



Joining the Idea Lab Team

Beth Juhl
Jeremy Goldstein
IUG Enhancements Co-Coordinator

 #IUG2019



Sunday, May 5th | Pre-Conference
Monday, May 6th – Wednesday, May 8th | Main Conference

What is the Idea Lab?

- Innovative's enhancement idea platform, operated in collaboration with IUG
- Replacement for prior IUG / PUG annual ballot systems
- ANYONE from any Innovative customer may participate
- Community submits, comments upon, votes for and prioritizes Idea submissions

Timeline

- Launched June 2017
- First successful challenge December 2017
 - Reinstate cancelled holds placed on roadmap, released in Sierra 4.2
- March 2018 Launched Always Open Space
- April 2018 Martha Gettys named Director of Segment Strategy / Idea Lab Liaison
- January 2019 Split Always Open into separate Sierra & Polaris spaces
- January 2019 new Innovative liaison, Jennifer Thie, Director of Product Management

By the Numbers

- 8 Timed Challenges
- 2,451 Users
- 1,034 Ideas
- 4,936 Comments
- 18,028 Votes
- 43 Ideas on the road map or already in release

As of 3/7/19

How Does It Work?

Phase 1
Ideation &
Collaboration
Starts Nov 28 Ends Dec 5
Participants
All Challenge Participants

Submit Ideas,
Collaborate & Vote
on Ideas

Your Contribution

Submit ideas, cast votes using thumbs up/thumbs down, comment on other ideas and edit your ideas based on other's comments.

How Ideas Progress

Based on popularity and voting, or hand-picked ideas from the challenge moderators.

Phase 2
Voting &
Commenting
Ends Dec 7
Participants
All Challenge Participants

Commenting,
Voting & Editing of
Ideas
(New Idea
Submission
Closed)

Your Contribution

Edit your ideas based on other's comments, cast votes using thumbs up/thumbs down and comment on other ideas.

How Ideas Progress

Based on popularity and voting, or hand-picked ideas from the challenge moderators.

Phase 3
Expert Review
Starts Dec 8 Ends Dec 11
Participants
Challenge Subject Matter Experts

Ideas Reviewed

How Ideas Progress

Highest rated ideas will be determined based on:

- Value for Libraries / return on investment for Innovative
- Ability to satisfy an unmet need among Libraries / urgency of need
- Technical Feasibility
- Regulatory Feasibility
- Strategic Fit

Phase 4
Prioritization
Starts Dec 12 Ends Dec 14
Participants
All Challenge Participants

Ideas Ranked

Your Contribution

Select your favorite ideas in a fun, head-to-head match up.

How Ideas Progress

The top rated ideas will be ranked by the Pairwise votes of challenge participants. The top ideas will then be advanced to the Selection Phase.

Phase 5
Selection
Starts Dec 15 Ends Dec 18
Participants
Selection Committee

Winning Ideas
Selected

How Ideas Progress

Top rated ideas will be reviewed by the Selection Committee before one or more winning ideas are chosen.



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Two Challenge Types

- Timed Challenges
 - Run over 2-6 week period
 - Cover a narrow aspect of the system
 - Include a commitment from III to develop winning idea(s)
- Always Open Challenges
 - Never close
 - Cover all parts of Innovative products
 - Lack a development commitment
 - But Ideas still make it to the roadmap



Phase 1: Submission

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Crafting a Winning Idea

- Identify the problem to address
- Try to keep the scope of the problem as narrow as possible
 - Bad: Acquisitions should be better
 - Better: Paying Invoices takes too many steps
 - Best: The inability to download multiple invoice files together adds 30 seconds to the workload per file

Crafting a Winning Idea

- Present a possible solution for the underlying problem
 - Take into consideration how other organizations might benefit from this solution
- Think of a way to quantify the benefit of your idea
 - # of patrons impacted, time saved, etc...
- Keep the scope of your idea focused
 - Broad ideas are a lot harder to develop

Post Your Idea

Post Your Idea

Title *

Idea Image

Stock Gallery Custom Image



Category *

Idea Description * ⓘ

Rich text editor toolbar with icons for undo, redo, bold, italic, bulleted list, numbered list, link, unlink, image, and table.

