

Collaborative Testing for ALEPH 21.0

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1. Introduction

The Ex Libris Group, in collaboration with the International Group of Ex Libris Users (IGeLU) and the Ex Libris Users of North America (ELUNA) initiated, in 2007 and with version 19 of ALEPH ILS, a partnership to test the features of the ILS before its distribution.

For each new version, IGeLU and ELUNA select two representatives from each group to take part in the last stage of ALEPH tests in teamwork with Ex Libris ALEPH quality and development staff.

To the Collaborative Testing for ALEPH version 21 IGeLU has nominated Maya Amichal, from Weizmann Institute of Science, Israel and Sílvia Lopes from Faculty of Pharmacy of University of Lisbon (FFUL), Portugal. The ELUNA nominates were Michael Edwards from Hampshire College and Ellen Jones from University of Iowa, USA.

2. Test preparation

In order to prepare the collaborators for the test environment, Ex Libris invited all of us for one webinar. These are the areas covered during the webinar:

- Introduction to Aleph 21 test environment – data available for testing and configuration of the test environment. Aleph 21 tests environment includes customer data; as well as our standard Aleph 'demo' data.
- Introduction to Quality Center – system used for bug reporting/tracking during Ex Libris QA; collaborative testers will enter any defects they find into this system during collaborative testing.
- Overview/summary of Aleph 21 QA data – scenarios tested, bugs reported, current status, etc.
- Collaborative testing – scenarios that will be assigned to collaborative testers.
- General information for collaborative testers such as overall schedule for the week of collaborative testing, travel details as required, etc.

In the webinar they informed us that each one of us could feel free to test any tasks so they didn't distribute the tasks for each collaborator (as occurred during the Aleph 20.0 collaborative tests).

In the webinar Ex Libris introduced us to the libraries selected for testers. These libraries were:

- BIB – FCC01
- HOL – FCC60
- AUT – FCC10

- ADM – BEC50, MDC50, MJC50 (95K), SCC50(127K), SPC50
- Course and ILL – each ADM has its Course and ILL libraries (e.g. BEC50 – BEC30 and BEC40)
- USR\PW – FCC50

Regarding the Mercury Quality Center system, we should report the defects detected, classified as:

- **Critical** if the system cannot move without it
- **High** if we cannot proceed the test without it
- **Medium** if it is a defect but we can go further without it
- **Low** if there is another way to do it

We also have access to the Aleph 21 Release Notes with the features of this new version.

3. Facilities

Ex Libris staff was very friendly and helpful and we note that all the team offered us a nice staying in Jerusalem and in Ex Libris office.

The hotel provided was very well located and was very quiet and cozy. Ex Libris has also organized us a tour in old city of Jerusalem and has promoted a social dinner with Ex Libris staff. Yifat Lulav and all the other members of the staff were always present and available to clarify our doubts.

In Ex Libris office we had good computers with access to internet and Ex Libris internal tools. They also provided wireless access to our notebooks which facilitate the access to our own documents.

This salutary environment was beneficial to encourage the collaboration between Ex Libris staff and the collaborators.

4. Test environment

As already said, each one of us was allowed to organize, to select and to do the tests accordingly with our preferences.

Regarding the collaborators interests, and, of course, the collaborators' responsibilities and activities they usually do, the tests were made accordingly:

- Ellen – Circulation and Web OPAC;
- Maya – Circulation, Web OPAC and Acquisitions.
- Michael – Acquisitions; GUI Setup and Configuration
- Sílvia – Acquisitions, Circulation and Web OPAC;

We used **us-aleph01** machine and the testing scenarios were conducted in Scratch version – slot 211: FCLA, Demo USM for all QA testing, defect fixing and verifying.

```

#####
#
#           Welcome to us-aleph01 Server
#
# Enter the Login value according to the ALEPH version you
# want to connect to
#
# Login Slot Release Revision Port Description
#-----
# 201 a20_1 20.0 00 8991 V.20
# 211 a21_1 21.0 00 8991 V.21 Main QA version (ENG/USM)
# 212 a21_2 21.0 00 8992 V.21 ELIE QA version
# 213 a21_3 21.0 00 CVS clean version
#####
Enter aleph version : █

```

The Scratch version had the following characteristics:

- Total of 50K BIB record in FCC01
- MJC50 and SCC50 are the biggest libraries (95K items and 127K items, respectively)
- Approximately 220 patrons in FCC50

5. Individual testing

Since Ex Libris gave us liberty to run the tests according to our preferences, for my own tests, I decided that it was best to try all the workflows as we usually do at FFUL.

