Working in Partnership: Collaboration Approaches

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We Depend on Customer Involvement and Input

Idea Exchange

NERS

Focus Groups and Working Groups

UX • Analytics • Authority
Consortia • Special Focused Group

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Your Ideas..

Idea Exchange

- 484 Idea Exchange items have the status completed
- 53 Ideas were completed in 2022
- 124 Ideas planned or accepted
- 28 Ideas are tentatively planned for 2023

NERS

NERS2020 Cycle -6 enhancements

NERS2021 cycle – 6 enhancements planned

NERS2022 cycle – in progress

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NERS

NERS

- ELUNA & IGeLU have a contractual agreement with Ex Libris for the enhancement of defined Ex Libris products.

- NERS (the New Enhancements Request System) is used to support voting by ELUNA/IGeLU members.

- NERS is the channel for "road-map commitment," in accordance with the <u>Product Development Collaboration Agreement signed by Ex Libris, IGeLU, and ELUNA</u>.

- Alma agreement 200 points

NERS cycle

- **2023 Alma Enhancement Timeline:**

  - Jan. 22-Feb. 4-- New Enhancements to NERS (2 weeks)

  - Feb. 5-Mar. 18 -- Enhancement Team reviews, dedups, scopes, verifies and sets up vote in NERS (6 weeks)

  - Mar. 19-Apr. 8 -- First round of voting (3 weeks)

  - Apr. 9-11 -- Enhancement Team reviews results, prepares to send to Ex Libris for pointing

  - Apr. 12 -- Enhancements to point to Ex Libris

  - Apr. 13-June 8 -- Ex Libris pointing work (8 weeks)

  - June 12-25 -- Second round of voting on pointed enhancements (2 weeks)

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Processing NERS enhancements

- TOP 25 enhancements requests are reviewed
- For each enhancement request
  - Open a basecamp discussion with NERS representative
    - verify that our understanding of the requirement are aligned
    - outline high level solution
    - receiving confirmation for high level solution
  - Work with R&D to receive a baseline estimation
  - Assign complexity points – it is not necessarily the baseline effort
- Complexity points are communicated to PWG for second round of voting
- Final votes communicated to Ex Libris
- List of NERS enhancements for the cycle are finalized according to priory and complexity points

Processing NERS enhancement

- Create Jira for the NERS enhancement
  - Commitment =Contractual
  - Commitment Note = NERS<year>
  - Commitment by = <year> August Release
- Add High level solution to [NERS article](#)
- Share FSD with NERS representative
- Make sure to have a KPI measure
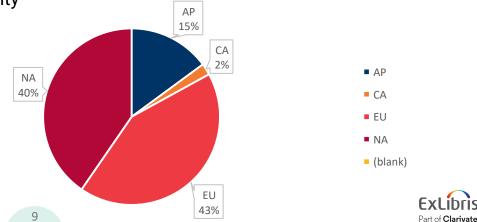- Once released highlight in Release Notes
- Track KPI measure

Example: Usage of NERS 2020 Features

- **NERS 6962 - Allow fulfillment renew before RS renew**
  Patrons can renew a Resource Sharing loan in advance of getting a lender's approval. The loan due date is updated as per the library's loan terms of use before getting the lender's approval. The loan can later be updated if the lender eventually responds with a different renew due date
  Total Votes: 3433
  Usage: 11 institutions enabled the functionality

- **NERS # 6676 Enable customer-defined order of locations in the Get It menu**
  The institution can define list of libraries, in a prioritized order, and list of locations within a library
  Total Votes: 2583
  Usage: 47 institutions enabled the functionality

Idea Exchange

Idea Exchange

- The purpose of the Ex Libris Idea Exchange website is to facilitate communication directly between the user and the Ex Libris product management team, to help the team set development priorities.

- The Ex Libris Idea Exchange website is completely open, enabling anyone to submit and review ideas. Each one has 25 votes

- We review the most popular ideas (those that receive more than a certain number of points), and we will respond to them or perhaps ask for more information.

Idea Exchange Statuses

- **Under Review**: When an idea has received a certain number of points, Ex Libris initiates a review of the idea.

- **Accepted**: Accepted Ideas are ideas that Ex Libris acknowledges their importance and is planning to add them to the product roadmap, however there aren't yet specific plans for adding them. When there will be such plans, the idea status will change to Planned. All points associated with the idea are returned to the users who supported it.

- **Planned**: If an idea has already been planned for the product road map or added to the road map on the basis of the user community's support, the idea's status changes to Planned. All points associated with the idea are returned to the users who supported it.

- **Completed**: When an idea whose status is Planned is incorporated in a release, the idea's status changes to Completed and all points associated with the idea are returned to the users who supported it.

- **Already Supported**: From time to time, an idea is submitted for a feature that the product already supports. The status of such an idea appears as Already Supported, and all the points associated with the idea are returned to the users.

- **Closed**: In certain rare cases, an idea is not aligned with our product vision or is not technically feasible. All the points associated with the idea are returned to the users who supported it.

Customer's View

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Admin View

Admin View

- Link to Jira

- Change status

- Merge Ideas

- Communicate with customers

- Reports

Communication & More

- Consistent review of Idea Exchange items
  - Focus on highly voted ideas.
- Keep it live! comment ,ask questions update
- Idea Exchange Update email for selected items
  - Once in quarter
- Upon completion report via Release Notes

Thank you!