



## **Pika Service Level Agreement (Pika SLA) Marmot Library Network**

### **A. Description of Service**

The Marmot Library Network (**Marmot**) develops, implements, maintains, and supports Pika discovery software. This service level agreement (SLA) describes Marmot services, member library responsibilities, and other terms and conditions related to Pika.

### **B. Marmot Governance**

Marmot is a non-profit 501(c)(3) organization incorporated to provide information technology services for member libraries (**Marmot Members**). Marmot supports Pika discovery software for Marmot Members as well as "Discovery Partners" (**Associate Members**). In this document, "**Members**" means Marmot Members and Associate Members.

### **C. Open Source Software and Agile Development**

Members and Marmot acknowledge the open source nature of the VuFind application originally developed at Villanova University; the SOLR software environment; the Lucene search engine; and other tools from the open source community. "Pika" by Marmot, based on VuFind, does not belong to Marmot or to Members but inherits all terms and conditions of the GNU General Public License.

Marmot develops software following SCRUM principles. Members submit enhancement requests in the form of "user stories". Each development "sprint" begins with a planning session where Members help prioritize user stories. Planning sessions are typically conducted by webinar. Marmot plans, performs, and tracks development in a way that is open to Members. Member librarians play an active role in development by reviewing and testing new features. The backlog of user stories is continually groomed to align with evolving priorities.

### **D. Warranty**

Marmot warrants that it develops, implements, maintains, and supports software following professional standards. Marmot developers are qualified to write PHP and java code compatible with Pika software, to work effectively with the SOLR/Lucene search engine, and to follow best practices for source code control.

### **E. Confidentiality and Privacy**

Marmot keeps Member data confidential as stated in the "Confidentiality of Information" policy posted at <http://www.marmot.org/policies>. Marmot honors Member policies by not sharing or using patron records except as needed to develop and test software.

### **F. Independent Contractor**

Marmot covers its own costs (employee compensation, benefits, payroll taxes, etc.) as an independent contractor. Marmot employees are not considered employees of Members. Marmot uses its own equipment and facilities to provide services to Members. When on site at a Member library, Marmot employees should be provided with a workspace and Internet access. Members are not expected to purchase equipment or software for Marmot employees.



### **G. Payments**

After Associate Member signs an “Order Confirmation Letter” detailing services and pricing, Marmot invoices Associate Member for a one-year subscription. Service may be renewed annually. Associate Members pay reasonable travel expenses for Marmot employees to work on site, as may be scheduled from time to time by mutual agreement.

### **H. Termination**

There are no special provisions for early cancellation of a one-year subscription. Associate Members planning not to renew should notify Marmot at least 90 days before the next subscription anniversary. If Marmot should ever decide to discontinue development, support, and maintenance of Pika software, Associate Members will be notified at least 6 months before such a decision would take effect.

### **I. Standard Pika Services**

- Support Pika application (address outages, errors, and bugs)
- Maintain Pika application (keep up to date with metadata standards, system links (APIs), etc.)
- Develop new features/enhancement requests

### **J. Additional Services for Pika Software-only Sites**

- OS updates & maintenance
- Server monitoring

Until 2016, in cases where Marmot implemented Pika on a server owned and operated by Member, Member was responsible for OS updates & maintenance. From 2017, Marmot supports Member’s Pika server as an “appliance” rather than a software-only site, taking full responsibility for application and OS updates and maintenance. This service is included for Members paying 2017 prices.

### **K. Additional Services for Pika Sites Hosted by Marmot**

Marmot hosts Pika for Associate Members paying an annual hosting fee. Terms and conditions spelled out in the “Website Hosting SLA” also apply to Pika sites hosted by Marmot.

### **L. Priority Development**

Priority development, included for members paying 2017 prices, allows Member to prioritize specific development projects outside the normal track of prioritized user stories. Depending on price tier, Member is entitled to a number of hours of particular development to be scheduled in 2017 and subsequent years.

<b>Size (Pika Price Tier)</b>	<b>Developer Hours</b>
LARGE	40
MEDIUM-LARGE	30
MEDIUM	20

### **M. Support Service Levels**

Marmot staffs a Help Desk from 8am to 5pm Mountain Time, and accepts calls for emergency support weekdays from 5pm to 8pm Mountain Time, and weekends from 8am to 5pm Mountain Time. Problem reports and change requests may be submitted by email, Help Desk Ticket System, or phone.



Priority	Target Initial Response	Target Resolution
Show-stopper	30 min	4 hours
Critical	2 hours	next business day
Major	1 day	By end of sprint reported
Normal	2 days	By end of sprint following report
Minor	2 days	Within 3 sprints following report
Feature / Enhancement	2 business weeks	Within 1 year for priority development. Additional suggestions will be added to the standard product backlog for traditional scheduling.

## N. Priority Definitions

- **Show-stopper** (outages and high-priority issues)
  - **Example:** Pika down, Pika index incomplete, Pika up but inaccessible by web.
- **Critical** (urgent defects and change requests)
  - **Examples:** ILS down (Marmot to keep Pika working in offline mode), ILS unresponsive (Marmot to diagnose API calls, direct database access, etc.); Pika slow (Marmot to solve performance problem); other servers called by Pika but not managed by Marmot (Syndetics, NoveList, Wikipedia, etc.) down or unresponsive (Marmot to diagnose, and resolve problems in Pika or report and track problems at 3<sup>rd</sup>-party vendor).
- **Major** (Issues that cause significant confusion or display incorrect information)
  - **Examples:** Errors in mapping or faceting of locations, collections, formats, etc.);
- **Normal**
  - **Examples:** Display problems or inconsistencies on various devices (laptops, tablets, phones); problems with specific bib, item, or patron records (Marmot to fix Pika code or advise Member to fix data); requests to change settings and preferences (Marmot to edit Pika software or advise Member to edit settings in Pika Admin interface).
- **Minor** (Issues that do not perform according to specification, but do not interfere with everyday usage of the system)
  - **Examples:** Notices within the test system; Unobtrusive display problems or inconsistencies on various devices (laptops, tablets, phones);
- **Feature/Enhancement requests**
  - **Examples:** Printer-friendly reading lists (*a la* ticket number: PK-241); option for Reading History to be stored in a Horizon Reading History table; future involvement in the digital archive system under development.



Marmot strives to operate within these service levels and timelines, proactively informing customers when problems cannot be resolved within the stated response time or resolution time. Items not completed within these times will be escalated for attention by the immediate supervisor of that resource.

It should be noted that once problems are referred to 3<sup>rd</sup>-party service providers, Marmot staff will have little ability to influence the speed of completion. However, Marmot will keep Member informed of relevant progress and serve as a liaison between Member and 3<sup>rd</sup>-party service providers.