Demystifying IUG Enhancements

MOBIUS Annual Conference

June 4, 2008

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Objectives of Presentation

- Clarify process of submitting an enhancement request to IUG
- Guidelines for writing an enhancement
- Role of functional expert
- Explain voting process
  - Development of ballot
  - Results

♬ *Let’s Start at the Very Beginning* ♬

Why Would I Want to Submit an Enhancement Request?

- Something is Missing
  - Used to be in an earlier version

- Shouldn’t Millennium be able to do this?

What Do I Do Next?

- Check the III Manual
- Send email to the Innopac electronic discussion list
  - innopac@innopacusers.org
- Send email to the MOBIUS Users discussion forum
  - MOBIUS-USERS-L@PO.MISSOURI.EDU]
- Check known problems
- Check new version/release information

After All That …

- Formulate an enhancement request to IUG

Parts of the Enhancement Request

- Problem
  - Describe the problem
- Enhancement suggestion
  - What would solve the problem?
- Decide what module/functionality
- If there is something in the III manual, indicate the page

Sample Enhancement Request

- Problem:
  - Currently, items on reserve provide no link to the professor and/or course. The only point of access is via course id number, which must be copies, pasted and searched in the Course Reserves or Search/Holds mode. This is very cumbersome for staff when they need to determine for whom or for which course the item is on reserve; several steps must be taken in order to obtain the desired information.

