

Enhancement Requests for MAAC

ID	old number	name	supported by
1		Display 945 tag and subfields	OhioLINK

Display the 945 fields from the bibliographic record in the Inn-Reach WebPAC. This would allow library staff to check details of record ownership and suppression values without switching to the character-based version of the catalog.(Again, we believe this was previously proposed but is no longer on the list of current enhancements).

ID	old number	name	supported by
2	2002-7,15	Checkin (at Owning Site): In transit- status code	OhioLINK, Orbis, PLUS

Item returned to Owning site: Leave status Returned or use new Status to indicate item received but on its way to appropriate circ desk. Coordinate with local INNOPAC circ checkin functions. Distinguish between "in transit" BETWEEN INN-Reach institutions (owning and borrowing instn) and between circ locations WITHIN an Institution (7). When checking in for patron hold and the item is at the wrong circ location, leave the status as in transit and indicate on the screen where to send the book.(15)

ID	old number	name	supported by
3	2002-1	Pickup notices: remove items already checked out	OhioLINK, Orbis, PLUS

Remove item from pickup notice queue if already checked out – i.e. check status prior to "printing" (paper, email). To avoid confusing patrons by notifying them to pickup items they have already picked up, please make InnReach pickup notices work the same way Innopac does: In the notice production process, before printing/e-mailing pickup notices, check the status of the item. If the item is no longer on the hold shelf and has already been checked out to the patron, delete the notice from the print queue.

ID	old number	name	supported by
4	2002-31	Canceled request-Transfer to another system	OhioLINK, Prospector, O
<p>Provide ability to move unfilled requests [those that would otherwise be CANCELED"] to OCLC ILL or other document delivery systems. Features: configurable at local institution level to determine which document supplier(s); format requests using national ILL application standards (e.g. ISO 10160/10161); support features such as specifying last date needed. [and notify patron regarding transfer of request] Must be OPTIONAL for use on an INN-Reach system.</p>			

ID	old number	name	supported by
5	2002-3	Checkin: system mesg for item w/ INNReach hold	OhioLINK, Orbis, PLUS
<p>When checking in an item that has an off-campus, or INN-Reach, hold the system replies: "02-19-99: requested by .p1005601@9lew0 Checkin item? (y/n)". Upon answering yes and doing checkin, the system then displays: "OFF-CAMPUS HOLD. Send to [Patron Name] at [Other INN-Reach library]" This misleads staff to simply mark and package the item instead of first doing the INN-Reach institution checkout. Suggest changing system message from <OFF-CAMPUS HOLD. Send to ... > to <OFF-CAMPUS HOLD. Process INN-Reach institution checkout>.</p>			

ID	old number	name	supported by
6	2002-13	Checkout (at Owning Site): accompanying items	OhioLINK, Orbis, PLUS
<p>Add holds for related, or accompanying items. Enable the Owning Site to add additional holds to the requester's record to include separately bar-coded items (item records) that are attached to same bibliographic record that may be needed to make the requested item fully usable. For example: Score and four individually bar-coded parts (Total of five item records attached to one bibliographic record). If a patron just orders the score, there is no easy way to send the four parts and have the patron accountable for them. [Result: the four parts are added to the requester's patron record at the home institution, or Borrowing Site.]</p>			

ID	old number	name	supported by
7	2002-39	Management Info - Turnaround time statistics	Prospector, OhioLINK, O
Track turnaround times for statistical purposes from the initial request to date[time] in-transit to date received [checkin date/time at Borrowing Site?]			

ID	old number	name	supported by
8	2002-8	Renewal: retain orig checkout date	OhioLINK, Orbis
Retain original checkout date when item renewed; do not replace it with renewal date, to facilitate explaining loan periods, fines, etc. to patrons. Currently, the overdue note shows the same date for Checked Out and Date Renewed. *see illus.			

ID	old number	name	supported by
9	2002-16	Reports ("Too Long"): add sort by patron name	OhioLINK, Orbis, PLUS
For all status reports (Returned Too Long, Paged Too Long, etc.) provide a sorting option by patron name and include the patron name and number on the printouts.			

