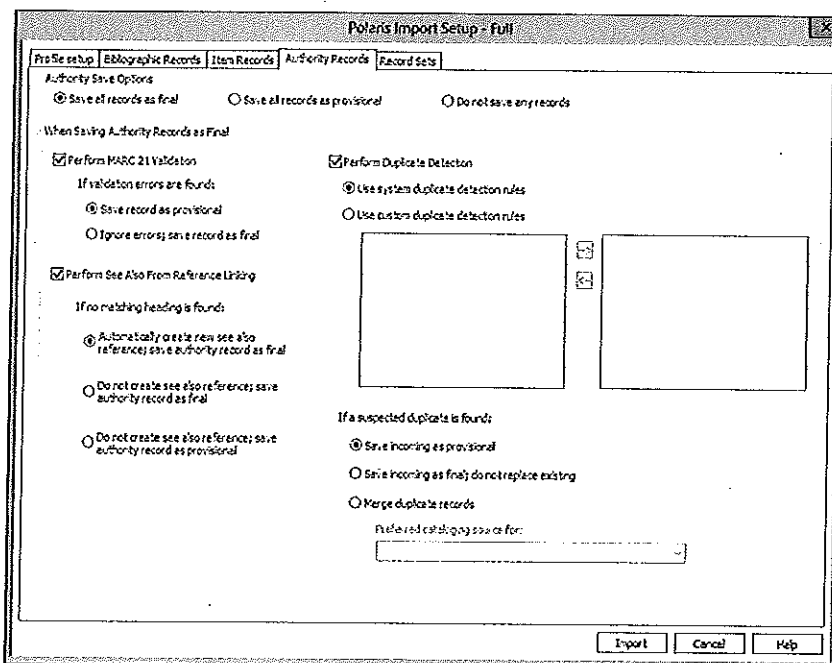
The screenshot shows the 'Polaris Import Setup - Full' dialog box with the 'Item Records' tab selected. The 'When Saving Bibliographic Records as Final' section has 'Build item records' checked. Under 'Embedded Holdings field/MARC subfield mapping', 'Holdings tag numbers' is set to '852'. A grid maps various fields to letters: Assigned Branches (a), Assigned Collections (b), Barcodes (p), Call Number Prefix (k), Call Number Suffix (s), Creation Status, Classification Numbers (h), Copy Numbers (t), Cutter Numbers (l), Display in PAC (4), Fine Codes (r), Free Text Blocks, Funding Sources (1), Holdings (5), Library Assigned Blocks, Loan Period Codes (u), Loanable Outside Systems (7), Material Types (m), Name Of Pieces, Non Gradings, Non Public Notes (y), Owning Branch (o), Physical Conditions (q), PULL Segment IDs, Prices (0), Public Notes (x), Renewal Limits (y), Shelf Locations (c), Shelving Schemes (1), Statistical Codes (d), Temporary Shelf Location (l), and Volume Numbers (v). Other options include 'Using embedded holdings fields only', 'Using template/system default values only', 'Using all available holdings/item fields', and 'Display in PAC (when not explicitly found)'. The 'Item template' dropdown is set to '(none)'. Buttons for 'Import', 'Cancel', and 'Help' are at the bottom.



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### Import Options for Authority Records

When you import authority records, you can perform MARC validation, duplicate detection, and See Also From reference checking. You can also specify whether duplicate authority records are saved as provisional or merged based on the preferred cataloging source.



After the records have been imported, you can check the import report to see if there were validation problems or duplicates. If you have specified a record set for the imported records, you can review all the imported records in one place. You can also make any necessary global changes to all the records in an item or bibliographic record set.

|  |          |
|--|----------|
| Ability to specify match-point in loading profiles | Required |
|--|----------|

iii innovative

Yes, when a bibliographic record is saved, it is checked for duplicates based on the Bibliographic Deduplication table. This table contains the rules that determine if a bibliographic record is a duplicate of an existing record. Two bibliographic records are identified as potential duplicates based on the rules groups in the Bibliographic Deduplication table. Each rules group contains one or more rules. Two bibliographic records must meet all the rules in at least one group to be potential duplicates.





The library can select the rules, how they are grouped, and the order of precedence in which they are applied.

| Rule  | Comment  |
|---|--|
| 1. The 001 tag of the imported record matches the 035 \$a of an existing record.                  | Applies only to imported records. The 001 tag must match the numeric portion of the 035 tag (normalized). The parenthetical information in the 035 tag is ignored.   |
| 2. The 001/003 tags of the imported record matches any 035\$a subfield in the existing record.    | Applies only to imported records. The 001 tag must match the numeric portion of the 035 tag (normalized). If the incoming record contains a 003 tag, the 003 data must match the parenthetical information in the 035 tag. If the incoming record lacks an 003 tag, the parenthetical information in the 035 tag is ignored. |
| 3 The 010\$a subfield of the incoming record matches the 010\$a subfield in the existing record.  | For LCCNs, the prefix, year, and serial number (the first 12 characters) must match. Suffixes and revision dates are ignored.  |
| 4. The ISBN in the incoming record matches any ISBN in the existing record.                       | The alphanumeric ISBN must match. Parenthetical and other information is ignored. This rule is applied to any 020 tag and also to any 024 tag where the first indicator = 3.   |
| 5. Any 022\$a subfield in the incoming record matches any 022\$a subfield in the existing record. | The 8-digit alphanumeric ISSN must match. Parenthetical and other information is ignored.  |
| 6. The LDR/06 value in the incoming record matches the LDR/06 in the existing record.             | The value in the Record Type position of the Leader must match exactly.  |
| 7. The LDR/07 value in the incoming record matches the LDR/07 in the existing record.             | The value in the Bibliographic Level position of the Leader must match exactly.  |



