

## **The joint ELUNA/IGeLU Enhancement Procedures for SFX and MetaLib**

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### **Introduction and background**

This document is based on the proposals, agreements and decisions described in the following documents:

- *"Proposal for the joint ELUNA/IGeLU Enhancement Procedure for SFX and MetaLib"*, dated August 14, 2006, confirmed by the IGeLU assembly of members, Stockholm, September 2006.
- *"IGeLU's product development cooperation agreement with Ex Libris"* by the IGeLU Steering Committee, confirmed by IGeLU and Ex Libris in Stockholm, September 2006.
- *"Preliminary agreement between Ex Libris product managers and IGeLU PWG for SFX/MetaLib"*, dated September 7, 2006, Stockholm, confirmed by Ex Libris product managers and IGeLU PWG for SFX/MetaLib.

Ex Libris and the ELUNA and IGeLU Steering Committees have agreed to set up joint ELUNA/IGeLU enhancement procedures for all Ex Libris products, except for Aleph. The purpose is to manage the process of cooperation for product development between customers and Ex Libris. All product specific development requests will be proposed and coordinated within the relevant Product Working groups of both ELUNA and IGeLU.

This document describes the procedures established for SFX and MetaLib, but they can easily be adopted for implementing enhancement procedures for other Ex Libris products.

### **Organisation**

The enhancement procedures will be organised individually per product. There will be separate enhancement request lists, separate voting procedures and separate product enhancement committees for SFX and MetaLib. The enhancement committees will consist of an equal number of representatives from both ELUNA and IGeLU.

Per product enhancement committee (SFX, MetaLib) the ELUNA representatives and the IGeLU representatives will each have their own Coordinator. The two Coordinators will act as co-chairs for the joint product enhancement committees.

The product enhancement committees will cooperate and communicate with the respective Ex Libris product managers for SFX and MetaLib. Ex Libris will provide the product enhancement committees with their schedules for release of the upcoming Service Packs and major version releases.

All information supplied by Ex Libris will be confidential unless otherwise stated.

### **Types of enhancements**

For each product (SFX, MetaLib) two major types of enhancements can be distinguished:

- 1 - Software enhancements
- 2 - Knowledge base enhancements

IGeLU and ELUNA are responsible for managing the software enhancement requests. Ex Libris is responsible for managing the knowledge base enhancement requests.

## **Software enhancements**

### ***Subdivision of software enhancements***

By type:

- Category - such as: general, consortia, multilingual, x-server, etc.
- Area - such as: user interface, system configuration, authentication, statistics, etc.

By perspective:

- Short term enhancements: enhancements that can be implemented within an existing major version, by means of Monthly Updates or Service Packs.
- Long term enhancements: software enhancements that can be implemented in one of the next planned major version releases.
- Long term developments: software enhancements that involve redesigning the functionality of the products, for which Focus Groups may be established, as described in the *Cooperation Agreement* in the section "*Big development issues*"

The product enhancement categories and areas will be identified and maintained by the product enhancement committees.

### ***Submitting requests***

Member institutions of ELUNA and IGeLU can submit software enhancement requests per product at any time in an online enhancement request tracking system. Member institutions can choose to submit requests through consortia or national and regional user groups. Ex Libris customers who are not members of IGeLU or ELUNA are free to submit requests directly to Ex Libris. In this case Ex Libris is responsible for entering these requests into the tracking system.

A software enhancement request must contain information about:

#### *Scope*

- product (SFX, MetaLib)
- category (general, consortia, multilingual, x-server, etc.)
- area (user interface, system configuration, authentication, etc.)

#### *Enhancement*

- short title
- description
- examples if possible

#### *Requester*

- submitting institution, consortia, user group
- contact person
- email address

### ***Processing requests***

The product enhancement committees work together with the Ex Libris product managers in processing submitted requests. Requests are reviewed, edited, merged and split as appropriate. This may involve contacting the submitting member institutions for clarification and feedback.

The product enhancement committees will also determine whether an enhancement is already available, in which case the request will be rejected.

The submitting member institution is to be informed of any modifications.

### ***Publishing requests***

Once they have been processed and approved for publication by the product enhancement committees, software enhancement requests will immediately be published online. Approval

for publication does not mean that the request has been approved for implementation by Ex Libris.

The list of published requests will be available to ELUNA and IGeLU member institutions only, as well as to Ex Libris staff.

### ***Voting***

Only IGeLU and ELUNA member institutions have the right to vote for software enhancements requests.