Words: 0, Characters: 0

Idea Value * ⓘ

Rich text editor toolbar with icons for undo, redo, bold, italic, bulleted list, numbered list, link, unlink, image, and table.

Words: 0, Characters: 0

Attachments

+ Add Files

Maximum file size: 10MB

Tags

* Required

Publish

Save Draft

Cancel

QuickSave Enabled ⓘ



Phase 2: Crowd Validation

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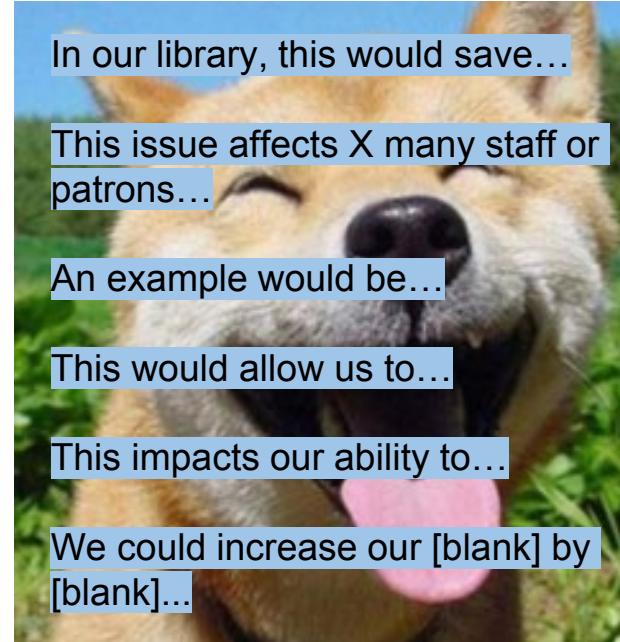
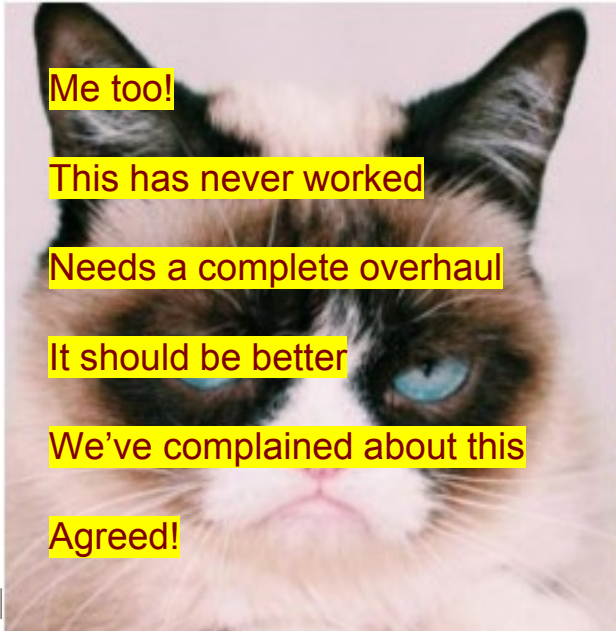
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Engage with Ideas

- Explore ideas and leave comments and ratings
- Share ideas with your colleagues
- Ideas must meet certain activity requirements in order to graduate to later stages
 - Those criteria are reviewed regularly
 - Always Open graduation requirements dropped twice in past year

