NAAUG ENHANCEMENT REQUESTS
2005-2006 for Release 19

Top 3 Enhancement Requests from

Acquisitions/Ser­ials – Dee Nolan, MnPALS Con­sortium, Min­neso­ta
Catalog­ing/Author­i­ties – Jo­Anne Deeken, Uni­ver­sity of Ten­nes­see,
Knox­ville
Circul­ation/Res­erv­es – Chris­topher Rose, Uni­ver­sity of Min­neso­ta
OPAC – Brian Thomp­son, Uni­ver­sity of Iowa
Sys­tems/Admin­is­tration – Linda Cul­berson, Missis­sippi Dept. of Archives &
His­tory

Final List – September 23, 2005

Revised September 7, 2005 with Devel­op­ment Weights

To be voted on by the NAAUG Mem­ber­ship
October 1-­November 15, 2005
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**Table 1: List for Voting:** This table summarizes the final list of enhancements for review/voting by the NAAUG membership [details of each request are found in the next section of this document]:

<table>
<thead>
<tr>
<th>Final NAAUG Tracking Number</th>
<th>Original NAAUG Tracking Number (as submitted June 2005)</th>
<th>Description</th>
<th>Development Weights</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Acquisitions/Serials</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ACQ/SER-Version 19-01</td>
<td>ACQ-19-01</td>
<td>Check for duplicate invoice numbers that are the same except for case as duplicates</td>
<td>5 points</td>
</tr>
<tr>
<td>ACQ/SER-Version 19-02</td>
<td>SER-19-02</td>
<td>Changes made to Serial order record vendor information should carry over to the Subscription Record and this information should be labeled consistently</td>
<td>15 points</td>
</tr>
<tr>
<td>ACQ/SER-Version 19-03</td>
<td>SER-19-05</td>
<td>Subscription Record field for “related title” information</td>
<td>5 points</td>
</tr>
<tr>
<td><strong>Cataloging/Authorities Non-Roman</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CAT-Version 19-01</td>
<td>CAT-Version 19-03</td>
<td>Making better use of split screen mode in the Record Editing node of the Cataloging Module</td>
<td>3 points</td>
</tr>
<tr>
<td>CAT-Version 19-02</td>
<td>CAT-Version 19-04</td>
<td>Items-In Client, Need Functionality that Filters/Sorts by Sublibrary, Sublibrary and Collection, Volume Numberation, Chronology, Copy</td>
<td>10 points</td>
</tr>
<tr>
<td>Final NAAUG Tracking Number</td>
<td>Original NAAUG Tracking Number (as submitted June 2005)</td>
<td>Description</td>
<td>Development Weights</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>--------------------------------------------------------</td>
<td>-------------</td>
<td>---------------------</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Number or Barcode</td>
<td></td>
</tr>
<tr>
<td>CAT-Version 19-03</td>
<td>CAT-Version 19-12</td>
<td>Allow batch deletion of items records, related holdings, and related bibliographic records if appropriate</td>
<td>15 points</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Circulation</td>
</tr>
<tr>
<td>CIR-Version 19-01</td>
<td>CIR-Version 19-02</td>
<td>Fines on lost items to be charged either when lost item is returned or when item is declared lost</td>
<td>5 points</td>
</tr>
<tr>
<td>CIR-Version 19-02</td>
<td>CIR-Version 19-03</td>
<td>Improve functionality of Tab 34</td>
<td>15 points</td>
</tr>
<tr>
<td>CIR-Version 19-03</td>
<td>CIR-Version 19-04</td>
<td>Dynamically change the due date on items that are recalled</td>
<td>10 points</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>OPAC</td>
</tr>
<tr>
<td>OPA-Version 19-01</td>
<td>OPA-Version 19-01</td>
<td>Display standard bibliographic information on item detail screens in Your Account</td>
<td>3 points</td>
</tr>
<tr>
<td>OPA-Version 19-02</td>
<td>OPA-Version 19-03</td>
<td>Selecting Filter Options with an empty search string</td>
<td>5 points</td>
</tr>
<tr>
<td>OPA Version 19-03</td>
<td>OPA-Version 19-04</td>
<td>E-mail records from My Account loans and holds list</td>
<td>10 points</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Systems</td>
</tr>
<tr>
<td>SYS-Version 19-01</td>
<td>SYS-Version 19-01</td>
<td>Provide for the ability to lock the database for writing, but still allow read access.</td>
<td>10 points</td>
</tr>
<tr>
<td>SYS-Version 19-02</td>
<td>SYS-Version</td>
<td>Fix services that</td>
<td>15 points</td>
</tr>
</tbody>
</table>
NAAUG Enhancement Requests 2005-2006

