Agreement on procedure for additions of resources to the Ex Libris Knowledge Bases between Ex Libris, IGeLU and ELUNA

This agreement is based on section C.2 of the Product Development Collaboration Agreement dated May 2008. The involved parties agree on the following principles for the procedure for the existing Central Knowledge Bases.

Goal: Improving the metadata for electronic resources in the Knowledge Bases of Ex Libris products and providing a mechanism for balanced consideration of the "regional resources". Knowledge Bases concerned at the time being: SFX/Verde and MetaLib. Similar procedure is aimed for Primo Central; the details will be regulated by an addition to this agreement.

IGeLU and ELUNA Commitments:

- Providing a platform (NERS[1]) for submitting, monitoring, enhancing and voting on continuously updated lists of requested resources for addition to the Knowledge Bases. Each Ex Libris product will have a separate voting area within NERS.
- Prioritizing the list of proposed additions to the respective Knowledge Base. This will be a joint IGeLU/ELUNA enhancement process.
- Organizing and managing the communication about voting process and the resources to be added to the Knowledge Bases among users and Ex Libris.
- Encouraging resource vendors to cooperate with Ex Libris, and facilitating communication between resource vendors and Ex Libris.
- Helping to identify users to act as representative partners with Ex Libris for the implementation of specific resources where needed.
- Encouraging users to provide Ex Libris with locally developed information/configuration for requested Knowledge Base resources.

Ex Libris Commitments:

- Annotating and continuously updating the lists of planned (Ex Libris) and requested (IGeLU/ELUNA) resources for addition to the Knowledge Bases and making them available for the customers.
- Adding at least the top 6 resources to the respective Knowledge Base in priority order, subject to technical, vendor support and other constraints. In SFX, resources are defined as Targets, their ObjectPortfolios, and associated TargetParsers that are not already part of the KB. Ex Libris will make reasonable efforts in software developments where necessary for highly desired resources.
- Working together with the Product (Working) Groups of IGeLU and ELUNA to identify and work with key users that will help with adding and updating highly requested regional resources (e.g. the so called national licenses).

1. General Principles

See the general agreement on Product Development Collaboration Part C.1. Both parties will work in full collaboration to make the most of this knowledge sharing.

---

[1] New IGeLU-ELUNA-Ex Libris Enhancement Request System

2. Basic Procedure

1. IGeLU/ELUNA members place their suggestions for resources to be implemented on the platform NERS.

2. In a 8 weeks cycle the user groups will conduct a voting round where each eligible institution will have the possibility to express their priority ("me too").

3. Members will vote using a rolling "me too" strategy - they can retract a "me too" at a later date (during later cycles) to reflect changes in their priorities.

4. The top regional resources will be determined in a rolling fashion - two regions will be up for consideration each cycle, and the regions will be rotated each cycle. For practical reasons the "region" will be defined according to the international telephone code.

5. IGeLU/ELUNA will send Ex Libris a list with the top resources from each voting cycle.

   - Ex Libris will evaluate the top 4 overall priorities and the top 2 regional priorities (based on a submitted list of a total of 6 resources) each cycle. The top 6 are a part of the Ex Libris commitment.
   If there are more resources that can be implemented quickly, Ex Libris will make the effort to add them (quick wins).
   - Should a new target/resource be sent from NERS (one that will have no Pivotal ID), Ex Libris will add it to the CRM. Ex Libris will determine what data structure is needed and check if Ex Libris can also load the requesting contact person / organization.

6. Resource requests need to be submitted for consideration for the release scheduled 8 weeks later. Ex Libris will indicate the implementability status (if able to implement) or reasons why a resource could not be implemented within 4 weeks of receiving the priority list. If for any reason one or more of the top resources can't be implemented, Ex Libris will make reasonable effort to implement additional resources that follow the top 6 on the priority list.

7. If needed, further specifications concerning any particular product will be added to this agreement.

September 2011, for Ex Libris, IGeLU, ELUNA

Anat Kuper

Jirka Kende

Laura Morse