**SirsiDynix**®

**Quote 89473  for:**

# City of League City - Helen Hall Library

Helen Hall - SaaS

**Prepared by:**
Matthew Jadwisiak
Executive Account Manager, Texas
SirsiDynix

**Quote Date**:  March 3, 2017          **Quote Valid Until**:  September 30, 2017

## Quote Information

### General

The assets listed in this quote will work as an upgrade for the existing assets listed below which will be removed.

Acquisitions
EDI
Native Language
Oracle RDBMS
Serials
Unicorn/Symphony
20 Staff Seats
SIP/NCIP connections
ITG 3rd part hardware peripherals

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# Purchase Details

All prices are in U.S. dollars ($) and are exclusive of taxes unless otherwise noted.

| Component | Year 1 | Estimated Year 2 | Estimated Year 3 |
|---|---|---|---|
| SirsiDynix SaaS subscription | 94,080 | 58,710 | 60,960 |
| Services | 20,860 | - | - |
| Third Party Products | 650 | - | - |
| Discount | ( 45,900 ) | - | - |
| **Total** | **69,690** | **58,710** | **60,960** |

**Initial Term:**            Two (2) Years

**Initial Term Annual Price Increase Cap for SirsiDynix Products/Services:**      3.9% annual price increase cap until Term renewal

Customer's usage is subject to limitations that can be found in the Terms and Conditions section at the end of the Quote.

The above price increase cap covers all Customer's active Products. However, SirsiDynix reserves the right to adjust Initial Term pricing for Third Party/integrated products/services if a Third Party vendor increases pricing for Third Party/integrated products/services by more than 10% in a given calendar year.

Any applicable discount shall be applied on final payment. Any and all pre-printed terms and conditions on Customer's Purchase Order(s) submitted to SirsiDynix are hereby rejected and shall be superseded by the current Master Agreement, unless such additional terms are statutorily required of the Customer.

This Purchase Details section may not include pre-existing obligations for ongoing Products not listed in the Quote.

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# Detailed Pricing

All prices are in U.S. dollars ($) and are exclusive of taxes unless otherwise noted.

| Component | Qty | Total Price |
|---|---|---|
| **SirsiDynix Symphony SaaS subscription** | | |
| SirsiDynix SaaS | 1 | 33,360 |
|   Cataloging | 1 | Included |
|   Circulation | 1 | Included |
|   Public Access | 1 | Included |
|   Z39.50 server | 1 | Included |
|   Authority control | 1 | Included |
|   Backup circulation | 1 | Included |
|   Inventory | 1 | Included |
|   Reports | 1 | Included |
|   ReferenceLIBRARIAN | 1 | Included |
| SaaS Acquisitions | 1 | 8,340 |
| SaaS 9xx | 1 | 1,550 |
| SaaS Electronic Data Interchange (EDI) | 1 | 2,010 |
| SaaS Serials | 1 | 8,340 |
| SaaS Universal SIP2 | 1 | 8,340 |
| SaaS User Level - 50 Staff seats | 1 | Included |
| SirsiDynix SMS Notification for Symphony SaaS, Annual Subscription - 5K Message Package | 1 | 600 |
| BLUEcloud MobileCirc, Annual Subscription | 1 | 3,340 |
| BLUEcloud Visibility, Annual Subscription | 1 | 10,010 |
| SaaS Enterprise Annual Subscription | 1 | 8,180 |
| SirsiDynix eResource Central Gateway Services, Annual Subscription | 1 | 5,010 |
| SirsiDynix eRC Connector for OverDrive, Annual Subscription | 1 | Included |
| SirsiDynix eRC Connector for hoopla digital, Annual Subscription | 1 | 5,000 |
| **Total SirsiDynix Saas subscription** | | **94,080** |
| **Services** | | |
| Data Services | 1 | 250 |
| Installation | 1 | 16,210 |
| Consulting | 1 | 2,980 |
| Training | 1 | 1,420 |
| **Total Services** | | **20,860** |
| **Third Party Products** | | |