<table>
<thead>
<tr>
<th>Final NAAUG Tracking Number</th>
<th>Original NAAUG Tracking Number (as submitted June 2005)</th>
<th>Description</th>
<th>Development Weights</th>
</tr>
</thead>
<tbody>
<tr>
<td>19-05</td>
<td>update bib records so that they keep existing cat level.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SYS Version 19-03</td>
<td>OPA-Version 19-08</td>
<td>Correct sorting of issues in Shelf List and Shelf Reading reports (p-item-05)</td>
<td>3 points</td>
</tr>
</tbody>
</table>

Table 2: **Requests no longer under consideration.** Each group originally proposed 5 enhancement requests. This table represents the remaining enhancement requests. These requests were either not pointed by Ex Libris or not prioritized by the enhancement groups. See the document “Version 19 Enhancement Requests Ranked 4, 5 or Not Pointed” at the NAAUG Site for details.

<table>
<thead>
<tr>
<th>Final NAAUG Tracking Number</th>
<th>Original NAAUG Tracking Number (as submitted June 2005)</th>
<th>Description</th>
<th>Development Weights/Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACQ/SER-Version 19-04</td>
<td>ACQ-19-03</td>
<td>Add Budget as column heading option for Invoice List</td>
<td>3 points. Reprioritized by the Acquisitions/Serials Enhancement Group</td>
</tr>
<tr>
<td>ACQ/SER-Version 19-05</td>
<td>SER-19-04</td>
<td>Enhancements to the Global Change button found in the Acquisitions/Serials Module</td>
<td>20 points. No longer needed. Due to points being left over from Version 18 enhancement process, this enhancement will be developed in next version of Aleph.</td>
</tr>
</tbody>
</table>

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## NAAUG Enhancement Requests 2005-2006

<table>
<thead>
<tr>
<th>CAT-Version 19-04</th>
<th>CAT- Version 19-01</th>
<th>Automatically supply an item status depending on sublibrary and collection</th>
<th>NOT POINTED. Not possible in Aleph. See comments in section III.</th>
</tr>
</thead>
<tbody>
<tr>
<td>CAT-Version 19-05</td>
<td>CAT- Version 19-02</td>
<td>Holding Record Creation</td>
<td>NOT POINTED. Not possible in Aleph. See comments in section III</td>
</tr>
<tr>
<td>CAT-Version 19-06</td>
<td>CAT- Version 19-05</td>
<td>Define field length limits in Aleph to be the same as definitions in MARC21.</td>
<td>NOT POINTED. Not possible in Aleph. See comments in Section III.</td>
</tr>
</tbody>
</table>

Note: The Cataloging Team sent in three additional enhancement requests for voting at the June 7 enhancement chairs meeting. One of these are on the final list of enhancements. The other two were not submitted for voting because one of them is being developed for Version 18 and the other was rejected as part of the ICAU Client Focus Interface Group discussion. Here are the two that were not submitted for pointing.

<table>
<thead>
<tr>
<th>CAT-Version 19-15</th>
<th>CAT- Version 19-15</th>
<th>Global changes on material type should be allowed</th>
<th>NOT SUBMITTED FOR POINTING. Will be developed in Version 18.</th>
</tr>
</thead>
<tbody>
<tr>
<td>CAT-Version 19-36</td>
<td>CAT-Version 19-36</td>
<td>Should be able to have more than two records display at a time</td>
<td>NOT SUBMITTED FOR POINTING. Considered as part of ICAU Client Interface Focus Group and was deemed not possible due to technical or conceptual limitations.</td>
</tr>
</tbody>
</table>

### Circulation

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>CIR-Version 19-05</td>
<td>CIR- Version 19-05</td>
<td>Track operator and last updater of patron records</td>
<td>15 points.</td>
</tr>
</tbody>
</table>

### OPAC

| OPA-Version 19-04 | OPA- | OPAC-Simplify | 15/20 points, |
## NAAUG Enhancement Requests 2005-2006

<table>
<thead>
<tr>
<th>Issue</th>
<th>Description</th>
<th>Resolution</th>
</tr>
</thead>
<tbody>
<tr>
<td>Issues display</td>
<td>depending on how it will be developed. Reprioritized by the OPAC group.</td>
<td></td>
</tr>
<tr>
<td>OPA-Version 19-05</td>
<td>Provide a mechanism so that one bibliographic library (or base) can use a different default brief view than another bibliographic library (or base)</td>
<td>NOT POINTED. See comments in Section III.</td>
</tr>
<tr>
<td>Systems</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SYS-2005-Version 19-04</td>
<td>Web OPAC (version 15.5.2) Display problem in listing items</td>
<td>NOT POINTED. Addressed in Version 17. See comments in Section III.</td>
</tr>
<tr>
<td>SYS-2005-Version 19-05</td>
<td>Multiple ue_01 queues</td>
<td>NOT POINTED. Addressed in Version 17. See comments in Section III.</td>
</tr>
<tr>
<td>SYS-2005-Version 19-06</td>
<td>Force abort of background process for fatal oracle error.</td>
<td>NOT POINTED. Ex Libris will address outside of enhancement process. See comments in Section III.</td>
</tr>
<tr>
<td>SYS-2005-Version 19-07</td>
<td>Z07 Prioritization -- Configuration of priority based on transaction type/source</td>
<td>5 Points</td>
</tr>
<tr>
<td>SYS-2005-Version 19-08</td>
<td>Allow jobs to be submitted to the batch queue via command line or scripting.</td>
<td>5 Points</td>
</tr>
</tbody>
</table>
Final List for Review/Voting

