NAAUG ENHANCEMENTS 2002-3003

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NAAUG 2003

Iowa City, IA

The Process

- Call for Working Group Participation – August 5
- Responses to CFP due – August 29
- WG's Appointed – September 6
- WG Chairs Appointed – September 11
- List of WG Chairs sent to Ex Libris – September 11
- Charge to WG Chairs – September 13
- Top Five Requests Submitted to Coordinators – November 26

The Process (cont)

- Edits to Requests by Analyst Group – December 13

- Meeting with WG Chairs, Coordinators, Ex Libris – December 16

- Requests Sent to Ex Libris for "Pointing" – January 3

- Pointed Requests Sent Back to Coordinators – February 3

- Pointed Requests Sent to WG Chairs – February 7

- Responses and Comments Back from WGs – March 3

The Process (cont.)

- Requests Mounted for Voting – April
- Voting Deadline – May 1
- Final List to Ex Libris – May 16

The Enhancement Groups

- **Acquisitions**
- **Cataloging/Authorities/Non-Roman**
- **Circulation/Reserves**
- **OPAC**
- **Serials**
- **Systems Administration/Reports**

Acquisitions

- Sherry Keen – Brandeis (Chair)
- Sarah Andrews – Iowa
- Ellen Purcell – FCLA
- Kathleen Anderson – Harvard
- Sara Spiegel – JTS
- Sue Koelmel – MnLINK
- Kathleen Darr – UCD
- *ICAU Module Coordinators:*
- Andrea Kroneisl
- Marta Zorat

Cataloging, Authorities, Non-Roman Scripts

- Helen Schmierer – Harvard (Chair)
- Wendy Robertson – Iowa
- Betsey Friesen – MnLINK
- Linda Culbertson – MDA
- Grace Wiersma – MIT (Non-Roman expertise)
- Sandy Card – SUNY-B
- Lynn Gibbs – UCSB
- *ICAU Module Coordinators:*
- Petra Zabickova
- Luise Hoffmann

Circulation/Reserves

- Kathleen Williams – BC (Chair)
- Lisa Hatch – Brandeis
- Elizabeth McKeigue – Harvard
- Larry Deck – McGill
- Christopher Rose – MnLINK
- Lea Messman – USMAI
- Gail Nichols – UCD
- *ICAU Module Coordinators:*
- Jiri Kende
- Margaret Robinson   Christian Zeising

OPAC

- Doug Archer – ND (Chair)
- Lisa Martincik – Iowa
- Janet Arth – MnLINK
- Tracy Gabridge – MIT
- Abigail Bordeaux – SUNY-B
- Bob Heyer-Gray – UCD
- Margaret Rankin – UCSB

Serials

- Adele Toutant – McGill (Chair)
- Kim Maxwell – MIT
- Patty Hatch – Harvard
- Pamela Bluh – USMAI
- Diane Willman – SUNY-O
- Pat French – UCD
- Catherine Nelson – UCSB
- *ICAU Module Coordinators:*
- Marta Zorat
- Helena Dvorakova

System Administration/Reports

- Christine Moulen – MIT (Chair)
- Brian Thompson – Iowa
- Ana Fidler – UCSB
- Bill Drew – SUNY-M
- Avi Jenssen – Spertus
- Adam Williams – MDA
- Alan Rykus – MnLINK
- *ICAU Module Coordinators:*
- Michael Voss
- Martin Vojnar

Enhancements Template

- NAAUG Tracking Number: xxx-2002-nnn
- Descriptive Title:
- Concise Description of Functionality Desired:
- Concise Rationalization of Request:
- Example 1:
- Example 2: (if appropriate)
- Example 3: (if appropriate)

The Results

- The six Enhancement Groups submitted ___ enhancement requests
- The top five from each group (30 enhancements) were discussed with EL staff
- The "runners up" were placed on the web site
- Thirty enhancements sent to EL for "pointing"
- EL assigned points to all 30 (beyond the agreed 150 points)

Results (cont.)

- 30 requests mounted for voting
  - 24 institutions voted
  - 2 logged in but did not vote
  - 5 did not log in nor did they vote
- 7 requests received the top votes and "used up" the allotted development points

Results (cont.)

Request Number	Voted points	Development points
CAT-2002-01	360	25
CIR-2002-01-F	268	12
CAT-2002-03-F	218	20
OPA-2002-02-F	192	15
CAT-2002-04-F	192	20
OPA-2002-01-F	177	6
SER-2002-01	161	10
Total	1407	108

The Winners

CAT-2002-01

Descriptive Title:

Authority Enhancements

Concise Description of Functionality Desired:

As requested at the December 16th meeting, the Cataloging/Authorites Enhancement Group will submit a document detailing all the problems with Authorities and the functionality improvements that are needed.

360 Votes   25 Development points

The Winners

CIR-2002-01-F

Descriptive Title:

Improvement in Cash Transaction Functionality

Concise Description of Functionality Desired:

Create a new status of 'p' for cash transactions that are actually 'paid', that is, some form of money has changed hands. Provide the ability to add a note when using the 'p' status to indicate how payment is made, etc.

268 Votes   12 Development points

The Winners

CAT-2002-03

Descriptive Title:

Increase length of string processed by first index sort to 200 characters in all ACC and IND indexes

Concise Description of Functionality Desired:

Increase length of string processed by first index sort to 200 characters in all ACC and IND indexes. It is our understanding that the length of the string processed is 69 characters, which is processed by p_manage_16.

218 Votes   20 Development points

The Winners

OPA-2002-02

Descriptive Title:

Improved Basket Display – Call Number and Location display

Concise Description of Functionality Desired:

The Basket Display layout and functionality need to more closely match the default brief table display and allow equal degrees of local customization.

192 Votes   15 Development points

The Winners

CAT-2002-04

Descriptive Title:

Items - In Client, Need Functionality that Filters/Sorts by Sublibrary, Sublibrary and Collection, Volume Numeration, Chronology, Copy Number

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

192 Votes   20 Development points

The Winners

OPA-2002-01

Descriptive Title:

Persistent Search Statements

Concise Description of Functionality Desired:

Browse, keyword and "Revise your search" forms at the bottom of short-table files all should have the original search statement included in the text area.

177 Votes   6 Development points

The Winners

SER-2002-01

Descriptive Title:

Enhancements to the Global Change button found in the Serials Module.

Concise Description of Functionality Desired:

We would like to see the Global Change button enhanced by adding the following functionality:

- Allow staff to select a set of items to change in the Serials Module
- Allow staff, with appropriate authorization, to be able to delete a selected set of items in the Serials Module
- Add additional fields that can be changed using the Global Change function
- Allow staff to select a set of items to Arrive in the Serials Module. .

161 Votes   10 Development points

Development Requests

- In addition to enhancement requests, the Sys Admin Group identified five areas for more extensive development
  - Reporting
  - Staff User Privileges
  - Aleph ADM Client
  - Documentation on GUI Services
  - User Profiles (Z61)
- The Steering Committee will be considering these requests for special projects with Ex Libris

Parting Thoughts

- Cataloging Received 770 votes (over half) and used 65 development points (2/3)
- Except for Cataloging, no enhancement beyond the first two from any group made it
- It is not clear how institutions allocate their voting points
- Jane Aitkens will be an excellent coordinator