ID	old number	name	supported by
10	2002-21	Reports (Status) In Transit Too Long	OhioLINK, Orbis, PLUS
IN TRANSIT TOO LONG: Indicate the pick-up location for the item			

ID	old number	name	supported by
11	2002-22	Reports (Status) Returned Too Long	OhioLINK, Orbis, PLUS
RETURNED TOO LONG: Indicate what library returned the materials			

ID	old number	name	supported by
12	2002-23	Reports (Status) Received Too Long	OhioLINK, Orbis, PLUS
RECEIVED TOO LONG: Indicate specific pickup location			

ID	old number	name	supported by
13	2002-33	Reports: Holds management report	OhioLink, Orbis, PLUS
<p>Offer a holds management report similar to the standard circulation report. The [local INNOPAC] circulation holds management cluster lists all patrons with outstanding holds and the status of each item (in transit, on holdshelf, available, etc.) Patrons that have INN-Reach holds do not appear on the list. There is no comparable list or easy way to track those holds.</p>			

ID	old number	name	supported by
14	2002-6	Requesting: announcement message	OhioLINK, Orbis, PLUS
<p>Provide space (1-2 lines) for an announcement or instruction provided centrally to accommodate temporary special circumstances and alerts.</p>			

ID	old number	name	supported by
15	2002-2	File locking: editing Web OPAC screens	OhioLINK
<p>Apply file locking when editing WebOPAC screen files ... AND anywhere else where more than one authorized user is currently able to have simultaneous access for editing a system table or file.</p>			

ID	old number	name	supported by
16	2002-55	Cancel request-increase text field	OhioLINK, Orbis, PLUS
Cancel request: Increase length of Cancellation Reason free text field and allow use of more punctuation marks; currently only periods can be used.			

ID	old number	name	supported by
17	2002-9	Checkout (to patron): change system mesg "cleared"	OhioLINK, Orbis, PLUS
Change system response at Patron Checkout to clarify that item is checked out to patron. When Borrowing Site receives item from Owning Site, BS does an institution checkin, and system assigns status code for "<System> REC'D" [meaning received from OS] When patron comes in to pick it up, staff does a patron checkout. System response is "Item has status <System> Rec'd and has been cleared. That phrase could cause someone to think that the transaction is entirely cleared from the system; please change to indicate item is checked out to patron, for example: "Status <System> Rec'd has been cleared; item checked out to patron.			

ID	old number	name	supported by
18	2002-17	Mgmt Info: Statistics - Item # of checkouts	OhioLINK, Orbis
Create separate checkout counters for Online Borrowing items in patron and item records. [Purpose: collect item information for collection development- what's being borrowed; collect patron information to review who's using INN-Reach]			

ID	old number	name	supported by
19	2002-34	Reports (Status) Returned Too Long	OhioLINK, Orbis, PLUS
Add to Returned Too Long report: a. Patron info: add home library b. Owning Site: in addition to Instn Code, add local LOC CODE c. Title: increase length from 25 to 30 or 35 characters			

ID	old number	name	supported by
20	2002-53	Cancel & transfer request to diff. Branch	Prospector
When one branch can't supply a copy, transfer request to another copy at different branch, and allow library to put request back into paging queue so the other branch will get the request when they print paging slips.			

ID	old number	name	supported by
21	2002-43	Requesting: Multi-Volume	Prospector
Enhance multi-vol requesting: 1) ask the user to select volumes for delivery before authentication (some users may be dissuaded from requesting a volume from a multi-volume set because they think the entire set will be delivered); 2) allow users to pick multiple volumes at the same time during the same request.			

ID	old number	name	supported by
22	2002-49	Paging slip: print Loan period	Prospector, Orbis, PLUS
On paging slip, print the Loan Period (or at least the Item Type) so that it is easier to notify patron of different loan periods for various kinds of materials.			

ID	old number	name	supported by
23		Count per-item use on INN-Reach	Prospector
Count per-item use as an item is checked out on INN-Reach for collection development purposes. (i.e. similar to in-house count but for INN-Reach circulations)			

ID	old number	name	supported by
24		Placing multiple requests on same copy	LINK+
Prevent patron from requesting more than one copy of a book: Before a request is processed and a hold is placed by the Inn-reach software, the system will check for another (previous) hold or request on the same bibliographic record at the Central site. Reason: Some patrons are monopolizing all of the copies of a book in the system.			

ID	old number	name	supported by
25		Clear Holdshelf, sort by patron name	OhioLINK
Allow the Clear the Hold Shelf report to be sorted by patron name.			

ID	old number	name	supported by
26		Turn off date due slips	OhioLINK
Allow date due slips to be turned off if checking out an INN-Reach item to the patron.			

ID	old number	name	supported by
27		Modify Millennium Offline Circulation	OhioLINK
Currently when the local system is offline for some reason, the Millennium Offline Circulation Program fails to recognize any INN-Reach transactions (check out, check in, or renewal). These have to be manually kept and entered when the system comes back online. We would like the Millennium Offline Circulation Program to be modified to accept INN-Reach transactions.			

