NAAUG ENHANCEMENTS 2003-2004

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NAAUG 2004

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The Annual NAAUG Enhancement Process

- The 6 Enhancement Groups each gather enhancement suggestions, and prioritize them, to end up with a list of their top 5 requests

- The combined list of the top 30 requests is sent to Ex Libris

- Ex Libris analyzes the requests and assigns a point value based on the development effort involved (i.e. the development weight)

- The NAAUG sites vote on the requests

- The requests receiving the most votes, up to the total number of development weights allotted to NAAUG for that year, get developed for the agreed-upon ALEPH release.

Setting up the Groups

- April 15 – Enhancement Group chairs were appointed by the SC and the first call was made for Enhancement Group members

- May 31 to June 2 – At NAAUG, the second call was made for Enhancement Group members; the incoming EG Chairs met with the Coordinator and with the outgoing Chairs

- July 15 – Enhancement Group members were appointed, and Charge given to the groups

The 2003-2004 Enhancement Group Chairs

- **Acquisitions** – Sue Koelmel (Minnesota)

- **Cataloging/Authorities** – Sandy Card (SUNY – Binghamton)

- **Circulation/Reserves** – Larry Deck (McGill)

- **OPAC** – Tracy Gabridge (MIT)

- **Serials** – Patty Hatch (Harvard)

- **Systems Administration/Reports** – Brian Thompson (Iowa)

What the Enhancement Groups Did

Between July and October, prepared lists of their requests

- Reconsidered previous years' requests and gathered new requests
- Wrote up requests, documented with examples, prioritized, and assigned tracking numbers

The NAAUG Enhancement Request Template:

NAAUG Tracking Number: XXX-Requests19-nnn (e.*g. ACQ-Requests19-01.)*
Descriptive Title:
Problem Statement:
Concise Description of Functionality Desired:
Concise Rationalization of Request:
Examples, Screen Shots (if appropriate):

Working the List of Requests

- October 17 – Enhancement Groups submitted their top 5 requests to the Enhancement Coordinator

- [October 27 – Meeting of the NAAUG Steering Committee and Ex Libris in Chicago]

- November 3 – Combined list of 30 requests sent to Ex Libris

- November 17 – Meeting of the Enhancement Groups and Coordinator with Carmit Marcus of Ex Libris, to review the list of 30 requests.
  Note: Ex Libris brought the development weights for each request to this meeting; the weighting used to occur after this meeting. *This was very helpful*.

Changes out of SC/Ex Libris meeting

Why? To reduce the number of NAAUG Enhancement Lists and to bring the work of the Enhancement Groups closer to the release in development.

What? Combine previous lists of enhancements for versions 17 and 18 with this year's requests and re-vote a new list for version 17 in January 2004; vote for version 18 enhancements in December 2004.

Ex Libris committed to complete the 3 major authority enhancements by version 16.02

Getting to the Vote

- November 17 to January 4 – Top 30 Requests list revised, points clarified by the Enhancements Groups and by Ex Libris

- January 5 – Voting began on the combined list of 40 requests

- January 30 – Voting ended

- February 13 – Results announced and sent to Ex Libris

The Vote

- 40 requests appeared on the ballot, including 4 from the version 17 list and 6 from the version 18 list
  - 34 institutions voted
  - 4 institutions did not vote

- 7 requests received the top votes - two developments tied for the last spot, at the cutoff of 115 development weights. Ex Libris graciously agreed to do them both (up to 127 development weights)

The numbers

Request Number	Voted Points	Development Weight
CAT-Requests19-01	374	30
OPA-Requests19-01	288	15
CIR-Requests19-01	253	15
CAT-2002-03-F 18 (#3 from version 18 list)	193	20
OPA-Requests19-03	193	15
CAT-2001-003　　(#1 from version 17 list)	152	20
CIR-2002-01-F 18　(#2 from version 18 list)	152	12
Total	1605	127

The winners

1. CAT-Requests19-01 - Improve moving items/orders to another bib record

2. OPA-Requests19-01 - Renewal of multiple selected items in Your Account

3. CIR-Requests19-01 - Cash, Loan, Item history list sorting

4. CAT-2002-03-F 18 - Increase length of string processed by first index sort to 200 characters in all ACC and IND indexes

