



Notice Inviting Tender

Memo No: AC/175/19-20

Dated: 25-07-2019

Sealed quotations are invited from Reputed Organisation to quote rate for cloud hosting configuration/customization of library automation software Koha (latest stable release) of NSOU in the Cloud and inclusion of library OPAC to NSOU website for Library Department, Netaji Subhas Open University (NSOU) located at Kalyani Regional Centre, NSOU, Kalyani, Nadia, West Bengal.

Last date for submission: 09/08/2019 up to 4 PM
Place of Submission: Finance Department, 4 th Floor, Netaji Subhas Open University DD-26, Sector-I, Salt Lake, Kolkata -700064
Copies of Documents to be submitted: GST No., PAN, TAN, Trade Licence, P. Tax and Certificate(s) / Documents in support of Credentials of the similar type of job(s).
The sum of all the items would be taken into consideration to have LOWEST QUOTATION.
Contact Person & Mob. No.(for any query): Deputy Librarian, NSOU, Mob - 9433042783 / 9051162059
The interested Bidders may visit the place of work at Kalyani Regional Centre, Library Department, 2nd Floor, Warehouse Building, Netaji Subhas Open University, Ghosh Para Station Road, Kalyani, West Bengal on 1st August, 2019 and 2nd August, 2019 (BETWEEN 12.00 Hrs to 15.00 Hrs.).

SPECIFICATION of WORK

Technical bid for cloud hosting configuration/customization of library automation software Koha (latest stable release) of NSOU in the cloud and inclusion of library OPAC to NSOU website for Library Department, Netaji Subhas Open University (NSOU) located at Kalyani. NSOU presently requires cloud facility for 50 concurrent users and 10000 items (around 3000 records are already available in local Koha instance in the library of NSOU that require to be merged with the cloud hosted Koha instance). The specifications are given below:

OPAC (Online Public Access Catalogue)

- Fully customizable web-OPAC and mobile OPAC (bootstrap theme).
- Provision for mobile apps for searching catalogue database (initially for Android phones).
- Keyword and advanced searching (with support for Boolean operators, Relational operators, Positional operators, Field-level searching, Truncated searching, Weight-term searching, Stem searching and Fuzzy searching)
- Browse options for Subject and Author.
- Faceted navigation options for Author, Subject, Title, class no, keyword, barcode.
- Search filtering by location, item type, subjects and more.
- Cover images from over 5 popular services (with options for selective integration of cover page image, reviews and ratings)
- Enhanced OPAC content from external products such as Open Library, Syndetic, Baker & Taylor and Library Thing.



- Tagging, commenting and star ratings (along with display of Tag cloud related subject descriptors and Author cloud in OPAC preferably via hyperlink in navigational panel).
- Availability and online resource links shown on search results (preferably through MARC Tag 856).
- Virtual shelf browser showing call numbers wise display of items with support for Forward and Backward moving.
- Social network share buttons covering all major social networking services.
- Support of Carousel service to display cover image, title, author and call number of recently added documents in OPAC by using external free service providers.
- Multilingual search options – support for Google Indic transliteration and Embedded Keyboards for Bengali scripts.
- Display options for ISBD format, MARC format and Custom format.
- Option to move to “Next record” and “Previous record” in retrieved result sets.
- Authority searching provision based on MARC 21 Authority Format:
 - o By author
 - o By subject
 - o From non-preferred subject term to preferred subject term
 - o From name variants of authors to name in catalogue
- Links to “Library services” “Library rules”, “Library resources”, “Library databases”, “E-journals portals” “E-books and resources” etc. from left/right navigational panel.
- Library name and address for each page in OPAC
- Customized OPAC header
- Options to extend search to other library catalogues (e.g. LoC (Library of Congress) catalogue, OCLC (Online Computer Library Center) catalogue, e-journals portal and Open Access portals
- Provision for item level information in OPAC – no. of items of a manifestation, circulation status, holding information, reviews etc.
- Provision to select libraries (for searching), Open Access e-books, e-journals, e- learning materials from pull down menu.
- Personalized patron experience:
 - o Ability to change password at user end.
 - o Ability to place, suspend and cancel holds.
 - o List of current and past checkouts.
 - o Account history (fines and payments).
 - o Reading history with provision for chronological listing.
 - o Private lists for favorite items.
 - o Ability to register for a library card online.
 - o Access to account information.
 - o Subscribe/Unsubscribe to/from library notices via email, SMS and/or phone.
 - o Make purchase suggestions (with provision for entering data for some field as mandatory such as Title, Author, ISBN, Publisher and Price, Barcode, Call no.)
 - o Provision for self-checkout (To be implemented in future)



