

## Serials

**Enhancement#:** 5 (11/18/2003)

**Category:** Serials

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: SER Status: Test Release: 0 Priority: 2 Weight: Large

**Proposal:** "Would like fully functional link between the serials module and acquisition module. Including support of X12 standards for subscriptions, renewals, claims and invoices. Enhancement #11 requesting 'first issue received' information to be forwarded to Acquisitions is now included in this enhancement. (See comments)"

**Enhancement#:** 6 (11/18/2003)

**Category:** Serials

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: SER Status: Test Release: 0 Priority: 3 Weight: Large

**Proposal:** "BINDING FUNCTION: Need a fully functional binding component to the serials module. This would programatically identify volumes to be bound, print workslips for the bindery and collapse item records upon return from the bindery."

**Enhancement#:** 7 (11/18/2003)

**Category:** Serials

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: SER Status: Test Release: 0 Priority: 2 Weight: Small

**Proposal:** Would like a keyword title search option in Checkin Module to work. Maybe include journal title index when data is loaded so this index could be searched in Checkin when ISSN is not available. (Original requestor not known but 5 comments in support)

**Enhancement#:** 8 (11/18/2003)

**Category:** Serials

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: SER Status: None Release: 0 Priority: 2 Weight: Small

**Proposal:** Ability to see holdings for all locations (in multi-site environment) for a title on the bib display screen without having to use the Show Copies button and/or All Locations from the pull down file menu. \*\*IMPLEMENTED IN 4.1. Not all users want so will leave in database. See comments.

**Enhancement#:** 9 (11/18/2003)

**Category:** Serials

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: SER Status: None Release: 0 Priority: 1 Weight: Medium

**Proposal:** Need the ability to collapse a range of item record numbers into one item record/number which would equal one physical volume. This function will part of a binding module. This enhancement was not merged in binding module enhancement request because it may be desired BEFORE a binding module is implemented.

**Enhancement#:** 10 (11/18/2003)

**Category:** Serials

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: SER Status: Release: 0 Priority: 2 Weight:

**Proposal:** "When issues are changed to expected and/or deleted after previously being checked in, the summary holdings and the summary holdings display in PAC should reflect this change."

**COMMENTS (Enhancement Cmte):** When checked in issues are changed to expected, Summary of Holdings in stafpac and PAC should reflect this change

**Enhancement#:** 12 (11/18/2003)

**Category:** Serials

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: SER Status: Release: 0 Priority: 1 Weight:

**Proposal:** "Would like more fields on the Serial Issue Detail screen. Should list 1st, 2nd, and 3rd claims and the dates of each. (This is related to #13 which asks for a note field that could allow for entry of a 'history' of claims and dates issued along with any other information worthy of noting.)"

**Enhancement#:** 13 (11/18/2003)

**Category:** Serials

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: SER Status: None Release: 0 Priority: 1 Weight: Small

**Proposal:** Would like to have a note field included in the Serial Issue Detail screen in Checkin so that any claim action or response could be entered on that screen. (This is a related request to #12 which asks for more detail on the number of claims and when each was issued.)

**Enhancement#:** 14 (11/18/2003)

**Category:** Serials

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: SER Status: Release: 0 Priority: 1 Weight:

**Proposal:** Would like to see history for title display in reverse order so that the most recently checked in issues would display on the first screen.

**COMMENTS (Enhancement Cmte):** Display title history in Serials Checkin in reverse chronological order

**Enhancement#:** 18 (11/18/2003)

**Category:** Serials

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: SER Status: None Release: 0 Priority: 1 Weight: Medium

**Proposal:** "From PAC, the users would have the option to see a list of serials checked in/received that day and their location."

**Enhancement#:** 19 (11/18/2003)

**Category:** Serials

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: SER Status: Test Release: 0 Priority: 1 Weight: Not Assigned

**Proposal:** Ability to list everything on subscription that will expire between specified dates. Could be in Serials Control or Acquisition.

**Enhancement#:** 20 (11/18/2003)

**Category:** Serials

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: SER Status: None Release: 0 Priority: 1 Weight: Small

**Proposal:** Default message for routing lists is cut off both within the record and when it appears on the routing list. Expand default limit.

