Exhibit 1-Specifications

Solicitation 4300000027

## Mandatory Specifications

Supplier must respond to each section of this document, indicating if the proposed product(s) meets or exceeds the requirement.

### The supplier shall provide the required coverage of digital resources as follows:

1. Full-text magazine and journal articles appropriate for meeting the informational, educational, and recreational needs of Oklahoma libraries of all types (public, academic, K-12, and special), including content from both popular periodicals and scholarly publications, including peer-reviewed journals.
2. Content shall cover a wide range of subject areas including, but not necessarily limited to Business, General Reference, and Health.
3. The proposal shall offer a minimum of 5,000 unique titles, of which at least 70% shall be full text.
4. Coverage shall include at least the current year, plus three years, and be searchable as a single file.
5. A supplemental proposal that includes additional products over and above what is offered in number one
above, with the library type specifically targeted by each product (public, academic, K-12, or special) clearly noted, may be included.
6. Similarities or differences with content targeting each library type shall be identified. Specifically, how does each product meet the needs of the wide range of customers?
7. Indexing, abstracting, and citations shall be included.

### The Supplier shall provide separate pricing for each area of coverage listed above. Suppliers may provide pricing for all items, submit partial proposals on individual line items, or propose different combinations of coverage options (e.g., database bundling). Invoices shall be issued quarterly in arrears. Supplier is responsible for payment of all copyrights.

### The proposals shall include only modules and features that are currently operational in multiple user sites.

### The supplier shall indicate the number of potential sites that the products are capable of serving.

### The proposal shall include an Implementation Plan and describe ongoing Support Services.

### Access to online digital resources shall be through the Internet from a variety of devices, including personal computers, tablets, and handheld mobile devices/cell phones. Access shall be available in libraries, on campuses and in classrooms, and from member libraries’ users accessing information from home or office. Individual participating institutions shall be able to choose to access the digital resources using any of the following methods:

* + 1. IP authentication
		2. Via proxy server
		3. Referring URLs
		4. Login/Password – Any login/password shall be authenticated by Supplier

It is desirable to provide direct access to Oklahoma citizens without the intervention of individual library authentication requirements. If the Supplier has the ability to authenticate on a statewide basis using geolocation or similar technique, the Supplier shall describe the geolocation capabilities and limitations.

The supplier shall describe how remote access to the product(s) occurs.

### The proposal shall include a description of other protocol compatibilities, if applicable, if NISO Standard version Z39.50 is unavailable.

### Access to online digital resources shall be available to an unlimited number of simultaneous users twenty-four hours a day, seven days a week, except for a maintenance window during off-peak periods. Suppliers shall specify the times of scheduled normal maintenance window(s), if any, during which service is unavailable. Supplier shall indicate how often the Digital content is updated.

### Only web-based products or services shall be considered under this RFP. Content shall be accessible with standard web browser software. Suppliers shall describe any additional software, special browser plug-ins, or helper applications (e.g., Adobe PDF viewer, media players, applets, proprietary drivers, etc.) that are required for accessing the product(s) included in this proposal or to access the content provided through the product(s). Suppliers shall indicate if a particular browser version or “no earlier than” version is required.

### Suppliers shall describe alternative interfaces compatible with text-based browsers and/or adaptive software and make them available during the trial demonstration period. A link to the product’s Voluntary Product Accessibility report (VPAT) shall be provided.

### Content Parameters

 Suppliers shall provide the following information for each product proposed:

1. Total number of titles in proposed periodical database(s)
2. Total number and percentage of current full-text titles included, excluding open access titles
3. Average length of back file provided for current full-text titles
4. Number of current full-text titles providing full text back files as follows:

 i. Greater than 1 year, but less than 3 years;

 ii. Greater than 3 years, but less than 5 years;

 iii. Greater than 5 years, but less than 10 years;

 iv. 10 years or more.

1. Describe the full-text content available (e.g., text, text + graphics, page images, etc.) .
2. Indicate the file formats in which full-text data is available (HTML, PDF, etc.) and the number and percentage of full-text titles for which each format is available.
3. List the number and percentage of full-text titles for which graphs, charts, and images (or any other graphical content) that were present in the original are NOT included in this offering.
4. If the Supplier proposes to provide multiple periodical databases, provide the percentage of overlap for each.
5. Provide access to a list of embargoed titles. Indicate the number of full-text titles that have embargoes as follows:

 i. Less than 90 days

 ii. At least 90 days but less than 6 months

 iii. At least 6 months but less than 1 year

 iv. 1 year or more

1. Provide the total number and percentage of “closed” titles (any title for which current coverage is not available) in the proposed resources.
2. Provide the total number and percentage of exclusive titles included in the offered resources.
3. Suppliers shall provide the following for peer reviewed titles:

 i. The number and percentage of current full-text peer reviewed titles that are included in the offer

 ii. Access to this list of peer-reviewed titles

 iii. The number and percentage of embargoed peer reviewed titles

 iv. The number and percentage of exclusive peer reviewed titles.