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|   |  |
|---|--|
| <p>8. The 1xx\$a subfield in the incoming record matches the 1xx\$a subfield in the existing record.</p>            | <p>The entire text of \$a subfield of both records must match. Punctuation is ignored. Tag and indicator values need not match.</p>  |
| <p>9. The 245\$a subfield in the incoming record matches the 245\$a subfield in the existing record.</p>            | <p>The entire text of \$a subfield must match. Punctuation is ignored. Indicator values need not match.</p>  |
| <p>10. The 245\$a subfield in the incoming record matches any 246\$a subfield in the existing record.</p>           | <p>The entire text of \$a subfield must match. Punctuation is ignored. Indicator values need not match.</p>  |
| <p>11. Any 246\$a subfield in the incoming record matches the 245\$a subfield of the existing record.</p>           | <p>The entire text of \$a subfield must match. Punctuation is ignored. Indicator values need not match.</p>  |
| <p>12. Any 247\$a subfield in the incoming record matches the 245\$a subfield in the existing record.</p>           | <p>The entire text of \$a subfield must match. Punctuation is ignored. Indicator values need not match.</p>  |
| <p>13. The 008/07-10 values in the incoming record match the 008/07-10 in the existing record.</p>                  | <p>The date in the Beginning Date of Publication must match exactly in both records.</p>   |
| <p>14. The last 260\$c subfield in the incoming record matches the last 260\$c subfield in the existing record.</p> | <p>The entire text of the \$c subfield must match in both records. Punctuation is ignored.</p>   |
| <p>15. The 035a of the incoming record matches the 035\$a of an existing record.</p>                                |  |
| <p>16. Any 035\$a subfield in the incoming record matches the 001 tag in the existing record.</p>                   | <p>This rule should be enabled only when a library is importing records that have been previously exported from the same Polaris database, when the intent is to have the incoming record replace the existing record.</p> |



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|   |   |
|---|---|
| 17. The Bib record owner value in the incoming record matches the value in the existing record.                                   |   |
| 18. The UPC of the incoming record matches the UPC of the existing record.  | This rule is applied to any 024 tag where the first indicator value =1.                   |
| 19. The 024\$a (excluding ISBN and UPC) of the incoming record matches the 024\$a (excluding ISBN and UPC) of an existing record. | This rule is applied to any 024 tag where the first indicator value is other than 1 or 3. |
| 20. The 028\$a of the incoming record matches the 028\$a of an existing record.   |   |
| 21. The 037\$a of the incoming record matches the 037\$a of an existing record.   |   |

|   |          |
|---|----------|
| Ability to automatically create and populate item information during MARC loading process | Required |
|---|----------|

iii innovative

Yes.

|  |          |
|--|----------|
| Ability to make global changes to the system | Required |
|--|----------|

iii innovative

Yes, global changes can be made to patron, bib and item records using record set functionality. Record sets group related records together so you can retrieve, change, or process them in one step. Bulk change is governed by permissions. If the library wants to restrict bulk change editing to a library's own records, this is possible. Bulk changes occur in real-time.



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Patron Record Bulk Change

The image displays four screenshots of the 'Patron Record Bulk Change' application interface, showing different tabs selected in the top navigation bar: 'General', 'Address', 'UOFs', and 'Report/Record Set'.

- General Tab:** Contains fields for 'Registered branch', 'Patron code', 'Expiration date' (set to 10/16/2016), 'Expiration term', and 'Statistical class'.
- Address Tab:** Contains fields for 'Address check date' (set to 10/18/2016), 'Address check term', 'Address for notices/bills', 'Notification options', and 'Additional TXT notice'.
- UOFs Tab:** Contains sections for 'Gender', 'Language', 'Date of original registration' (set to 10/16/2016), 'eReceipt options', 'Exclude from Notices and Reminders' (with sub-options for Overdue notices, Almost overdue/auto-renew reminders, Hold notices, Patron record expiration reminders, Billing notices, and Inactive patron reminders), 'Exclude from collection agency', 'Maintain reading history', 'Email notices in plain text', 'Do not delete patron record', and 'Secure the patron record'.
- Report/Record Set Tab:** Contains sections for 'UOF 1: Drivers License', 'UOF 2: Newsletter', 'UOF 3: Book Club', 'UOF 4: Internet Enabled', and 'UOF 5: Voting District', each with an 'Actions' dropdown menu.

Each screenshot includes 'OK', 'Cancel', and 'Help' buttons at the bottom.



Paltron Record Bulk Change

Registration | Address | General | UDFs | Blocks/Notes | Report/Record Set

Library assigned blocks: Actions: [v]  
[ ] [v]

Free text blocks: Actions: [v]  
[ ] [v]

Non-blocking notes: Actions: [v]  
[ ] [v]

Blocking notes: Actions: [v]  
[ ] [v]

OK Cancel Help

Bibliographic Record Bulk Change

Bibliographic Record Bulk Change

Non-MARC | Data Fields | Leader | 006 Tag | 007 Tag (1) | 007 Tag (2) | 008 Tag

Display in PAC       Do not overlay  
 on     off       on     off

Record owner  
From: [v]  
To: [v]

Save provisional records as final

Create resource entities  
Vendor account: [v]

OK Cancel Help

Bibliographic Record Bulk Change

Non-MARC | Data Fields | Leader | 006 Tag | 007 Tag (1) | 007 Tag (2) | 008 Tag

Operation: [v] Insert a new tag

Insert Tag

Tag number [ 100 ] [v]

Indicator fields [ ] [v] Cns + [ ] [v] Ino = \*\*

Subfield \$ [ ] [v] Describes

Add Remove

Add Change To Queue

Bulk change queues for data fields

[ ] [v] Remove  
Up Down

OK Cancel Help



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**Bibliographic Record Bulk Change**

Non-MARC | Data Fields | Leader | 006 Tag | 007 Tag (1) | 007 Tag (2) | 008 Tag

Record status (05)  
From: [ ] To: [ ]

Type of record (06)  
From: [ ] To: [ ]

Bibliographic level (07)  
From: [ ] To: [ ]

Type of control (08)  
From: [ ] To: [ ]

Character coding scheme (09)  
From: [ ] To: [ ]

Encoding level (17)  
From: [ ] To: [ ]

Descriptive cataloging form (18)  
From: [ ] To: [ ]

Linked record requirement (19)  
From: [ ] To: [ ]

OK Cancel Help

**Bibliographic Record Bulk Change**

Non-MARC | Data Fields | Leader | 006 Tag | 007 Tag (1) | 007 Tag (2) | 008 Tag

Tag level

Insert (05) [ ] Define [ ]  As first  As last

Delete (00) [ ]  First instance  Last instance  All instances

From (00): [ ]

Replace To (00): [ ] Define [ ]  First  Last

Books From: [ ] To: [ ]

Com. file/ Elec. rec. From: [ ] To: [ ]

Contin. resources From: [ ] To: [ ]

Maps From: [ ] To: [ ]

Mixed materials From: [ ] To: [ ]

Music From: [ ] To: [ ]