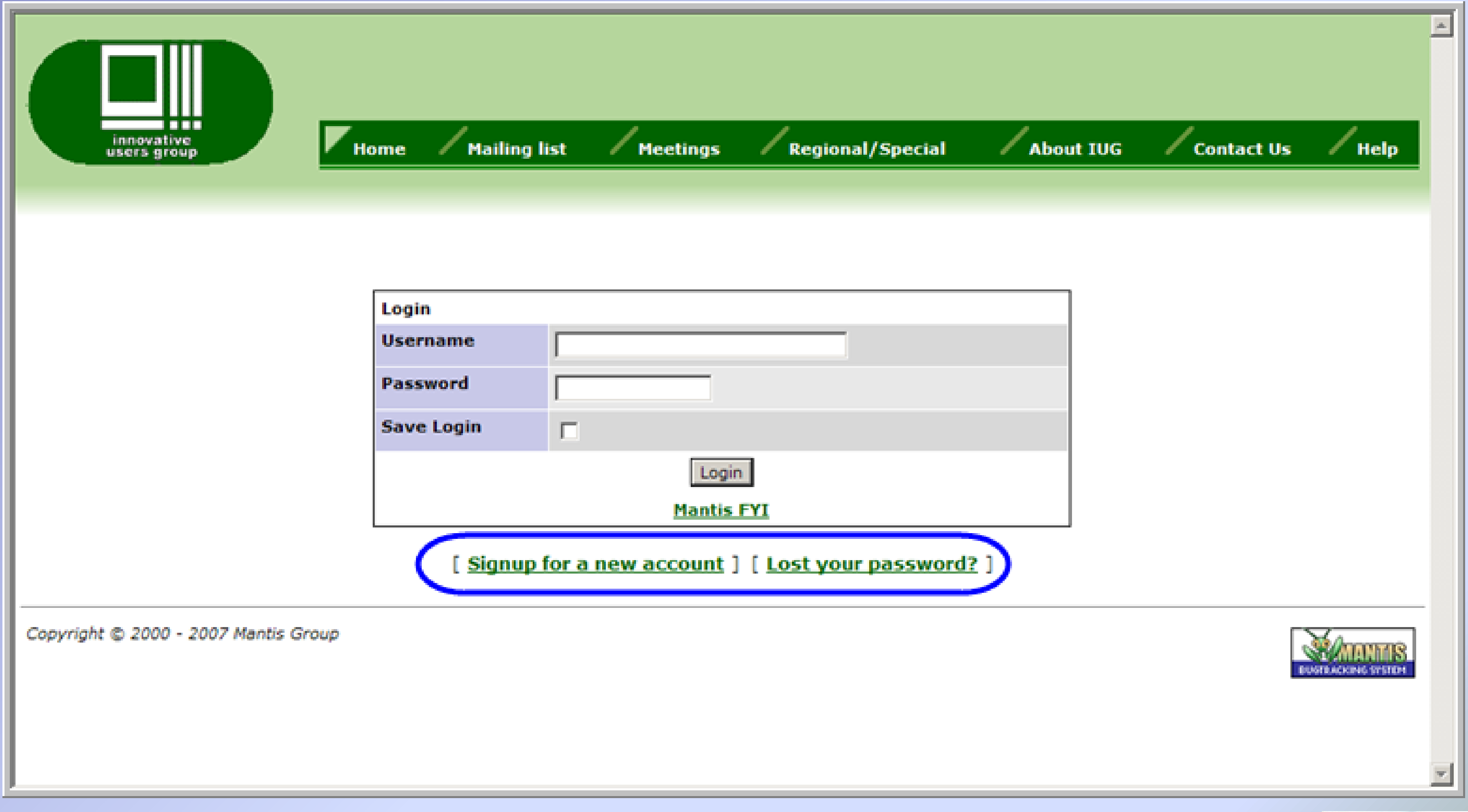
Sample Enhancement Request

- Proposed Solution:
  - Provide a link from item records on reserve to corresponding course(s) and professor(s).

One last thing before the actual submission

- Check the Mantis system to see if it has already been submitted.
- If there, read the enhancement
  - Add comments, improvements to the notes box

Mantis Login



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Save Login	☐

Login
Mantis FYI

[Signup for a new account] [Lost your password?]

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MANTIS
BUGTRACKING SYSTEM

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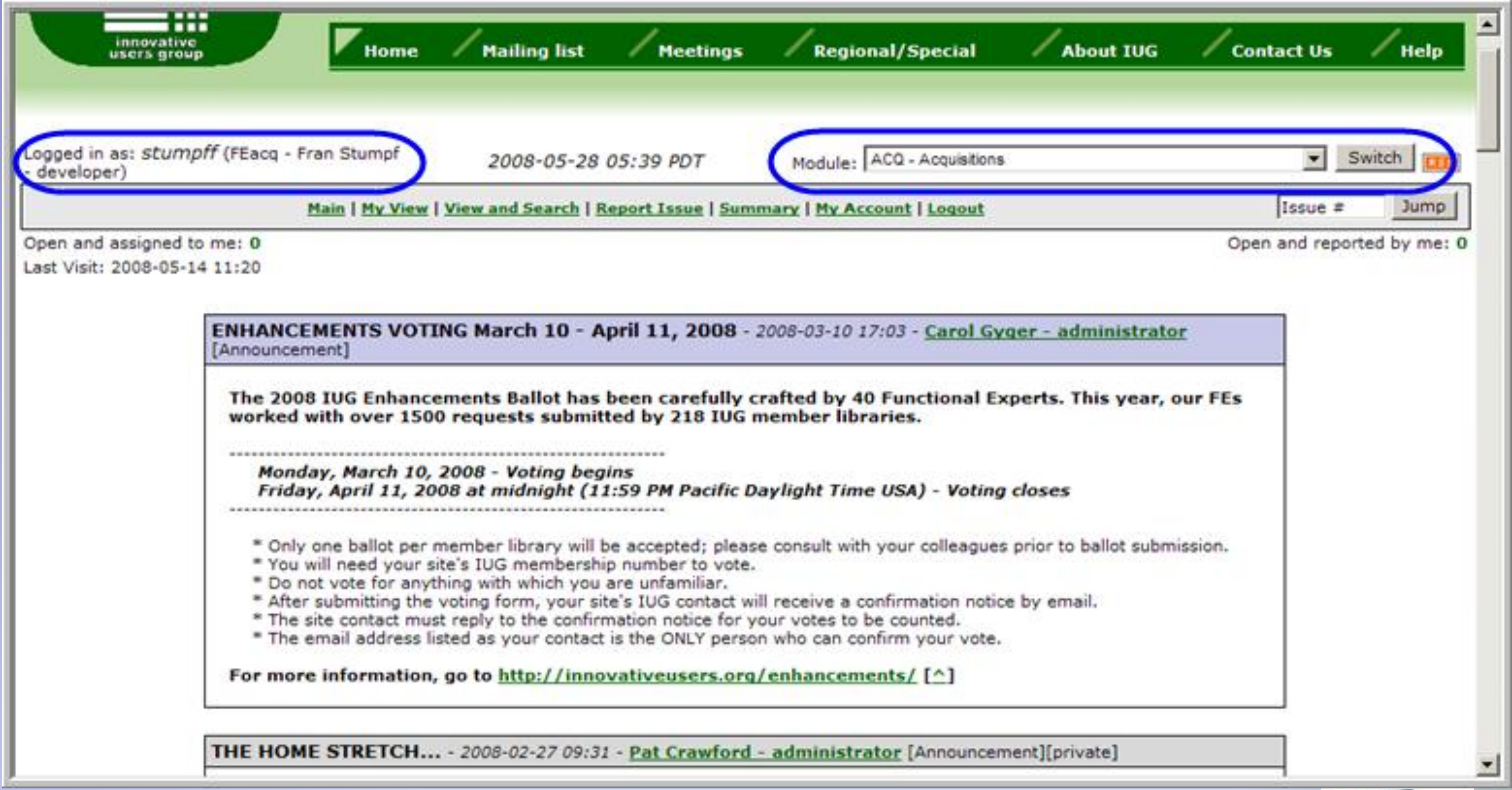
Mantis Home Page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Logged in as: *stumpff* (FEacq - Fran Stumpf - developer)

