

CAPITA

Using Ideas Improving Capita Library Products and Services

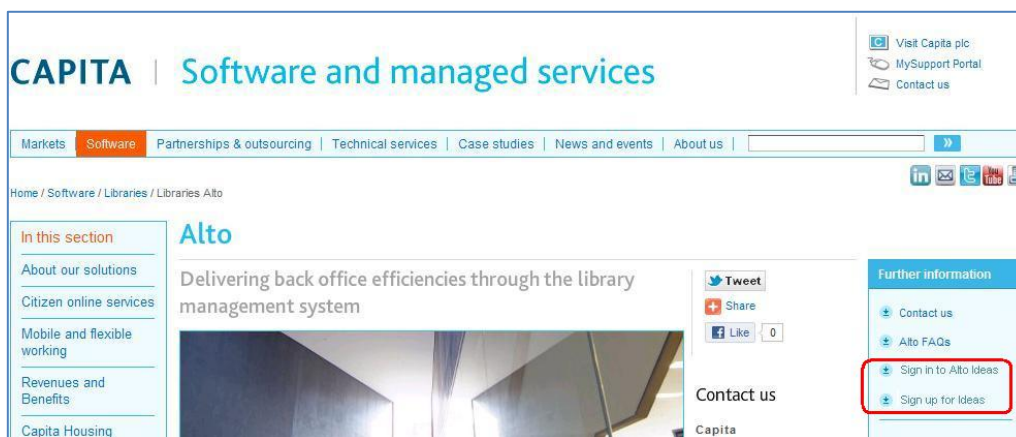
May 2012

About this document

- ◆ This document explains how to use the online Ideas service to make suggestions for improving Capita Libraries' products such as Alto and Prism. The service also allows users to comment and/or vote on changes proposed by others, and provides a channel for Capita Libraries staff to communicate progress on implementing suggestions
- ◆ It is intended for routine use by any and all customers of Capita Libraries products and services

Related documents

The Ideas service can be accessed at via a link on the relevant product home page. Here for example is the link on the Alto home page:



Support

If you are experiencing difficulties, please contact your System Manager/IT Department in the first instance.

You can raise, track, and close your support cases using our 24 x 7 **My Support** web service. You must have a user name and password to access the service – you can register at the following address: www.capita-libraries.co.uk/services/register/index.shtml

Support Site: www.capita-libraries.co.uk/services/support/

Telephone: +44 (0)870 400 5400

Email: libraries-support@capita.co.uk

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1. What will contributing to a Library Ideas forum do for you?

Capita Library Ideas helps drive development priorities for Capita products. At its simplest it is therefore an easier way to make your organisation's voice heard in determining product improvements. It is also:

- ◆ *open* (Capita customers and Capita staff will be able to see what customers are requesting)
- ◆ *fair* (all customers can vote for, and comment on, proposed improvements on an equal basis)

2. How does it work?

Appropriate Capita products and some services have their own forum on Library Ideas. Any customer using a Capita product that has a forum can request access to that forum. Once authorised (see below), users can...

- ◆ Add a new idea,
- ◆ Comment on an idea or
- ◆ Vote for an idea.

This covers both

- ◆ Requests for new or changed features, layout or appearance
- ◆ Defects – software behaving in an unexpected or erroneous way

This new process largely (but not wholly) replaces the old PERs and Defects processes. Here, for example, is a view of the Prism 3 Forum.

The screenshot shows the Capita Prism 3 forum interface. At the top, the 'CAPITA' logo is displayed in large blue letters. Below the logo, the forum title 'Prism 3' is shown with a lock icon. A user profile for 'jly' is visible in the top right corner, with options for 'Stay signed in', 'Settings', 'Admin Console', and 'Sign out'. The main content area features a welcome message: 'Welcome to Prism 3 Ideas. Use this forum to submit any ideas you have about how to improve Prism 3. In your suggestion, try to consider the direct needs, desires and motivations of the end user, rather than just describing new product functionality.' Below this is a section titled 'I suggest you consider ...' with a text input field labeled 'Enter your idea'. A navigation bar includes 'Hot ideas', 'Top', 'New', 'Status', and 'My feedback'. The main idea being displayed is 'borrower expiry date warning' with 2 votes. The description reads: 'A couple of borrowers have complained that they are unable to renew their items because their ticket is about to expire. When customers log on to their account, could they be given a warning if their ticket is about to expire within a set number of days.' It shows '2 comments' and 'Admin' as a responder. A response from 'Terry Willan (Admin, Capita)' is shown with the status 'UNDER REVIEW' and the text: 'This fits with our understanding of what account expiry means and how Prism should behave with regard to it.' On the right side, there is a '20 votes left!' indicator, a 'Prism 3' section with 'Post a new idea...', 'All ideas', and 'My feedback' links, a search bar, and a 'Give feedback' section with links for 'Alto', 'Capita Services', 'Integration', and 'Prism 3'. At the bottom right, there is a 'Capita' logo.