Visual materials From: [ ] To: [ ]

OK Cancel Help

**Bibliographic Record Bulk Change**

Non-MARC | Data Fields | Leader | 006 Tag | 007 Tag (1) | 007 Tag (2) | 008 Tag

Tag level

Insert (00) [ ] Define [ ]  As first  As last

Delete (00) [ ]  First instance  Last instance  All instances

From (00): [ ]

Replace To (00): [ ] Define [ ]  First  Last

Electronic resource From: [ ] To: [ ]

Globe From: [ ] To: [ ]

Kit From: [ ] To: [ ]

Map From: [ ] To: [ ]

Microform From: [ ] To: [ ]

Motion picture From: [ ] To: [ ]

Nonproj. graphic From: [ ] To: [ ]

OK Cancel Help

**Bibliographic Record Bulk Change**

Non-MARC | Data Fields | Leader | 006 Tag | 007 Tag (1) | 007 Tag (2) | 008 Tag

Notated music From: [ ] To: [ ]

Projected graphic From: [ ] To: [ ]

Remote-sensing image From: [ ] To: [ ]

Sound recording From: [ ] To: [ ]

Tactile material From: [ ] To: [ ]

Text From: [ ] To: [ ]

Unspecified From: [ ] To: [ ]

Video recording From: [ ] To: [ ]

OK Cancel Help



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**Bibliographic Record Bulk Change**

Non-MARC | Data Fields | Leader | 006 Tag | 007 Tag (1) | 007 Tag (2) | 008 Tag

Book From: \_\_\_\_\_ To: \_\_\_\_\_  
 Replace the entire 003 tag

Computer files From: \_\_\_\_\_ To: \_\_\_\_\_  
 Replace the entire 003 tag

Coroll. resource From: \_\_\_\_\_ To: \_\_\_\_\_  
 Replace the entire 003 tag

Maps From: \_\_\_\_\_ To: \_\_\_\_\_  
 Replace the entire 003 tag

Mixed materials From: \_\_\_\_\_ To: \_\_\_\_\_  
 Replace the entire 003 tag

Music From: \_\_\_\_\_ To: \_\_\_\_\_  
 Replace the entire 003 tag

Visual materials From: \_\_\_\_\_ To: \_\_\_\_\_  
 Replace the entire 003 tag

OK Cancel Help

Item Record Bulk Change

**Item Record Bulk Change - Number of records: 17**

Location | Circulation | Call Number | Notes/Blocks | Misc | Report/Record Set

Owner: \_\_\_\_\_

Assigned brands: \_\_\_\_\_

Assigned collections: \_\_\_\_\_

Shelf location: \_\_\_\_\_

Home branch: \_\_\_\_\_

Temporary locations: \_\_\_\_\_

OK Cancel Help

**Item Record Bulk Change - Number of records: 17**

Location | Circulation | Call Number | Notes/Blocks | Misc | Report/Record Set

Circulation status: \_\_\_\_\_

Material type: \_\_\_\_\_

Loan period: \_\_\_\_\_

Fine code: \_\_\_\_\_

Statistical code: \_\_\_\_\_

Renewal limit: \_\_\_\_\_

Holdable:

Link To

Patrons: \_\_\_\_\_

Patrons from this library and branches:

Patrons from this branch only:

Preferred borrowers:

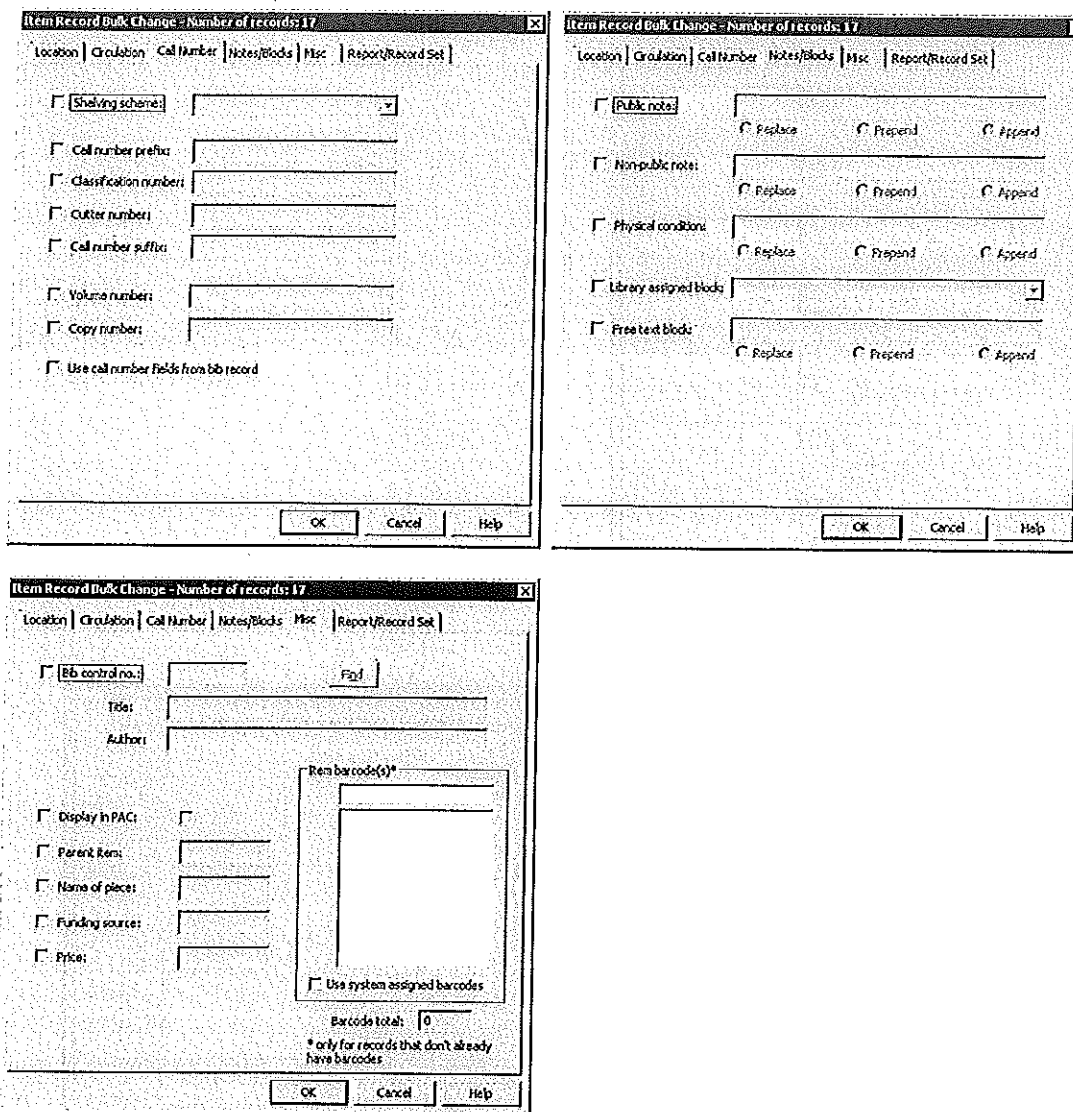
Non circulating:  Do not float:

Loanable outside system:  Do not mail to patron:

OK Cancel Help



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There is a robust indexing process that takes place. Specifically, for “expensive” or resource intense cataloging operations like bulk changes, we generally handle those operations in background jobs. These background jobs effectively restrict the system resources (i.e. CPU, memory, and network bandwidth) dedicated to cataloging tasks such that the system won’t be overloaded with more work than it can handle. These background jobs are based on incremental indexing and are optimized for running while the system is online/live.





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|   |          |
|---|----------|
| Ability to integrate digital content from local library | Required |
|---|----------|

iii innovative

Yes.

|   |          |
|---|----------|
| Ability to upgrade records to be discoverable on the internet | Optional |
|---|----------|

iii innovative

Yes.

Innovative offers a service that simplifies a library's publication of Linked Data records dramatically, reducing the time and effort for libraries to reveal their collections to the Web and contribute learning to the LibHub Initiative. The Innovative Libhub process includes setting up a conversion program that takes MARC/XML data, converts it into BIBFRAME, and makes it accessible to search engine web crawlers. When found and indexed by the search engines, the link goes back to the MARC record in the library's catalog. The linked data subscription is available at an additional cost.

|                       |          |
|-----------------------|----------|
| Spellcheck capability | Optional |
|-----------------------|----------|

iii innovative

Spell check in the staff client is not supported. However, you could load third-party software on the PC that would allow for spell check.



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### **Polaris Indexing**

The library can define its local indexing scheme at the time of data conversion and implementation. The Polaris ILS supports all MARC 21 bibliographic tabs and subfields, including those tags that are locally defined. Polaris also supports the inclusion of any tag/subfield combination in its indexes, including locally-defined tag/subfield combinations (for example, 9XX, X9X, and XX9).

The indexing scheme is not editable by the customer, and changes must flow through the Polaris Site Manager, but can be made. Full re-indexing is available for a nominal fee; however, subsets of records can be re-indexed simply by resaving them. In addition, all indexing schema changes take effect immediately on new (or newly saved) records.

The Polaris ILS architecture allows access to data without the need for a fixed collection of predefined indices. Specifically, within the Polaris architecture:

- Bib, Authority, and Item information is bridged
- All relevant tag/subfield information is indexed
- All searches may be scoped by fixed field information
- More categories of indices are available in Polaris:
  - Browse (authority controlled tags)
  - Keyword
  - Exact match implicitly truncated
  - Exact match explicitly truncated
  - Phrase

In addition, the Polaris ILS comes with 135 indices built on bibliographic, item, and authority data.

#### **Bibliographic Indices**

Polaris ILS comes standard with 61 indices on built on bibliographic records. These indices bridge both bibliographic and authority information contained in the bibliographic record. All of these indices may be scoped at the time of search using any number of the following five bibliographic fixed field element indices:

- Format
- Language
- Material Type (combination of data from the leader, 008, & 007)
- Publication date
- Target audience



---

Further, at the time of search you may further limit your Polaris search using various elements based on the item record such as item status, organization, collection, and material type.

The 61 predefined bibliographic indices include:

1. Title exact match (implicitly truncated)
2. Title exact match (explicitly truncated)
3. Title Browse
4. Title Keyword
5. Title phrase
6. Author exact match (implicitly truncated)
7. Author exact match (explicitly truncated)
8. Author Browse
9. Author Keyword
10. Author phrase
11. Subject exact match (implicitly truncated)
12. Subject exact match (explicitly truncated)
13. Subject Browse
14. Subject Keyword
15. Subject phrase
16. Series exact match (implicitly truncated)
17. Series exact match (explicitly truncated)
18. Series Browse
19. Series Keyword
20. Series phrase
21. Call Number exact match (implicitly truncated)
22. Call Number exact match (explicitly truncated)
23. Call Number Browse
24. Control Number exact match (implicitly truncated)
25. Control Number exact match (explicitly truncated)
26. CODEN exact match (implicitly truncated)
27. CODEN exact match (explicitly truncated)
28. Dewey exact match (implicitly truncated)
29. Dewey exact match (explicitly truncated)
30. LC Classification exact match (implicitly truncated)
31. LC Classification exact match (explicitly truncated)
32. NAL Classification exact match (implicitly truncated)
33. NAL Classification exact match (explicitly truncated)
34. NLC Classification exact match (implicitly truncated)
35. NLC Classification exact match (explicitly truncated)
36. NLM Classification exact match (implicitly truncated)
37. NLM Classification exact match (explicitly truncated)
38. UDC Classification exact match (implicitly truncated)
39. UDC Classification exact match (explicitly truncated)



40. Other System Control Number exact match (implicitly truncated)
41. Other System Control Number (explicitly truncated)
42. Notes Keyword
43. Notes Phrase
44. Genre Keyword
45. Genre Phrase
46. Gov Doc exact match (implicitly truncated)
47. Gov Doc exact match (explicitly truncated)
48. ISBN exact match (implicitly truncated)
49. ISBN exact match (explicitly truncated)
50. ISBN Keyword
51. ISSN exact match (implicitly truncated)
52. ISSN exact match (explicitly truncated)
53. Keyword (general) Keyword
54. Keyword (general) Phrase
55. LCCN exact match (explicitly truncated)
56. Publisher Keyword
57. Publisher Phrase
58. Publisher number (028) exact match (implicitly truncated)
59. Publisher number (028) exact Match (explicitly truncated)
60. STRN (Standard Technical report number) exact match (implicitly truncated)
61. STRN (Standard Technical report number) exact Match (explicitly truncated)