2008-05-28 05:39 PDT

Module: ACQ - Acquisitions

Switch
Main | My View | View and Search | Report Issue | Summary | My Account | Logout
Issue #
Jump

Open and assigned to me: **0**

Open and reported by me: **0**

Last Visit: 2008-05-14 11:20

ENHANCEMENTS VOTING March 10 - April 11, 2008 - *2008-03-10 17:03* - Carol Gyger - administrator [Announcement]

The 2008 IUG Enhancements Ballot has been carefully crafted by 40 Functional Experts. This year, our FEs worked with over 1500 requests submitted by 218 IUG member libraries.

Monday, March 10, 2008 - Voting begins
Friday, April 11, 2008 at midnight (11:59 PM Pacific Daylight Time USA) - Voting closes

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* Only one ballot per member library will be accepted; please consult with your colleagues prior to ballot submission.
* You will need your site's IUG membership number to vote.
* Do not vote for anything with which you are unfamiliar.
* After submitting the voting form, your site's IUG contact will receive a confirmation notice by email.
* The site contact must reply to the confirmation notice for your votes to be counted.
* The email address listed as your contact is the ONLY person who can confirm your vote.

For more information, go to http://innovativeusers.org/enhancements/ [^]

THE HOME STRETCH... - *2008-02-27 09:31* - Pat Crawford - administrator [Announcement][private]