Acquisitions/Serials

NAAUG Tracking Number: ACQ/SER-Version 19-01

Descriptive Title: Check for duplicate invoice numbers should not be case sensitive. [Weight: 5 points]

Problem Statement: System does not consider invoice numbers that are the same except for case as duplicates.

Concise Description of Functionality Desired: When system checks for duplicate invoice numbers, it should consider numbers that are the same except for case as duplicates. For example, 21NM/ka20030707 and 21NM/KA20030707 should be recognized as duplicates.

Concise Rationalization of Request: We discover many duplicate invoice records because staff members entered alphanumeric invoice number once with lowercase letters then again with uppercase letters, and do not realize that the invoice record already exists. Catching these errors and cleaning them up is time-consuming.

Site Submitting the Request: Harvard (16.02)

Examples, Screen Shots: NA

Additional Information: This was #2 of top 5 ACQ enhancements last year. Ex Libris assigned it 5 development points. It received 110 votes. It was #20 in final 2003-2004 NAAUG voting.

Ex Libris Comments, June 7, 2005: 5 points.

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NAAUG Tracking Number: ACQ/SER-Version 19-02

Descriptive Title: Changes made to Serial order record vendor information tab should carry over to the Subscription Record
and this information should be labeled consistently. [Weight: 15 points]

Problem Statement: When a vendor change is required for a serial order, changes made to the serial order record do not automatically carry over to the serial subscription record, even if the subscription record is linked to the serial order record. An additional problem exists in that the labeling of certain fields in the Serials Order Record is labeled as something else in the Subscription Record, and this can cause confusion with some staff members.

Concise Description of Functionality Desired: In Acquisitions/Serials, when the user makes a change to a field in the Vendor Information tab of the Serial Order Record (S Type Order), the system should automatically make the change to the appropriate field in the Subscription Record. In addition, the labels for the information from the Serials Order Record should be consistent in the Subscription Record.

Concise Rationalization of Request: In versions 15.2 and 16, vendor information will carry over from the serials order record when you create a subscription record in the Acquisitions/Serials module. The vendor information will not change if you change the subscription period subsequently. For consistency’s sake, subsequent changes should also be carried over to the Subscription Record.

Some of the fields are labeled differently in the two modules. Specifically, changes in the following fields should carry over from the z tables:

<table>
<thead>
<tr>
<th>z68 column</th>
<th>z16 column</th>
<th>Label in GUI</th>
</tr>
</thead>
<tbody>
<tr>
<td>z68_vendor</td>
<td>z16_vendor_code</td>
<td>Vendor Code</td>
</tr>
<tr>
<td>z68_vendor_reference_number</td>
<td>z16_vendor_order_number</td>
<td>Vendor Reference</td>
</tr>
<tr>
<td>z68_delivery_type</td>
<td>z68_delivery_type</td>
<td>Delivery Type</td>
</tr>
<tr>
<td>z68_subscription_date_from</td>
<td>z16_copy_from_date</td>
<td>Subscription Start</td>
</tr>
<tr>
<td>z68_subscription_date_to</td>
<td>z16_copy_to_date</td>
<td>Subscription End</td>
</tr>
</tbody>
</table>

This enhancement will allow libraries to be more productive by eliminating the currently manual, two-record update process into a single process requiring the editing of one record only. This will increase both efficiency and accuracy, thus avoiding mistakes in serials claiming.

Site Submitting Request: Harvard (16.02)

Examples, Screen Shots (if appropriate): N/A
NAAUG Enhancement Requests 2005-2006

**Additional Information**: This enhancement request appeared on the NAAUG Serials Enhancement List last year as item SER-Request18-01 and previous years as well. Last year ExLibris assigned 15 points. It received 202 votes.

**Ex Libris Comments, June 7, 2005**: 15 points.

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**NAAUG Tracking Number**: ACQ/SER-Version 19-03

**Descriptive Title**: Subscription record field for “related title” information **[Weight: 5 points. Was originally SER-19-05]**

**Problem Statement**: The system currently has no mechanism to retrieve multiple subscriptions that are related to one order when there is no order record attached to the subscription records. For example, if we have an order for a membership, we currently create subscription records for the journals received as benefit of that membership, but do not create orders for these titles. There is no mechanism to retrieve a list of subscription records related to the membership order. Putting the order number of the membership in the Order No.: field of the journal subscription records allows us to find the main order, but does not function in any way to get is from the main membership order to the list of subscriptions.