**Enhancement#:** 21 (11/18/2003)

**Category:** Serials

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: SER Status: None Release: 0 Priority: 1 Weight: Small

**Proposal:** Would like to make the addition of a barcode number to an item record a non-required field.

**Enhancement#:** 23 (11/18/2003)

**Category:** Serials

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: SER Status: None Release: 0 Priority: 1 Weight: Not Assigned

**Proposal:** "Would like to have series issues which have a volume but no number in enumeration display in chronological order by volume number, not by receipt date."

**Enhancement#:** 24 (11/18/2003)

**Category:** Serials

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: SER Status: None Release: 0 Priority: 1 Weight: Small

**Proposal:** "In multi-site libraries, need ability to view the checkin screens of other sites from their checkin screen."

**Enhancement#:** 25 (11/18/2003)

**Category:** Serials

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: SER Status: Test Release: 0 Priority: 3 Weight: Large

**Proposal:** "Would like local definition of print formats for SER printed products including claim letters, route lists, and workslips."

**Enhancement#:** 26 (11/18/2003)

**Category:** Serials

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: SER Status: None Release: 0 Priority: 1 Weight: Medium

**Proposal:** "When adding a borrower to route list, ability to insert name into list where wanted. SEE WORK AROUND IN COMMENTS. (Ann Springer: Parke-Davis)"

**Enhancement#:** 241 (11/18/2003)

**Category:** Serials

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: SER Status: Test Release: 0 Priority: 1 Weight: Not Assigned

**Proposal:** Would like ability to add barcodes for bound volumes of serials.

**Enhancement#:** 249 (11/18/2003)

**Category:** Serials

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: SER Status: Test Release: 0 Priority: 1 Weight: Not Assigned

**Proposal:** Would like the capability to output serial holdings in USMARC format

**Enhancement#:** 253 (11/18/2003)  
**Category:** Serials  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: SER Status: None Release: 0 Priority: 2 Weight: Not Assigned  
**Proposal:** "Would like to have the full name of the vendor display in a Serials Control record, not just the code for the vendor."  
**COMMENTS (Enhancement Cmte):** Full name of vendor in Serials Control – can be done by change to serial copy record edit view

**Enhancement#:** 254 (11/18/2003)  
**Category:** Serials  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: SER Status: None Release: 0 Priority: 2 Weight: Not Assigned  
**Proposal:** "Would like to have the full name of the vendor display in a Serials Control record, not just the code for the vendor."

**Enhancement#:** 255 (11/18/2003)  
**Category:** Serials  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: SER Status: None Release: 0 Priority: 1 Weight: Not Assigned  
**Proposal:** Want the ability to 'send' a serials record from Serials Checkin to Serials Control. It is currently possible to do the reverse.  
**COMMENTS (Enhancement Cmte):** Send record from Serials Checkin to Serials Control

**Enhancement#:** 256 (11/18/2003)  
**Category:** Serials  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: SER Status: None Release: 0 Priority: 1 Weight: Not Assigned  
**Proposal:** "Routing list enhancements. Ability to create 'standard' routing lists which could then be selected for multiple titles, ability make it possible to copy an existing routing list to another title/s. See comments for others."

**Enhancement#:** 257 (11/18/2003)  
**Category:** Serials  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: SER Status: None Release: 0 Priority: 1 Weight: Not Assigned  
**Proposal:** Would like a field added to the Serials Copy screen for entry of the OCLC number.

**Enhancement#:** 259 (11/18/2003)  
**Category:** Serials  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: SER Status: None Release: 0 Priority: 1 Weight: Not Assigned  
**Proposal:** Change the Serials Checkin module so that pressing the ESCAPE key once too often does not close Serials Checkin.

**Enhancement#:** 261 (11/18/2003)  
**Category:** Serials  
**Subcategory:**

**Software Version/Release:**

**Subject:** Module: SER Status: None Release: 0 Priority: 1 Weight: Not Assigned  
**Proposal:** "Need to have a printout of the Copy History screen in Serials Checkin include the title of the serial. Currently, if the Copy History is printed only the phrase 'where serial number=380' is printed. There is no way to search this serial control number."