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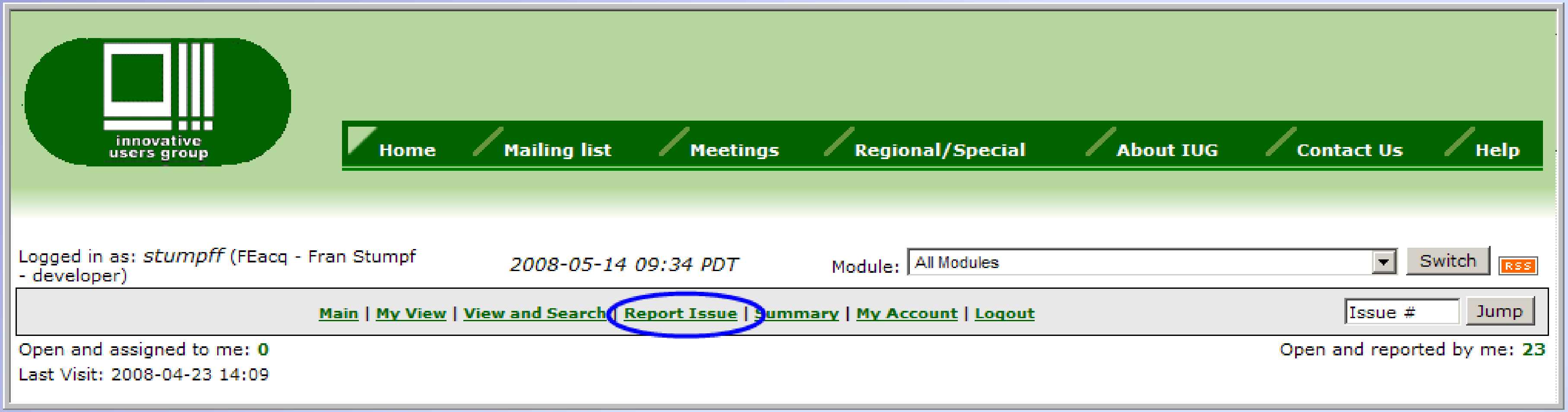
Submitting A New Enhancement

- Mantis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Jump

Logged in as: *stumpff* (FEacq - Fran Stumpf - developer)

2008-05-14 09:34 PDT

Module: All Modules

Open and assigned to me: **0**

Open and reported by me: **23**

Last Visit: 2008-04-23 14:09

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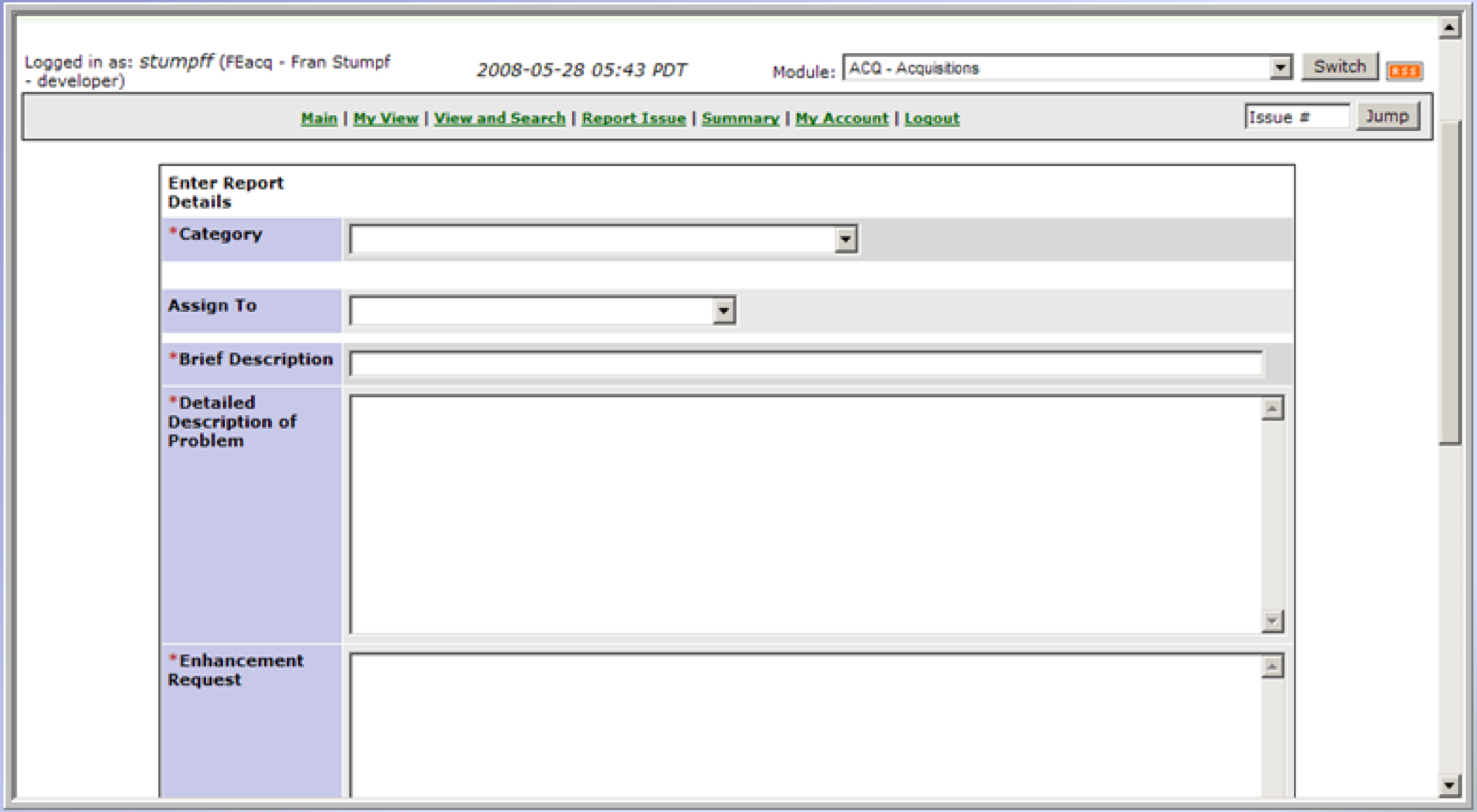
Mantis Report Screen