In parallel were analyzed the several enhancements and changes that are new for Aleph 21 listed in “Aleph 21 Release Notes” document.

5.1. Acquisitions

To test this, I began to create a specific budget and vendor for tests. After that, I searched for bibliographic records to create a few orders with single and multi invoice lines. I also tested if the system sent the order to the vendor according to defined system parameters (both List and Letter order delivery were tested).

After the Arrival Items procedure, I tested the Invoice Procedure since this is, in the late versions (version 18, for example), a problem to solve at University of Lisbon. It was tested several ways to create the invoice. I reported the problem that occurs with decimal units in the total invoice. This occur everytime we introduce discount and vat amounts (in invoices with several lines). The Ex Libris team had opportunity to verify this problem in loco.

Another feature tested was the “Order Closure Upon Arrival Completion” with any defected detected.

At the end, I can say that this module seems to be optimized and it is possible to do all the workflow since the beginning and without any problems.

5.2. Circulation

To test that have been done at the Circulation module had various steps. It was tested all the procedures since the creation of the patrons’ record until all the possible moves (loan, hold requests, photocopy requests, renewal, cash transactions, global blocks, local permissions, etc.). An initial problem was detected with the email address that system didn’t recognized. Also the

Zip Code field at patrons address should accept more than 10 characters (all collaborators realized that they need more characters, in your countries). It could be important to create a separate field for the city associated with the zip code (this limitation also occurs in the late versions).

Some changes and enhancements done at circulation module (referred "Aleph 21 Release Notes" document) were tested, namely Circulation Request Refusal, Cash Transactions Enhancements, Photocopy Workflow Enhancements, Hold Checks, Booking Checks, Check for Similar Item On Loan.

It was very interesting to verify that most of the enhancements implemented in this version could help the daily routine at circulation module and also allows making available a few services according with several internal rules that in the late versions we could not apply.

5.3. Web OPAC

To test Web OPAC it was necessary to create an account. At this stage, the system didn't let me create a new user account. It was necessary ask Ex Libris staff to parameterize with that option. The features tested at Web OPAC were the Hold Request Confirmation Page Enhanced, the New Photocopy Request Confirmation Page, the Displaying Requested in the Due Date Column of the Holding Screen and the My E-Shelf Enhancement. At the same time, it was analyzed the way how we could saw these actions (hold requests and photocopy requests) at the circulation module. Although the tools are more optimal and all the features tested work perfectly I think the Web OPAC needs to be more user friendly and could integrate new features as RSS feeds and social web tools.

6. Conclusions and recommendations

First of all, I must say that the friendly and helpful environment created by Ex Libris staff was very important for me and, if possible, they should maintain the same in future tests. Although the collaborators didn't know before, the working environment created was very pleasant with a great sense of sharing and mutual aid. The integration of the collaborators in the team was perfect and it was very important. I learned a lot with all the Ex Libris team and with the way they work together. The Mercury Quality Center system (where we should report all the defects) was efficient and user friendly. We are invited to participate in two meetings with the Ex Libris staff. The first one was with the staff responsible for the tests and it was great because we could talk a little bit about our experience with version 21 and about the tests. The second one it was with all group and it was a very nice, lively and fun meeting where we (the collaborators) speak a little bit about our institution, functions and tasks we usually do and I also how it was our experience with the Aleph 21 version. The Ex Libris staff shared with us their expectations regarding collaborators team and the tests. They also shared their opinion about all the week and with all the activities including the social program.

One of the difficulties I encounter was the fact of usually I do not work with Linux. The entire tests done at FFUL by me are made together with the informatics team. Although I understand the queries, I didn't felt safe to change the parameters by myself. This was a personal handicap that could have a negative influence in the productivity of my own tests.

However, I believe it was a great week of tests. And I could experiment several new features and enhancements of the Aleph 21 version. The Aleph 21 version seems to be quite stable. It was noted that some of the main problems found in previous versions have been resolved. During the week of testing, we identified some issues that were promptly reported to the Ex-Libris team. The new features and enhancements implemented in this version seem to meet the real needs of customers and resolve some issues previously encountered.