3. How do I get access?

3.1 Who is eligible to access Ideas forums?

Any Capita customer automatically qualifies for access to forums related to the product or service they use. It is strictly for Capita Customers; even Capita staff may not raise issues or vote on them, although they will comment on and update the status of ideas. Indeed one of the goals of Capita Ideas is to allow fast and open feedback from Capita.

To preserve fairness between customers, we authorise one Ideas account per customer organisation per forum, so most accounts will be shared by a number of stakeholders. Note that you can if you wish use the same account for multiple forums, or have a separate account for each forum. So an organisation called “Broadminster” for example could have:

- ◆ a single “Broadminster” account for both Alto and Prism 3 or
- ◆ separate “Broadminster Prism” and “Broadminster Alto” accounts

This makes no difference to voting – in either case you get the same number of votes per forum.

3.2 Setting up a brand new account

Registering a new account is a two step process:

1. Decide an account name and account e-mail address
2. Request Access

3.2.1 Decide on an account name and an e-mail address to use with it

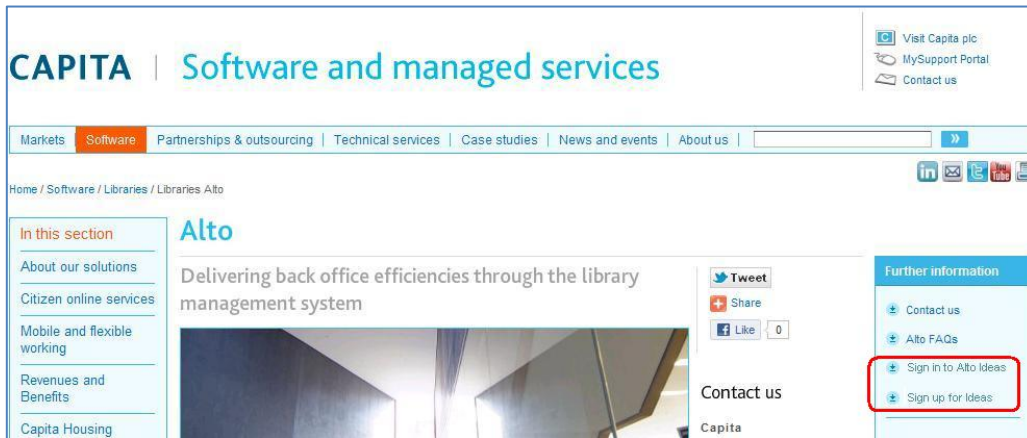
All your ideas and comments will be tagged with your account name, so it helps if your account name makes it obvious which organisation you are representing i.e. the institution or authority name should be obvious from the account name so for example

- ◆ “Broadminster” is better than “Fred Bloggs” as an account name
- ◆ “Broadminster University” might be better yet, if there is also a Broadminster Public library authority.