5. OPA-Requests19-03 - Improvements to the Basket part 2 – sorting, multiple select etc.

6. CAT-2001-003 - Holdings/Item Relationship when moving an item from one bib to another

7. CIR-2002-01-F 18 - Improvement in Cash Transaction Functionality

Orphaned Enhancements

Requests in the Enhancement Queue 'lost' due to new vote	Votes
OPA-2002-01-F 18 (#6 from version 18 list) Persistent Search Statements OPAC	115
OPA-2002-02-F 18 (#4 from version 18 list) Improved Basket Display - Call Number and Location display	105
OPA-2001-001 (#3 from version 17 list) Circulation Status - an expand with summary information on the holdings screen	93
CAT-2002-04-F 18 (#5 from version 18 list) Item sorting in Staff modules	83
SER-2002-01-F 18 (#7 from version 18 list) Enhancements to the Global Change button found in the Serials Module	74
SYS-2001-002 (#2 from version 17 list) Upgrade Staff Security - add user permissions for updating item fields	53
OPA-2001-003 (#6 from version 17 list) Found Item Display In Browse List	6

NAAUG Enhancement Process for 2004-2005

More changes

The 2004-2005 Enhancement Group Chairs

- **Acquisitions** – Kathleen Anderson (Harvard)

- **Cataloging/Authorities** – Pat Riva (McGill)

- **Circulation/Reserves** – Gail Nichols (UC - Davis)

- **OPAC** – Janet Arth (Minnesota)

- **Serials** – Pamela Bluh (Maryland)

- **Systems Administration/Reports** – Daniel Cromwell (FCLA)

New Enhancement Co-coordinator

Patricia Hatch of Harvard University

Co-coordinator in 2004-2005

Coordinator in 2005-2006

Even Tighter Schedule

- Ex Libris wants the next batch of NAAUG Enhancement choices by November 2004. The development weight 'cutoff' will be 120.

- The winning enhancements will be for version 18, scheduled for general release in January 2006.

- This is in response to the Steering Committee's request for earlier general releases dates – January not April, in order to catch the summer window to upgrade.

Reviewing Specs and Testing Enhancements

- This past year, the Enhancement Groups relied heavily on Harvard to test the version 16 enhancements, and to highlight problems.

- At meeting with Chairs in November 2003, Ex Libris proposed that, starting with version 17, the Enhancement Groups receive, review and sign off on specs before programming by Ex Libris begins.

- The Enhancement Groups would also be involved in pre-release testing of the Enhancement requests.

Proposed Timeline for 2004-2005

	Chairs appointed by SC
At NAAUG and via Aleph-NA	Call for participation in Enhancement Groups
July 16	EGs appointed and begin work
September 1	EG's submit their top "X" requests to the Coordinators
September 15	Coordinators send compiled list of top "X" requests to Ex Libris for pointing
October 15	EG Chairs and Coordinators meet with Ex Libris to review the pointed requests
November 7	EGs work on any requests needing more info, and send to Coordinators
November 15	Voting Begins
November 30	Voting Ends

Proposed Timeline for 2004-2005 – cont'd

December to March	Ex Libris works on specs for the Enhancements and delivers FSD *(Functional Specification Document – describes the solution; how the enhancement will be developed, possibly screen shots)* to the Enhancement Groups
April to May	Enhancement Groups review and sign off on the FSD.
June to September	Ex Libris works to programme the Enhancement Requests.
October to November	Pre-release testing by NAAUG and signoff by Steering Committee
January	Enhancements delivered in the General Release of the version.

My proposal for this shortened year

- Reduce the number of requests submitted by the Enhancement Groups from 5 to 3

- Will result in a compiled list of 18 requests rather than 30

- Less time will be needed by Enhancement Groups to gather, Coordinators to compile and Ex Libris to point

- Voting will be more focused

Enhancement Slippage - 1

- **From the version 16 list:**

  Better staff security SYSADMIN SA-2000-001 (add a button in Admin to display proxy users) – **slips to version 17**

- **Outstanding Authority work, promised for 16.2:**

  Online Updating Of Headings From Authority Records CATAUTH CAT-2001-001 – **slips to version 18**

  Ambiguous Cross References--Display CATAUTH CAT-2001-002 - some in 16.2, the rest – **slips to version 18**

  Authority Enhancements CATAUTH CAT-2002-01 – **slips to version 18**

Enhancement Slippage - 2

- **From the version 17 list:**

  # 1: CAT-Requests19-01 Improve moving items/orders to another bib record - still thinking about – (weight=30) **slips to version 18**

  # 6: CAT-2001-003 Holdings/Item Relationship when moving an item from one bib to another - still thinking about – (weight=20) **slips to version 18**

  # 7 CIR-2002-01-F 18 Improvement in Cash Transaction Functionality - parts will be in v 17 - payment method, partial payment or waive, the rest – **slips to version 18**

Points for discussion

- Change the timetable to give the Enhancement Groups more time to work – initiate new groups in early Spring rather than around time of NAAUG.

- Continue with the existing 6 groups, or for next year, adjust to match number of clients?

- Add any new groups?

Become a Enhancement Group member

As easy as filling in a form