

IGeLU/ELUNA/Ex Libris Collaborative Testing Guidance for Testers

November, 2007

Strategic aim: The initial motivation for user involvement in collaborative testing of new releases of Ex Libris products was to help reduce the total cost of ownership of the products. Users spend enormous resources on duplicative testing of new software releases, in part because of a history of buggy releases. The hope is that user involvement will reduce the number of problems with new releases, and allow users to implement them with less need for exhaustive local testing.

Immediate goals:

1. Improve the quality of the release under testing. Earlier experience suggests that users test software differently than developers and in-house testers, in part because their testing is based on experience with the software in actual production settings. It is important to note however that the collaborative testing is not intended to be focused on critiquing or suggestion new functionality, but on insuring that the software performs as intended. Product functionality is addressed by the user groups in other ways (focus groups, enhancement processes).
2. Provide feedback to both the user groups and to Ex Libris management on the quality of Ex Libris internal testing, and suggestions on how to improve the effectiveness of pre-implementation testing.

Notes and guidelines:

1. Testers should be aware that they represent the user community and not their own institutions when doing the testing. To the degree practical, testers should consider how libraries of different sizes, consortial relationships, and workflows would use the system when doing testing.
2. In an earlier collaborative test, Ex Libris provided testers with existing test scripts used internally by the company. Testers should use their judgment as to how much they should rely on such existing scripts and how much to do independent testing. There is utility in both processes.
3. Earlier testers have expressed some frustration about not being able to test all aspects of the system. Given time constraints, it is inevitable that cooperative testing cannot address every aspect of system functionality. It is however

obviously useful for testing to cover as many modules, utilities, configurations, languages, and browsers as practical. Customization, interfaces with external systems, and performance are harder to test, but desirable if possible.

4. Related to the frustration discussed above, it may be useful for testers to explicitly discuss with Ex Libris the target scope of testing at the beginning of the process. Testing should definitely encompass both new functionality and regression testing of pre-existing functionality.

5. Testers cannot expect to have complete documentation available to them, as it may still be in preparation. It may be useful for testers to explicitly discuss how they can be helpful in assessing documentation for the release at the beginning of the process.

Report:

After the end of testing, testers are expected to prepare a short report to the user groups and to Ex Libris management. If possible, the report should:

1. Assess the quality of the release.
2. Assess the quality of the testing being performed by Ex Libris, including the need for new or changed test scripts.
3. Assess the utility of the collaborative testing process, including answering the question as to whether it should be repeated for the next product release.
4. Provide suggestions for Ex Libris as to how future testing can be improved. Areas that might be addressed include: changes to scripts, changes to the test environment, changes in test methodology, different user involvement, and off-site user testing.
5. Provide suggestions for the user groups and Ex Libris about how to make future collaborative testing more effective.