

Spring 2004 Database Trials

Vendor Questions:

1. Describe the database product(s). If you want us to link to more than one product, provide a unique description for each product. If there are special hardware or software needs, please make sure you include them in the description.

The OCLC FirstSearch service is a rich collection of more than 64 databases from both OCLC and a wide range of database vendors. It includes links to web resources, over 5.9 million online full-text articles, full-image articles from over 4,600 electronic journals, library holdings, and interlibrary loan. FirstSearch supports research in a wide range of subject areas with well-known bibliographic and full-text databases, in addition to reference tools such as directories, almanacs and encyclopedias.

FirstSearch's user-friendly interface allows users to conduct searches on their own and requires little or no intervention by library staff. With FirstSearch, users point and click through FirstSearch to find the information they need. Additionally, FirstSearch supports sophisticated searching, including nested terms and index-specific browsing. FirstSearch offers three levels of searching to meet all of your users' needs: basic, advanced and expert.

FirstSearch offers a link to the OCLC Interlibrary Loan service to streamline borrowing of articles and materials from more than 7,100 libraries worldwide. In addition, a number of document delivery suppliers have matched the list of materials they can supply against many of the FirstSearch databases. The link allows users to generate OCLC ILL requests for materials cited in FirstSearch databases. The request may appear in the library's ILL review file, and the librarian may then route the material to the appropriate supplier. Alternatively, the library may choose to have the ILL requests sent directly to the OCLC ILL service by the users.

The FirstSearch OPAC link allows FirstSearch users to link from FirstSearch to their institutions' OPACs or the consortial union catalogs in order to access local holdings information. Once connected, a user will be able to see more detailed local serials holdings data than is often available within FirstSearch and will also have access to information about the shelf status of materials within their local library collections. The FirstSearch OPAC link is a hot link from within the "Ownership" section of detailed record displays. This optional link is available to those FirstSearch libraries that have a web-accessible OPAC, which can be accessed via a static URL and which includes an ISSN and/or ISBN index.

In addition, OCLC is transforming OCLC WorldCat from a bibliographic database and online union catalog into a globally networked, web-based information resource of text, graphics, sound, and motion. OCLC has already enhanced WorldCat records with cover art, tables of content and book summaries.

We will accomplish this transformation by:

Expanding OCLC WorldCat to encompass global resources

Enhancing bibliographic records in OCLC WorldCat to help users determine the best resources for their purposes by licensing and adding book and serial cover art, book reviews, book tables of contents, author biographies and links to applicable web sites and digital images representing the unique collections of libraries, museums, historical societies, and other contributors, such as publishers and authors

Increasing the depth of WorldCat by providing access to serial articles and other analytic data such as book chapters, songs, and data within other formats.

2. Is remote access included in the subscription price? If there are additional charges or requirements in order to offer remote access, please describe. What methods of remote access are supported? If applicable, please discuss any methods or assistance you offer regarding remote access patron verification and authentication.

Remote access FirstSearch is included in the subscription price. Methods of remote access supported are IP address recognition and automatic logon via the OCLC WebScript CGI application. IP address recognition requires submission of authorized IP addresses to OCLC and is not available for those accessing FirstSearch via Lynx or Z39.50. WebScript allows users to click links on the institution's web pages to go directly to a page within FirstSearch, bypassing the logon screen.

FirstSearch provides several patron authentication methods, and OCLC will work with participating libraries to determine the best FirstSearch authentication process for each. With FirstSearch, libraries can manage authentication using (1) authorization/password, (2) IP address recognition, and (3) CGI WebScript.

Authorization/Password

Each library accessing FirstSearch will receive one or more authorizations and passwords. When a consortium purchases FirstSearch, OCLC assigns each library one or more authorization and password combinations to access FirstSearch. The library may change the password associated with the authorization at any time using the FirstSearch administrative module.

IP Address Recognition

OCLC offers basic IP-address recognition for logon authentication to FirstSearch. This service allows for very specific to very general IP addresses. The participating libraries will be asked to provide a list of the IP numbers for each institution, and OCLC staff will implement the access. Instructions for IP address recognition are available on OCLC's web page at https://www3.oclc.org/app/ip_recognition/.

CGI WebScript (Scripting Logons)

The OCLC WebScript CGI application is copyrighted freeware, distributed free of charge, and subject to license terms and conditions. With the scripts, FirstSearch appears as a menu item on the library's web page. Using the WebScript CGI application, libraries can set up FirstSearch so that users will not be required to type in an authorization and password to gain FirstSearch access. Since the library controls access to the library's web page and/or links, library staff can limit FirstSearch access to authorized users.

3. What customer training is provided, and at what cost? Please include "freebies" such as Web-based tutorials, end-user documentation tents, cheat-sheets, etc.

While training is not required with FirstSearch, "train-the-trainer" sessions may be planned in conjunction with WSL libraries. OCLC Western Service Center trainers can conduct the training at on-site and/or regional locations. Once OCLC has ascertained the training needs of the WSL libraries, we will be able to provide a cost.