Switch
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Issue #
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Logged in as: *stumpff* (FEacq - Fran Stumpf - developer)

2008-05-28 05:43 PDT

Module: ACQ - Acquisitions

Enter Report Details

***Category**

Assign To

***Brief Description**

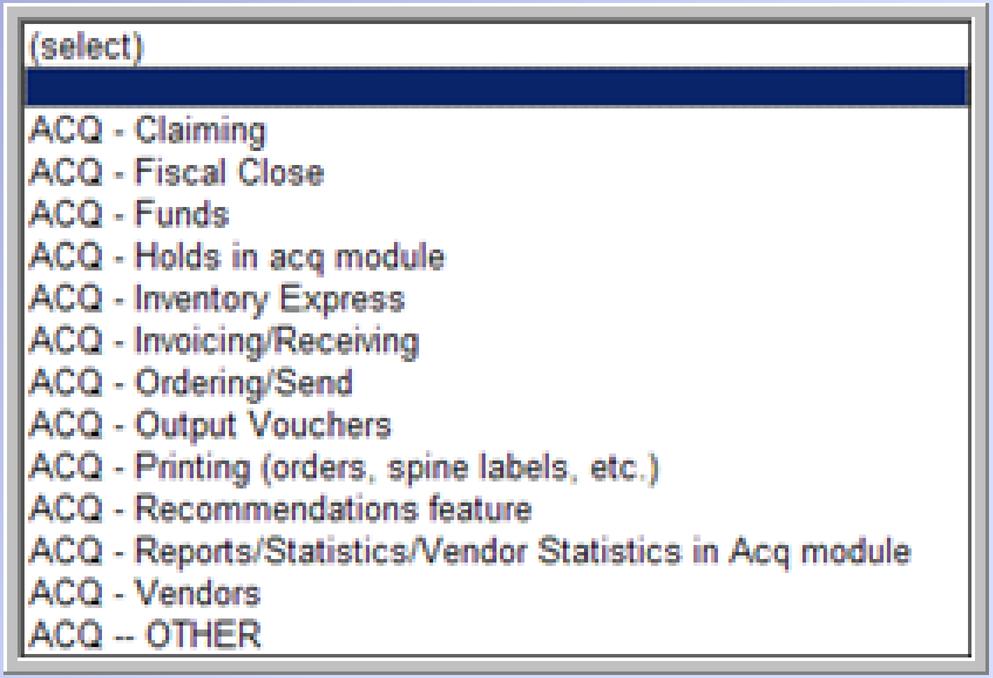
***Detailed Description of Problem**

***Enhancement Request**

New Request

- Category
- Brief Description
- Detailed Description
- Enhancement Request
- Interface
- Release level
- IUG Membership number
- Library Name

