



Issue Date: August 31, 2016

Request For Information (RFI) No. 230827
Computer Time Management System

Response Due Date: October 5, 2016 by 5:00 p.m. Local Arizona Time (MST)

PURPOSE AND SCOPE

Pima County Public Library is requesting information from firms and parties that could assist the Library in researching and procuring a computer time management system that manages access to public computers, printing services, online fine payment, and point of sale system.

The Request for Information (RFI) process is an informal process utilized to gather information that may result in a subsequent Request for Proposal (RFP). No award will be made based on the results of this RFI process. Any procurement by the County will be subject to a separate process and subject to budget approval. **Interested firms or parties are asked to submit responses by 5:00 p.m. Local Arizona Time (MST) on Wednesday, October 5, 2016.**

Submit information for any products or services your firm provides that would address the County's objectives as detailed on page two (2) of this RFI under the paragraph entitled "SUBMITTAL CONTENT." There is no structured format for the presentation of your material. Your submittal should include one electronic copy (CD or Thumb Drive) and one hard copy. The submittal should also include any of the following: printed brochures, written statements regarding firm qualifications that address questions posed and issues identified, along with references and testimonials from past or present customers, especially any governmental entities.

BACKGROUND AND GENERAL INFORMATION

The Pima County Public Library is a large-scale public library system in Pima County, Arizona. Pima County Public Library is comprised of 27 libraries and serves a population of just fewer than one million residents.

Pima County Public Library is seeking an integrated system to:

- Manage customers' access to and time on the Library's public computers
- Manage customer sign-up, waiting lists, and notifications for computer use
- Manage customer printing services for wired workstations and wireless devices, including laptops, tablets, and smartphones
- Collect and account for printing charges, with options for separate charges for black and white and color printing
- Provide an online point of sale system for library customers to pay fines online
- Provide a cash drawer system for library staff to take in-house payments for fines and fees
- Interface with existing hardware, including PCs, multifunctional printers, and coin/bill payment towers

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SUBMITTAL CONTENT

Instructions

Please fully answer the following requests for information. Do not respond with “see XX.”

Reference to any other documents should be made only if the response is in excess of one page of document text and then should include a link to such document within the response.

Include screenshots whenever possible.

Specifically, the County invites interested firms and parties to provide information regarding the following:

VENDOR INFORMATION

1. Company Information
 - a. Company Name and Headquarters Mailing Address
 - b. Contact Name, Telephone and Email
 - c. Company Website URL
 - d. Type of Organization (Corporation, Partnership, etc.)
 - e. How long has the company been in business in its current form
 - f. Provide a description of your corporate strategy and how it manifests itself in your product direction.
 - g. Does the vendor use any subcontractors for the proposed product?
 - h. Please provide your technology roadmap.
 - i. What direction will your product(s) take over the next two years?
 - ii. What factors in the market are driving that direction?
 - iii. If there are any potential or planned changes in the product over the next 18 months, provide detailed information about the changes.
2. Experience
 - a. Provide contact information for at least 3 urban libraries with several locations that use your product, with at least 2 using Innovative Interface Incorporated's ILSP specifically Sierra.
3. Product / Solution
 - a. Provide a brief overview of the company and its computer time management solution.
 - b. Answer all questions in the sections below in detail.
 - c. Explain plans for future direction leveraging advances in technology for the proposed solution.

COMPUTER TIME MANAGEMENT

- A. How does a patron interact with the computer time management functionality? Provide screenshots for what the patron will see.

Provide screenshots and information about:

1. Direct sign up
 - a. How does a patron sign up directly at the computer?
 - b. How is patron privacy (name, barcode, PIN) maintained?
 - c. Does the system allow for optional masking of barcode and PIN at the workstation?
2. Queue sign up
 - a. How does a person sign up to get into a queue/waiting list?
 - b. How does a patron identify and select the zone/section they want?
 - c. How is patron privacy (name, barcode, PIN) maintained?
 - d. Does the system allow for optional masking of barcode and PIN at the sign-up station?
 - e. How does a patron cancel a session without staff interference?
3. Computer Availability
 - a. How does the system display computer availability for the patron?
 - b. How does the system indicate the approximate length of time a patron will have to wait for a computer?
 - c. How does the system notify a patron when their PC is available?
4. Future appointments
 - a. How does a patron schedule a future appointment?
 - b. How does a patron reserve a specific computer for a specific time on-site?
 - c. How does a patron reserve a specific computer for a specific time off-site through a web interface?
 - d. Are there both in-house and online options for scheduling? How do they work?
 - e. How does a patron cancel, reschedule, or edit an appointment?
 - f. Can the system detect and indicate when a duplicate appointment is made?
5. Computer Use
 - a. How notifications are displayed to patrons (session length, time left, warning messages, etc.)?
 - b. What notifications does the system have (session length, time left, warning messages, etc.)?
 - c. How does the patron accept the user agreement?
 - d. If a patron wants to walk away for a brief time, how do they lock the computer so that another patron cannot use it? How long does it stay locked before the PC is given to the next patron? How does the patron un-lock the PC to resume use?
 - e. How does a patron end their session early?
 - f. What does the on-screen indicator that shows time remaining look like?
 - g. How does the system ensure that the on-screen indicator is visible but does not interfere with use of the computer?
 - h. How is the patron notified of an optional time extension?
 - i. If the patron walks away from the computer and does not return, how long until the system logs the patron off and allows the next patron to sign on?
 - j. How does the system ensure that a patron will be able to continue with their session if the computer experiences technical problems (e.g. reboot) during their session?

- B. How does staff interact with the computer time management capabilities? Provide screenshots for what a staff member will see.

Provide screenshots and information about:

1. Future reservations
 - a. How does a staff member make a future reservation for a patron?
 - b. How does a staff member cancel a reservation for a patron?
 - c. How does a staff member edit a reservation for a patron?
 - d. How does a staff member override a schedule to add a patron with immediate needs?
2. Signing on/off patrons
 - a. How does a staff member sign up a patron directly to a computer?
 - b. How does a staff member end a patron's session remotely?
3. Management console
 - a. How does a staff member access the management console?
 - b. Can multiple staff members work in the management console simultaneously?
 - c. How does the system display approximate wait time for a computer on the staff console?

PRODUCT CONFIGURATION AND MANAGEMENT

Include details about configuration and system administration, including the parts of the interfaces that can be configured by staff and those that must be configured by the company. Provide screenshots for all features.

1. How does the staff console allow the ability to manage different time limits for groups of computer?
2. How does the staff console enforce overall per-day limits by barcode number, either locally or systemwide?
3. How does staff configure a library-specific acceptable user agreement?
4. How does the product allow for configuring computer groupings by area and session lengths?
5. How does the system prevent the same barcode from being used simultaneously?
6. Does the system have the option to restrict consecutive sign-up sessions if desired by library?
7. Does the system allow library staff to configure how many days in advance a computer can be reserved?
8. Does the system allow library staff to configure the length of the grace period to sign on to a reserved session before losing the reservation and the PC becoming available to the next user?
9. Does the system allow library staff to configure holidays and closures by location from a central location?
10. Does the staff console allow access to time used by the patron?
11. Does the staff console allow staff to override the total time allowed for a specific patron?
12. Does the staff console allow staff to block off one or more computers for classes?
13. Does the staff console allow staff to take computers out of the regular queue for emergency use?
14. How are computer zones/sections/areas/segments managed?
15. Can the library create locally configured warning intervals to alert patrons of upcoming closing times?
16. How does the system allow for the configuration of fields and forms?
17. How are patrons tracked and a detailed audit log maintained and accessed?

SYSTEM ADMINISTRATION (TECHNICAL)

1. What are your Database Requirements?
 - a. Database Management Platform (e.g. MS SQL Server, MySQL, PostgreSQL, etc.)
 - b. Database location options and consequences (e.g. Hosted Remotely, Hosted Locally, etc.)
 - c. Access Requirements
 - i. Must Pima County interact with the database using TSQL (or equivalent) in order to configure Application?
 - ii. Must Pima County never query application database directly (i.e. as opposed to through an application interface)?
 - iii. Will reports run against the application database or a reporting copy?
 - iv. Is Pima County allowed to write its own custom reports and/or export data from the database?
2. What type of Administration Console/Interface is used?
 - a. Web
 - b. PC Client
3. Do you have different levels of Administrator permissions?
 - a. Full Access Administration
 - b. Tech Support Access
 - c. Library Staff Access
4. What is your licensing for Development, Test, User Acceptance and Production Environments?
5. Are all administrative tasks completed through an Administrative Console?
 - a. Adding/Removing Computers
 - b. Modify Users
 - c. Delete Records

AUTHENTICATION AND FILTERING

Include details about authentication and filtering, including the parts of the interfaces that can be configured by staff and those that must be configured by the company. Provide screenshots for all features.

