SFX Version 4 Collaborative Testing
Summary Report

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Ex Libris, in cooperation with the member user groups (IGeLU and ELUNA), conducted collaborative testing of SFX v.4 from March 7 to 11, 2010 at the Ex Libris headquarters in Jerusalem, Israel. As outlined in the 'Product Development Collaboration Agreement,' the purpose of collaborative testing between Ex Libris and the user groups is to ensure that the products are in line with customer needs and provide a true customer perspective in the implementation of new versions of products before they are released. The user groups' testing team consisted of 2 members from IGeLU and 2 members from ELUNA, and they represented different types of SFX installations and local implementations, ranging from large consortia to single institutions. The testers were:

- Jessica Hartwigsen from California State University (CalState), U.S.A.
- Inga Overkamp from Max Planck Gesellschaft (MPG), Germany
- Holly Thomason from Stanford University, U.S.A.
- Bas Vat from Leiden University, The Netherlands

Each customer site had a particular testing focus and was asked to bring test scenarios, as well as lists of items to upload using the DataLoader. Jessica was chosen to test the upgrade process on the CalState consortia environment and to check afterwards that everything worked as expected. Inga was assigned the task of starting with an upgraded MPG environment, running tests to see if everything worked as expected, and then checking her most commonly used workflows. Holly and Bas were asked to work on a new SFX v.4 environment, testing their most commonly used workflows and focusing on the new SFX Admin interface.

Two participating institutions (CalState and MPG) were asked to share a backup of their entire SFX installations to ensure that parts of the test could be executed in a localized environment. The data was loaded by Ex Libris staff into two SFX installations before the testing started. Each tester had access to a separate SFX installation and was asked to focus on the specific aspects mentioned above. Ex Libris also gave the testers detailed testing plans that included sample OpenURLs and testing scenarios.

Ex Libris staff members gave elaborate presentations on the new release, the upgrade process, the new data model, and even the internal procedures of the Ex Libris KB team (who were already working with the new version). An overview of known issues was supplied, as well as documentation for the new release. Participants used spreadsheets to keep track of defects and to record suggestions for possible enhancements. Line items were assigned an initial priority of Critical, High, Medium, or Low. Each day ended with a brief wrap-up meeting with Ex Libris to discuss the highlights of the day's testing. Each morning began with a detailed discussion of the findings from the previous day. Meetings were attended by members from the Quality Assurance team, development, support, and product management. During these meetings, reported issues were clarified and loaded into an internal bug reporting tool for further handling.

Conclusions:

1. The quality of the release:

Generally speaking, the testers felt the release was impressive. The underlying database structure has changed dramatically, and the human interface on top of it was also re-designed. The testers found a fair number of defects, but given the scope of the changes, they were a little surprised that they didn't encounter more problems than they did. They especially liked the new navigation and the look of v4.

2. The quality of the testing being performed by Ex Libris:

Before arrival, Ex Libris had conducted extensive testing, mostly on the use of the KBmanager. At the start of testing, Ex Libris supplied the testers with a list of known issues and gave a brief presentation on known problems. The exact extent of the testing by Ex Libris was a little hard to determine because their testing took place separately from the testers. In retrospect, the testers wished they'd talked more with the Quality Assurance group about their work on v.4 (although that, of course, may have influenced the testing). SFX development was actively fixing defects while the testers provided feedback, and the testers were asked to try some of the fixes. Development was working very quickly to fix defects. The test plans were fairly thorough, and it was clear that Ex Libris staff cared very much about getting things right.

3. The utility of the collaborative testing process:

As a whole, the collaborative testing was very useful. The testers found many bugs which had not been discovered previously. In some cases, the bugs probably wouldn't have surfaced until beta testing or later. The testing scenarios used, based on real data and real use cases, were significantly different from earlier tests conducted by Ex Libris, and they produced worthwhile results. After a day of testing, it was helpful for the testers to talk with each other, not only about the defects they had found, but also about the improvements they saw in v.4. Learning how each institution works with SFX was helpful in understanding how it's used outside of their own institutions and workflows. The testers left with the impression that their testing will result in significant improvements to the initial release.

4. The ways that Ex Libris might improve future testing:

It might have helped if the testers had gotten a look at the test plans before arriving at Ex Libris. Also, a quick tour of the Ex Libris departments would have been interesting. Testers were surprised at how large Ex Libris is.

5. The ways that the user groups might improve future testing:

   Perhaps the testers could have learned the user groups' expectations a little more in advance, and it might have been helpful if the time between the selection of participants and the testing had been a bit longer to give testers more time to prepare.

Both the Product Working Groups and the collaborative testers are all extremely grateful to Ex Libris for the opportunity to provide feedback on SFX Version 4. The testers were shown gracious hospitality that they will never forget.