**Concise Description of Functionality Desired**: We would like a new field created in the subscription record that would allow retrieval of titles that are related to one another by the order on which they are paid – memberships, combined subscriptions, etc. We would like this field to function in such a way that if 10 titles are related to one paid order, we can retrieve a list of them even if the 10 titles have no orders attached to them.

**Concise Rationalization of Request**: There is often a need to work on lists of titles that are related to one another via a common order. For example, if we cancel a membership order, we need a way to retrieve the subscription records of all the titles that are benefit of that membership so that we can close them. Searching the order number of the membership order does not allow this functionality. Putting notes of membership benefit titles in the order log requires maintenance as titles change, are added or removed from the package.

**Site Submitting the Request**: UC Davis (v.16.02)

**Ex Libris Comments, June 7, 2005**: 5 points. Proposed solution: A new option for searching by the subscription record’s Order Number will be added to the dropdown list of search options on the Serials Bar in the Acquisitions Module. It is expected that the library will enter the ACQ order number of the "common
order" in each of the subscriptions. Searching by the order number will retrieve all the records. Current standard functionality is that when search in the Serials Bar retrieves multiple records, the staff user is informed "Multiple matching records found. View in brief list?". When the staff use chooses "yes", the titles display in the Show node in the Search tab.

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Cataloging/Authorities/NonRoman

NAAUG Tracking Number: CAT-Version 19-01

Descriptive Title: Making better use of split screen mode in the Record Editing node of the Cataloguing Module. [Weight: 3 points. Was originally CAT-Version 19-03]

Problem Statement: When opening a second record related to the record currently displayed in part of the editing window, the system does not make use of the other editing window available in split screen mode, even when that other window is empty. To see both records at once requires additional steps (bring empty window in focus, then move to the top left pane to select the record which was previously open but now is not).

Concise Description of Functionality Desired: When opening a second record, by default the system should place that record in any empty editing window which is available if the user is in split screen mode.

Concise Rationalization of Request: There are at least 2 situations where the user is opening a record from another record and clearly will need to see two records together to proceed. It will save the user steps if the system would automatically show the newly opened record beside the record from which is was called up.

Case 1) When using "View Related" the related record should turn up in the empty record editing window, not in the window formerly occupied by the record it is related to. The whole reason to call up the related record is to compare the 2 records side-by-side.

Case 2) When working with a bibliographic record in split screen, and choosing to edit any attached HOL record, that HOL record should end up in the other record editing window, not replacing the bibliographic record in the current window. Generally when editing the HOL record the cataloguer needs to see the class number field and/or the volume information in the bibliographic record.
Site Submitting the Request:
Pat Riva
Romance Languages Cataloguer/Bibliographic Database Specialist
Library Technical Services
McGill University 514-398-4790
3459 McTavish Street fax: 514-398-8919
Montreal, Quebec, Canada H3A 1Y1
pat.riva@mcgill.ca

Examples, Screen Shots (if appropriate):
for Case 1 (View Related). Having accidentally duplicated an authority record, get the message that it is a duplicate of another record.

Clicking on "View Related" end up with a view only of the new record, not the one the user was working with:
Should have ended up like this, 2 records beside each other, focus on the newly opened record (the related record):
Case 2 (Opening HOL for editing):
Selecting the highlighted HOL makes the bibliographic record disappear:
Ex Libris Comments, June 7, 2005: Ex Libris proposal. Automatically populate the 2nd pane if present and empty.

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NAAUG Tracking Number: CAT-Version 19-02

Descriptive Title: Items - In Client, Need Functionality that Filters/Sorts by Sublibrary, Sublibrary and Collection, Volume Numeration, Chronology, Copy Number, or Barcode [Weight: 10 points. Was originally CAT-Version 19-04]

Concise Description of Functionality Desired: In Items client (or wherever item screens are presented, which would include serials module), provide functionality that permits sorting/filtering by Sublibrary, Sublibrary and Collection, Volume Numeration, Chronology, Copy Number, or Barcode.
Concise Rationalization of Request: Libraries with large collections and a history of creating item records have considerable item data, which in Aleph grows quickly with items created at time of order and for serial receipts. Functionality that permits efficient sorting and staff filtering is a must if technical services work is to proceed smoothly (e.g., collecting issues for binding, collecting issues from several libraries for binding, determining what volumes a library holds).

Careful reading of the documentation available shows that any of the sorts that are provided are not under the customer's control, but that they are developed by the vendor. These are set up in the tab_z30_sort table for ITEM-0, ITEM-1, ITEM-2, ITEM-3, ITEM-4, ITEM-5; which should encompass the sort option choices in pc_tab_exp_field.eng.