#### Authority Indices

Authority specific indices are available as well. There are 28 authority-based indices:

1. Control Number exact match (implicitly truncated)
2. Control Number exact Match (explicitly truncated)
3. Heading exact match (implicitly truncated)
4. Heading exact Match (explicitly truncated)
5. LCCN exact match (implicitly truncated)
6. LCCN exact Match (explicitly truncated)
7. Other system control number exact match (implicitly truncated)
8. Other system control number exact match (explicitly truncated)
9. Conference Name Keyword
10. Conference Name Phrase
11. Corporate Name Keyword
12. Corporate Name Phrase
13. Genre/Form Subject Keyword
14. Genre/Form Subject Phrase
15. Geographic name Keyword
16. Geographic name Phrase
17. LC Children's subject keyword
18. LC Children's subject Phrase



19. LC subject keyword
20. LC subject Phrase
21. Name Keyword
22. Name Phrase
23. Personal name keyword
24. Personal name phrase
25. Subdivision heading keyword
26. Subdivision heading phrase
27. Topical term keyword
28. Topical term phrase

#### Item Indices

The Polaris ILS also offers 40 indices that 'bridge' bibliographic, item, and authority information. These available item based indices include:

1. Title exact match (implicitly truncated)
2. Title exact match (explicitly truncated)
3. Title Browse
4. Title Keyword
5. Title phrase
6. Author exact match (implicitly truncated)
7. Author exact match (explicitly truncated)
8. Author Browse
9. Author Keyword
10. Author phrase
11. Subject exact match (implicitly truncated)
12. Subject exact match (explicitly truncated)
13. Subject Browse
14. Subject Keyword
15. Subject phrase
16. Series exact match (implicitly truncated)
17. Series exact match (explicitly truncated)
18. Series Browse
19. Series Keyword
20. Series phrase
21. Barcode exact match (implicitly truncated)
22. Barcode exact match (explicitly truncated)
23. Call Number exact match (implicitly truncated)
24. Call Number exact match (explicitly truncated)
25. Call Number Browse
26. Circulation Status exact match (implicitly truncated)
27. Circulation Status exact match (explicitly truncated)
28. Classification number exact match (implicitly truncated)
29. Classification number exact match (explicitly truncated)



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30. Control Number exact match (implicitly truncated)
31. Control Number exact match (explicitly truncated)
32. Current borrower exact match (implicitly truncated)
33. Current borrower exact match (explicitly truncated)
34. Due date (range)
35. General Notes Keyword
36. General Notes Phrase
37. Genre Keyword
38. Genre Phrase
39. Record status exact match (implicitly truncated)
40. Record status exact match (explicitly truncated)



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**Serials**

| Serials  |          |
|--|----------|
| Ability to automatically send claimed missing issues to vendor, as per configured parameters, with no staff intervention | Required |

iii innovative

Yes, serials claiming can be set up to be manual or automatic, and the claim notification method and text can be set in Polaris Administration.

|  |          |
|--|----------|
| Report of missing issues automatically generated | Required |
|--|----------|

iii innovative

Yes, Polaris supports automatic claiming.

|   |          |
|---|----------|
| Ability to utilize frequency information from vendor to automatically create check in boxes and customize dates | Required |
|---|----------|

iii innovative

Yes, Polaris supports publication patterns for automatic prediction. You can use a publication pattern template, or you can specify the enumeration, chronology, frequency, and regularity for the serial title in the serial holdings record. If you are creating the publication pattern by specifying the enumeration, chronology, frequency, and regularity for the serial title, you may also save the publication pattern as a template before you save the publication pattern, so that it may be used to create other publication patterns for your organization. If you already have publication pattern templates, you may test them by checking the prediction preview. If the publication pattern has changed since the templates were created, you can update the template. When you create a new publication pattern for a serial title, you can save it as a template.

|                                       |          |
|---------------------------------------|----------|
| Ability to create routing information | Optional |
|---------------------------------------|----------|

iii innovative

Yes, when you check in a serial issue, you can print a route slip to attach to the issue if you want to route it to several people.



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|   |          |
|---|----------|
| Serials invoicing occurs automatically, with no staff intervention, and automatically connects into accounting software | Optional |
|---|----------|

iii Innovative

Serials invoicing is not automatic.

However, Polaris supports full access to your data. Your staff can create reports on any data in your database. You can perform full SQL queries or use SimplyReports to create custom reports.





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| Acquisitions                    |          |
|---------------------------------|----------|
| Acquisitions                    |          |
| Ability to utilize EDI ordering | Required |

iii innovative

Yes, Polaris supports the X12 version 4010 standard to transmit purchase orders electronically, load electronic confirmations (or receive confirmations via email) and generate invoices in Polaris using the following vendors:

- Audio Book Services
- Baker & Taylor
- Brodart
- Children's Plus, Inc.
- Findaway World
- Gale-Cengage Learning
- Ingram
- Library Bound
- Micro Marketing LLC
- Midwest Library Service
- Midwest Tape, Inc.
- CVS Midwest Tape
- Penworthy
- Quality Books, Inc.
- Rainbow Books
- Recorded Books
- Scholastic Library Publishing
- United Library Services
- Whitehots, Inc.
- Yankee Book Peddler (support is pending)



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|  |          |
|--|----------|
| Ability to create order records from imported vendor carts | Required |
|--|----------|

iii innovative

Yes.

**9xx Ordering**

You can access vendors' web-based selection tools and databases directly from the main Polaris menu. Using your library's profile on the vendor's site, you can select titles and specify material type, fund, destination library, collection information, and non-public notes. Then, the brief bibliographic records are imported into record sets that can be automatically bulk added to selection lists or purchase orders. As a result, the purchase orders already include bibliographic, fund, and order distribution information.

Polaris has successfully imported MARC records using the following vendor systems:

- Baker & Taylor's Title Source 3
- Brodart's Bibz2.com
- Ingram's iPage
- Midwest Tape

The vendors above support the Polaris designated 970 order distribution tag with the following subfields:

- 970\$i [location]
- 970\$c [collection]
- 970\$f [fund]
- 970\$q [quantity]
- 970\$p [price] (If no 970\$p, Polaris uses 020\$c)
- 970\$n [non-public notes]

Multiple 970 tags are supported in the MARC bib record. Finally, Polaris supports the ability to overlay duplicate identical bibliographic records while retaining (970) order data, so that multiple selectors can work simultaneously in either a centralized or de-centralized acquisitions workflow.

|                     |          |
|---------------------|----------|
| Claiming capability | Required |
|---------------------|----------|

iii innovative

Yes.