Additional customer assistance:

1. Online Help

The FirstSearch Online Help is a comprehensive "how to" manual for users. It provides detailed general-help topics as well as database-specific help topics. Online help is context-sensitive and can be accessed from anywhere in the system. The following is the listing of FirstSearch general-help topics:

2. Online Tutorial

FirstSearch offers an online tutorial, the FirstSearch Guided Tour, which is available at <http://www.oclc.org/firstsearch/guidedtour/index.htm>.

3. Web-accessible User Manual

FirstSearch documentation is available online at:

<http://www.oclc.org/firstsearch/documentation/index.htm>. The documentation is continuously updated, can be reviewed at any time, and is free of charge. Libraries also can request print versions of the documentation.

4. The standard FirstSearch training documentation package includes:

Using OCLC FirstSearch (Basic information on using FirstSearch)

Using OCLC FirstSearch with a Lynx Browser (Basic information on using FirstSearch with the text-only Lynx browser)

Managing OCLC FirstSearch (Covers the administrative module, connecting to

FirstSearch, WebScript CGI, IP address recognition, FirstSearch usage statistics, etc.)

OCLC FirstSearch Databases notebook, 4th ed. (Descriptions and searching tips for each database)

4. What customer and technical support is provided, including hours of operation? In your reply, please include contact names (if applicable) or name of department, the phone numbers and e-mail addresses for your support services. If you have toll-free access to these support centers, please make sure they are available here.

The first line of support for WSL library staff is the OCLC Western Service Center Help Desk. Trained librarians and library services staff provide both customer and technical support. The Help Desk is available from 7:00 a.m. to 5:00 p.m. Pacific Time, Monday through Friday, via the toll-free number 800-854-5753. Support also is available via e-mail at western@oclc.org.

Additional support is offered through OCLC User & Network Support (UNS), located in Dublin, Ohio. UNS may be contacted using the toll-free number 800-848-5800, the local number 614-793-8682, and via e-mail at support@oclc.org. The UNS help desk is staffed from 4:00 a.m. to 7:00 p.m. Pacific Time, Monday through Friday, and 5:00 a.m. to 5:00 p.m. Pacific Time on Saturdays. The UNS telephone system allows you to leave a message for a prompt return call. Library staff and end users may also access the OCLC Support and User Documentation service on OCLC's web site at www.oclc.org.

5. Please describe the statistics you provide, and discuss whether your statistical reporting complies in part or in whole with the guidelines developed by the International Coalition of Library Consortia found at <http://www.library.yale.edu/consortia/webstats.html> or the COUNTER Code of Practice found at http://www.projectcounter.org/code_practice.html

The FirstSearch Usage Statistics service contains information about your library's use of FirstSearch. FirstSearch administrators in libraries log on to the usage statistics service at <http://www.stats.oclc.org> using the library's FirstSearch authorization number and

administrative password. Monthly reports are included for individual and group (consortium) accounts. Each month, OCLC adds another month to the statistics service. Once the service includes 25 months of reports, OCLC will remove the earliest month when adding a new month so the service always includes the latest 25 months of reports. Overview reports combine data for all databases, including the number of sessions, searches and full-text documents used. They also provide data about the actual number of simultaneous users of the account. Other reports provide data about each database, including the number of searches and full-text documents used.

Other information available from the online statistics includes:

Consortium Overview

This report shows the total number of consortium authorizations used in a given month, the number of times users logged on, the total number of searches conducted and the total number of full-text documents ordered over a one-month period.

Institution Overview

This report shows the maximum number of logons used, the average number of logons used and the total number of searches conducted over a one-month period. It also shows the total number of users who logged on FirstSearch over a one-month period.

Institution Activity

This report shows the number of times users logged in each database, the total number of searches conducted in each database and the percentage of searches conducted in each database. It also shows the average number of users logged into a particular database, as well as the maximum number logged into a particular database at one time.

Full-Text Activity

This report shows, by database and as a total, the number of full-text documents that users viewed, e-mailed or printed over a one-month period.

OCLC is currently working on a redesign of the FirstSearch statistics that will make the reports nearly 100% ICOLC compliant.

6. Describe your pricing structure or formula for the product. (Note: This question means - we want to know what your prices are and how they are calculated: Based on FTEs? On buildings? On a combination, or on something else?)

If you cannot provide a standard price that would enable each library to understand their cost to subscribe, then for each product you must tell us the price that you would charge these hypothetical libraries if they subscribe to your product as a result of these trials.

- a. Library A: A high school library with 750 students in grades 9-12
- b. Library B: A public library that serves a population of 100,000 and has two branches
- c. Library C: A public library that serves a population of 20,000 and has only one building, no branches
- d. Library D: A community college library serving 5,000 full-time equivalent students
- e. Library E: A four-year academic library serving 5,000 full-time equivalent students
- f. Library F: A hospital library serving a hospital that employs 1,000 staff plus has 200 doctors attached to the hospital

OCLC offers three FirstSearch purchase options to help you fill your users' online reference needs:

1. Subscription
2. Per-search
3. A combination of subscription and per-search

Subscription Pricing

OCLC offers subscription access to packages of databases, as well as subscription access to most individual databases. Subscription pricing provides you with the security of fixed prices for unlimited searching of selected databases. With this option, libraries choose the databases that best fit their needs.