### Title List Availability

 Suppliers shall describe the availability to libraries of title or content lists and descriptions for their product offering(s):

###  a) Frequency with which title lists are updated, compared to changes occurring with the product(s)

###  b) Indicate if title lists include start and stop dates for each title.

###  c) Indicate if embargoed titles are listed.

###  d) Indicate if peer reviewed titles are designated as such.

###  e) Suppliers shall provide access to full title list for proposed product(s) in electronic format (spreadsheet preferred).

###  Access may be via a web link, as long as the provided list matches the proposed product(s).

### User Interface and Functionality

### Describe the user search interface for the proposed product(s):

###  a). Is traditional search functionality available (e.g., Boolean, truncation, proximity operators)? Describe any features designed to aid the novice searcher in implementing these functions.

###  b) Describe any automatic stemming functionality.

###  c) Describe any spell checking functionality. Does the system suggest or automatically implement alternate spellings?

###  d) Describe available search limits (e.g., date, peer review, article type, full-text availability).

###  e) Describe any “natural language” searching capability.

###  f) If multiple products are proposed, to what extent can they be searched simultaneously? Are duplicates automatically eliminated?

###  g) Describe sort options for search results.

###  h) Printing:

###  i. Online digital resources shall allow for the unlimited downloading and/or printing of text for no additional fees.

###  ii. The interface shall have the capability to mark records for viewing and/or printing.

###  iii. The interface shall provide a print command that results in printing to a local or network printer.

 iv. The Supplier shall identify any operating system platforms from which printing cannot be performed or conditions under which printing may not function.

### Any products offered by the Supplier shall be accessible through firewalls configured in common ways accepted by the computer security industry.

### Suppliers shall provide configuration information in their RFP responses if special firewall configurations are required to make the product(s) accessible

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### Suppliers shall indicate if any product(s) offered use a non-standard port for accessing the information.

### Suppliers shall describe the standards met and protocols used to provide interoperability with participating library systems and tools that allow proposed product(s) to link to and be linked from other sources, such as Integrated Library Systems, e-journals, discover tools, Internet resources, etc.

### MARC Records

 It is desirable that libraries have access to MARC records that meet industry standards for periodicals and monographs that are included in any proposed product(s). Describe the availability of MARC records for titles included in the proposed product(s):

###  a) Are comprehensive MARC record file(s) available for initial load during implementation?

###  b) Are periodic MARC record file(s) provided for new titles added, and/or periodic files for deleted or ceased coverage titles?

###  c) Do the MARC records include standard 9xx holding statements?

###  d) Do the MARC records include 856 title-direct URLs?

###  e) What is the source of the MARC records (i.e., in-house, third party Supplier, etc.)? Specify name of source and describe how the provided MARC records meet industry standards.

###  f) If MARC records are available, the Supplier shall be prepared to provide sample records for examination upon request.

### Training for Library Staff

The Oklahoma Department of Libraries (ODL) expects the successful Supplier(s) to provide up to a minimum of six (6) days of training each year of the contract to ODL staff and participating libraries staff, including in-person, remote, and hands-on training. This training may include sessions conducted at statewide conferences, such as the Oklahoma Library Association Annual Conference and Oklahoma Society for Technology in Education Conference.

1. Supplier shall describe training programs for the staff of the different types of libraries that will be using

 the offered product(s).

1. Supplier shall describe any training or resources specifically designed to aid academic and K-12 teacher librarians, as well as teachers and faculty, in integrating the use of the offered product(s) into the curriculum.
2. Supplier shall share examples of other large-scale training programs that have been used to reach a variety
of user audiences and levels.
3. Supplier shall provide sample training and instructional materials as an electronic appendix to this proposal or point to the availability of such materials online.

### Training Aids for End Users

 a) Describe training and/or point of use instructional materials that are available for end-users.

 b) How many physical copies of these aids will be provided free-of-charge to member libraries on request? What is the cost for additional physical copies?

 c) Provide sample training and instructional materials as an electronic appendix to this proposal or point to the availability of such materials online.

 d) Describe (or provide samples of) any materials that can be adapted or customized for local use. Also describe the electronic format(s) in which the materials are provided to support local printing.

 e) Online help shall be available.