**Enhancement#:** 309 (11/18/2003)

**Category:** Serials

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: SER Status: None Release: 0 Priority: 3 Weight: Not Assigned

**Proposal:** Would like a routing list linked to a specific copy record when there are multiple copies and multiple lists.

**Enhancement#:** 311 (11/18/2003)

**Category:** Serials

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: SER Status: None Release: 0 Priority: 1 Weight: Not Assigned

**Proposal:** Put serials prediction patterns out on the Horizon Web page.

**COMMENTS (Enhancement Cmt):** CODI is currently working on this— this is not really an enhancement

**Enhancement#:** 313 (11/18/2003)

**Category:** Serials

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: SER Status: None Release: 0 Priority: 1 Weight: Not Assigned

**Proposal:** Would like the ability to cut and paste summary holdings in serials control.

**COMMENTS (Enhancement Cmt):** Ability to cut and paste Summary of Holdings is there

**Enhancement#:** 314 (11/18/2003)

**Category:** Serials

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: SER Status: None Release: 0 Priority: 1 Weight: Not Assigned

**Proposal:** Would like the ability to batch summary holdings.

**Enhancement#:** 320 (11/18/2003)

**Category:** Serials

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: SER Status: None Release: 0 Priority: 1 Weight: Not Assigned

**Proposal:** Claims are now location specific but would like the ability to control claims for all locations from a central point.

**Enhancement#:** 322 (11/18/2003)

**Category:** Serials

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: SER Status: None Release: 0 Priority: 1 Weight: Not Assigned

**Proposal:** Fields in the Summary of Holdings edit screen should be reversed so that 'From' (the older volume) is listed first and 'To' (the recent volume) is listed second. This would correspond to the listing for chronology fields.

**COMMENTS (Enhancement Cmt):** Summary of Holdings 'To' and 'From' reversed

**Enhancement#:** 361 (11/18/2003)  
**Category:** Serials  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: SER Status: None Release: 0 Priority: 1 Weight: Not Assigned  
**Proposal:** In multiple site settings would like the ability to delete checkin data for a canceled journal at one site without effecting the other sites still receiving the title.  
**COMMENTS (Enhancement Cmte):** Delete checkin data for one copy without affecting data for other copies with like media type

**Enhancement#:** 374 (11/18/2003)  
**Category:** Serials  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: SER Status: None Release: 0 Priority: 0 Weight: Not Assigned  
**Proposal:** Would like the ability to search the Checkin module by scanning the SICSAC barcode.  
**COMMENTS (Enhancement Cmte):** Checkin by SISAC code

**Enhancement#:** 514 (11/18/2003)  
**Category:** Serials  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: SER Status: None Release: 0 Priority: 1 Weight: Not Assigned  
**Proposal:** "Would like the 'special handling' note from Serials Control to display on the initial screen in Serials Checkin. Currently, to view this note in Checkin you have to checkin an issue."

**Enhancement#:** 515 (11/18/2003)  
**Category:** Serials  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: SER Status: None Release: 0 Priority: 1 Weight: Not Assigned  
**Proposal:** "In Serials Checkin, would like issue status to display on the initial checkin screen. Currently, it is only displayed in copy history."

**Enhancement#:** 516 (11/18/2003)  
**Category:** Serials  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: SER Status: None Release: 0 Priority: 1 Weight: Not Assigned  
**Proposal:** Would like an option to display only the latest issue received in PAC. Could be a checkbox in the copy record.

**Enhancement#:** 517 (11/18/2003)  
**Category:** Serials  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: SER Status: None Release: 0 Priority: 1 Weight: Not Assigned  
**Proposal:** "When doing screen prints from Serials Checkin and Serials Control, the printout should include the entire screen, including the 'grey area'.  
**COMMENTS (Enhancement Cmte):** Screen print from Serials Checkin and Serials Control should include 'grey area'

**Enhancement#:** 534 (11/18/2003)

**Category:** Serials  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: SER Status: None Release: 0 Priority: 0 Weight: Not Assigned  
**Proposal:** Summary of holdings should collapse all entries into one line. This would include those issues entered outside of the predicted pattern (i.e. special check-in and free enumeration items).