FirstSearch subscription packages are designed to meet specific online reference searching needs. Libraries may choose from the following packages.

The FirstSearch Base Package is a valuable collection of resources for libraries of all types. It includes:

WorldCat (the Online Union Catalog)

OCLC ArticleFirst

OCLC FirstSearch Electronic Collections Online (bibliographic index)

OCLC Union Lists of Periodicals

OCLC PapersFirst

OCLC ProceedingsFirst

ERIC

GPO

MEDLINE

World Almanacs/Book of Facts

Clase/Periodica

The FirstSearch Base Package, with the addition of the Wilson Select Plus with full text database. This package offers the Base Package with the added value of high-quality full text at an affordable price. It includes:

WorldCat

ArticleFirst

Electronic Collections Online (bibliographic index)

Union Lists of Periodicals

PapersFirst

ProceedingsFirst

ERIC

GPO Monthly Catalog

MEDLINE

World Almanac/Book of Facts

Clase/Periodica

Wilson Select Plus with full text

The OCLC Collection consists of essential OCLC databases at an affordable price. It includes:

WorldCat

ArticleFirst

Electronic Collections Online (bibliographic index)

Union Lists of Periodicals

Consortial Purchases

More than 92 libraries in Washington, Oregon, Montana, and Idaho participate in, and share the cost of, a consortial (the Pacific Northwest FirstSearch Consortium) purchase of 11 core databases, including WorldCat. Libraries in these states may join this consortium for access to FirstSearch databases. Participating libraries pay for the core package of databases based on usage, with a minimum charge of \$1,000 per year.

Optional Databases

Whether or not you choose a subscription package, you can purchase individual subscription access to one, some, or all of the other eligible FirstSearch databases. In the Pacific Northwest FirstSearch Consortium, OCLC secures custom pricing for subgroups of libraries interested in optional FirstSearch databases.

Per-Search Pricing

With per-search pricing, you pay by the search and purchase blocks of 500 searches in advance. Per-search pricing provides virtually unlimited simultaneous logon access to more than 40 databases.

What counts as a search? A search is counted when you send a search word or phrase to FirstSearch and receive at least one record (e.g., "baseball and umpires" is one search). As an example, when you purchase 10,000 searches, you make it possible for you and your users to perform that number of searches in FirstSearch.

Valid for two years from the date of purchase. The searches you buy under the open per-search pricing option are valid for two years from the date of purchase. After two years, unused searches expire unless you make a subsequent FirstSearch purchase under any per-search or subscription option during that period. If you make an additional purchase, the expiration dates of all searches purchased under the open per-search pricing option are adjusted to expire two years after your latest purchase.

Members receive a discount. OCLC members receive a discount on the per-search pricing option. OCLC members are libraries that do all of their current cataloging online with OCLC or via batchload. Member libraries agree to use existing records in WorldCat to catalog materials and to input original cataloging records when there are no corresponding records in the database.

Subscription and Per-Search Pricing Combination

FirstSearch also allows you to combine:

Subscription pricing for access to one or more databases
and

Per-search pricing for access to other databases under the same authorization

Simply choose your subscription databases. When you purchase search blocks to be used under the same authorization, you can access the rest of the eligible non-subscription databases on a per-search basis.

Pricing for ASCII Full Text

Some FirstSearch databases offer the full text of articles online. Online full text is available under per-search, monthly billing, and subscription pricing options for articles ordered from a variety of bibliographic indexes. A single authorization can allow a combination of per-search payment, monthly billing, or subscription payment as an

option for ASCII full-text document ordering. Per-search payment for ASCII full text cannot be combined with certain subscription pricing options.

Per-Article Payment/Billing Options

Each time a user enters ASCII full-text mode to view a document under the monthly billing option, the user is charged for one document. Documents can be e-mailed from the screen at no additional charge. Documents that are e-mailed but not viewed on the screen also incur a per-document charge.

Subscription Option

Libraries can pay a subscription fee for unlimited retrieval of full-text documents from one or more ASCII databases.

7. If a library subscribes to any of your products as a result of this trial, will their future subscription rates continue to reflect any savings or discount they may receive today?

Libraries that choose to purchase FirstSearch through participation in the Pacific Northwest FirstSearch Consortium will receive the OCLC member discount if they are an OCLC member. OCLC has no plans to change this price structure

8. What is the minimum participation level (however you care to define it) that would be needed to allow participating libraries to receive a group discount? How will you treat existing library customers with regard to a group buy?

Libraries typically begin enjoying discounts when at least three libraries participate in a group. With regard to a group purchase, existing FirstSearch subscribers with access to the same database(s) would be credited for the unused portion of their current database subscriptions.

9. Please provide the name and contact information (toll-free telephone number, e-mail address, hours, etc.) for libraries to make further inquiries. (Sales representatives for our area preferred.)

All inquiries may be directed to Mr. Paul Cappuzzello, West Region Manager, 800-848-5878, extension 6258, or via e-mail at paul_cappuzzello@oclc.org, between the hours of 8:00 a.m. - 5:00 p.m. Eastern Time, Monday through Friday.