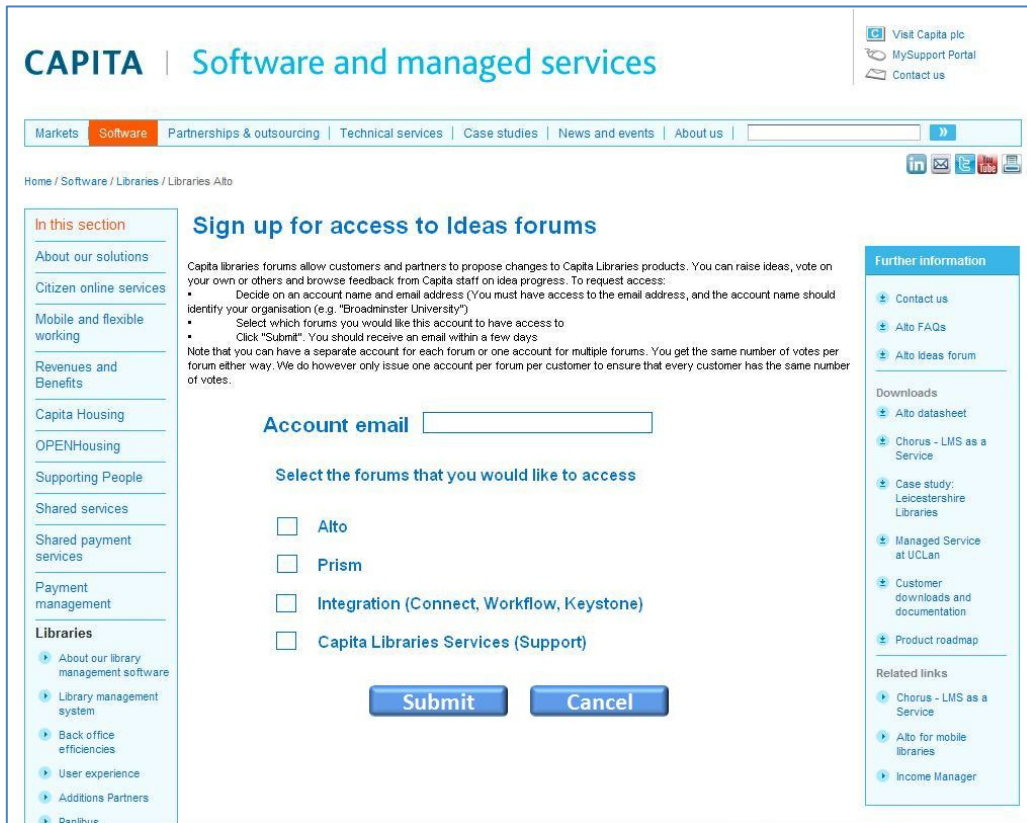
To set up an account you also need an email address. You will not be asked for any of the email credentials so the use of an email address in this way does not compromise security. An email address is guaranteed unique, plus it is a place to which we can send Ideas-related email: so it should be a real address, and one to which you have access. A group email is ideal if you have a suitable one or can easily request one, because it can be shared amongst relevant colleagues and access for the organisation is not compromised when someone leaves.

3.2.2 Request access

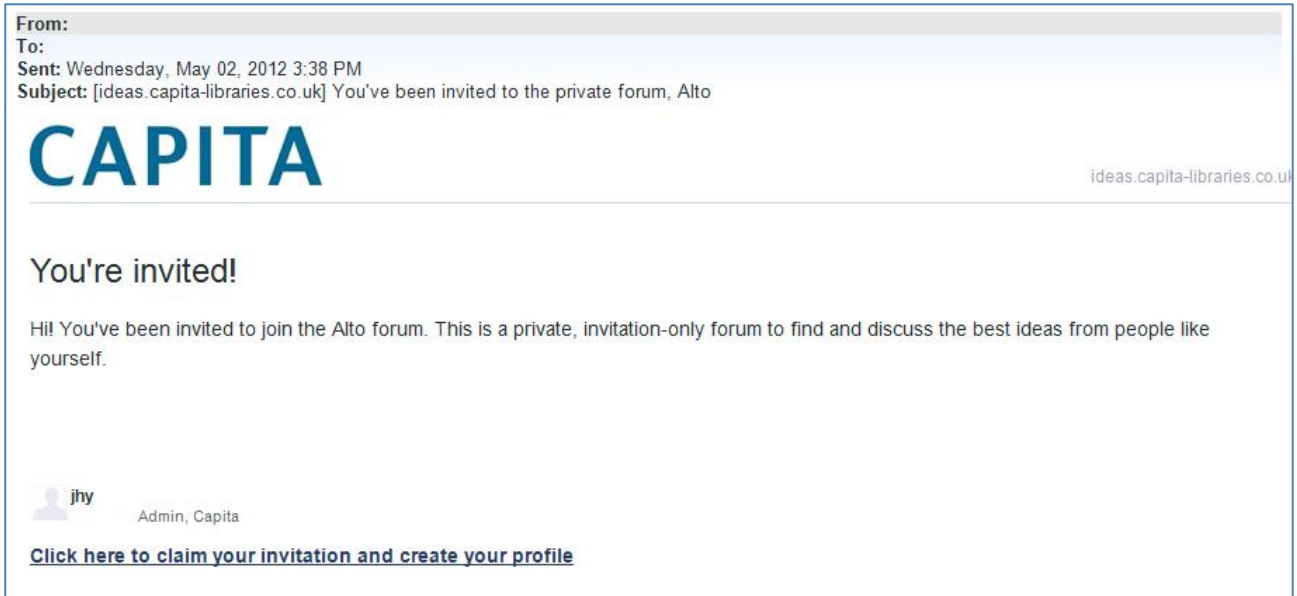
Go to any of the product home pages and click on the relevant “Sign Up” link