ID	old number	name	supported by
28		Record matching and merging-019	OhioLINK, Orbis
<p>The union catalog should report a list of records coming into the database with an 019 field when it matches an 001 in the "o" index. That would be a start. We'd send the list to the members who would re-catalog (download a new record from OCLC) as necessary to eliminate the union catalog duplicates. After a year or so of seeing the duplicate reports we'd have a good idea of just how good - or bad - an idea it would be to automatically merge the records, and whether an INN-Reach automated solution should be requested." [previously sent to INN-Reach e-mail list, with full explanation, Aug. 9] --Nancy Nathanson</p>			

ID	old number	name	supported by
29		Print labels at point-of-pickup	Prospector
<p>Print labels at point-of-pickup as requested item is checked in. Label could have patron name and any other pertinent information (holdshelf removal date based on loan rule parameter, etc.). Useful for holdshelf placement.</p>			

ID	old number	name	supported by
30		Create a new status for a Billed book	Prospector
<p>Create an INN-Reach billed status code. The lending library has no way of knowing whether or not a book that is long overdue has been billed at the borrowing site. The long-overdue list does not provide a definitive billed status. This makes fiscal reconciliation between institutions very difficult.</p>			

ID	old number	name	supported by
31		Create a NOTE field for a Lost/Paid book	Prospector

In conjunction to the enhancement above, when an item is lost and paid...or...the borrowing institution wants to remove a long-billed item from a patron's account-perhaps for purposes of closing/deleting the patron account,...or...the lending institution wants to remove a long-billed item from their system-perhaps for withdrawal purposes, INN-Reach will establish a function that permits the borrowing library to sever the virtual links when a book is in Billed status (see enhancement above). This function would simultaneously put a note field in the non-virtual patron record and non-virtual item record. The functionality of this enhancement would act exactly like the claims return function-except that in this case the book in question happens to be in a billed status when the links are severed. The NOTE created should be clear that it is different from a claims return NOTE.

ID	old number	name	supported by
32		Update barcode functionality in Mil-circ for IR	Prospector

Change the barcode functionality in Millennium to match the Text version of Innopac circulation. The "insert" functionality is present in Millennium but the "edit" functionality is grayed-out in Millennium.

ID	old number	name	supported by
33		Merge patron records in local system	Prospector

Permit merging of patrons in local systems when one or both of the duplicate patron records being merged have virtual records attached. Currently this is not possible.

ID	old number	name	supported by
34		Improve hold function, system wide availability	Prospector
Improve hold functionality for copy returned soonest (title level holds). Instead of focusing on one library, wide the focus to copy returned soonest at all owning sites.			

ID	old number	name	supported by
35		Improve hold functionality: not needed after	Prospector
Add the ability for the patron to include a "not needed after" date when they are placing a hold in INN-Reach for a title that currently has no copies available.			

ID	old number	name	supported by
36		Incorporate NCIP for patron authentication	Prospector
Allow the use of the NISO Circulation Interchange Protocol (NCIP) for patron authentication with INN-Reach. This would be helpful for the incorporation of non-Innovative systems into the INN-Reach system.			

ID	old number	name	supported by
37	2002-46	Pass-thru (transfer) search for suppressed record	Prospector, PLUS

If a patron tries to transfer to the central INN-Reach system a search from a local record that has been suppressed from the central catalog though not from the local one (bcode3=z, for example), the search will be unsuccessful because no exact match is found on the record ID. The patron sees a screen that says "This item does not exist in the database" and the only option given on the screen is to "Return home" to the local catalog. We suggest that another button be added to the screen that gives the patron the option to remain in INN-Reach and continue searching there.

ID	old number	name	supported by
38		Patron view local record	Prospector

Provide the ability for patrons to view local check-in cards from within an INN-Reach PAC by linking back to a local Innopac. This link should appear with each "Library Has" statement.

ID	old number	name	supported by
39		Reordering of item records	Prospector

The re-ordering of item records (into correct volume, copy order) that takes place at the local site, should transfer automatically to the Central server without any extra steps required.

