

The logo for Ex Libris, featuring the words "Ex Libris" in a dark blue, serif font. The text is set against a white background that is framed by a thick, light blue border. A thin, horizontal gold line runs beneath the letters "x" and "i".

Ex Libris

Creating a Successful Enhancement Request

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Preliminary Research

- First: define 'Success': acceptance of concept by Ex Libris and approval from your colleagues
- Identify the issue
- Check with colleagues and other institutions to see if they concur on your analysis
 - Base the request on behavior in the latest released version, but
 - Verify as best you can behaviors in the upcoming version (where Ex Libris has

made the information available as in Focus

Preliminary Research

- Check the PRB database
- Is the proposal amenable to configuration/setup?
 - Does there exist an (acceptable) workaround?
- Check prior enhancement lists and voting records to see what was voted up/down

Needs Assessment

- Is the problem perceived as a problem by your peers/peer institutions?
 - Is this a local workflow/need, or is it generic?
 - Is it likely to be 'popular'?
- Does the proposal cut across modules?
 - Do you need to solicit support?
- How big is it?
 - Is it likely to 'fit' within a reasonable number of points, or if 'big' is the pressure for its adoption widely understood?

Writing the Proposal

- Provide a succinct problem statement
- Provide detailed supporting documentation
 - Precise steps, Screenshots: Perception of problem
- Provide a preferred scenario
 - But bear in mind that you are after desired functionality or flow, not necessarily a precise implementation of it
- Involve an analyst in the definition and compilation

The Ex Libris Perspective

- Requests that cut across 'modules' are more problematic than those that are focused
- Requests that are 'infrastructural' or involve entirely new Oracle tables are more problematic than those that involve basic 'workflow'
 - Building on existing structures is generally preferable
- The process is building on Aleph+ (2-3 years)

The Ex Libris Perspective: What Works

- Precision and focus in formulating request
 - Express request in specific Aleph and Oracle terms
- Target specific outcomes
- Requests such as 'Move Course Reserves to GUI' require consideration outside enhancement process
- Perennial requests: Improve Documentation and Improve Security: Evolutionary and incremental vs. Major systems enhancement

The Ex Libris Perspective: Specific Processes

- New GUI process
 - Longitudinal (2-3 years)
 - Designed, not haphazard
 - Interaction and iterative process: Focus groups
- Recall process
 - Online, realtime vs. Batch
- Table-driven (added configuration complexity) vs. Hard-coded (no options)
- Timeline (2-3 years) to fruition

Be Realistic

- Ex Libris will only guarantee to provide points for ca. 150 points' worth of proposals
 - In 2001/2002 10 requests per Group
 - In 2002/2003 5 requests per Group
- 7-10 Enhancements will likely emerge
 - For both NAAUG and ICAU
- Keep your expectations of pointing and acceptance realistic
- Major Enhancements (e.g., Reporting) may be routed onto a separate