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|  |          |
|--|----------|
| Detailed fund reports for collection areas | Required |
|--|----------|

iii innovative

Yes.

|   |          |
|---|----------|
| Automated status changes from Ordered/Receive/Invoiced without staff intervention | Optional |
|---|----------|

iii innovative

Yes.

|  |          |
|--|----------|
| Invoices are integrated into accounting software, with no staff intervention | Optional |
|--|----------|

iii innovative

This is not something that is a standard part of Polaris, however, most of our customers have worked to create SQL queries and reports to handle this type of integration.



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| System, Server & Software Functionality                                   |          |
|---|----------|
| Functionality   |          |
| Ability to add and integrate APIs (provide an overview of available APIs) | Required |

iii innovative

Yes, Polaris supports an API that allows external systems to access Polaris-defined functionality. The functionality is exposed via RESTful Web services. We can provide a list of the proprietary Polaris API-supported functions in the company-confidential Polaris API Guide (upon request and upon signing a mutual non-disclosure agreement).

The Polaris API was developed initially in response to the Phoenix Public Library's requirement to design and develop its own public access catalog using the Endeca software development toolkit. The Polaris API has since expanded, and it will continue to expand to meet customer requirements.

A few examples are:

Darien Library

<https://www.darienlibrary.org/>

Darien Library has been a customer since 2010. Darien Library has a distinguished reputation for innovation and has continued their efforts to deliver on a great user experience with the launch of the latest and greatest version of the originally developed SOPAC, or "Social PAC" catalog. SOPAC3 has been completely rewritten to give users the best experience. Features include:

- Allowing parents to see what children have checked out without a separate login
- The ability to register for library events from within their profile screen
- Works-level concordance, rather than retrieving a full page of search results for a given title, each title is displayed in a single record with clickable tabs to check location and availability of each format.

Johnston Public Library

<https://www.johnstonlibrary.com/>

Johnston Public Library has been a customer since 2013. JPL has a collection of over 73,000 volumes and circulates over 260,000 items annually. JPL is located in Johnston, Iowa (in the Des Moines area).



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The Johnston Catalog is extraordinary and perhaps the best example of library staff using the Polaris APIs and open architecture to build their own public interface. Here is just some of the custom functionality the library has built into their catalog:

- Display of Amazon ratings with each title and an integrated link to the Amazon reviews
- Automatic results from EBSCOHost with every search
- A graphical shelf browse including item status display
- Pre-configured email alert lists for new material
- Extended suggested searching and “did you mean” capabilities

The JPL “homepage” is a basic component of the City of Johnston site. By comparison, the catalog landing page is really fleshed out with more extensive searching options and other library content that JPL wants to promote to its patrons.

Johnston Public Library has created a one-of-a-kind patron experience.

TRAC (The Regional Automation Consortium)

<http://www.tracpac.ab.ca/>

TRAC has been a customer since 2008. TRAC has a combined collection of nearly 3 million volumes at over 170 public and school libraries.

TRAC is a partnership of four regional library systems covering most of the Province of Alberta, Canada:

- Marigold Library System
- Northern Lights Library System
- Peace Library System
- Yellowhead Regional Library

TRAC was one of the first Polaris consortia covering such a wide geographical area. TRAC has always been a progressive site, particularly given the challenges of serving a multi-type, multi-system consortium. TRAC engaged a local firm who used the Polaris API to create the first mobile apps working with Polaris.

Richland County Library

<https://www.richlandlibrary.com>

Richland County Library (RCL) has been a Polaris customer since 2013. RCL has a collection of over 1.2 million volumes and circulates over 4.6 million items annually. RCL is headquartered in Columbia, South Carolina and has 11 locations throughout Richland County.



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RCL has accomplished some of the most sophisticated customization work we've seen. Their website features a fully responsive web design and RCL has used the Polaris API to integrate a lot of searching and PAC functionality right into the home page. The RCL PowerPAC includes extensive customizations – many of which are aimed at making the site very mobile/tablet friendly. Interestingly, the PowerPAC full display includes a link to the title on Amazon.com.

The Polaris API features a mix of both read and write function calls. The Polaris API forms the backbone of many of our third party integrations (social networking, e-resources, third party discovery) and so bidirectional support is a critical component.

In conjunction with the API we have established the Polaris Developers Network (PDN). The PDN is a website where our Development Community (employees, customers, third party partners) can share resources and ideas as they create their own Polaris-based applications. The PDN also features sandbox environments where developers can test their API calls against any one of several release versions of Polaris. This is a great alternative to trying out your latest great idea on your production system.

|   |          |
|---|----------|
| Ability to distinctly brand and customize options for staff and public interfaces | Required |
|---|----------|

iii innovative

Yes, the Polaris ILS offers a wide range of customization that is managed via its robust System Administration interface. Functional customizations can be obtained through external interfaces to the Polaris ILS database. Innovative publishes the complete, documented Polaris ILS database schema for customers interested in developing functional customizations. Using both Microsoft Reporting Services and other widely available utilities, Polaris customers enjoy complete access to the database.

Polaris offers five levels of PAC customizability to suit customers with different needs and different technical comfort levels. These levels of customizability are the most flexible in the industry.

- System Administration – Through the system administration interface, the authorized user can customize title lists (aka dashboards), navigation, search options, messages and content at the system, library, branch and workstation levels.
- Language Editor (Web Admin) – This is a Web-based tool you can use to customize English and other licensed language strings in all the parts of Polaris that support multiple languages, including Polaris PowerPAC, Polaris ExpressCheck, printed and e-mail notices, telephone notices, Polaris Phone Attendant (inbound telephony), and Polaris Fusion. You can compare, add, edit and distribute language strings easily, without editing individual files. You can add or customize language strings at the system, library, and branch levels. Branch settings override library settings; settings made at the library level override system-level settings. Polaris Language Editor also provides tools specifically for Polaris PowerPAC, including a language string identifier and a Reload tool to clear the Polaris PowerPAC cache and reload PowerPAC pages.