There is no sort currently that would do the following with each succeeding element being a possible subsort:

- SUBLIBRARY COLLECTION ENUM CHRONOLOGY COPY (if no ENUM and/or CHRON then use DESCRIPTION before COPY)

- SUBLIBRARY COLLECTION COPY (if there is no ENUM CHRON or DESCRIPTION)

Note as well, that the request is to put enumeration before chronology.

In addition, a Barcode sort option would allow a quick tracking of a range of barcodes when there are many items records on a single bibliographic record.

This request should be considered an addition to any sorting/filtering requirements needed for circulation.

Site Submitting Request: (expanded by the new request for a barcode sort from Minnesota State University/Mankato); previously CAT-2002-04-F: Item Sorting in staff modules

Ex Libris Comments, June 7, 2005: 10 points. Only sorts; no filters.

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NAAUG Tracking Number: CAT-Version 19-03

Descriptive Title: Allow batch deletion of item records, related holdings, and related bibliographic records if appropriate. [Weight: 15 points. Was CAT-Version 19-12]

Problem Statement: The Delete Bibliographic Records Including Related ADM/HOL Records process (p-manage-33) currently runs against usm01 only. It
deletes any ADM/HOL records associated with the Bibliographic records that are being deleted.

**Concise Description of Functionality Desired:** We desire that p-manage-33 be run against usm50 in order to delete a range of item records. In addition to the deletion of the item records, the program should have the ability to utilize the following algorithm: If the item being deleted is the only item attached to the Holding record, delete the Holding record. If the Holding record being deleted is the only Holding record attached to the Bibliographic record, delete the Bibliographic record and all related ADM records.

**Concise Rationalization of Request:** Some of our libraries do not automatically delete discarded items. Instead, they mark these items as “Withdrawn”. They are then required by their governing bodies to present the list of “Withdrawn” items to be approved for deletion. Upon approval, we would run this list of “Withdrawn” items against the usm50 using p-manage-33. In this manner, any library which wanted to change their technical services workflow could run p-manage-33 to cleanly delete their items in batch.

**Site Submitting the Request:**
Mike Ryan, Coordinator of Library Management Systems Products
College Center for Library Automation
1753 W. Paul Dirac Drive
Tallahassee, FL 32310
850-922-6044, mryan@cclaflorida.org
Version 15.5.1

**Examples, Screen Shots (if appropriate)**

**Ex Libris Comments, August 21, 2005:** We will probably enhance p_item_11 or create a new service with a file containing the key for the item to be deleted as an input.

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**Circulation**

**NAAUG Tracking Number: CIR-Version 19-01**

*Descriptor Title: Fines on lost items to be charged either when lost item is returned or when item is declared lost. [Weight: 5 points. Was originally CIR-Version19-02].*
**Problem Statement:** Under current functionality, when an item in circulation is declared lost, a fine continues to accrue and is never charged to the patron unless the lost item is subsequently returned. The problem with this is that some patrons declare a book lost, in part, to stop overdue fines from accruing when they realize or believe they really have lost the book. If at a later time they find and return the book, they discover that they have continued to accrue fines. Furthermore, the current functionality can be confusing for patrons who get a bill for a lost book, later return the book, and then even later find out they owe an overdue fine.

**Concise Description of Functionality Desired:** This enhancement would introduce the option to either charge the accrued overdue fine(s) at the time a lost item is returned (existing functionality) or to charge the accrued overdue fine(s) at the time the item is declared lost. Note that the enhancement request requires that the change in system behavior is optional so that sites not wanting the change would not be affected.

**Concise Rationalization of Request:** The current system behavior has proven confusing to some patrons.

**Site Submitting the Request:** Harvard (16.02) (based on PRBs 12122 and 3976)

**Ex Libris Comments, June 7, 2005:** 5 points.

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**NAAUG Tracking Number: CIR-Version 19-02**

**Descriptive Title: Improve functionality of Tab34** [**Weight: 15 points. Was originally CIR-Version 19-03**]

**Problem statement:** Tab34 does not allow the definition of call number ranges or Material Types for defining default lost item replacement costs.

**Concise Description of Functionality Desired:** Tab34 column 4 allows for defining default replacement cost by a specific call number, or using a # for all call numbers. In addition, this column should allow for a range of call numbers to be defined, for example: PN1080# to represent all items falling in the call number range beginning with PN1080, or E# to represent everything falling within the LC call number range for History: America. This functionality should allow for call number ranges of any type: LC, Dewey, NLM, and other classifications.