- General search support:
 - OPAC must be fully integrated with other modules and accessible through web-based client irrespective of web browser and versions;
 - OPAC should provide browse indexes for author, title, and series and browse index combining all four indexes;
 - Should support searching different forms of authorities;
 - It should allow combined, specific and field level searching for all formats along with phrase searching, nested searching and truncated searching;
 - It must enable searching by using Boolean operators (OR, XOR, NOT, AND), positional operators (SAME, WITH, NEAR, ADJ) and relational operators ('greater than', 'less than', 'equal to', etc.) within and across all fields including provision for Fuzzy searching;
 - It should provide facility to see processing status (fully catalogued, in process, lost, withdrawn etc.) and circulation status (in transit, reserve, recalled, on-hold etc.);
 - OPAC should support full, brief, standard, ISBD, FRBR and customized display of records including relevancy ranking of search results.

Circulation

- Check in and out with a barcode scanner or manually (RFID compatibility on the basis of global standards in the domain (To be implemented in future)).
- Privilege control to access circulation module.
- Academic calendar based fine calculation and due date determination.
- Enter calendar of closings for calculating fines and due dates.
- Ability to forgive fines on check in with proper authentication
- Holds pull list generated as per the reservation schedule.
- Course reserves.
- Offline circulation facility.
- Place, suspend and cancel holds for patrons by circulation staff.
- Bulk transfer of materials between all Regional Centres and schools .
- Set circulation, fine and holds rules for each branch with Independent Branch management option.
- Perform collection inventory.
- Circulation rules for privileges control – item type-wise and patron category-wise.
- Provision to include grace period, fine amount, fine interval etc. in Circulation rules.
- Circulation statistics.
- Support for NCIP (NISO Circulation Interchange Protocol) for portability of circulation data.
- On demand circulation reports in custom formats (formats to be given by the library).

Patrons

- Upload patrons in bulk.
- User-driven profile creation.
- Uploading patron images individually and in bulk mode.
- Creation of bar-coded photo-included patron cards with custom format (to be given by library) and provision to print patron card in required medium and in required size.



- Batch modification of patrons.
- Batch upload of patron data from txt, csv and xls files to patron database in Koha.
- On demand reports on circulation in custom format (to be given by library).
- Search patrons by phone, email address, name and more.
- Browse patrons by name, school and programme code.
- Add custom searchable fields to patron records.
- Provision to lodge complain/problems/feedback to librarian from user end.
- Provision at the user end to tag a resource by appropriate subject term (tag) with facility to approve terms by librarian (Folksonomy).

Cataloguing

- Support for MARC 21 Family of standards (Bibliographic format, Authority format and Holding format) (specially for serials).
 - Separate Biblio framework with required MARC tags (to be given by the Library) for different library materials – monographs, serials, reports, reference books, learning objects, theses, e-books, digital objects etc.)
 - Provision for authority lists / code lists / MARC Code lists for different MARC tags and sub-fields (to be given by library) for standardization of data entry.
 - Dynamic linking of name authority data and subject authority data with bibliographic records.
 - Add bibliographic and authority records by batch uploading.
 - Add records by copy cataloguing with a built in Z39.50 search engine (with provision to transfer Unicode-compliant multilingual records preferably in UTF-8 format).
 - Add records using original cataloguing in MARC 21 Formats.
 - Add and modify items individually or in a batch.
 - Provision for Status declaration of an item (confined copy, reading room copy etc.)
 - Add and link to authority records – name authority and subject authority.
 - Catalogue following AACR2 or RDA rules with FRBR wise display option.
 - Create custom cataloguing templates with pre-set values for efficient cataloguing.
 - Built in links to Library of Congress cataloguing help for each MARC Tags and corresponding sub-fields.
 - Create spine and barcode labels in required shape and size.
 - Batch modification and deletion of item records.
 - Create public lists of records at the library.
 - Provision to serve MARC records in UTF-8 format for other libraries through Z 39.50 server (To be implemented in future).
 - Provision for easy inclusion of e-book metadata supplied by vendors.
 - Direct linking to full-text e-book from OPAC search
 - Authority data:
- o Provision for generation of SEE, SEE ALSO references and NT-BT-RT relationships network from authority records and link these references to matching access points in OPAC;