1. Library card
 - a. Does the system to authenticate with library card only?
 - b. Does the system require a PIN along with the library card to authenticate?
 - c. Does the system have the option to authenticate with a username associated with the library card number? If so, how does a patron set up the username? How does a patron change or update the username?
 - d. How does the system communicate and pass information back and forth with the ILS?
2. Guest pass/visitor pass
 - a. What kinds of levels of guest/visitor pass does the system allow?
 - b. Can an adult visitor change their session to unfiltered?
3. Filtering
 - a. Provide information about your product's web filtering integration.
 - b. How does the system filter sessions by age?
 - c. Explain the different levels of filtering and what categories of websites that are included in each.
 - d. Which filtering companies do you have a history of working with?
 - e. What aspects of your filtering solution are configurable by the library?

PRINTING

Describe your product's print management capabilities. Include details about both back-end retention and displays for both staff and public computers. Provide screenshots for all features.

1. Describe the printing process that a patron will take to print a job from a computer and retrieve it at a print station. Provide step-by-step detail.
2. Provide a list of compatible coin/payment towers for the product.
 - a. If the product is only compatible with coin/payment towers provided by the vendor, please specify the unit costs of these coin/payment towers.
3. Describe how a patron can select from multiple printers at the location by feature, with printer descriptions configured locally.
4. How is the price per page set by the print station and/or zone/segment/section/location?
5. How does the patron see the accurate print charge prior to sending a job to the printer?
6. How does the system ensure that jobs are not printed until payment is received?
7. Does the system create a personal print queue, allowing the patron to review and delete individual print jobs and to see total charges?
8. How does a patron cancel a print job?
9. Can the system handle multiple print jobs with a single payment transaction on both the patron and staff side?
10. When operating in staff-mode for print release/payment, can print jobs be released from multiple locations within the library?
11. How does the system allow wireless users on the network print to a networked printer with the same options as wired users, capable of supporting multiple printers, able to distinguish between black & white and color print jobs?
12. Explain the options for staff to override print release station and the ability to track overrides/amount of waiver.
13. Can staff print without requiring payment for work-related printing?
14. Does the system have the ability to track the volume of print jobs that have been overridden?
15. Does the system have the ability to track staff related printing separate from patron printing?
16. Does the system have a configurable expiration time for print jobs?
17. Explain the steps for a patron to send a print job to the computer. What messages will a patron see?
18. How does the patron select the printer?
19. What print options will the patron have (page selection, single/double sided, black and white/color, etc.)?
20. If a customer sends a print job of ten pages, for example, and decides at the print station that they need only a portion of that print job, can they select and print that portion at the printer? Or do they have to resend the print job?
21. What payment options does the system allow?
22. Is there a process for handling concurrent printing AND copying?
 - a. How does it handle money when people use a multifunctional device for different purposes?

REPORTING

Describe the product's reporting capabilities. Provide screenshots and sample reports.

1. Explain the systems reporting tool(s).

- a. Are reports generated directly from production data or from a secondary staging data store?
- b. What are the capabilities of the system to export data to Microsoft Office (Word, Excel, etc.) or other (e.g., Adobe Acrobat) formats?
- c. Can data be directly exported to other reporting systems or databases?
2. Explain the system's reporting ability to process queries.
 - a. What pre-defined queries are available?
 - b. How can queries/reports be customized?
 - c. Can reports be scheduled to be run on an automated schedule?
3. Explain the system's ability to report on usage, particularly all aspects of and overall usage.
 - a. Describe the level of granularity in your usage reporting, including sessions, assignments, missed assignments, etc.

POINT OF SALE

Describe your product's point of sale options. Include information about its capability to interface with Innovative Interface, Inc.'s integrated library system Sierra in regards to payments and fines. Also include whether it is a separate program or if it is integrated with time management.