Another column should be added to enable a Material Type definition (from tab25, Book, Issue, DVD, etc.) Include both the Item Status Column and a
Material Type column. Libraries wishing to charge only by item status can use ## in the material type column, libraries wishing to charge by material type can use ## in the item status column. Retain the functionality of placing the I/ in front of the price in both columns to indicate that the price should be pulled from the item record first and then look in tab 34 if the item record price field is blank.

**Concise Rationalization of Request:** The ability to specify call number ranges would allow default replacement costs to be set according to Bowker Annual price ranges. This would allow more reasonable default replacement costs based on subject areas, which may have drastically different price ranges.

Libraries should have the choice of tying the default item replacement cost to the Material Type and/or to the Item Status. One item status can be used with many different material types. For example, libraries may include DVDs, Photocopies, and Books in the Reserves collection with an item status of 1-Day Loan. The default lost item replacement cost will not be the same for a photocopy as for a DVD. Currently, libraries are forced to have more item statuses than are necessary because of this one difference in circulation parameters. Manually reviewing and adjusting every Lost item replacement cost is not an option.

**Site Submitting the Request:**
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1753 W. Paul Dirac Drive
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**Ex Libris Comments, June 7, 2005:** Change functionality of tab34 col.4 (60 pos.) to "from - to" call number; also allow call number truncation in col.4.

**Further Clarification Request from NAAUG:** Last year, this request was pointed at 10 points. Why is the request being pointed at 15 points this year?

**Ex Libris Clarification, July 25, 2005:** The suggested solution includes set default replacement costs by material type. For V19 it is pointed by 15 points (you have to remember that ALEPH is changing from a version to version).

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**NAAUG Tracking Number: CIR-Version 19-03**

**Descriptive Title:** Dynamically change the due date on items that are recalled. [Weight: 10 points. Was originally CIR-Version19-04]
Problem Statement: Aleph currently provides two ways of performing a recall: the regular recall, which changes the due date on an item by running a batch process (better run after hours so that there will not be an impact on system performance), and the online recall, which allows books to be recalled one at a time, but dynamically changes the date the book is due at the time the recall is placed. Aleph sites should be able to configure both date options for both types of recalls in the system.

Concise Description of Functionality Desired: The request is to calculate the revised due date at the point when the recall is placed in the OPAC. We would like the revised date to be shown to the requester before the "COMMIT", so he has the option to cancel the request if the item will not be returned soon enough for him.

If the OPAC cannot initiate the sending of the recall notice, we would consider it acceptable to have a batch "send the recall notices" job.

Concise Rationalization of Request: It was originally believed that the ability to dynamically change a due date for a recalled item, regardless of how it is recalled, was part of the Dynamic Recall enhancement approved by NAAUG in the year 2000. The dynamic recall function was partially added in Version 16, and subsequent changes to improve that recall is now expected in Version 18. What Ex Libris will not do is add the ability to dynamically change the due date in the OPAC for regular recalls as it currently does for the online recall. Allowing a site to configure this option provides more flexibility to both patrons and staff and applies a more consistent way of dealing with recall requests.

Site Submitting the Request:

Patricia Hatch, Enhancement Coordinator, on behalf of NAAUG

Examples, Screen Shots (if appropriate):

Please see the screen shots below that show the differences between how the date changes uses the Regular Recall function vs. the Online Recall function:

Regular Recall

1. Patron B searches for book in OPAC, finds that it has been checked out to unknown Patron A:
2. Patron B clicks on Request link and makes request for item; public catalog now indicates that there is 1 in the Wait list column. Before they place the request, however, they are not told the new due date of the book.

The Due Date does not change until the batch process is run later. We have seen, however, that it is possible to see the Due Date change in the OPAC through the Online Recall function. It seems that if the Due Date can be changed through one recall mechanism, it should be available through all recall mechanisms. Patron A will be notified via letter or email that the book has been recalled.

In the client, this is what is displaying on the Item List in Circulation before the batch process is run:
Item indicates that it has been requested, and Hold Requests indicates 1

This allows staff to see that the book has been requested, but again, there is no way to see the revised due date until the batch process is run. Staff will be expected to know their specific library’s policy for a due date on a recalled item; there is nothing in the client to tell them this until the batch process is run.

### Online Recall

1. Staff is looking for a book to place on reserve. They find that the book is currently out on loan.

2. To recall this book, staff decides to use the Online Recall feature available in the client. At this time, when staff requests the book, they can only
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change the due date, not indicate who is requesting the book (we understand that this will change in Version 18, so this aspect is not part of this request.)

Staff does however, have the option to see the new due date as part of the recall, and can even change that date if they would like.

When staff hits the Continue button, this does generate a recall notice to Patron A who has the book:
The Due Date **automatically changes in the client and in the OPAC.**
Ex Libris Comments, June 7, 2005: Message will display to Patron stating when recall return is expected; this is based on the item and the time at which "request" is placed. This should be considered an approximation, because the actual time will depend on (1) time when batch recall is performed (theoretically there could be a gap of a day or more from time to request to batch process which creates recall); (2) the specific item recalled when batch is run. When patron places request the item is not recalled, recall is created by batch service.