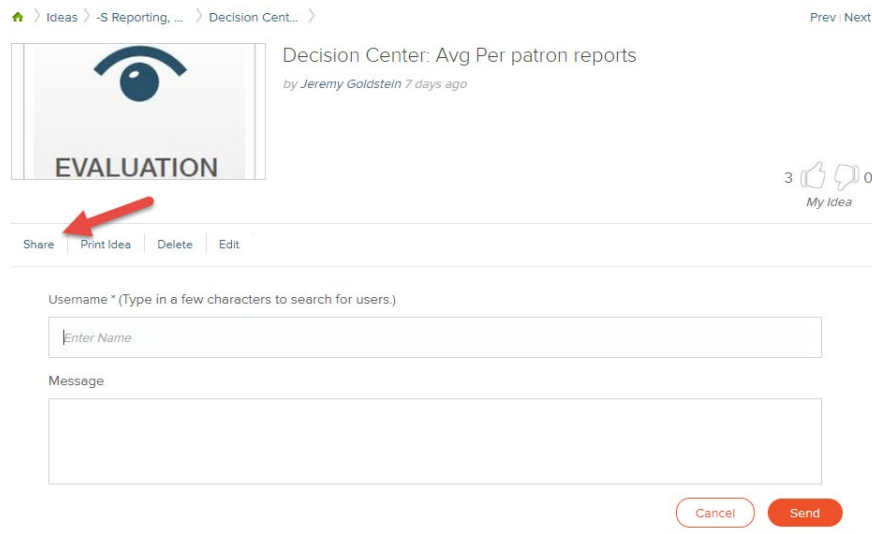
Comments count

Innovative Product Owners need use cases, scope, examples, and context




Sharing



- Promote ideas
- Share directly from Idea Lab
- E-mail to colleagues locally or over forums and mailing lists



Home > Ideas > -S Reporting, ... > Decision Cent... >

Prev | Next

 Decision Center: Avg Per patron reports
by Jeremy Goldstein 7 days ago

3   0
My Idea

[Share](#) [Print Idea](#) [Delete](#) [Edit](#)

Username * (Type in a few characters to search for users.)

Message

[Cancel](#) [Send](#)

Comparable Ideas

Comments Tasks Statistics **Comparable Ideas**



Allow auto-renew to ignore patron blocks
by *Trish Pelletier*



Autorenew blocks
by *Trish Pelletier*



Leap Patron Record Display - Polaris 6.2
by *Cecilia Smiley*



Polaris Notices - Include item call number and volume on Hold and Almost Overdue notices - Polaris 6.3
by *Diane Robinson*

- Widget to find related ideas on the site
- Find users interested in particular topics
- Consider sharing ideas with them



Phase 3: Expert Review


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Expert Review

- Expert Reviewers are drawn from the IUG Idea Lab team
- Reviews can be viewed by anyone with an Idea Lab account
- Reviews are a rough cost/benefit analysis of an idea

Comments | **Tasks** | Statistics | Comparable Ideas

Expert Review  66% [+ Add New Task](#)

User Tasks

Task	Assigned to	Due Date	Status		
Expert Review	 Beth Juhl	03/28/2019	Incomplete		
Expert Review	 Nicole Turzillo	03/28/2019	✓ Completed on 03/11/2019		
Expert Review	 Kathy Setter	03/28/2019	✓ Completed on 03/11/2019		

Crowd Analytics

Tasks	Added	Progress	Status
Minimum Review Rating for Expert Review	03/07/2019	4.47/4.0	✓ Complete




Phase 4: Prioritization

Pairwise

Vote on as many sets as you wish. The system will offer you voting until you have seen every possible combination of ideas (up to a maximum 66 total pairs).

Pairwise ends in: **14** DAYS **15** HRS **24** MINS




Always page title-level holds in the SDA and Sierra Web

Inspired by ability for Library to remove "do not page for title" from the Sierra Public Services Workflow Challenge. Under Title Priority Paging, patron-placed holds always page if they are pageable. Do the same for title-level holds placed by ...

[Vote](#)

VS



Separate Alternate ID and Patron Alias features and modify Patron Alias in My Account

Inspired by Make "Pickup Alias" a patron editable field in My Account in Always Open - Sierra. The design of Patron Alias and Alternate ID features uses the same field for both features. This has several implications: If both features are ...

[Vote](#)

UNDO

1/15

- Tool for prioritizing ideas
- Each user will be presented with all possible idea pairings
- Can quit anytime and pick up later
- Useful to vote for all pairings, even the ones where you do not like either idea.



Phase 5: Selection

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Product Review

- Similar to expert review but completed by III's product owners
- Not included in all challenges
- Product owners can also select ideas directly so they skip phases

Product Review

Quantitative Criteria

Poor:1 | Excellent:5

Idea offers a significant advantage over the current approach. * ⓘ

5

Cost of adopting the idea would be less than the value. * ⓘ

5

Idea requires minimal learning on behalf of users for libraries to implement. * ⓘ


4




Close

Future Possibilities

Sort: Filters:

10 Ideas





69   0
I liked it 




New Field - Authentication
by Rebecca Coert
8 months ago

A new field in the patron record to display the last time the record was used via API or other authentication (ebooks, computer usage, etc.).