ID	old number	name	supported by
40		Clearer delineation in holdings display	Prospector
<p>In the new holdings display implemented in Release 2002, Phase 2 it is difficult to distinguish between institutions. There should be some display technique to more clearly differentiate between sites such as bold lines around individual institutions, the use of an extra (narrow) empty rows or the ability to color code (under local control).</p>			

ID	old number	name	supported by
41		Material type mapping	Prospector
<p>Develop a mapping for "material type" in local Millennium systems to a central value on the INN-Reach system so users can reliably limit searches by material type regardless of differences in local system mapping. [similar to ability developed for BCode3, etc.] This may be covered through enhanced mapping of other Bcode values that is under development but we wanted to make sure this was not lost.</p>			

ID	old number	name	supported by
42		Automatic "AND" searching with AVS	Prospector
<p>Allow a new "AND" default with AVS searching. Currently, if a patron enters a series of unqualified keywords in AVS the system automatically does a string search. Allow INN-Reach to choose a default Boolean "AND" search when multiple terms are entered in AVS (this option should not preclude the current default string searches for those libraries who prefer it).</p>			

ID	old number	name	supported by
43		More Flexibility in INN-Reach Screen Messaging	Prospector

When a patron is denied the ability to borrow something a general message such as "Sorry you are not allowed to request items" is given to the patron. Provide more detailed messaging as to why a loan was denied. Also it would be nice to allow local INN-Reach system to locally adjust how this messaging is worded.

ID	old number	name	supported by
44		Packing List	LINK+

A program that would associate each shipping container (which is barcoded for a suppressed record) with the barcodes of the books shipped within it. The program would out put a written packing list, an electronic copy of that list which would be e-mailed to the receiving library, update lending item records with a note (eg. INN-reach item shipped mm/dd/yy to "borrowing library") and update returned book item records with a note (eg. INN-reach item returned mm/dd/yy by "lending library"). These notes could or could not be automatically deleted when checked in at the receiving library. To assist in tracking down items "lost in transit", Provide more detailed status information for patron, Provide performance measuring on couriers.

ID	old number	name	supported by
45		Message to explain Smart Hold Failure	LINK+

If a patron's request / hold for an Inn-reach item fails the Smart Holds 'test' (filter) the system will inform him/her with a more explicit message. (eg. Item cannot be held ... Too many holds or Too early to hold) Reason: Assist patron with information regarding why the hold cannot be placed.

ID	old number	name	supported by
46		865 with multiple \$z's	MOBIUS

Currently when multiple \$z's are present in an 856 Marc field with only one \$u, the first \$z links to the resource but subsequent \$z's while appearing to hotlink actually lead to a blank screen. This enhancement request is to have subsequent \$z's correctly link to the resource or not be hotlinked at all. Note: Since MARC21 format supports repeatable \$z's; the software should work properly.

ID	old number	name	supported by
47		Print price from virtual record	MOBIUS

INN-Reach bills should print the item price from the virtual item record. This would allow items with prices significantly higher or lower than the default billing price to be billed at the actual item price. Items with unpopulated price fields would still be billed at the default price. The item price field is visible in INN-Reach virtual item records. (This would encourage the lending of more expensive items that may otherwise be deemed too costly to risk lending off campus, particularly if there is no negotiation above default billing price for lost items. It would also be a protection for those libraries whose collections are more specialized, therefore generally more expensive.)

ID	old number	name	supported by
48	2000-29	Patron verification; max # items	SDCircuit

a. Check maximum # of items on each INN-Reach system for which institution is participating, not simply total # of virtual items. b. Exclude from the count any items with status "RETURNED".

ID	old number	name	supported by
49		Lost and billed--clean up records	SDCircuit
<p>When collecting payment for a lost and billed INN-Reach item, the system should automatically detach the virtual item record from the patron record, both from the list of currently checked out items and the list of attached virtual records. In addition, the system should then notify the owning institution of the transaction and update their item record appropriately.</p>			

ID	old number	name	supported by
50		New report, lost and paid	SDCircuit
<p>An additional system report would be useful that would list all of the items that have been lost and paid. Currently, when full payment is collected, the bill is marked as paid, but then staff must manually check in the item from the patron record (for sites with the Bursar In/Out module, this results in a credit being sent to the Bursar.out file that must be stopped). Then, staff at the owning institution must be contacted to manually check in the lost item and change its status code accordingly.</p>			

ID	old number	name	supported by
51		Institution hldgs: same order on central as local	Orbis
<p>Keep institution holdings (items) in the same order that they were loaded, or as they are on the local catalog. Result should be items in logical order as they are arranged at the local site, for example: pt.A,pt.B,pt.C; v.1,v.2,v.3,v.5. III explanation: Due to the difference in record structure on INNREACH central machines, it is not possible to display items in numerical order. When a record is first loaded to the central machine, the order should be the same as the local catalog. Once changes have been made (records added or deleted), the order at central can possibly change and will no longer reflect the order at the local site.</p>			