**Enhancement#:** 535 (11/18/2003)  
**Category:** Serials  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: SER Status: None Release: 0 Priority: 0 Weight: Not Assigned  
**Proposal:** Expand subscription # field beyond 20 characters to accomodate all publishers account numbers.  
**COMMENTS (Debby G.):** **Obsolete**—Expand subscription # field beyond 20 characters

**Enhancement#:** 545 (11/18/2003)  
**Category:** Serials  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: SER Status: None Release: 0 Priority: 0 Weight: Not Assigned  
**Proposal:** Need the system to reflect the change from 'claim' to 'claimed' after that process has occurred. Presently there is no way to tell whether an issue has been placed on the claim review list of actually claimed as status is the same for both.

**Enhancement#:** 570 (11/18/2003)  
**Category:** Serials  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: SER Status: None Release: 0 Priority: 0 Weight: Not Assigned  
**Proposal:** Add a free text box to Review Serials Claim list so that additional information can be added to the item record. This will then be exported with the item record when it is sent to vendor.

**Enhancement#:** 571 (11/18/2003)  
**Category:** Serials  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: SER Status: None Release: 0 Priority: 0 Weight: Not Assigned  
**Proposal:** Automatic prediction of the next issue should calculate from the date the last issue was received.

**Enhancement#:** 574 (11/18/2003)  
**Category:** Serials  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: SER Status: None Release: 0 Priority: 0 Weight: Not Assigned  
**Proposal:** Ability to alphabetize claims before printing.

**Enhancement#:** 575 (11/18/2003)  
**Category:** Serials  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: SER Status: None Release: 0 Priority: 0 Weight: Not Assigned  
**Proposal:** Display full name of vendor in Claims Review.

**Enhancement#:** 576 (11/18/2003)  
**Category:** Serials  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: SER Status: None Release: 0 Priority: 0 Weight: Not Assigned  
**Proposal:** Ability to maximize windows in Serials Control and Serials Check-in. This can be done in Cataloging.  
**COMMENTS (Enhancement Cmte):** Ability to maximize windows in Serials Control and Serials Checkin

**Enhancement#:** 577 (11/18/2003)  
**Category:** Serials  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: SER Status: None Release: 0 Priority: 0 Weight: Not Assigned  
**Proposal:** Ability to access Acquisitions purchase orders from Claims Review.

**Enhancement#:** 615 (11/18/2003)  
**Category:** Serials  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: SER Status: None Release: 0 Priority: 0 Weight: Not Assigned  
**Proposal:** "Summary of holdings should display ONLY the first level of enumeration is the numbering resets with each new volume. This was the way the system worked in 4.1 and has changed since then. epixtech does not, however, see this as a bug and therefore will not list it as such."  
**COMMENTS (Enhancement Cmte):** Summary of Holdings display lists all volumes together, then all numbers in a range, where the first number is the first number of the first volume and the last number is the last number of the last volume

**Enhancement#:** 616 (11/18/2003)  
**Category:** Serials  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: SER Status: None Release: 0 Priority: 0 Weight: Not Assigned  
**Proposal:** "Extend the length of the allowable characters in the summary of holdings area past 30 characters, specifically for free enumeration. This will allow the information to display properly in the PAC display."  
**COMMENTS (Enhancement Cmte):** Extend length of allowable characters for Summary of Holdings display in PAC

**Enhancement#:** 657 (11/20/2003)  
**Category:** Circulation  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: Status: None Release: 0 Priority: 3 Weight: Not Assigned  
**Proposal:** Develop a sharing code so that prediction patterns others have already created can be utilized as new users build the serials records  
**COMMENTS (Jim, Dynix):** 7.3; Serials Enhancement

**Enhancement#:** 665 (11/18/2003)  
**Category:** Serials  
**Subcategory:**  
**Software Version/Release:**  
**Subject:** Module: SER Status: None Release: 0 Priority: 1 Weight: Medium

**Proposal:** Printing needs to be simplified and better supported by epicTech. Issues include: splitting call number on spine labels in a meaningful way; solving form fee issues; ability to tractor feed an laser print; ability to attach local printer as network printer; ability to use wider range of printers; user-definable fonts; automatic printing of spine label as each issue is checked in; print routing slips in user definable formats; option to reformat information to utilise sticky label stationary; ability to print routing lists from serials control as well as checkin for administrative purposes (no need for issue-specific info from this option); sometimes a routing list will not print correctly.