After clicking on the link you will see a screen like this:



Fill in the dialogue with your chosen e-mail and account name, and then click on "Submit". In due course you should receive an email like this (the wording may be different)



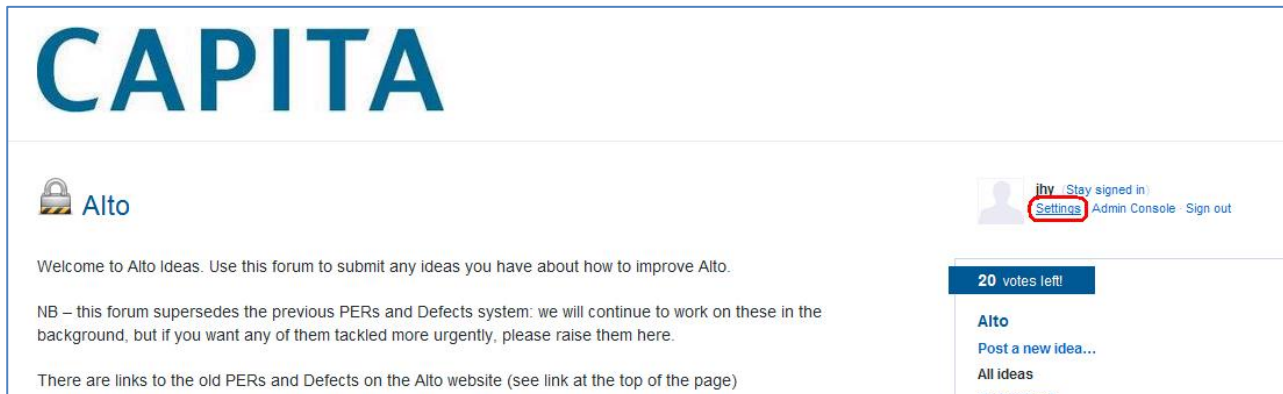
Click on the link or copy/paste it into a browser. This should open a form thus:

The image shows the CAPITA "Create Your Profile" form. The CAPITA logo is at the top. Below it, the heading "Create Your Profile" is displayed. A yellow banner contains the text: "Create your profile to gain access" and "Once you've created your profile we'll forward you to the Alto forum." Below the banner, there is a text input field containing the email address "jlgh@dsl.pipex.com". Underneath this field, it says "If you already have a profile click here to sign in". There are three more text input fields: "Your Name", "Enter your new password", and "Confirm your new password". At the bottom, there is a line of text: "By signing up you agree to our terms of service." and a "Sign up" button.