OPAC

NAAUG Tracking Number: OPA-Version 19-01

Descriptive Title: Display standard bibliographic information on item detail screens in Your Account [Weight: 3 points]

Problem Statement: If a user clicks on the number next to any item within Your Account (items on loan, hold requests, etc.) they cannot see standard information about that item, like title, author, call number, due hour for reserves items, etc.). Users lose track of that information and get frustrated that they have to look at two different screens to get the whole picture.

Concise Description of Functionality Desired: Allow sites to customize that screen to allow for a customized set of bibliographic data to display. At the very least, as a default, all of the information that is contained in the list on the previous page (e.g. bor-loan, bor-hold) should appear on the item detail pages (e.g. bor-hold-exp). Thus we could take out items that we do not wish to display.

Concise Rationalization of Request: Users do not want to have to look at multiple pages to get a complete picture of an item. This would allow them to be more efficient when looking for more information about their loans, holds, etc.
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Site Submitting the Request: MIT


Ex Libris Comments, June 7, 2005: 3 points.

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NAAUG Tracking Number: OPA-Version 19-02

Descriptive Title: Selecting Filter Options with an empty search string [Weight: 5 points. Was originally OPA-Version 19-03].

Problem Statement: If the user selects one or more filter options while leaving the search box(es) empty, the system returns an error message (the message varies depending which search screen the user is using). This makes it difficult to retrieve comprehensive lists of items the library owns that match certain filters, e.g., all French films.

This also applies to the refine screen, where a user may wish to select a filter option without filing in an additional term for the search.

Concise Description of Functionality Desired: When a user submits a search or refine request with at least one filter option selected and an empty search box, the system should treat the filter option(s) as the search terms and return appropriate results. This should apply to all screens where the user can select filter options.

Concise Rationalization of Request: Selecting multiple filter options with a blank search box is an easy way for a user to get a comprehensive list of items matching their criteria. This was commonly used when we had v.14.2.

Additionally, on the refine screen it is quite likely that users will want to select a filter option without a search term. E.g., to simply limit there results to a particular format, collection or language. This should be possible without having to implement separate OPAC screens for “refine” vs. “limit”.

Currently a number of Aleph sites are using JavaScript to allow users to submit searches or refine requests with an empty search box. These are cumbersome and may be unreliable with some browsers. If the user has turned JavaScript off, they may prevent the search from working at all.

Site Submitting the Request:
University of Notre Dame (Michiana Area Library Consortium)
Chair comment: McGill mentioned that this is possible with find-a search screen, but not with find-b, find-c, find-d or short-refine

**Ex Libris Comments, June 7, 2005:** Ex Libris proposal: When the search box is left empty, and a filter has been chosen the search box will default to "find alldocuments" ("alldocuments" used in tab_base for defining a base such as "alldocuments not suppressed"). If both the search box and the filter are blank, the system will respond with an error message (as it does currently).

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**NAAUG Tracking Number:** OPA-Version 19-03

**Descriptive Title:** E-mail records from My Account loans and holds list [**Weight: 10 points. Was originally OPA-Version 19-04**]

**Problem Statement:** Users can print loan lists from My Account, but cannot e-mail them.

**Concise Description of Functionality Desired:** From their My Account items lists, users should have the ability to save/mail as they do from the basket.

**Concise Rationalization of Request:** Users are accustomed to save/mail from their basket; similar functionality is expected and should be available from My Account. Under the current situation, the list loses a great deal of utility if a printer is unavailable, and often results in users asking help desk staff for a printout.

**Site Submitting the Request:** U Iowa

**Additional Information:** Past Years’ Reference Numbers: OPA-Requests18-17 (2004); OPA-Requests19-9 (2003); Related Numbers: IA-2003-06

**Ex Libris Comments, June 7, 2005:** 10 points.

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Systems

NAAUG Tracking Number: SYS-Version19-01

Descriptive Title: Provide for the ability to lock the database for writing, but still allow read access. [Weight: 10 points.]

Problem Statement: Many Aleph batch jobs "lock the library". A locked library prevents both editing and displaying of any data in that library.

Concise Description of Functionality Desired: Make it possible to prevent staff from updating data in a library, or even better, specific tables, while still allowing full use of display functionality in the system, or editing of unrelated data.

Concise Rationalization of Request: The greatest problem is blocking use of the OPAC while system maintenance jobs need to run. Users expect the OPAC to be available 24x7, even if the library is closed. Another problem is the great variety of functionality in the ADM libraries. Blocking edits in one area of the system should not prevent the rest of the staff from doing their work.