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# Detailed Pricing

All prices are in U.S. dollars ($) and are exclusive of taxes unless otherwise noted.

| Component | Qty | Total Price |
|---|---|---|
| Zepheira Services - BLUEcloud Visibility | 1 | 650 |
| **Total Other Third Party Products** | | **650** |
| **Discount** | | |
| Services Discount | | ( 8,340 ) |
| Customer Loyalty and package discount | | ( 37,560 ) |
| **Total Discount** | | **( 45,900 )** |
| **QUOTE TOTAL** | | **69,690** |

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# Component Descriptions

## SirsiDynix SaaS subscription

### SirsiDynix Symphony SaaS

SirsiDynix Symphony's Core Package includes Cataloging, Circulation, and Public Access modules. Additional functions include: utilization of an Oracle database, a Z39.50 server, Authority Control, Backup Circulation, and Reports. Authority Control: Links authority-controlled bibliographic headings with corresponding authority records through an ANSI-standard thesaurus. SirsiDynix Symphony complies with Bath Profile release 1.0 and most of release 2.0 Functional Area A. We comply with Release 1.0 of Functional Area B. SirsiDynix Symphony complies with Z39.50 Level Three (client and server), provides broadcast searching as a standard, and complies with Bath Profile Level One.

### ReferenceLIBRARIAN

SirsiDynix Symphony ReferenceLIBRARIAN: Enhances the Public Access Catalog with Kids' Library, Find-it-Fast, and Have-You-Read pre-defined searches.

### SaaS Acquisitions

SirsiDynix Symphony Acquisitions provides efficient online tracking of materials from ordering through claiming, receiving, invoicing, and processing. Firm orders, gifts, subscriptions, approval, and standing orders are all easily accommodated and can be tracked separately or together.

### SaaS 9xx

9XX Order Interface automatically loads bibliographic and order information from online acquisitions systems.

### SaaS Electronic Data Interchange (EDI)

EDI X-12: SirsiDynix supports all transactions formats currently adopted by SISAC (Claims/Claim Response /Invoice /Dispatch Information/Functional Acknowledgment). SirsiDynix Symphony can electronically transmit and receive information in these formats using X12. EDI (Electronic Data Interchange) allows libraries to communicate with vendors to transfer ordering, invoicing, or subscription information between computers.

### SaaS Serials

SirsiDynix Symphony Serials manages the prediction, receipt, and routing of all serial subscriptions, generating and maintaining a separate MARC holdings record for each subscription. Managing orders and renewals are fully integrated with SirsiDynix Symphony Acquisitions. As the library receives individual issues, Serials automatically predicts the next expected issue based on the serials publication pattern. Combined issues, special issues, missing issues, or other irregularities are handled easily and efficiently. Basic Serials Binding functionality is included in this package.

### SaaS Universal SIP2

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# Component Descriptions

SirsiDynix Certified Solutions Providers offer SIP2-certified products to our customers. We certify that their products are compliant. This interface price encompasses all SirsiDynix Certified SIP2 vendors.

<u>SaaS User Level - 50 Staff seats</u>

<u>SirsiDynix SMS Notification for Symphony SaaS, Annual Subscription - 5K Message Package</u>

Subscription to the SMS Notification feature requires your ILS system to be on SirsiDynix Symphony 3.4.1 Patch Cluster 1 or above. Up to 5,000 messages included per year. Additional messages used, if allowed, will be deducted from the subsequent subscription package purchased. Messages not used at annual renewal will be forfeit. You may change the subscribed package to increase or decrease the number of messages at annual renewal time.

<u>BLUEcloud MobileCirc, Annual Subscription</u>

MobileCirc enables library staff to work wherever they are, with or without a data connection. Features include: - Mobile circulation. Perform common tasks like check-ins, checkouts and renewals. Register new users by scanning driver's license (selected regions only) or by manually entering user information. - Flexible inventory. Integrates with Bluetooth scanners to make taking inventory faster and easier. - Efficient shelving. Provides real-time lists of candidates for weeding and items needed to fill holds. MobileCirc lists include filters designed specifically for library staff. Requires SirsiDynix Symphony 3.4.1 SP2 and SirsiDynix Symphony Web Services 3.5 or higher, OR, Horizon 7.5.2 and Horizon Web Services 2.0.