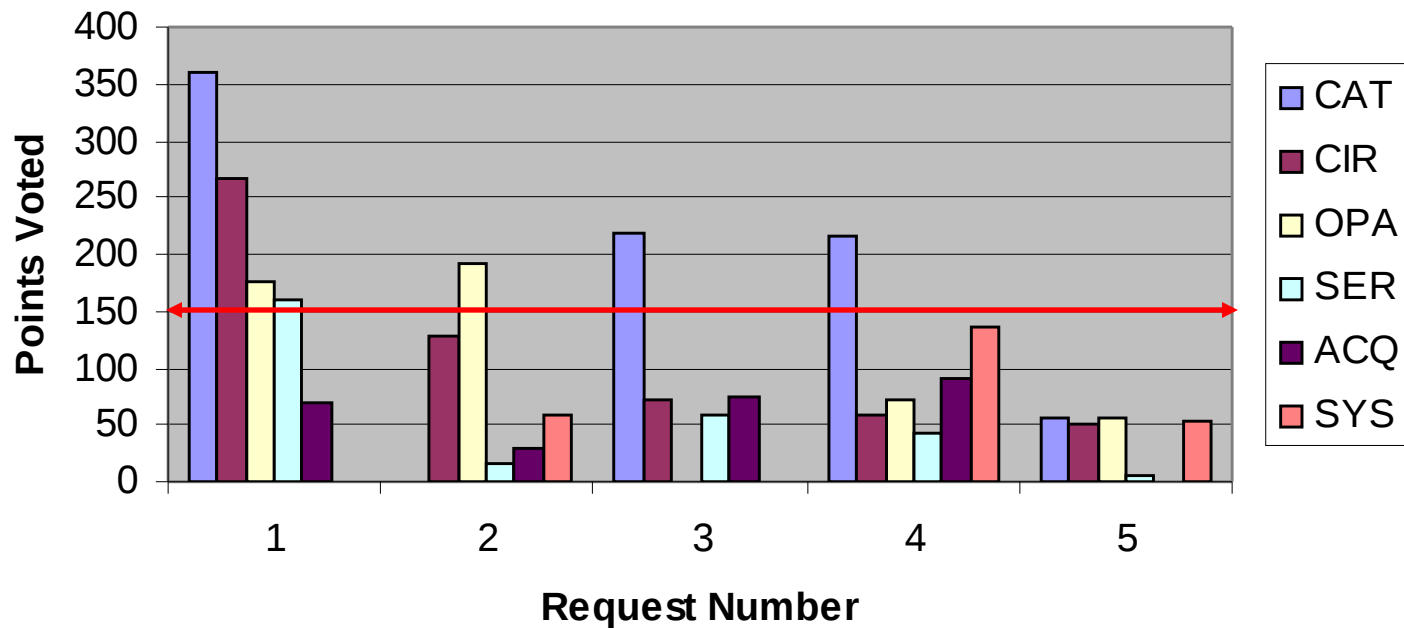
development track

Success in 2002/2003

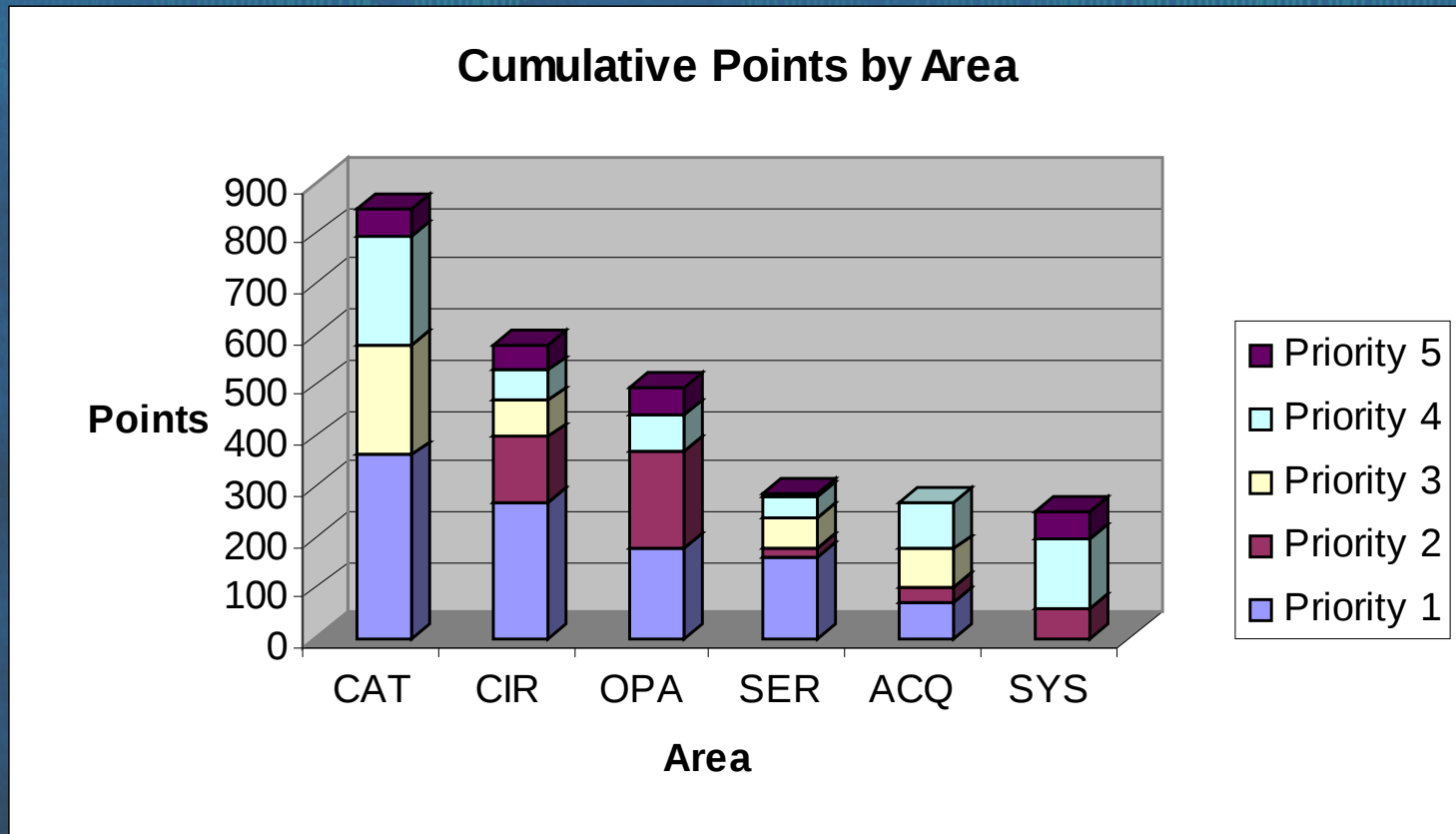
- 30 Proposals result in 7 Requests
- Cataloging requests 1/2, 3 and 4: ranks 1 (25), 3 (20) and 5 (20) for 65 aggregate points
- Circulation request 1: rank 2
- OPAC requests 2 and 1: ranks 4 (15) and 6 (6) for 21 aggregate points
- Serials request 1: rank 7 (10 points)