Must allow any bibliographic field to be authority controlled (particularly 1xx, 6xx and 7xx groups in MARC 21 bibliographic format) and should include facilities to search, retrieve, and display print and global editing of authority records by authorized operators;

Bibliographic Control and Interoperability:

MARC 21 bibliographic and authority framework for processing bibliographic data including multilingual data processing support (Unicode character set processing ability); Data entry support to enter positions values for MARC 21 Leader and Control fields (00X group) Global editing utility that find and replace data within specified fields; Data format validation during input of bibliographic data; MARC 21 format for holding and display of holding on the basis of ANSI Z39.44 serials holdings display format; Import of bibliographic data through Z39.50 complaint distributed cataloguing interface in CCF, MARC, UNIMARC formats; and Interoperability and crosswalk through incorporation of ISO-2709, XML, RDF and metadata schemas (e.g. Dublin Core Metadata);

Reports

- Provision of a report library (as given by library for different modules)
- Complete access to all data stored in Koha (write any report you want).
- Custom reports shared publicly on the Koha wiki.
- Easily run any saved report at any time in any format (HTML, PDF, CSV, TXT etc) with additional facility like line graph, bar chart and pie chart.
- Group reports by branch, category or any custom criteria.
- Provision for First, Second and Third Sort Keys for arranging items in a report.
- Enter filters on reports to run them on for specific item types, branches, patron categories, time frames and so much more.
- Search reports for easy access.

Acquisitions

- Managing budgets (with sub heads) and funds.
- Real-time fund accounting for each budget heads and sub heads.
- Support for INR as default currency for all calculations.
- E-mail notification to vendors with facility to predefined notice
- Provision for Duplicate budgets and funds for the following year.
- Provision to keep track of all vendor information through master file.
- Order from vendor files.
- Order multiple copies.
- Supports all order types – standing order, renewal, books-on-approval etc.
- Order copies of existing records.
- Order by searching Z39.50 targets.
- Track order status.
- Generate late reports and claim letters.
- Track budget encumbrances and expenditures.
- Create 'on order' items to allow patrons to place holds.
- Accept purchase suggestions (with provision for entering data for some field as mandatory such as Title, Author, ISBN, Publisher and Price) and keep patrons notified as the item moves through the Acquisitions process.



- Provision to enter details for received items (including accession numbers) at the time of receiving.
- Seamless movement of bibliographic data from Acquisition module to Catalogue Module.
- Privileges settings to operate Acquisition Module to ensure accountability and responsibility

Serials

Generic requirements

- Create subscriptions with full prediction patterns.
- Receive issues one at time or in bulk.
- Barcode serials on receipt if desired.
- Generate late issue reports and claim emails.
- See full serial history.
- Print routing lists for each subscription.
- Duplicate subscriptions for multiple branches.

Specific requirements

- New subscription
- Renewal of subscription
- Cancellation of subscription
- Budget control

§ Department/unit-wise budget

- Invoice processing

§ Invoice for individual issues, or for annual (or other period) subscription

- Recording the receipt of journal issues
- Formula for generating expected issues (predictive mode of serials control)
- Easy Kardex management
- Managing (sending claims for) missing issues
- Sending reminders
- E-mail notifications
- Print reminders
- Support for domain-specific bibliographic format like MARC 21 Bibliographic Format (Tag and sub-fields will be given by library) and MARC 21 Holdings Format

- Needs to be able to cope with "special editions", supplements, and indexes
- Should also be able to cope intelligently with name changes (of publication, publisher) and merges or splits (i.e, one journal becomes two, or two join together)

- Binding control
- Accessioning bound volumes

§ Barcoding of accession numbers

- Complete holding information for individual title
- Report generation
- Listing the periodical for browsing

§ Hyper linking the e-journals from publisher's sites or consortia sites

- Editing and updating of records
- Searching in OPAC



§ By title

§ By publisher

§ By distributor

§ Sorting by date or volume/issue number

- Printing of holdings of periodicals and supporting Routing of periodicals
- Options for display holdings and receiving of serials issues in Web-OPAC

Administration

- Full access to administrative functions.
- System preference setting by librarian with proper authentication.
- Full circulation and fine rules matrix for each branch.
- Define your libraries, item types, shelving locations and more.
- Create custom pull down menus for use in cataloguing, patron management and invoicing.
- Enter/change Z39.50 targets.
- Provision for Z 39.50 server to support distributed cataloguing.
- Privilege control with granular permission set up provision.