<u>BLUEcloud Visibility, Annual Subscription</u>

BLUEcloud Visibility makes libraries' collections visible and searchable on the open Web through Linked Data technologies, specifically BIBFRAME. SirsiDynix makes MARC 21 data accessible to search engines like Google and Bing, so library collections can be searched on the Web and geographically located thus meeting library users wherever they are. BLUEcloud Visibility has the potential to place library records in front of thousands of new eyes every day. The most important way that a library can expose its bibliographic data and resources on the open web is by breaking free of the constraints of the MARC format. BLUEcloud Visibility is a product that includes; transforming MARC21 records to BIBFRAME, establishing links between bibliographic data elements and open Web data, and associating the globally-linked data with your catalog records and public discovery page. With BLUEcloud Visibility, a library's collections are positioned with open, global standardized ontologies. The web of data includes key identifiers that link to other works, websites, and resources dealing with that subject. BLUEcloud Visibility takes the mystery and complexity out of linked data. In order to reap the benefits of eyeshare and mindshare, placing your library in front of the eyes of your community members, you do not need to make massive investments in search engine optimization, understand all the intricacies of web development, or reconstruct your entire library database. You simply need to allow SirsiDynix to convert your records to their link data elements.

<u>SaaS Enterprise Annual Subscription</u>

SirsiDynix Enterprise is a state-of-the-art faceted search solution that empowers libraries to make their collections

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# Component Descriptions

more searchable and discoverable than ever before. Capitalizing on fuzzy search logic technology never before available to libraries, SirsiDynix Enterprise delivers leading-edge faceted search capabilities, simplified search interfaces, and much more.

### SirsiDynix eResource Central Gateway Services, Annual Subscription

Minimum requirements: SirsiDynix Symphony 3.4.1 or Horizon 7.5.1 and above. eResource Central Gateway Services provides eBook integration which allows libraries to provide seamless access to all library resources via a single user interface. Open Library and Project Gutenberg content is available and included with this service.

### SirsiDynix eRC Connector for OverDrive, Annual Subscription

Provides access through SirsiDynix eResource Central Gateway Services to the approved content of one OverDrive main account. It does not include any 3rd Party fees which may be required by the Partner to use the content being accessed.

### SirsiDynix eRC Connector for hoopla digital, Annual Subscription

Provides access through SirsiDynix eResource Central Gateway Services to the approved content of one hoopla digital main account. It does not include any 3rd Party fees which may be required by the Partner to use the content being accessed.

## Services

Data Services:

### BLUEcloud Visibility Data Services
Includes a data analysis report of current MARC21 catalogue records

Installation:

Product Delivery

### Symphony Oracle to Oracle Platform Migration (remote)
Migration includes installation of Oracle and migration of existing ILS software, configuration and data as exists on current system. Non embedded Oracle installations must meet SirsiDynix Oracle requirements.

### BLUEcloud MobileCirc Installation
Installation of BLUEcloud MobileCirc against one database.

### BLUEcloud Visibility Installation

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# Component Descriptions

Includes installation of BLUEcloud Search Source ILS Agent and Web Services

### SirsiDynix Enterprise Software Installation

Includes installation of Enterprise in SirsiDynix SaaS facility, installation of Enterprise Agent on a Horizon or SirsiDynix Symphony ILS and installation/configuration of the appropriate Java Development (JDK). In addition; it includes the installation of Web Services for sites using SirsiDynix Symphony.

### SirsiDynix eRC Gateway Services Installation

Includes installation and configuration of SirsiDynix eResource Central Gateway Services and one eRC connector.

### SirsiDynix eRC Additional Partner Setup

Includes configuration of one SirsiDynix eResource Central Partner.