Site Submitting the Request: MIT Libraries

Examples, Screen Shots (if appropriate):
1. Running p_acq_04 (rebuild order index) locks the ADM library. This process prevents item data from displaying in the OPAC. It also prevents staff from performing circulation activities. But these have nothing to do with Acquisitions.

2. Running any of the main bibliographic indexing jobs (p_manage_01, p_manage_02, p_manage_07) locks the BIB library. This prevents use of the OPAC altogether. Word searching could certainly be available while headings indexes are running. [Parallel indexing may be a big help here, so is this a bad example? What about sites who don't have the space to run parallel indexing?]

3. Running p_manage_18 (batch loading doc records) locks the library being loaded to. Catalogers may need to be prevented from adding new records, but OPAC searching should still be available. [Has this changed with later versions?]

[Comment from Daniel Cromwell of Florida Center For Library Automation in 2004: In 15.5 there is a choice for running p_manage_18 "Multi user" or "Single user" which determines whether the library will be left up or locked]
Ex Libris Comments, June 7, 2005: Ex Libris proposal: OPAC can continue for SEARCH only; it will not be possible to place requests, renew loaned items, update borrower details, self-register, save records in e-shelf, create or run SDI profiles/queries. When re-indexing of words is running, it will not be possible to perform searches which use words, but it will be possible to use headings, and vice-versa.

NAAUG Tracking Number: SYS-Version19-02

Descriptive Title: Fix services that update bib records so that they keep existing cat level. [Weight: 15 points. Was Originally SYS-Version19-05 ]

Problem Statement:
Most services which update bib records add a CAT field to the records that they update. Some of them allow you to set the level of all the updated records to a single value. But many (most) of them don't allow you to leave the CAT level as it was before the update, making it impossible to use such services to update online records with differing levels. (One exception to this is p_manage_21, which “does the right thing”).

Concise Description of Functionality Desired: Services which update bib records need to be modified so that they don’t change the existing cat level of records that they update.

Concise Rationalization of Request: Because of this deficiency, sites which use CAT level to control record access can’t use many of the services for updating records.

Site Submitting the Request: University of Michigan

Examples, Screen Shots (if appropriate): N/A

On May 24, 2005, Ex Libris asked for the following clarification concerning this request:

SYS-2005-Version19-05 - Fix services that update bib records so that they keep existing cat level

Could you please provide a list of services you wish us to amend?

On June 1, 2005, the Systems Group Responded:

We believe that the following services require the same flexibility as what is offered with p_manage_21:
Fix Catalog Records (manage-37)
Merge Records (manage-38)
Delete "CAT" Field (manage-13)
Load PALAS Shelfmark (manage-45) [New job; we are not sure if it affects CAT level]

We want to be clear that this request is intended to affect any service that may change the existing CAT level.

Ex Libris Comments, June 7, 2005: Ex Libris proposal: Cataloger Name: If the username of the cataloger is entered in this field, a "CAT" field containing the cataloger name is added to all records updated by the batch (either old or newly created). If the cataloger name is left blank, the "CAT" field will be created anyway, but it will contain only subfields $c (date), $l (active library), and $h (hour). If the cataloger name is set to "NO-CAT", "CAT" fields will NOT be added to the records updated or added. Cataloger Level: This field can be used to determine the cataloger level that is recorded in the "CAT" field added to a record which has been updated or added. Note that if the Cataloger Name field is set to "NO-CAT", then no "CAT" field is added and the Cataloger Level becomes irrelevant. Services which should include the manage-18/manage-95 functionality: -Modify Cataloging Records File (file-08); -Fix and Check Catalog Records (manage-25); -Fix Catalog Records (manage-37); -Merge records (amanager-38); -Copy Tags to Linked Records (manage-55)

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NAAUG Tracking Number: SYS-Version 19-03

Descriptive Title: Correct sorting of issues in Shelf List and Shelf Reading reports (p-item-05) [Weight: 3 points. Was originally SYS-Version19-08]

Problem Statement: Currently items are being sorted solely by the z30_call_no_key and then by the z30_sequence if the z30_call_no_keys are the same. This does not produce a list sorted by ascending volume order to match the bound volumes on the shelf. Concise Description of Functionality Desired: It is desired that the list be ordered by the z30_call_no_key and then by Z30_ENUMERATION_A Z30_ENUMERATION_B Z30_CHRONOLOGICAL_I Z30_CHRONOLOGICAL_J

Concise Rationalization of Request: The reports are not currently ordered as material sitting on the shelf for bound volumes.

"The sorting of the items which appear on the p_item_05 (and p_item_04) reports is based strictly on the z30_call_no_key field (the sort-key created by p_item_06 and re-created each time the item is updated). Items which have the same z30_call_no_key are further ordered by the sequence in which they are retrieved, which is the z30_sequence. Any change to this would need to be an enhancement request."

Site Submitting the Request: McGill