Provide detailed information about:

1. Staff POS system
 - a. What are the system requirements to run the POS software?
 - b. How does the POS system interface with Ill Sierra ILSP for fine payments and waivers?
 - i. How long is the communication time between Sierra and the POS software?
 - c. Explain the steps to process a fine payment.
 - d. Explain the steps to process a fine waiver.
 - i. How can waiver options be customized to match our existing waiver codes?
 - ii. How can staff select more than one line item to waive at a time with a single click?
 - iii. How can staff waive a specified amount rather than selecting line items?
 - e. Does the POS software allow payments or waiver of more than is owed resulting in a credit on the patron's account?
 - f. Explain the steps to process a payment for specified merchandise.
 - g. Does the POS software allow staff to enter the amount tendered and display the change to give back?
 - h. Can a Customer record be open in Sierra while processing a fine payment or waiver?
 - i. Describe the reconciliation reporting that is available to staff using the software.
 - j. Explain all customization options for the software.
 - k. List all forms of payments that can be accepted.
 - l. What is the time-out setting if staff leaves the POS software unattended? Is this setting configurable by staff?
 - m. Does the system print a receipt after every transaction?
 - i. Does staff have the option to not print a receipt?
 - ii. Does staff have the option to print a duplicate receipt?
 - n. How does staff open the cash drawer using the software without a transaction?
 - i. Is there a report of the cash drawer being opened without a transaction which includes staff account information?
 - ii. Will the system time-out if the cash drawer was opened with a staff account so the drawer cannot be opened again?
 - iii. What safety precautions does the system have in place so that the cash drawer cannot be opened accidentally or without authorization?

2. Auditing
 - a. Explain how administrator(s) can create a staff account for every individual using the POS system.
 - i. How does the receipt reflect which staff account processed a transaction?
 - ii. How do reports show which staff account processed a transaction?
 - b. How does staff print receipts from previous transactions?
 - c. Will staff accounts be automatically logged out after a transaction or drawer opening is completed?
3. Online fine and fee payment system
 - a. How does the online system interface with III Sierra ILSP? Explain all integration in detail.
 - b. How do administrators set a minimum amount for online payments? Is this amount customizable?
 - c. Explain any and all customization options for the online payment system.
 - d. What are the system requirements for the customer's computer?
 - e. Can a customer pay fines using a mobile device? Which OS's are supported?
 - f. Is there an app that customers can download to pay fines on their smartphones or tablets?
 - g. Is the site for online payment fully accessibility compliant? Explain in detail.
 - h. Is the site for online payment fully responsive for all screen sizes? Explain in detail.
 - i. List all credit card carriers that are accepted.
 - j. Explain the steps for a customer to make a payment online. Provide screenshots of the process.
 - k. Are patrons alerted to a failed transaction?
 - i. Will a failed transaction show up as pending on the patron's bank or credit card account?
 - l. Does the system have the ability to accept donations?
 - i. Can the system accept a donation and fine payment in the same transaction?
4. Explain your system's compliance to the PCI/DSS standards.
 - a. How do you guarantee that your system is complaint to the PCI/DSS standards?

SUPPORT

1. Describe your company's documentation about and for your product.
 - a. How is it distributed, where it is available, and what types are available to the library?
2. Explain maintenance options.
 - a. What specifically is covered (support, upgrades, previous versions, patches)?
3. Explain the avenues of communication that are available to library staff.
 - a. Does each library have a designated contact/account person?
 - b. What is the typical speed of response?
 - c. Explain the method for escalation.
 - d. Does the vendor maintain a Knowledge Base? User Support Group? Listserve?
4. Explain the typical version upgrade process.
 - a. How often are major releases, minor updates, and patches released?
 - b. How will upgrades affect any customization done for the library?
 - c. What is the average necessary downtime or reinstallation associated with updates?
 - d. What mechanisms do you use for rolling back upgrades?
 - e. What assistance is provided by the company for upgrades?
 - f. What staff is necessary from the library for upgrades?

- g. What is the estimated time necessary for the upgrade process?
- h. How is the library provided with release notes prior to an upgrade?
- 5. Describe the support infrastructure.
 - a. What communication methods are available for the library to report problems? How does the “ticketing” system work?
 - i. How does staff report problems, bugs, or ask questions?
 - ii. How does staff receive responses?
 - iii. How does library staff track the status of a request?
 - b. What is the target, typical, and guaranteed response time for issues?
 - c. What is the target, typical, and guaranteed resolution time for issues?
 - d. What are the technical support hours and availability?
 - e. Explain the escalation procedures.
 - f. Explain the vendor contractual commitment to resolve issues.
 - g. Explain the typical troubleshooting processes used.
- 6. Describe how the vendor keeps the product up to date with the latest operating systems.
 - a. How does the vendor ensure quick adoption of new versions of Windows.
- 7. Provide a copy of the vendor’s service-level agreement.
- 8. What are the warranty terms, including anything that voids the warranty?