## Project Management

### Core Module Add On (Tier 2)

Tier 2 Project Management Services for the implementation of new/additional modules either during an ILS Migration or as a standalone add on order for a current customer, including: Acquisitions, Homebound, Inventory, Media Scheduling, Reserves, Serials, SIP/NCIP, Classified Accountability, Materials Booking, 9xx Interface, SmartPort, EDI, Reference Librarian, Languages, Outreach, VIP.

### Unicorn/Symphony Platform Migration

Project Management Service for a Unicorn/Symphony Different OS and/Or Different Database Platform Migration. Project Management Service includes a project management resource who will do the following during the standard, active implementation period of the project: act as the primary SirsiDynix Contact; hold weekly progress calls (as needed) with the customer; coordinate SirsiDynix resources; and transition the customer to client care once the new platform has been implemented.

### Project Management - SirsiDynix SMS Notification

Project management for SirsiDynix SMS includes a dedicated project manager to guide you through the implementation of SirsiDynix SMS. This includes, scheduling and coordination of SirsiDynix resources, holding project progress calls (if needed) and helping with a smooth transition to SirsiDynix customer support after the project is complete.

### Project Management - BLUEcloud MobileCirc

Project Management Services for the implementation of BLUEcloud MobileCirc.

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# Component Descriptions

Project Management - BLUEcloud Visibility

SirsiDynix Enterprise Project Management

Project Management Services for the implementation of SirsiDynix Enterprise

Project Management - SirsiDynix eResource Central

## Consulting:

### Enterprise SureStart-3

SureStart is a layer of consulting support designed to smooth the transition to Enterprise by addressing configuration issues like search limits, profiles, etc.

### SirsiDynix Enterprise Theme Customization

Working with a SirsiDynix Consultant, theme customization addresses changing the look and feel of the product like colors, adding graphics, and using CSS to edit fonts and page layouts. This custom work is guaranteed to work on the version of Enterprise currently installed on the customer's system. SirsiDynix cannot guarantee compatibility with future releases. Updating custom work to be compatible with a later release will attract additional fees.

## Training:

### BC157 BLUEcloud MobileCirc, Self-Paced

This training reviews the functionality present in MobileCirc. One user will have unlimited access to this course for one year. This training is available in English only.

### BC824 SirsiDynix Enterprise: End User, Group

One seat in a group distance instructor-led course for Enterprise End User training. This class focuses on performing searches and maneuvering through the end-user interface. You will learn how to use the facets and different search types. By the end of the class you should know how to: - Use Did you mean? and other search suggestions - Limit search results by item library, item type, or other search facets - Utilize email and print options - Check item availability as well as place hold requests - Write a patron review"

### BC862 BLUEcloud eResource Central, Private

Eight seats in a Private distance instructor-led course for eResource Central.

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# Component Descriptions

### BC828 SirsiDynix Enterprise: Administration and Rooms Content, Group, Hands-on Lab

One seat in a group distance hands-on lab course for Enterprise Administration and Rooms. This class focuses on the maintenance of Enterprise Profiles and Rooms. By the end of the course you will know how to manage access to profiles and rooms, the search configurations within each, and control how often content updates from the ILS to Enterprise.

## Third Party Products

### Zepheira Services - BLUEcloud Visibility

Includes setting up of transformation services and converting data to BIBFRAME format

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# Terms and Conditions

## Other Terms

SirsiDynix SaaS Services are based upon annual circulation and Staff Users. You may use the SaaS Services for up to 910,000 annually circulated items and up to 50 Staff Users; an increase in either circulation or Staff Users requires additional licensing fees.

SirsiDynix may add and/or substitute equivalent products for any third party items in the event of product unavailability, Software requirements and/or model number changes.

Customer's data must be provided to SirsiDynix in a format approved by SirsiDynix or additional data conversion/migration charges will apply. De-duping is the Customer's responsibility, unless stated otherwise in writing.

SirsiDynix Professional Services performed by way of remote network access require ssh (Unix/Linux), Remote Desktop (Windows) or unattended Logmein Rescue (Windows) access for the duration of the project. The library may limit connectivity to the SirsiDynix Corporate IP address or implement a Cisco AnyConnect VPN tunnel. Other remote connectivity options may incur additional fees, onsite travel fees or void the ability of SirsiDynix to perform the project. A full description can be found in the Access Requirement for Support Guide on our customer support website.

