

## 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.

**Morningstar.com Library Edition, the only online investing service created specifically for libraries, will assist patrons with the investing process. With Morningstar.com Library Edition, patrons can research a stock or mutual fund that meets their needs, research current or prospective holdings, or see how their individual investments fit together by using our exclusive Portfolio X-Ray feature.**

**With Morningstar.com Library Edition your patrons will have access to:**

- Over 20,000 Stock and Fund securities covered**
- Independent Reports on 1,000 stocks and 2,000 funds, updated frequently**
- Analyst Archived reports**
- Instant X-Ray Portfolio-Create a portfolio online, with 11 different views**
- Exclusive Morningstar Ratings for both Stocks and Mutual Funds**
- Morningstar Screener Tools**
- Over 170 different stock and fund selectors to choose from**
- Monthly usage reporting**
- Promotional materials to market the site in your community**
- IP Recognition**
- Diagnostic features**
- Remote Access is available*
- Online Training**
- Formatted printable PDF Stock and Fund reports**
- Customer Service Hours including Saturday**

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 is available for an additional charge. The additional fee for a library depends on the population of the area the library covers. Remote access can be done one of two ways, either by proxy server or a reference URL. There is a separate URL libraries will get from Morningstar to access the service remotely.**

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.

**Morningstar provides a remote training through a service called Placeware. The Morningstar Account Executive can walk through Morningstar.com Library Edition for the librarians through a remote interface. *There is no charge for this service.***

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.

**Our toll free number is 1-866-215-2509. We offer customer service hours which include Saturday. I will be Washington’s primary point person. My email address is [James.Pryor@morningstar.com](mailto:James.Pryor@morningstar.com).**

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](http://www.projectcounter.org/code_practice.html)

**Morningstar provides each library with a tracking usage link. The library assigns a password for their reports, which will give them the number of logins and pageviews each month. The stats are updated on the 6<sup>th</sup> of each month and each month can be archived.**

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?)

- 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

#### **Washington State Group Purchase 2004**

##### **List Price**

**Large Library (population 100,000 or more) - \$3,670**

**Small Library (population 100,000 or less) - \$3,250**

**5 or more libraries subscribe:**

**Large Library- \$2,569 (30% discount)**  
**Small Library- \$2,275 (30% discount)**

**Less than 5 libraries subscribe:**

**Large Library- \$3,120 (15% discount)**  
**Small Library- \$2,763 (15% discount)**

*\*In the event there is no group purchase, we will still honor a 15% discount for single libraries*

**List Price Remote Access**

**Population covering 100,000 or lower-\$2,550**  
**Population covering 100-500,000-\$3,550**  
**Population covering 500,000 or more-\$5,050**

**5 or more libraries subscribe:**

**Population covering 100,000 or lower-\$1,785 (30% discount)**  
**Population covering 100-500,000-\$2,485 (30% discount)**  
**Population covering 500,000 or more-\$3,535 (30% discount)**

**Less than 5 libraries subscribe:**

**Population covering 100,000 or lower-\$2,168 (15% discount)**  
**Population covering 100-500,000-\$3,018 (15% discount)**  
**Population covering 500,000 or more-\$4,293 (15% discount)**

*\*In the event there is no group purchase, we will still honor a 15% discount for single libraries*

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?

**Yes.**

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?

**Morningstar would like to have a least 5 libraries on board to go ahead with a full group purchase. However, if 4 or less participate, we will still be able to provide those libraries with a discounted rate. Both price points can be seen on the pricing attachment. At present we only have one library that has subscribed to Morningstar.com Library Edition. Upon their renewal they can be a part of any new 2005 group purchase.**

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.)

**Any questions or additional information needed can be directed to me:**

**James V. Pryor**  
**Account Executive**  
**225 West Wacker Drive**  
**Chicago IL 60606**  
**312.696.6413**  
**866.215.2509-Toll Free**  
**312.696.6024-Fax**  
**[james.pryor@morningstar.com](mailto:james.pryor@morningstar.com)**

**Customer Service Hours are:**  
**Monday –Friday 7am to 7pm (central time)**  
**Saturday 9am to 4pm**  
**Sunday office is closed**