- **Style sheets** – Polaris’s use of cascading style sheets (CSS) allows the user to customize the look and feel of the entire PowerPAC. CSS is a simple mechanism for adding style (e.g. fonts, colors, spacing) with a single entry that then ‘cascades’ through every screen in the PowerPAC. This tool is highly conducive to experimentation because changes can be applied or reversed very rapidly.
- **Web Pages** – PowerPAC utilizes web pages into which the user can directly enter HTML. These are the User Defined pages, and they include: Portal (located below the Weather section), Weather (usually just contains the weather.com magnet, but actually can contain whatever the customer desires), Events, Policies, & Website. There are special "include" files for the customer located in a special directory signifying that they can change these files to be whatever they want. These files are actually just HTML fragments and they are included automatically in their respective pages.
- **Complete customization** – For those customers who want complete control of all aspects of PowerPAC, Polaris provides two different types of files: the non-search engine files and the search engine files. The non-search engine files are .asp files that dynamically create the HTML. The search engine files use XML and XSLT to display the pages. Polaris uses .asp pages to dynamically create XSLT style sheets that THEN dynamically create the HTML pages. Those customers who are confident in their technical abilities with .asp could make changes at this level if they wanted to change the placement of search results. For example, a customer who wanted the format icon to appear in a different place in the results list could make such a change here. However, extreme care would have to be taken when making a change at this level. These pages also contain substantial amounts of business logic that drive the actual search engine, and a mistake at this level could adversely affect the search engine itself. Fixing a problem like this would not be covered under the standard subscription contract.

#### PAC Branding

Five stock themes are delivered with the Polaris PowerPAC. The library has the option, through System Administration, to define their own logo image as well as background and foreground colors for the header and custom HTML for the main portal page. The Polaris ILS includes the ability to have a custom theme down to the individual library and/or branch level (if appropriate).

Custom themes, which give the user much more control over the look and feel of the interface (including colors, font sizes, replacement of any image), are maintained in a custom directory. Some basic knowledge of HTML/CSS/XML/XSLT is needed to make these customizations. Each library system and branch can have their own theme. This allows for a library to brand their PowerPAC site to mirror the look and feel of their library web site.

Visit [http://polaris.iiidiscovery.com/?page\\_id=780](http://polaris.iiidiscovery.com/?page_id=780) to see how a variety of Polaris customers have taken advantage of the ability to customize the Polaris PowerPAC.



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Additionally, here are the direct links to a few notable examples:

- Baltimore County Public Library: <http://www.bcpl.info>
- Denver Public Library: <http://catalog.denverlibrary.org>
- Pierce County Library System: <http://polariscatalog.piercecountylibrary.org/polaris>

|   |          |
|---|----------|
| Ability to access the ILS from anywhere | Required |
|---|----------|

iii innovative

Yes.

|  |          |
|--|----------|
| Automatic regular backups with no staff intervention | Required |
|--|----------|

iii innovative

Yes, Innovative performs daily backups using AWS' snapshot-based technology as part of the standard hosting package. The snapshots are stored in geographically diverse AWS S3 locations that are replicated to other availability zones to meet the offsite storage requirements for all customers. Random backups are periodically tested and restored to ensure compliance.

|   |          |
|---|----------|
| Software regularly updated and upgraded with no impact on service | Required |
|---|----------|

iii innovative

Yes, software upgrades are scheduled with each customer to occur during the regular maintenance window at a time and date that will have minimal impact on library operations.

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|---|----------|
| Development cycle that is responsive to known issues and enhancements | Required |
|---|----------|

iii innovative

Yes, through our Agile development process, Innovative releases software updates approximately quarterly, which include enhancements as well as any maintenance fixes that are needed. For all released products we inform our library partners of these releases through our library partner support system and direct communication. For major and minor releases, we typically also provide more marketing-oriented communication for more general library market consumption. Typically, our support team works proactively with each library partner to plan upgrades to the latest releases in a fashion favorable to the individual library partner.





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User-driven development and enhancements are managed using a shared space called Idea Lab. Idea Lab is an innovation environment, designed for users to submit, discuss, and vote on ideas to improve solutions for libraries. Idea Lab uses “challenges” to collect ideas. A challenge is a time-bound event that is focused on a specific opportunity that could be a topic, a functional area, a product, or a theme. Each challenge is designed to solicit actionable ideas from the participants, with a clear path to implement one or more winning ideas. All users can comment and vote on ideas. Idea Lab uses automated algorithms and an expert review process to promote the best ideas for prioritization by the group before winning ideas are selected. When the challenge ends, Innovative will announce which winning ideas have been selected, and what users can expect with regard to how those ideas will be implemented.

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| Notice of software update provided minimum 24 hours in advance of an update | Required |
|---|----------|

iii innovative

Yes.

|  |          |
|--|----------|
| Availability/usage of SIP2 connections | Required |
|--|----------|

iii innovative

Yes, Polaris supports SIP2 connections.

|  |          |
|--|----------|
| Granular security that can be applied to each user account | Required |
|--|----------|

iii innovative

Yes, Polaris supports a permissions model that allows libraries to establish security based on the following criteria: who is performing the action, the action to be taken (create, access, modify, delete), the type of record upon which the action is taken (patron, fund, item, etc.), and the organization that ‘owns’ the record (branch, library or system). Workstations can also be restricted to specific functions. This model allows a tremendous degree of flexibility and granularity in assigning permissions, and includes options such as group permissions to expedite initial setup.

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| Customer information and backups remain in the United States | Required |
|--|----------|

iii innovative

Yes.