General parameters

- Date format: Selection of "metric," "us," or "iso" date format for entire ILS ("us" = mm/dd/yyyy; "metric" = dd/mm/yyyy; "iso" = yyyy/mm/dd);
- Tax parameter: Setting of tax (generally in percentage) for acquisition of documents;
- Parameters for Authorities: Involves decisions regarding Authority Display Hierarchy and Authority separator;
- Default character encoding: Selection of character encoding standard for whole ILS, usually Unicode for multilingual data;
- Theme selection: Selection of themes for appearance for both librarian and user interfaces;
- Branch management: Option for setting managing parameters for library branches.

Cataloguing parameters

o Allows settings of the following parameters for cataloguing activities – default display format for retrieved documents, default data format (MARC, UNIMARC etc.), Auto/manual barcode generation, Filing rules etc.

Circulation parameters

o Allows parameters setting related to maximum outstanding fine amount, maximum reservations allowed, patron image display, notification for borrower expiry, generation of gate pass etc.

OPAC parameters

o Supports setting for the following parameters related to OPAC – enhanced content linking (like Amazon etc.), suggestions by users from OPAC, virtual shelf management.

Other Parameters:

- **Library Branches:** Options for setting library code, name, address, IP address, domain name etc. Integration of cloud based Koha system with the NSOU official website to be included in scope of the work of cloud implementer of Koha.



- **Library Funds:** Setting of budget heads for different library materials as per the decision of the authority;
- **Currencies:** Define the currencies library deal with exchange rates.
- **Item Types:** Setting "categories" into which library items are divided.
- **Borrower Categories:** Setting definition for the types of users of library and how they will be given privileges.
- **Issuing Rules:** Controls aspects related to the circulation of library materials.
- **Authorized values for bibliographic format:** Options for setting list of authorized values for different tags and sub-fields of selected bibliographic format.
- **Bibliographic framework:** Scope for customizing of data entry framework by selecting require tags and sub-fields.
- **Printers:** Setting of printer (or several printers) that is attached to ILS server.
- **Stop words:** Provision to list all of the words library staff wish to ignore by ILS when performing catalogue searches or building the keyword index.
- **Z39.50 Servers:** Adding Z39.50 servers. Library requires ILS to search.
- **ILS-DI:** Support for ILS-DI parameters for future compatibility.
- **OAI Server:** Support for OAI (Open Access Initiative) server to ensure MARC records harvesting by Web-scale resource discovery agent (for future use)
- **Export/Import:** Settings for performing export/import activities by following standards like ISO-2709 and MARC-XML.
- **Backup/Restoration:** Regular backing up databases preferably automatically through Cron Job for restoration at the time of emergency.
- **Zebra retrieval engine control:** Easy to use scripts for indexing/re indexing bibliographic and authority records.
- Integration of Mibew chat facility may be included for endowing online reference service.
- Library orientation A V lecture may be linked in Koha interface.
- AMC for technical support required.

System

- Unices Platform (preferably latest stable Debian or Ubuntu LTS)
- Support for Indian languages at server
- Setting of UTF-8 as locale
- Apache-MariaDB-PERL/PHP architecture support
- Unlimited SIP2 connections.
- RFID compatibility with support for global standards in the domain and self-check out products.



Format for Submission of Quotation

Name of Participant:

Sl.	Description	Amount (Rs.)	GST(Rs.)	Total Ammount With GST (Rs.)
1.	Cloud hosting configuration/customization of library automation software Koha (latest stable release) of NSOU in the cloud and inclusion of library OPAC to NSOU website for Library Department, Netaji Subhas Open University (NSOU) located at Kalyani Regional Centre, NSOU, Kalyani, Nadia, West Benga			

Signature with Seal

Date:

Address:

Mobile No:

Email ID:

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