

SCHEDULE 1

WorldShare® Management Services

Section 1 Description

WorldShare Management Services provide cloud-based library management and discovery applications in an integrated suite, offering librarians a comprehensive and cost-effective way to manage library workflows efficiently, and improve access to library collections and services. The application may include acquisitions, circulation, interlibrary loan, metadata management, license management, analytics, and discovery services.

Section 2 Definitions

- 2.1 “**Guidelines**” means the “Guidelines for Contributions to WorldCat” as modified from time to time. A current copy of the Guidelines is available at: <http://www.oclc.org/worldcat/community/guidelines.en.html>.
- 2.2 “**Policy**” means the “WorldCat Rights and Responsibilities for the OCLC Cooperative” as modified from time to time as a result of the policy review process described therein. A current copy of the Policy is available at: <http://www.oclc.org/en/worldcat/cooperative-quality/policy.html>.
- 2.3 “**Principles**” means the WorldCat Principles of Cooperation as modified from time to time. A current copy of the Principles is available at: <http://www.oclc.org/worldcat/community/principles.en.html>
- 2.4 “**WorldCat® Data**” is defined as set forth in the Policy.
- 2.5 All capitalized terms not defined herein shall have the same meaning ascribed to them in the Framework Agreement.

Section 3 OCLC Cataloging and Metadata Service:

- 3.1 For Sections 3-6, the terms in each section shall apply to this Agreement only to the extent that the product named in each section heading is listed on Institution’s agreed upon pricing document.
- 3.2 OCLC's cataloging and metadata services give Institution the tools needed to effectively manage the metadata for Institution’s collection.
- 3.3 Institution shall create bibliographic records and related data for entering information into WorldCat consistent with the Guidelines maintained by OCLC and its advisory groups.
- 3.4 Institution using the Systems for cataloging agrees to abide by the Principles and the Guidelines.
- 3.5 Institution agrees that the use and transfer by the Institution of WorldCat Data is subject to the Policy.
- 3.6 If, during the term hereof, an Institution informs OCLC that bibliographic records it furnishes to OCLC for addition to WorldCat will be subject to usage or transfer restrictions beyond or in addition to those applicable under this Schedule, and if OCLC nevertheless elects to accept such records for addition to WorldCat, OCLC will so notify Institution, after which Institution’s rights to access, use and transfer such records will be subject to said usage and transfer restrictions.

Section 4 WorldShare ILL:

WorldShare Interlibrary Loan is a resource sharing network to lend and borrow resources which allows users to quickly obtain global library content located in Institution’s collections and the collections of other ILL libraries around the world. WorldShare Interlibrary Loan simplifies tasks such as sharing of resources, automating request and entry processes, managing ILL fees, analyzing borrowing and lending patterns, and delivering documents easily and securely through Article Exchange.

Section 5 Discovery Services:

- 5.1 **Description.** WorldCat Discovery Services is a suite of cloud-based applications that enable people to search WorldCat and discover more than 2 billion electronic, digital and physical holdings in a single search.
- 5.2 **Content.** The Bibliographic Data, Holdings Data, OCLC and/or 3rd party databases and other content available through the Service may change from time to time and are subject to OCLC and/or third-party claims of copyright and other rights and may be subject to supplemental terms and conditions. The Product Description, documentation, features and/or functionality of the Service, and/or the WorldCat.org service may also change from time to time. Certain databases may only be accessed if Institution subscribes to that database through a third party.
- 5.3 **Bibliographic Data.** Bibliographic Data may not be stored other than temporarily as required for use authorized by the Agreement and shall not be otherwise transferred, or accessed by any other person not an Authorized User.

5.4 Cataloging Prohibited. Institution may not resell the Service or the Bibliographic Data or other content accessible through the Service.

5.5 Compatibility.

- a) Certain parts of the Service function properly only when interacting with a local library system which is compatible with and supported by the Service. A list of local library systems which are compatible with and supported by the Service is available from OCLC. Prior to placing its order, Institution should verify that its local library system is compatible with and supported by the Service.
- b) In the event Institution’s local library system is or becomes incompatible with or unsupported by the Service at any time during the term of this Agreement OCLC may if requested by Institution make reasonable efforts to resolve the issue at OCLC’s then current rates. If such efforts are unsuccessful OCLC or Institution may terminate this Schedule upon written notice to the other party.