ID	old number	name	supported by
52		INN-Reach patron requests via Web reports	Orbis
<p>/olinkpatrep/ Requests, Fulfillments, Cancellations, Transfers a. include data for _all_ local sites, i.e. do not exclude sites with no stats for that month; instead, report "0" b. provides totals Current situation: from month to month the report will have a different number of columns and row, depending on the statistics. One or more local sites will not be listed, I assume because the total was 0 (zero). Here's the problem: For any given month, we may have NO cancel or transfer statistics reported for specific local site(s). This causes extra work when I'm using the Ill spreadsheets. We look at data for ALL the local sites, to compare to each other and to previous reports. So we have to insert rows and columns where they are missing. Please set it up to report "zero" instead of nothing at all.</p>			

ID	old number	name	supported by
53		Reminder email notice	Orbis
<p>System should queue up a Reminder Pickup Notice if item not checked out within n# days (therefore, 2nd notice to patron -- before item would be returned at end of Hold Shelf period)</p>			

ID	old number	name	supported by
54		Requested Too Long Report	Orbis
<p>Omit items from report if they are checked out at Owning Site and Due Date has not yet passed. Currently, staff take the additional time to check the Due Date in central catalog before sending (or calling) the Owning Site to inquire about the request.</p>			

ID	old number	name	supported by
55	2002-35	Mgmt Info: Statistics - Unwanted items	Orbis, PLUS
<p>Offer a way to gather statistics for books requested, sent to another library, and sent back without being checked out by the patron. [ed.: i.e. "Count number of "Returned Unwanted INN-Reach items"]</p> <p>These books represent a lot of staff time, but we are not sure they are being counted anywhere. (This was more important to small libraries than large)</p>			

ID	old number	name	supported by
56		Priority to circ trans from local to central	Orbis
<p>In processing transactions from local sites to central, give circulation transactions highest priority. Problem: Record updates (bib, order, item, checkin) -- especially resulting from batch processes such as rapid and global update, and following periods of downtime -- can flood the link(s) to the central system, while circ transactions are backing up behind them. This inteferes significantly with patron service related to circulation, the hallmark of the INN-Reach system.</p>			

ID	old number	name	supported by
57		Hold limit	PLUS
<p>Change the local site hold limit, under the automatic patron block table to differentiate between INN-Reach and Inter-Library Loan virtual items attached to a patron. Currently the system can not distinguish between an Inter-Library Loan virtual item and an INN-Reach virtual item attached to a patron when applying maximum hold limits. The ILL hold limit currently needs to be increased to accommodate INN-Reach request limit. This allows patrons to request a higher than desired number of ILL requests.</p>			

ID	old number	name	supported by
58		Management Reports	PLUS
In addition to the previous request of adding the location code to the In Transit Too Long report add the call number and item barcode.			

ID	old number	name	supported by
59	2002-19	Paging: remove from queue if checked out	PLUS
Remove item from paging slip queue for items already checked out.			

ID	old number	name	supported by
60	2002-29	Requesting: patron verif, max # items on 2 systems	PLUS
Check maximum # of items on each INN-Reach system for which institution is participating, not simply total # of virtual items [I.e.. compute max # on combined total]. Exclude from the count items with status <Returned>			

ID	old number	name	supported by
61	2002-45	Patron view local record	PLUS
Provide the ability for patrons to view local check-in cards from within an INN-Reach PAC by linking back to a local Innopac. This link should appear with each "Library Has" statement.			

ID	old number	name	supported by
62		List of materials checked in at borrowing library	InMich
Provide ability to generate list of materials checked in at borrowing library. List should be sorted by owning library and contain item record #, title, and date checked in. Rationale: Something appears on the "returned too long list." The status shows the book was not checked in at the owning library. The borrowing library would like to be able to tell the owning library when the book was checked in and what other materials were checked in that same day and, therefore, were likely to be in the same shipment.			

ID	old number	name	supported by
63		All books on hold shelf	ConnectNY
To get a list of items to pull from the hold shelf (never picked up), you must do each CNY library in the P> PRINT INN-Reach Hold Shelf Report. The more libraries that join, the more time consuming this will be. Should be able to get a list of ALL books on the hold shelf for CNY in one list.			

ID	old number	name	supported by
64		Cancelled page report	ConnectNY

A problem report that shows what books have had their pages cancelled at other schools. This would help if a patron is curious where a book requested from another school is. For example, the report could say, "Your book was cancelled by whatever school because it was missing" or whatever happened to it.

ID	old number	name	supported by
65		Record matching, title, isbn report	ConnectNY

Report generated by the system that looked at title and ISBN when a record is matched by OCLC # to a master record. If there was an inconsistency found in one or both of those two fields between the master record and the newly merged record, a report would be generated so investigation could occur.