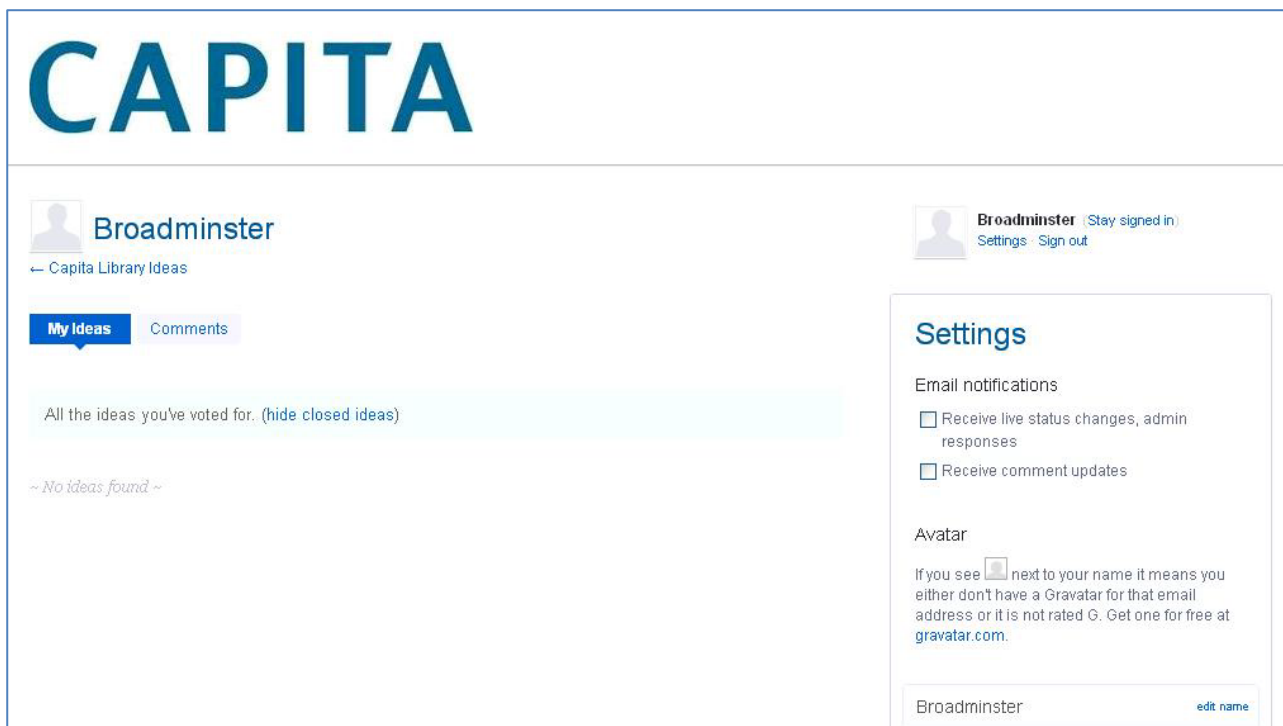
Fill in the Account name you selected earlier for your account and set a password in the usual way.

4. Maintaining Settings

You can amend your account settings (including email address and password) any time you are logged in by clicking on the “Settings” link near the top right of the page after log in:



This opens a form like the one below. On the left are Ideas you have posted and on the right are your profile settings which you can amend and save. Note in particular the options relating to email notifications.



5. Organising voting in your library

As mentioned above, every organisation is given a fixed number of votes per forum (currently 20 on the Prism and Alto Forums). You can move these around at will within the same forum, and they are automatically returned to you when an issue is closed. 20 votes doesn't sound like a lot, but we are advised that 10 - 20 is around the optimum number as it encourages focus on the most important requirements.

It is however important to agree vote allocation with relevant stakeholders in your library. The worst-case scenario is an “edit war” where different stakeholders continually reallocate organisational votes according to their personal priorities. Two options (there are others) are:

- ◆ A formal cross-departmental meeting (or agenda item in an existing meeting) to review current issues and vote allocation, and agree adjustments as required.
- ◆ Designate a senior library manager to handle voting on the basis of discussions with stakeholders.

6. What about existing PERs and Defects?

Part of the reason for this new system is that the old PERs and Defects procedures used in products like Alto gave little insight into priority (apart from that gleaned from a few one-off voting exercises). Library Ideas allows for fairer prioritisation, and for far more immediate feedback on status and planning.

We have not however thrown away the old PERs and Defects. We have made lists of them available via links on the Alto website and we will continue to work our way through them in the background; but if an old Defect or PER is particularly important for you, then raise it again on the Ideas forum and encourage others to vote for it. This will raise its priority considerably.

7. What about defects discovered by Talis staff?

It may be that defects will be discovered by Talis staff, as a result of Support activity for example. These will be recorded on internal Talis systems and where relevant to customers will be published periodically via the links on the Talis website.

8. How can I get more help?

If you are having trouble with Ideas, we suggest that you raise a case with Support in the usual way.