Categories



(select)

ACQ - Claiming
ACQ - Fiscal Close
ACQ - Funds
ACQ - Holds in acq module
ACQ - Inventory Express
ACQ - Invoicing/Receiving
ACQ - Ordering/Send
ACQ - Output Vouchers
ACQ - Printing (orders, spine labels, etc.)
ACQ - Recommendations feature
ACQ - Reports/Statistics/Vendor Statistics in Acq module
ACQ - Vendors
ACQ -- OTHER

Categories

- **Acquisitions**
- **Cataloging, Database Maintenance & Authority Control**
- **Circulation Ancillary Programs**
- **Circulation Functionality**
- **Circulation Parameters**
- **Consortia**
- **Electronic Access Products**

More Categories

- **Management Information, Create Lists & Statistics**
- **Other Programs**
- **Patron Functions in the WebOPAC**
- **Serials**
- **Systems Functionality**
- **WebOPAC**

Categories have Categories

- **Acquisitions**
  - Claiming
  - Fiscal Close
  - Funds
  - Holds
  - Inventory Express
  - Invoicing / Receiving
  - Ordering / Send
  - Output Vouchers
  - Printing (orders, spine labels, etc.)
  - Recommendations
  - Reports / Statistics / Vendor Statistics
  - Vendor

New Category - Consortia

- Acquisitions
- Cataloging, Database Maintenance & Authority Control
- Circulation Ancillary Programs
- Circulation Functionality
- Circulation Parameters
- Electronic Access Products
- Management Information, Create Lists & Statistics
- Patron Functions in the WebOPAC
- Serials
- System Functionality
- WebOPAC

2008 IUG Enhancement Schedule

- 2008 Enhancements - Deadline for submissions on Dec. 14, 2007 at midnight (Pacific Time USA)
- 2009 Enhancements - Cycle began on December 15, 2007 at 12:01 (PST)
- March 10, 2008 - Ballot published on IUG website and IUG voting starts
- April 11, 2008 - IUG voting ends at 11:59pm (Pacific Time USA) - firm deadline
- **April 21, 2008 - Ballot results posted to IUG website and sent to III**

FE Enhancement Schedule

- Jan. 8, 2008 - FE trading deadline between categories
- Jan. 9, 2008 – FE’s given the # of ballot items per category
- Feb. 15, 2008 - FEs have first good draft of ballot items in Mantis
- Feb. 22, 2008 - FEs send final draft of ballot items to Coordinators
- Mar. 3, 2008 - Final draft from FEs is complete with all necessary edits
- Mar. 10, 2008 - Final ballot published on IUG website and IUG voting starts
- Apr. 11, 2008 - IUG voting ends at midnight (Pacific Time USA) - firm deadline
- Apr. 21, 2008 - Ballot results posted to IUG website and sent to III
- Apr. 27, 2008 – FE’s meet at IUG – Critique, suggest, summarize

2008 Enhancement Voting

- 40 Functional Experts
- 1500+ requests by 218 libraries
- 250 for ballot
- 50 – Telnet, can Millennium can’t
- 57% of membership voted
- Percentage as basis for number of ballot items per category
- 75 top vote getters submitted to III

INN-Reach Enhancements

- Separate process
- Separate discussion list
- Not very active
- 2009 – INN-Reach enhancements will become part of IUG process
- MOBIUS = One vote

Innovative Enhancements

- enhance@iii.com

- Innovative is discussing using the IUG process for all enhancements

Shameless Plug

- Only IUG members can vote
- $70 IUG membership fee

Questions?

- Kathleen Schweitzberger
  - schweitzbergerk@umkc.edu
- Fran Stumpf
  - stumpff@umsystem.edu

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