**Enhancement#:** 666 (11/18/2003)

**Category:** Serials

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: SER Status: None Release: 0 Priority: 1 Weight: Medium

**Proposal:** "Request facility for processing electronic and & email serial titles - to register receipt of electronic issues, trigger claims, etc. Requires interface with email for receipt and routing of issues. (Library may receive paper copy as well)"

**Enhancement#:** 667 (11/18/2003)

**Category:** Serials

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: SER Status: None Release: 0 Priority: 1 Weight: Medium

**Proposal:** "Display of items created in check-in without enumeration should file in correct numerical sequence, not alphabetically - the issues for each year should file together. Currently all December issues for 1997-2000 file together, followed by February, etc."

**Enhancement#:** 668 (11/18/2003)

**Category:** Serials

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: SER Status: None Release: 0 Priority: 1 Weight: Medium

**Proposal:** "Request ability to delete copy records - to delate all reference to a particular copy in StaffPAC, WebPac, iPAC. Currently cannot be done if any other copy exists since they share Prediction."

**COMMENTS (Enhancement Cmte):** Ability to delete copy records without affecting other copies that share prediction

**Enhancement#:** 670 (11/18/2003)

**Category:** Serials

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: SER Status: None Release: 0 Priority: 1 Weight: Medium

**Proposal:** Require ability to view all routes for a borrower - without knowing at least one title they receive on routing.

**Enhancement#:** 671 (11/18/2003)

**Category:** Serials

**Subcategory:**

**Software Version/Release:**

**Subject:** Module: SER Status: None Release: 0 Priority: 1 Weight: Medium

**Proposal:** "Display borrow address on routing screen to assist co-location of borrowers, eg from the same building or section"

**Enhancement#:** 672 (11/18/2003)

**Category:** Serials

**Subcategory:**

**Software Version/Release:****Subject:** Module: SER Status: Release: 0 Priority: 1 Weight:**Proposal:** "Print routing list from serials control module including header information(title) and borrowers name and address, producing a facsimile of the actual routing list. This list would not include issue-specific information since the list produced isn't associated with any particular issue."**Enhancement#:** 673 (11/18/2003)**Category:** Serials**Subcategory:****Software Version/Release:****Subject:** Module: SER Status: None Release: 0 Priority: 1 Weight: Medium**Proposal:** "When a prediction pattern has been generated by using a publication pattern, retain that information in the prediction module. Currently you cannot tell which pattern was used to design the original pattern"**Enhancement#:** 674 (11/18/2003)**Category:** Serials**Subcategory:****Software Version/Release:****Subject:** Module: SER Status: None Release: 0 Priority: 1 Weight: Medium**Proposal:** "Request ability to check-in duplicate issues to copies already held - rather than creating special issues, a new copy record or adding item in Cataloging. eg. the ability to add a copy-issue record to a single issue without requiring a copy record."**Enhancement#:** 675 (11/18/2003)**Category:** Serials**Subcategory:****Software Version/Release:****Subject:** Module: SER Status: None Release: 0 Priority: 1 Weight: Medium**Proposal:** Record specific check-in date for serial issues. (Add field to copy-issue to record the date the status of the specific copy-issue was changed to 'received').**Enhancement#:** 676 (11/18/2003)**Category:** Serials**Subcategory:****Software Version/Release:****Subject:** Module: SER Status: Release: 0 Priority: 1 Weight:**Proposal:** "In serials check-in list, display expected date for pending issues, and receipt date for received issues. When multiple copies are partially received replace date with the word 'partial'."**Enhancement#:** 677 (11/18/2003)**Category:** Serials**Subcategory:****Software Version/Release:****Subject:** Module: SER Status: None Release: 0 Priority: 1 Weight: Medium**Proposal:** Prevent the system from automatically predicting more than one expected issue. We continue to require the ability to manually predict multiple issues.**Enhancement#:** 678 (11/18/2003)**Category:** Serials**Subcategory:****Software Version/Release:****Subject:** Module: SER Status: None Release: 0 Priority: 1 Weight: Medium