In -S Circulation, Access Services & Fulfillment ✓ Viewed







75   0
I liked it 




Allow for rolling expiration date in patron record templates
by Jenn Dei Cegno
8 months ago

Patron record templates only allow for a fixed date or blank date, requiring staff to enter or manually increment the date. The option to set a rolling date (such as current date plus 6 months or 5 years) would add significant convenience and value ...

In -S Circulation, Access Services & Fulfillment ✓ Viewed






63   0
I liked it 

Lightweight WebPAC tokens for responsive design
by Ken Irvin
6 months ago

Updated 2018-10-09 -- modified proposal based on a comment from a colleague offline as well as the one from an IdeaLab user. The modified proposal calls for separate tokens of the label and for the field, e.g. {publish-label} and {publish-field}. ...

In -S Discovery & OPAC ✓ Viewed



- Winning ideas not yet placed on the road map
- Many will eventually be selected
- Can also lead to future challenges or related developments

Selected

Sort: Filters:

31 Ideas

The screenshot displays three idea cards in a grid. Each card features a header image, a title, author information, a detailed description, and a progress bar at the bottom. The first card has a colorful geometric pattern header and a 'Quick View' button. The second and third cards have blue and yellow gradient headers respectively.

Card 1	Card 2	Card 3
49 (thumbs up) 1 (comment)	75 (thumbs up) 1 (comment)	59 (thumbs up) 0 (comment)
Polaris Notices - Include item call number and volume on Hold and Almost Overdue notices - Polaris 6.3	Send password update link in "Forgot password?" emails - Polaris 6.3	Control the length of the summary field in the PAC - Polaris 6.3
by Diane Robinson 9 months ago	by Marie Martin a year ago	by Jason Thomson 8 months ago
Include the item call number and volume on Hold Notices as well as Almost Overdue Reminders (and Almost Overdue Other Items). The call number and volume is currently printed / displayed on Overdue and Bill notices but not on almost overdue and hold ...	When a patron follows the "Forgot your password?" link from the account login page, they are sent an email containing a new, randomly generated password in clear text. This is not secure, and very much unexpected in today's security climate. It would ...	On the brief/full display of the PAC search results we would like the ability to control the length of characters that are displayed in the summary. Some titles have very very long summaries which cause the brief/full display to take up a lot of ...
In -P Circulation, Access Services & Fulfillment ✓ Viewed	In -P Discovery & OPAC ✓ Viewed	In -P Discovery & OPAC ✓ Viewed

- Ideas have been placed on the roadmap
- Names updated to include release information

Selected Ideas at innovativeusers.org

HOME ABOUT ▾ MEMBERSHIP ▾ CONFERENCES ▾ ENHANCEMENTS ▾ RESOURCES ▾ HELP ▾ FOR

Selected Ideas

Sierra Ideas

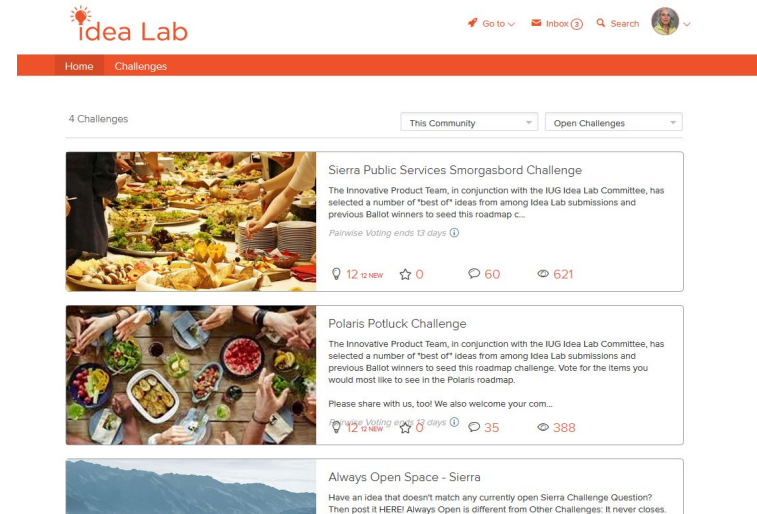
Idea	Submitter	Release	Challenge
When home pick-up is designated in the loan rule, that pickup location should be the only one available when placing a hold	Kathy Setter & Library Connection, Inc	Sierra 4.0	Sierra Public Services Workflow
Find In Record	Jeremy Goldstein	Sierra 4.1	Sierra Public Services Workflow
Reinstate cancelled holds	Eeva Stierwalt & Karen Nixon	Sierra 4.2	Sierra Public Services Workflow
Add price field from item record to due slip data library	Jeremy Goldstein	Sierra 4.3	Always Open
Enable searching of volume record by record number	Eliza Richards	Sierra 4.3	Always Open
Customization of fonts and colors in Sierra	Jeremy Goldstein	Sierra 4.3	Always Open
Undo delete	Eliza Richards	Sierra 5.0	Undo Options for Sierra

