



Collaborative customer testing of MetaLib 4.0

Ex Libris offices, Jerusalem, December 2006

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Agenda

- Background and context – customer involvement in testing
- Testing – mechanisms and processes
- Testing – the customer-tester experience
- Post-testing – follow-up and feedback
- Recommendations and observations
- Future developments
- Any questions?

Background and context

- At Stockholm IGELU conference, September 2006, idea raised
 - IGELU and ELUNA participation in last-phase testing of MetaLib 4.0
- Following agreement: a very short period for preparation on all sides; degree of novelty in the process
- ELUNA and IGELU advertised for testers
 - Two sets of testers; each working on product testing for one week
 - Based at Ex Libris offices in Jerusalem; expenses met by Ex Libris
 - Required to participate in pre-testing conference calls and post-testing report writing and user group feedback
- Four testers selected
 - IGELU: Richard Cross, [NTU](#); Rui Francisco, [b-On Consortia](#)
 - ELUNA: Lori Jargo, [Brown University](#); Licia Duncan, [PSCE](#)

Testing – mechanisms and processes

- Testing took place in Jerusalem in December 2006
 - Karen Groves (MetaLib Product Manager) and Hedva Scop (MetaLib Development Team) served as hosts
- Kick-off meeting with the development team to scope out process
 - Responsive to areas of user interest, expertise, responsibility
 - Set out timetable for week; mechanics of the process
- Testing was undertaken using a combination of methodologies
 - Script driven – detailed walkthroughs; testing new and existing functionality
 - Open ended scenario – experimenting with customisation, module settings
 - Exploratory – work through /M and /V sides of different process
- Audited reporting of 'bugs' through proprietary Test Director
 - 'Verified fixed' (QA confirms resolved)
 - 'Closed' (either 'Rejected' or reported as a 'Duplicate')
 - 'Deferred' (resolution suspended)

Testing – the customer-tester experience

- Wide range of MetaLib v.4.0 functionality tested
 - /V – clustered / faceted searching; customisation; usability
 - /M – category management and IRD enhancements
 - System level – Upgrade Express
- Testers were able to report 'bugs' – and see many of them fixed
- Range of presentations were offered on v.4.0 developments
- Opportunity to present to the MetaLib Development Team – not normally in contact with customers
- Professional collaborative atmosphere throughout; nothing 'off-limits'; encouragement to be open; to report and assess
- Shared recognition of the utility of process for all involved

Post-testing follow-up

- Participants prepared detailed reports for ELUNA and IGELU
- Findings shared and discussed during conference calls
- Agreed [summary](#) was submitted to Ex Libris – reaction to which was positive
- Full reports uploaded members' area of IGELU and ELUNA websites; summary freely accessible
- Reports written for the user group press – inc *SMUG-4-EU*
- Participant report-backs at ELUNA and IGELU conferences

Recommendations and observations

- Clarify the status and remit of the testers and the testing process
- Build-in lengthier preparation times – match workload to timeframe
- Ensure full-breadth of functionality is tested – variety of methods
- Explore combination of on-site and remote testing mechanisms
- Integrate customer review of the implementation documentation
- Maintain distinction between 'bug' reporting and 'enhancement' requests
- Fully acknowledge differences between last-phase **pre-release testing** and involvement in the **development process**

Future developments?

- Shared recognition that this was an extremely productive first experience – will help to maintain momentum
 - Enthusiasm on user group side to repeat and to generalise across the Ex Libris product suite
 - Important to manage expectations on both sides; build this process in to the product development lifecycle
 - To demonstrate the continuing enthusiasm of the user community:
be ready to volunteer!
- Any questions?