"Go Live Date" means, with respect to the SirsiDynix Software license orders, the date on which the SirsiDynix Software is available for operational use for normal daily business, including searching the public access catalog and circulating materials.

Maintenance must be ordered for all copies of the Software and for all elements of the Software which are used conjunctively by Customer.  Customer's System shall remain within two (2) previously released software versions of the most recent version of the software at all times or an additional maintenance surcharge service charge will be added to the maintenance renewal.

Customer shall not integrate products offered by third parties into Software, Subscriptions or Subscription Software without additional license from SirsiDynix.

SirsiDynix shall have the right to aggregate and retain non-personally identifiable data.

## Payment Terms

The term of any quoted products is for no less than two (2) years.  Subsequent years' Maintenance and Subscription fees are to be paid annually in advance. Following the first year of System operation, Maintenance and Subscription fees will be subject to annual increases. Any discounts that may be listed on this quote will be applied to the final invoice.  Unless otherwise specifically stated in writing, products and/or services purchased at promotional  prices or with promotional discounts do not qualify for such discounts or limitations on price increases for subsequent years.

**Third Party Products/Software license fees**
- 100% due upon installation of third party products/software on Customer's system

**SirsiDynix Software license fees**
- 100% due upon installation of client SirsiDynix Software on Customer's system

**Subscriptions fees**
- 100% of first year's Subscription(s) due at installation

**Maintenance fees**
- 100% of first year's Maintenance due at installation of Software

**Services/Training**
- 50% due upon completion of first data test load, where a test load is part of the services
- 100% of the remainder due upon completion of services/training

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# Terms and Conditions

**SaaS Migration**

•     100% of total for Services and first year Subscription fees due on date of initial live use of SaaS Services.
**Payment/Invoices while Migrating to the Cloud/SaaS** - During the transition from a locally hosted system to a Cloud/SaaS services, annual Maintenance for the locally hosted system must be timely paid for the entire invoiced period to avoid interruption in receiving support and updates. Once your Cloud/SaaS services "Go Live," SirsiDynix will issue a pro rata credit for the unused portion of the previously paid Maintenance to be used against future billings.

\*\*Fees and Payment Terms which do not reflect the services and/or products purchased by the Customer are non-applicable.
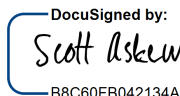
Any reference to license metrics and/or licensed amounts included in this quote shall be applicable only to the Products and/or services mentioned in this quote. This document and any software or professional services associated with this document are hereby fully incorporated into the current Agreement executed between SirsiDynix and Customer. If there is no current agreement between the parties, the terms and conditions of the current SirsiDynix Master Software License and Services Agreement shall be deemed the controlling Agreement between the parties, a copy of which shall be furnished upon Customer's request. Any and all pre-printed terms and conditions on Customer's Purchase Order(s) submitted to SirsiDynix are hereby rejected and shall be superseded by the current Agreement, unless such additional terms are statutorily required of the Customer. In the event of a conflict, the terms, payment terms, discounts, product lists and/or statement of work contained within this document shall take precedence over the current Agreement between the parties. In the event Customer desires or requires updated terms and conditions for the continuing business relationship with SirsiDynix, please contact your regional Sales Representative.

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# Terms and Conditions

**Customer Signature:**                                    **SirsiDynix Signature:**

**City of League City - Helen Hall Library**

DocuSigned by:

*Scott Askew*

By: _____                    By: ____B8C60FB042134A3..._____
(Authorized Signature)                                    (Authorized Signature)

Name: _____                    Name:    Scott Askew
(Printed)                                                (Printed)

Job Title: _____                    Job Title:    Secretary/General Counsel

Date: _____                    Date:    Aug-24-2017 | 14:13 PDT

**Billing Address:**
  **City of League City - Helen Hall Library**
  **100 W. Walker**
  **League City**
  **Texas    77573**
  **United States**

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