5.6 Third Party Database Terms:

- a) **British Library Database.** Bibliographic Data made available from the British Library is licensed solely for non-commercial use. For the purpose of this Section “Non-Commercial Use” means internal or personal use solely for the purpose of resource discovery, learning, teaching, academic, or scientific research, private study, verification of bibliographic information, and/or the identification of materials to be ordered via interlibrary loan, from document vendors, or from other sources from which materials may be acquired, and specifically excludes transmission, selling on, redistribution or circulation of any form outside of Institution’s organization or use in violation of the Agreement.
- b) **National Library of Medicine (“NLM Database”).**
 - (1) Organizations or institutions may download NLM-produced citations and reuse these records within their organization or institution. NLM suggests that organizations limit the number of records to 1,000 per month. Since NLM makes corrections and enhancements to and performs maintenance on these records at least annually, you should plan to replace or correct the records once a year to ensure that they are still correct and searchable as a group.
 - (2) NLM databases are produced by a U.S. government agency and as such the contents are not covered by copyright domestically. They may be copyrighted outside the U.S. Some NLM produced data is from copyrighted publications of the respective copyright claimants. Users of the NLM databases are solely responsible for compliance with any copyright restrictions and are referred to the publication data appearing in the bibliographic citations, as well as to the copyright notices appearing in the original publications, all of which are incorporated by reference. Users should consult legal counsel before using NLM-produced records to be certain that their plans are in compliance with appropriate laws.

Section 6 Worldshare Report Designer

- 6.1** WorldShare Report Designer provides the ability to utilize Institution’s WorldShare Management Services data to build custom reports and visualizations or use existing reports as a base for customizing desired reports.
- 6.2** Institution must obtain the consent of another Institution with holdings in WorldCat (a “WorldCat Institution”) to compare its collections against the WorldCat Institutions’ individual collections. For purposes of the foregoing sentence, the term “individual collections” means collections that are identified as belonging to the WorldCat Institution. Institution shall provide OCLC with reasonable documentation of such consent(s) upon OCLC’s request.

Section 7 Payment Processor API

- 7.1** OCLC will integrate the Payment Processor API specifically for use by mutual customers of WMS services for the Purpose, and that limited personal data of users will be processed to identify the users for the Purpose.
- 7.2** Institution agrees that OCLC and the Payment Processor are separate processors to the Institution, and that the Institution is directing each to cooperate.
- 7.3** Institution shall establish appropriate and separate contracts with OCLC and with the Payment Processor, including data processing agreements as applicable.
- 7.4** To the extent OCLC receives personal data from the Payment Processor for this Purpose, OCLC will process the personal data in accordance with the applicable data processing terms in place with Institution.
- 7.5** With respect to its use of the Payment Processor API, Institution hereby:
 - a) authorizes OCLC to share access to Institution’s data with the Payment Processor for the Purpose listed above;
 - b) authorizes OCLC to take any additional and reasonable technical measures needed to allow access;
 - c) acknowledges that Payment Processor access will remain until revoked by Institution; and

- d) releases OCLC from any liability and holds OCLC harmless from and against any action or claim in relation to or associated with OCLC's sharing Institution's data and allowing access to the Payment Processor.

Section 8 Service Level Agreement

8.1 Scope. This Service Level Agreement sets forth the service level and performance objectives of OCLC in providing the Hosted Services (as listed in Section 2 of this SLA) to Institution (the "Systems"). OCLC will use commercially reasonable efforts to meet the following service level and performance objectives to support the operation of the Systems.

8.2 Uptime Commitment.

a) **Availability.** OCLC will use commercially reasonable efforts to ensure that the Systems are available 99.5% of the time (the "Uptime Commitment"). Availability will be measured as follows:

(1) Availability = (T-D)/(T) * 100%; where

(2) T = the total number of minutes in the respective month, and

(3) D = the total number of minutes of downtime in the month excluding planned outages for scheduled maintenance, telecommunications or power disruptions caused by third parties, any other causes beyond OCLC's reasonable control, and excluding other times described herein.

b) **Notice Required.** OCLC will notify Institution promptly of any factor, occurrence, or event coming to its attention likely to affect OCLC's ability to meet the Uptime Commitment, or that is likely to cause any material interruption or disruption in the Systems.

c) **Scheduled Maintenance.** Scheduled maintenance may occur any Sunday during a 4-hour window and may occasionally be extended. Notice of scheduled maintenance shall occur 3 days prior to scheduled downtime. In the event planned emergency maintenance is required, OCLC will make commercially reasonable efforts to notify Institution in advance.

8.3 Systems Management

a) **Monitoring.** OCLC will monitor and maintain the Systems in working order each day (24 x 7). OCLC will proactively manage and monitor all application server hardware devices and software to ensure optimal performance and reliability as well as to detect abnormal events or exceeded utilization or performance thresholds.

b) **Maintenance.** OCLC will operate, monitor, and administer all servers, applications, and networks supporting the Systems. In order to provide such coverage, OCLC may utilize a mixture of on-site and on-call support staff, automated server monitoring, and automated paging technology.

c) **Change Control.** OCLC will install new equipment, software, releases, upgrades, fixes, patches, and **other** items necessary to maintain the Systems to industry standards. OCLC will proactively gather information from appropriate server, peripheral, operating system, or database vendors regarding upgrades, defect patches, or fixes.