Polaris Ideas

Idea	Submitter	Release	Challenge
Payment Processing	Robin Dye	Polaris 6.0	Polaris Web Application
ExpressCheck - widescreen resolutions	Jonathan Rohner	Polaris 6.0	Always Open
Leap find and deleted records	Jason Tenter	Polaris 6.0	Always Open
Print List Option	Keith Davis	Polaris 6.1	Polaris Web Application
Need to Update Item Parameters Using Bulk Change in Record Sets	Kathie Brown	Polaris 6.1	Polaris Web Application
Print from all tabs in LEAP	Sarah Colombo	Polaris 6.1	Always Open
Allowing more than one Comprise eCommerce			

Want to Get Involved?

- Register at idealab.iii.com
- Explore ideas
- Submit our own
- Leave comments
- Vote for your favorites
- Help set priorities
- Consider joining the Idea Lab Team



The screenshot shows the Idea Lab website interface. At the top, there is a navigation bar with the "Idea Lab" logo, a "Go to" dropdown, an "Inbox" icon, a search icon, and a user profile icon. Below the navigation bar, there is a "Home" and "Challenges" tab. The main content area displays a list of challenges under the heading "4 Challenges". The first challenge is "Sierra Public Services Smorgasbord Challenge", which includes a photo of a large buffet table. The second challenge is "Polaris Potluck Challenge", which includes a photo of a group of people at a potluck dinner. The third challenge is "Always Open Space - Sierra", which includes a photo of a mountain landscape. Each challenge card provides a brief description, a "Ballot" icon, a "Vote" icon, a "Comment" icon, and a "View" icon. The "Sierra Public Services Smorgasbord Challenge" card shows 12 new votes, 0 stars, 60 comments, and 621 views. The "Polaris Potluck Challenge" card shows 12 new votes, 0 stars, 35 comments, and 388 views. The "Always Open Space - Sierra" card has no visible statistics.

Idea Lab Team

- 2-year commitment
 - For 2019-20 some volunteers will have a single year term in order to create staggered terms
- Participate as a Moderator or an Expert Reviewer
- Spread the word: recruit and present
- Come to our annual meeting at IUG
- Make connections with your colleagues around the globe

Idea Lab Team Members

Moderators

Help idea authors clarify the value and purpose of their ideas.

Moderators keep the conversation going by connecting similar ideas and soliciting comments from the community.

Expert Reviewers

Assess ideas that have passed a certain threshold of votes and comments for assess overall value, need, and feasibility.

Roles are not fixed: Idea Lab Team members might be a moderator on one challenge and an expert reviewer on another.

Want to Join the Team?

Volunteer at:

<https://tinyurl.com/IdeaLabTeam>

Send questions to:

enhancements@innovativeusers.org

More Idea Lab @ IUG2019

- Polaris Feature Prioritization with IdeaLab
 - Tuesday 1:30-2:30 Phoenix B
- IUG Enhancements Forum
 - Tuesday 3:00-4:00 Phoenix D
- Sierra Feature Prioritization with IdeaLab
 - Tuesday 4:30-5:30 Ahwatukee

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