The Magnificent Seven

Request Number by Functional Areas

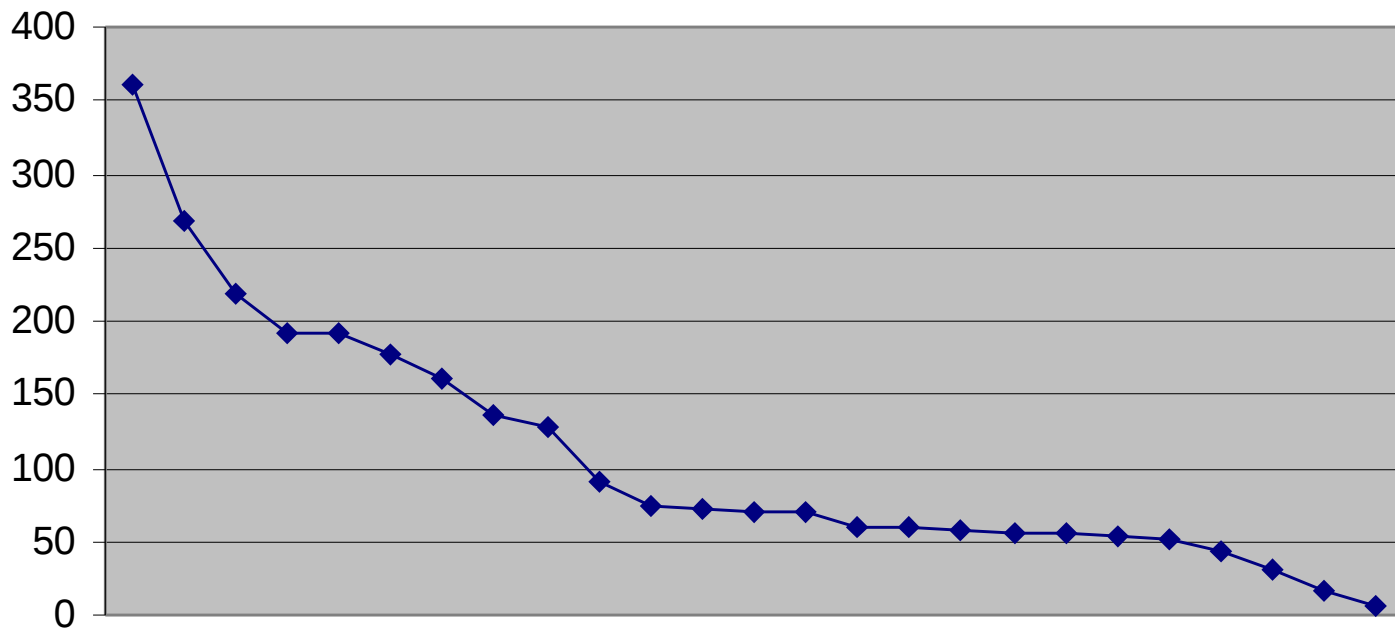


Who's on Top?



The Slippery Slope

Point Distribution



Priorities?

Functional Areas: Priorities/Points