### Promotion and Marketing

 Suppliers shall describe the type of assistance it will offer to promote its product(s) to the public.

 a) Suppliers shall describe any public service announcements, or other mass media marketing they are prepared to provide – preferably to media outlets, not to libraries.

 b) Does the Supplier use web-based or social media marketing? If so, describe any efforts the Supplier is prepared to provide as a part of this contract.

 c) Suppliers shall describe promotional materials they can provide, such as bookmarks, posters, table tents, shelf hangers, etc. Suppliers shall provide sample materials as an electronic appendix to this proposal or point to the availability of such materials online.

 d) How many physical copies of these aids will the Supplier provide free-of-charge to member libraries on request? What is the cost for additional physical copies?

 e) Suppliers shall describe, or provide samples of, any marketing or promotional materials that can be adapted or customized for local use. Also, describe the electronic format(s) in which the materials are provided to support local printing.

f) Products shall be branded throughout with logos of the Oklahoma Department of Libraries and Institute of Museum and Library Services and reference both as funders of the service using language to be provided.

### No advertising for products other than the contracted product(s) shall appear anywhere in the interface. The statewide list of registrants shall not be used for additional advertising of products not included in the contracted product(s).

### Usage Statistics and Reports

 Usage statistics and reports shall be available for all participating institutions and each participating library on a monthly basis.

 a) Suppliers shall describe the specific usage statistics that are available.

 b) Suppliers shall describe the time intervals for which statistics can be generated (e.g., hourly, monthly, annually, etc.).

 c) Suppliers shall indicate which of the following are available for individual libraries/institutions, by library type (public, academic, K-12, and special, and cumulative statewide:

 i. Total search sessions

 ii. Total number of non-overlapping searches

 iii. Number of unique users

 iv. Number of citation/full- text requests/views/downloads/reports, etc.

 v. Number of document requests per source (e.g., individual periodical titles)

 vi.

 d) Reports shall be available for the preceding month, no later than ten days after the close of that month.

 e) Suppliers shall describe the format in which statistics are available (e.g., COUNTER, SUSHI, etc.)

f) Suppliers shall describe and provide examples of standard usage reports

 g) Suppliers shall indicate whether such usage reports are provided automatically via e-mail or obtained on request by use of a login/ password protected, web-based application.

 h) For usage reports generated by the Supplier’s system, Suppliers shall describe the metadata (title of the report, time period covered, any other parameters set by the requestor) included with the body of the report itself, and/or in the text of the e-mail message that accompanies a report.

### Suppliers shall describe the features of any administrative modules and note how such modules are offered to and accessed by participating institutions.

### Customer Service

 a) The Supplier(s) shall, at a minimum, provide toll-free technical support for participating libraries available from 7:00 a.m. to 7 p.m. (Central Time Zone), Monday through Friday.

 b) Suppliers shall describe procedures governing calls to technical support.

 c) Suppliers shall describe other options available to reach customer service staff (e.g., e-mail, web, chat, etc.).

 d) Suppliers shall provide Customer Service statistics for the most recent six months:

 i. Resolution within 4 hours of service initiation

 ii. Resolution within 24 hours of service initiation

 iii. Customer satisfaction scores for the public, academic, K-12, and special library markets

### Customer Notification

 a) Suppliers shall describe notification methods for content dropped from or added to Supplier’s product(s)and indicate the timeline for notification.

 b) Suppliers shall describe notification methods for platform or interface changes or enhancements. Indicate the timeline between notification of customers and implementation of change(s).

 c) Suppliers shall describe notification methods for scheduled downtimes, including amount of notice before scheduled downtimes occur.

 d) Suppliers shall describe policy and methods of notifying customers of periods of unavailability, other than regularly scheduled maintenance, and targeted time period for restoration of services.

### Suppliers shall provide system reports documenting downtimes or system unavailability for the period January 1, 2021, through December 31, 2021, including, but not limited to, vender server software or hardware problems and/or Supplier Internet service downtime.

### Suppliers shall describe the system redundancy in place to prevent periods of service unavailability.

### Start-up and Transition

Access to product(s) shall begin no later than October 1, 2022.

### a) Current library participants shall be automatically enrolled into any new subscription system required by the Supplier(s) awarded the contract.

### b) Supplier proposals shall describe the process to rollover registration for existing participants.

### c) Supplier proposals shall describe the process to register new participants, including the length of time registration and access to the product(s).

### d) Supplier shall describe the process for elimination of duplicate registrations for participating institutions.

### e) The enrollment period shall begin prior to October 1, 2022, in order to avoid interruption of service.

### f) Supplier shall ensure that the Oklahoma Department of Libraries receives all new registration information.

### Suppliers shall describe how individual participating institutions with existing product subscriptions/licenses are affected by the statewide proposal, including options for credits to the libraries.

### Suppliers shall make the following available to an evaluation committee:

### a) Access to offered products

### b) Appropriate technical and user manuals