Per product (SFX, MetaLib) 100 voting points are granted to each member institution to be distributed among the software enhancement requests. Institutions that hold membership in both ELUNA and IGeLU will still only be given 100 points for each separate ballot. Points can be distributed in any whole number quantity among as many enhancements as desired.

Member institutions can vote for software enhancement requests continuously. They can assign and reassign their voting points at will.

Elections constitute deadlines at which voting is temporarily closed. The total number of votes per request on that date serves as input for the process of accepting and planning of the enhancements.

Voting will be opened again after the results of the election have been processed and the list of requests has been revised.

Elections for software enhancements requests will be held at least once a year for each product. In addition, the software enhancement committees may call a special election if necessary. Triggers for a special election may include but are not limited to: a major revision planned for the product, a significant change in another Ex Libris product that impacts functionality of SFX and/or MetaLib, a significant development in the marketplace that affects the functionality of SFX and/or MetaLib.

An announcement of a deadline for voting will be published through the appropriate channels, such as: the IGeLU and ELUNA websites, the SFX and MetaLib mailing lists and any other means the software enhancement committees decide.

### ***Accepting requests and implementing enhancements***

The number of requests to be implemented depends on the amount of work needed, the perspective of the requests and the general characteristics of major version releases.

After an election, the requests will be considered in the order of the number of votes.

The product enhancement committees decide in cooperation with Ex Libris whether enhancements can be implemented within the current release by means of a Service Pack (short term enhancement), in a planned major release (long term enhancement), or if the requests are candidates for further investigation or a focus group (long term development).

The requests are marked with the appropriate perspective and time frame in the tracking system. Perspectives can be "short term enhancement", "long term enhancement", "long term development". Time frames can include a specific Service Pack, a specific version or more general terms ("further investigation needed", "focus group", etc.).

Comments explaining the reasons for the assigned perspective and time frame are added to the requests by the product enhancement committees and Ex Libris.

Ex Libris aims to implement enhancements with higher numbers of votes before enhancements with lower numbers of votes, and as soon as possible, within the limitations described above.

The process of assigning perspectives and time frames to requests, with accompanying explaining comments, is not limited to elections. It will take place continuously. This way customers will be informed of perspectives and time frames at the earliest possible time.

Twice each year - at both the ELUNA and IGeLU annual conferences - Ex Libris will report to the membership the status of each enhancement recommendation.

***Evaluation***

After each election an evaluation will be conducted in order to decide whether adjustments to the procedure are needed.

## **Knowledge base enhancements**

Knowledge base enhancements are requests for adding new resources to the Knowledge base.

### ***Submitting requests***

Ex Libris customers can submit knowledge base enhancement requests through various channels (CRM, email, tracking system, etc.).

A knowledge base enhancement request must contain information about:

#### *Scope*

- product (SFX, MetaLib)
- type (SFX: source, target, object in portfolio)

#### *Database*

- name
- description
- url
- provider

#### *Requester*

- submitting institution, consortia, user group
- contact person
- email address

### ***Publishing requests***

It is the responsibility of Ex Libris to manage and publish one consolidated list of knowledge base enhancement requests, accessible to their customers. This could be done via the IGeLU/ELUNA tracking system.

### ***Voting***

Voting for knowledge base enhancement requests is a continuous process. There will be no elections and deadlines.

Only IGeLU and ELUNA member institutions have the right to vote for knowledge base enhancements requests.

Per product (SFX, MetaLib) an unlimited number of voting points are granted to each member institution to be distributed among the knowledge base enhancement requests. Each member institution can assign one vote per knowledge base request as desired.

Member institutions can vote for knowledge base enhancement requests continuously. They can assign and reassign their voting points at will.

### ***Accepting requests and implementing enhancements***

The number of requests to be implemented depends on the amount of work needed and the perspective of the requests.

The integration of resources into the Knowledge Bases is highly dependent on the interfaces and standards supported by the information providers. Therefore, resources cannot be added according to their priority only, but the technical preconditions need to be considered as well.

The requests are marked with the appropriate status and time frame in the tracking system. Status information includes availability of protocols, linking syntax, technical requirements.

If possible a specific CKB or monthly KB update will be indicated.

Ex Libris aims to implement enhancements with higher numbers of votes before enhancements with lower numbers of votes, and as soon as possible, within the limitations described above.

Communicating technical requirements to the information provider is a shared responsibility of Ex Libris, the product enhancement committees and the users of the products. The vote count can be used in communication with the information providers to stress the need for implementing protocols and technical requirements for the databases listed.