

Primo SaaS Meeting (IGeLU / ELUNA / Ex Libris)

Memorandum of Understanding

August 23, 2015

Principle: IGeLU and ELUNA accept SaaS as the strategic decision and direction of development of Ex Libris and understand the advantages of it, both for customers and the service provider. The SaaS environment, with adequate localization and developer tools, is envisioned as the future of the production architecture of Ex Libris.

While SaaS is the primary Ex Libris business model, Ex Libris acknowledges the need to create space for local customization and development within their application framework. Ex Libris described plans to create spaces/hooks within its applications for local code integration and customization (for example, javascript execution within multiple areas of the new Primo UI).

Where locally executed code was previously necessary, Ex Libris aims at providing web service integration within the Primo application and the new UI to enable incorporating output from externally hosted code using accepted web standards such as JSON or XML (not just within the UI, but also within back office operations such as enrichment, deep search, etc.).

In this case, Primo would request information from externally hosted web services and incorporate that response data into various application workflows/UI components (i.e. deep search, enrichment, push-to, real-time availability, file splitters, etc.).

This development strategy allows Ex Libris to have a standard code base for the new UI while providing a space for institutional development/customization regardless of hosting scenario. Business and functional requirements should be collectively articulated with Ex Libris, the product working groups (PWGs), Interoperability (IO) and Linked Open Data (LOD) Special Interest Working Groups (SIWGs).

IGeLU and ELUNA understand that the new Primo UI represents a shift in how development and local customization works within various Ex Libris products. Ex Libris understands the need to develop capacities to support the development community within the SaaS environment having close consultation with and input from IGeLU and ELUNA

Principle: The user groups and Ex Libris mutually understand that moving customers into SaaS will be done in consultation and with the consent of each individual customer. As part of such consultation, Ex Libris plans to discuss the extent to which the SaaS environment will accommodate the needs of customer development before the customer moves to SaaS. Furthermore, because Alma is a pure SaaS solution, migrating to Primo in a SaaS environment is the most optimized way to implement Primo with Alma. As part of the migration to Alma, Ex Libris will work in cooperation with the customers to ensure smooth transition to Primo SaaS.

Ideally, Ex Libris would like to migrate the entire customer base to SaaS, but recognizes the interim needs of customers who actively develop, service providers (such as the ACC) and large consortia. Ex Libris stated their business priority to improve their SaaS applications in a way that accommodates as many development/customization scenarios as possible. However, this may be accomplished through extendable web services rather than local code execution.

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Our main priority is for Ex Libris to bridge the gap between non-SaaS and SaaS customer requirements as quickly as possible. IGeLU and ELUNA can accept that gap for a short while and look forward to future SaaS-based tool development.

To bridge this gap, Ex Libris plans to allocate considerable resources to adapt the SaaS environment to customer needs so that sufficient local development/customization requirements will be incorporated into the SaaS platform.

Principle: Primo functionalities, where technically possible and still relevant, will be available for all customers in all variations of implementation during the transition period. Exceptions are to be discussed with IGeLU and ELUNA with regard to general exceptions or the individual customer with regard to specific exceptions (like Total Care customers).

IGeLU and ELUNA identify the new Primo Analytics (Oracle Business Intelligence) and 'Autocomplete' as functionality that are technically SaaS only and will not be available to non SaaS customers. This is hard to accept for IGeLU and ELUNA and Ex Libris is requested to compensate for this by giving priority to bridge the gap between non-SaaS and SaaS. Ex Libris will prioritize the needs of customers who invested in local developments and develop the most common functionality that is required to facilitate the customers' transition. IGeLU and ELUNA are particularly concerned with the restricted availability of analytics within the new SaaS environment. The assessment of this business decision has been delegated to an analytics working group who will provide an impact report.

Principle: Configuration is available on the institutional level as much as technically possible or functionally desirable, using the installation level where needed for infrastructure reasons or functional synergy (i.e. language features). These functions are maintained by Ex Libris with input and collaboration from the Primo community.

Principle: API limits should be based on a transparent and general model, not a customer by customer base (see <http://api.altmetric.com/> as an example). The user groups require a fair use of API limits. Ex Libris needs to provide detailed information about these limits, and explain that they are in the interest of customers operating in a Multi Tenant Environment. Overuse of APIs will affect general performance for all tenants in an installation, proper documentation is essential for ensuring correct development and use of these APIs.

Principle: The user groups and Ex Libris agree that there is a need for regular developer meetings to keep "development" and "expectations" in sync. To serve efficient and informal communication, the user groups provide Ex Libris with adequate communication channels (i.e. chairs of IGeLU and ELUNA working groups like the Interoperability SIWG).

Principle: Ex Libris will invest in improving its documentation for application, API, and data model (example: data dictionary) and keep it up-to-date, acknowledging that writing and updating documentation is part of the development process. Ex Libris stated their intention to make as many web services backwards compatible wherever possible. Documentation will also provide announcements (with sufficient lead-time) about deprecation as well as enhancement.

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GENERAL ACTION ITEMS :

1. The product working groups (PWGs), Interoperability (IO) and Linked Open Data (LOD) SIWGs shall deliver a report about development tools needed within SaaS within the next three months (where all toolkits should exist within all hosting scenarios (non-SaaS and SaaS) where technically possible).
2. Documentation required from Ex Libris for application, API, and data models (example : data dictionary).