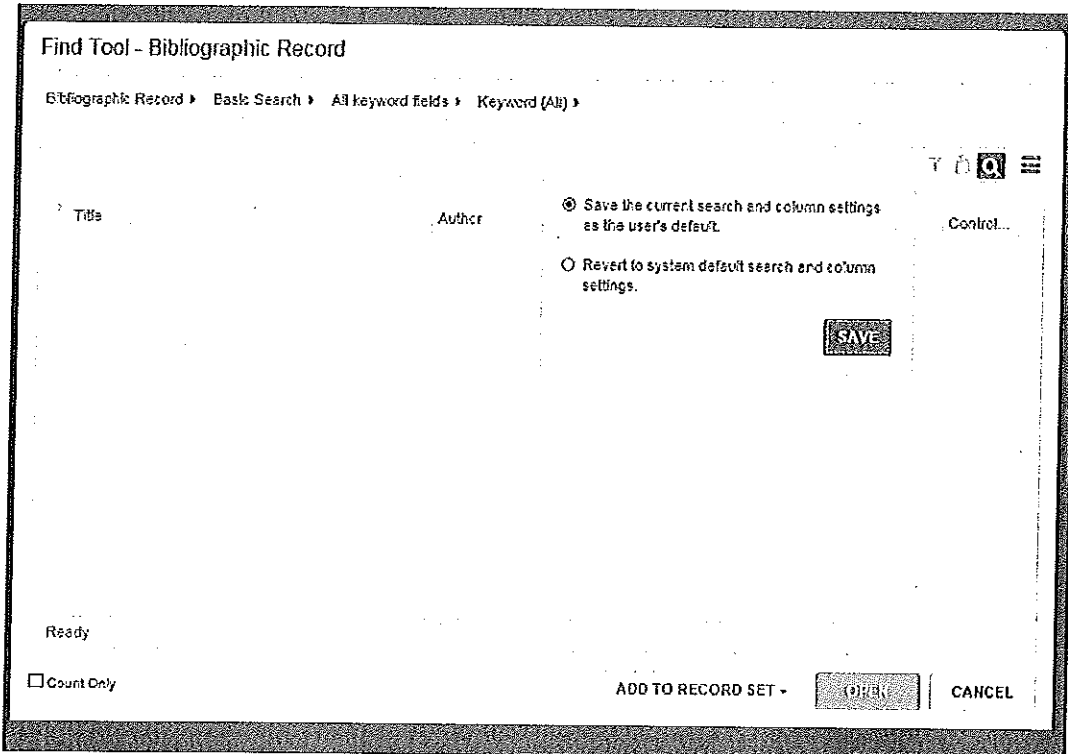


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|  |          |
|--|----------|
| Ability to customize the staff interface | Required |
|--|----------|

iii innovative

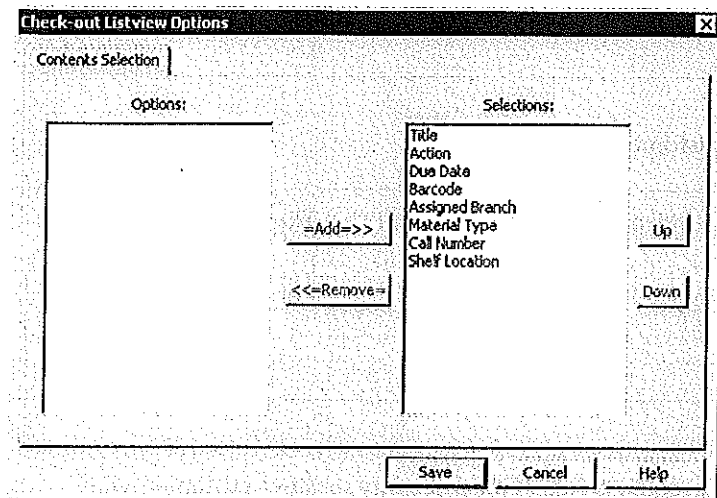
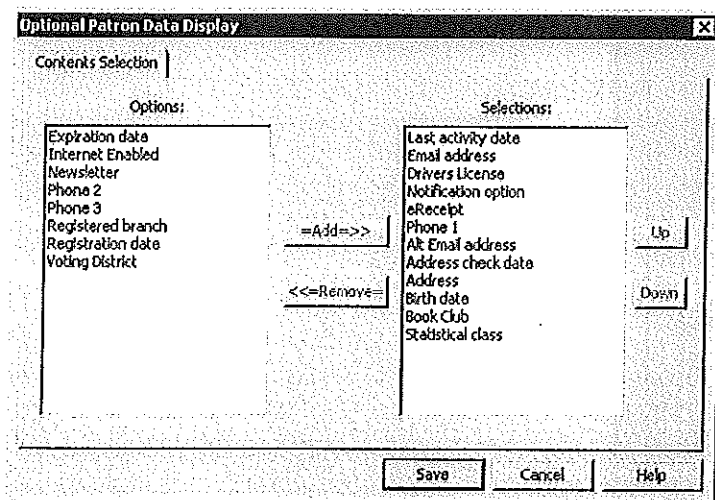
Yes, staff operators can save default search options in the Find Tool.





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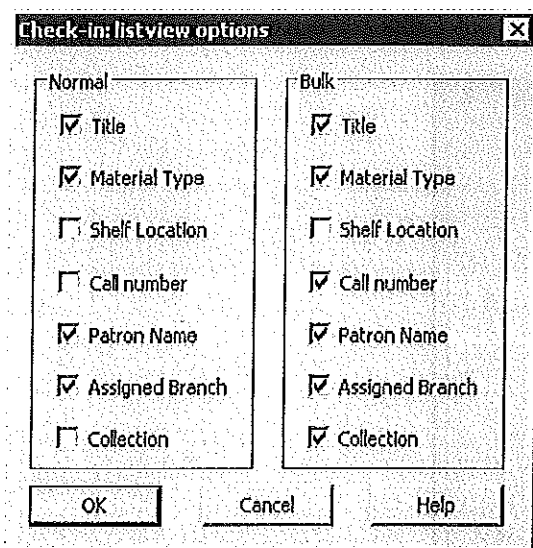
Settings can also be set in System Administration at the branch and workstation levels. These settings are based on user permissions. For example, on the check-out screen, the user can customize what patron data displays in the header and, to a limited extent, what data displays for items checked out.





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On the check-in screen, the user can select what item data to display:



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|---|----------|
| Ability to customize the public interface | Required |
|---|----------|

iii innovative

Yes – see the answer above about PAC customizations.

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| Security measures are included to minimize chance of fraudulent activity or access | Required |
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iii innovative

Yes.

#### Physical Security

AWS' data centers are designed to satisfy requirements of most security sensitive customers with constant monitoring, high automation, high availability, and highly accredited to global security standards, including: PCI DSS Level 1, ISO 27001, FISMA Moderate, FedRAMP, HIPAA, and SOC 1 (formerly referred to as SAS 70 and/or SSAE 16) and SOC 2 audit reports. Innovative also holds ISO27001 certification for Cloud Hosting services.

#### Security

Security is an important part of our reputation; it is critical to earning our customer's trust, vital to how we do business, and essential in delivering our product. Innovative's proprietary Information Security Management System (ISMS) supporting its cloud and hosted infrastructure is based on NIST and is ISO 27001:2013 certified. For more details on Innovative's ISMS please visit the [www.iii.com/security](http://www.iii.com/security) web page.