



## PALNI SERVICE LEVEL AGREEMENT

Last Revision JANUARY 1, 2017

### 1. Agreement Overview

This Service Level Agreement (“SLA”) is between the Private Academic Library Network of Indiana (“PALNI”) and the supported institutions. This SLA defines the scope and nature of support provided by PALNI to the supported institutions. Supported institutions may “opt-in” to receive any of the services outlined below.

### 2. Goals and Objectives

The purpose of this SLA is to ensure that the necessary support functions exist to meet the requirements of supported institutions.

The objectives of the SLA are to:

- Articulate clear roles and responsibilities of the PALNI service staff (primarily the KB/LM Librarian)
- Provide concise and clear description of the services and support provided
- Provide concise and clear description of the responsibilities of support organizations utilizing these services
- Ensure that expected service is delivered through measurable means

### 3. Stakeholders

The following parties are identified as the primary stakeholders in this SLA:

- PALNI Staff, Coordinators, and other paid employees
- Directors of each supported institution

### 4. Review Period

This SLA will be valid from the effective date below and in force as long as mutually agreed. Should either party withdraw the SLA will be dissolved.

The PALNI Executive Director, the Executive Committee of PALNI supported institutions, and the primary stakeholders shall review the SLA Annually or as required due to changes in staffing, expectations, or service need.

**Effective Date: 1/1/2017**  
**Previous Review Date: 1/1/2017**  
**Next Review Date: 1/1/2018**

## **5. PALNI Provided Service Definitions**

### **a. Consultation**

- i. KB/LM service orientation
- ii. Task / Workflow Mapping to KBLM services, PALNI Community & Group Support, OCLC WMS Support
- iii. Workflow, Best Practice, Training, and vendor support resource guide
- iv. Review resource configuration and optimization (credentials will need to be supplied)

### **b. Product**

- i. WMS Knowledge Base
  1. Monitor feeds of Collection Manager, Approve Changes to Global Collections, and approve/deny changes as requested.
  2. Manage resources including activation/deactivation
  3. Create custom knowledgebase collections
  4. Create shared knowledgebase collections for one or more PALNI supported organizations. Submit shared collections as global collections when appropriate.
- ii. WMS License Manager
  1. Configure license and encode licensing terms for new online resources, including database only collections.
  2. Provide consultation on SUSHI configuration and setup for automatic harvesting and documentation and consultation for supported organizations to load statistics manually when required.
  3. Review monthly SUSHI harvesting for configured resources to check for missing reports.
- iii. Service Configuration Administrator
  1. Configure supported organization local or PALNI global Metasearch Content, Licensed Content, and Databases for Discovery resources.
  2. Manage custom database groups in Licenses Content and Databases for new resources according to individual institution guidelines for group configuration.
- iv. EzProxy
  1. Contact OhioNET with resource changes
- v. OCLC Service Tickets

1. Submit tickets to OCLC on request for Discovery, KB, LM, and Service Configuration for multiple sites or for systematic bugs.

## **6. Supported Organization Responsibilities**

- a.** Manage WMS admin (Admin Tab) as needed
  - i. User Management
  - ii. Roles/Permissions
- b.** Service Configuration Management
  - i. Maintain “Inbound Links and A-Z”
    1. Manage Full Text OpenURL resolvers
    2. Update and maintain “WorldCat Registry”
    3. Enable/update hours, authorized users, and more
  - ii. Update Circulation Policies as necessary
- c.** OCLC Service Tickets
  - i. Submit tickets to OCLC as needed for Discovery, KB, LM, and Service Configuration
- d.** ContentDM
  - i. Uploading and managing digital collection in ContentDM
- e.** Cataloging
  - i. Copy Cataloging
- f.** Ezproxy (Local or via OhioNET)
  - i. Keep all Ezproxy stanzas up-to-date per OCLC and Ezproxy listservs
  - ii. Manage/Add/Delete Ezproxy stanza for new/trial/canceled resources
- g.** Resource Vendor Relations
  - i. Communicate IP Address ranges
  - ii. Maintain account
  - iii. Maintain vendor configuration options
- h.** Other tasks
  - i. Check links for Online Resources
  - ii. Set shelving locations

## **7. Requirements**

### **a. Supported Organizations**

- i. Availability during normal business hours (per supported institution schedule/calendar) for follow-up questions or clarifications
- ii. Email support will be initiated using the [KB/LM request form](#) unless follow-up on existing service request is initiated by a PALNI supported organization directly with the KB/LM Librarian



- iii. Each supported organization may provide designated contact information such as a local email list.

**b. PALNI**

- i. Provide service support communication at a minimum via email and telephone
- ii. Meet response times according to the schedule in part 6-A and 6-B.
- iii. Provide notification to the Supported Institutions for any planned absences via the PALNI calendar

**8. Service Management**

**a. Service Availability**

Available Monday to Friday during PALNI business hours.

**b. Service Requests**

Confirm receipt of initial request within 24 hours on a business day.  
Report on progress for pending requests within 5 business days.

**c. Service Monitoring and Reporting**

Provide quarterly reports on number of service requests and time to completion. Goals for completed service requests will be set based on average time to completion for typical requests by module/category.



## SELECTED SERVICES AGREEMENT

LIBRARY NAME:

START DATE:

### A. Consultation

In a few sentences, provide a general description of consultation services requested. Examples provided in Section 5a include KB/LM orientation, optimization of KB/LM configurations, and review of workflows.

### B. Product

- i. WMS Knowledge Base
  - Monitor feeds of Collection Manager to approve changes to Global Collections, and approve/deny changes as requested.
  - Manage resources including activation/deactivation.
  - Create custom knowledgebase collections.
  - Create shared knowledgebase collections for one or more PALNI supported organizations. Submit shared collections as global collections when appropriate.
- ii. WMS License Manager
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  - Manage custom database groups in Licenses Content and Databases for new resources according to individual institution guidelines for group configuration.
- iv. EzProxy
  - Contact OhioNET with resource changes.
- v. OCLC Service Tickets
  - Submit tickets to OCLC on request for Discovery, KB, LM, and Service Configuration for multiple sites or for systematic bugs.

Primary contact:

Library director:

Director's signature \_\_\_\_\_ Date \_\_\_\_\_