IMPLEMENTATION

- 1. Provide an overview of your proposed implementation methodology including key milestones/deliverables and a projected timeline.
 - a. Discuss the critical success factors for this project.
- 2. Provide a diagram identifying all the components of the system as proposed including servers and any other components.
- 3. Describe the project management approach and how your project team will communicate with the library’s implementation team.
- 4. Discuss the roles of your project manager and the County’s project manager.
- 5. Discuss the expectations for your and the library’s project team including:
 - a. Number of people
 - b. Roles
 - c. Required skills
 - d. Level of time dedication (100%, 75%, etc.)
 - e. Potential over commitments (or multiple responsibilities) of vendor project staff during implementation and how conflicts will be resolved
- 6. Define the vendor’s role in development of training materials and in training end users.
 - a. How much training is offered on-site? Please include amount of time in days or hours.
 - b. How is training offered remotely?
- 7. Describe the training and support documentation that will be provided to the library and in what forms (i.e., manuals, training plans, training material, system related procedures, and the like).
- 8. Describe the process for testing of the new system with actual users.
- 9. What functionality is provided out-of-the-box during implementation, and what functionality would require additional development costs?

INTEGRATION

- 1. Describe your product’s general ILS integration capabilities.
 - a. Include details about what information the product acquires from the ILS, how it acquires it and procedures and processes for that acquisition.
- 2. How does the system ensure the security of patron records?

3. Describe how the system uses API's provided by Innovative Interface, Inc.
4. Describe how the system integrates with existing hardware, such as PCs, coin towers, and multifunctional printing devices.

FEES AND LICENSING MODEL

1. Describe your licensing methodology or structure. Where applicable, provide information for the following (cost ranges acceptable/preferred):
 - a. Cost per site
 - b. Cost per installation
 - c. Cost per CPU
 - d. Cost per CPU Core
 - e. Cost per user
 - f. Cost for administrator
 - g. Cost for developer
 - h. Cost for content creation/editing
 - i. Hourly fees for consulting and implementation services (if not included in license cost)
 - j. Administrator, Developer and End User Training (if not included with initial purchase)
 - k. Initial start-up, installation and training (if not included in initial purchase)
 - l. Additional costs that may apply to your model
 - m. Annual maintenance costs (include different levels of support)
 - n. Production and non-production environments
 - o. Include the modules and/or functionality with cost where appropriate.
2. Please explain cost drivers per range.

ADDITIONAL INFORMATION

What other information do you feel is appropriate to be considered by the County in this information-gathering exercise?

EVALUATION CRITERIA

If the County does pursue an RFQ or RFP, what evaluation criteria do you feel the County should use in selecting a successful respondent(s)? What weighting / priority / rank should the County use in evaluating the criteria? Provide examples.

**REQUEST FOR INFORMATION (RFI) No. 230827
Computer Time Management System**

RFI INQUIRIES

In an effort to maintain fairness in the process, inquiries concerning this solicitation, including questions related to technical issues must be communicated **by email** to the Commodity/Contracts Officer.

Inquiries must be in writing and directed to:

Paul M. Turner, CPPO, CPPB
paul.turner@pima.gov

All questions must reference the RFI page number, section heading, and paragraph. The question(s) must be concisely stated and numbered in sequential order.

All questions regarding this RFI must be received in writing by no later than 2:00 PM Local Arizona Time (MST) on Thursday, September 22, 2016.

RFI SUBMITTALS

All submittals related to this request ***must be delivered to:***

Pima County Procurement Department
Attn: Paul Turner
130 West Congress St, 3rd Floor
Mail Stop #DT-AB3-126
Tucson, AZ 85701

All responses must be received by or before 5:00 p.m. Local Arizona Time (MST) on Wednesday, October 5, 2016.

Your submittal should include one electronic copy (CD or Thumb Drive) and one hard copy.

The submittal must include any accompanying printed material and must be received in a sealed envelope clearly marked or labeled "***RFI No. 230827, Computer Time Management System.***"

(END OF REQUEST FOR INFORMATION)