

eiNetwork Evergreen Functionality Gap List

Gap Nbr	Priority	Functional Area	Requirement Description	Gap Description
83	1	Acq - Invoicing	When invoice number and vendor name are entered, notify if there are existing payments. Allow additional payments if balance is non-zero. Require change to invoice line items and/or additional charges before allowing payment on zero-balance invoice.	Entered the same invoice number and provider as a previously existing invoice - no warning.
85	1	Acq - Invoicing	Ability to search invoices by invoice number or vendor name; invoices records include links to vendors, and vendor records include links to invoice history.	Partial gap - there is a link from the provider to their invoices, but not from the invoices to the provider. Can use acquisitions general search to search for invoices by provider, invoice id, invoice date, receiver, invoice type, vendor invoice id, payment method, payment
91	1	Acq - Invoicing	Partial payments change invoice status to 'partial'; remaining balance is visible; encumbered balance remains encumbered.	Flag in invoice record flags incomplete invoices. Open invoices are easily queried from the acquisitions menu.
92	1	Acq - Invoicing	Support electronic receiving and invoicing as follows: ability to receive electronic packing slips and invoices by purchase order or invoice number; ability to edit number of copies, amount due, freight and service charges, and tax; ability to delete line items; ability to recalculate total amounts; ability to authorize payment within ILS.	No electronic invoicing
70	1	Acq - Ordering	Choose to show or hide orders in OPAC display	No way to suppress orders. Orders will show in OPAC with on order status.
87	1	Acq - Ordering	Ability to classify purchase order types (i.e. standard, prepaid, blanket) that require different business processes. Report on purchase orders by type.	No purchase order types
97	1	Acq - Ordering	Add optional notes to indicate why the order is in a status	No order status notes
126	1	Acq - Ordering	Set up user defined fields in order records with a controlled vocabulary (drop down list). The fields can be designated as required fields when an order is created or edited	Line item attributes can be defined per vendor for bib records imported from the vendor. That may fill some needs

22	3	Acq - Rcvng	Set a default item price by item type (i.e. children's books, books on CD, DVD, etc.)	Workaround. Currently, you can set price info at the copy level. Because Evergreen offers copy templates during cataloging, you could set up a copy template for DVDs that uses a default price of \$20.00. At the same time, you'll
78	1	Acq - Selection Lists	Assign permissions to selections – who can read, update, and approve and remove items on the list.	Partial gap - Acquisitions Administrators can see all selection lists for their org unit via the General Search. Each user can see the selection lists that they own.
80	3	Acq - Selection Lists	Patron requests are collected through website (or, less preferably, through a separate webform); patron information is authenticated against ILS; requested items are checked for existence in the collection; owned items are flagged for communication to patron; unowned items directly populate a selection list in the ILS so that retyping is unnecessary. Additionally, information on which vendors have the requested titles would be helpful at the review stage. Ability to manage patron requests throughout the selection and ordering process and generate patron notifications.	There is an option on the Acquisitions menu for patron purchase requested, but how does it get populated?
188	2	Acq-Selection Lists	Selection lists are collections of bibliographic records (short or full) that temporarily store titles being considered for purchase. Selection lists can be shared between acquisitions staff and can be made visible to other staff members for collaborative input. Selection list privileges can be granted to individuals or groups. Selection lists can be queried by selector, list, format, etc. Ability to create order records from selected items on selection list. Additional (desireable but not mandatory) attributes: add notes to selection list; link items on selection list to appropriate fund(s), if assigned, and view fund(s) balances from selection list; ability to show similar and related titles from ILS and/or vendor catalogs; ability to create new selection lists from selected items on existing selection list. Note that a single selection list and even a single item may be linked to several funds.	Can't show a running total of the cost of the items on the selection list.
160	1	Authority Records	Allow staff to directly search and browse authority records; allow only cataloging staff to edit authority records.	In development. There is a Manage Authorities on the catalogin menu in the staff client, but not much functionality.
161	1	Authority Records	Locally create and edit subject authority records	In development. There is a Manage Authorities on the catalogin menu in the staff client, but not much functionality.

162	1	Authority Records	Locally create and edit subject authority records	In development. There is a Manage Authorities on the catalogin menu in the staff client, but not much functionality.
163	1	Authority Records	Allow authorized users to delete authority records.	In development. There is a Manage Authorities on the catalogin menu in the staff client, but not much functionality.
164	1	Authority Records	Import and export authority records in MARC format.	In development. There is a Manage Authorities on the catalogin menu in the staff client, but not much functionality.
166	1	Authority Records	System supports automatic authority processing, whereby records are authenticated and marked for further attention. Library may specify authority sources to authenticate against, including an external authority processing vendor and local authority files. Library may specify how records are overlaid during updating process. Library may specify rules for marking or highlighting records that meet or fail to meet certain criteria, e.g. records with unique headings, records with new headings, and records that match a 'see from' (4XX) or 'see also from' (5xx) reference in an authority record).	No functionality
165	1	Cataloging	List records with duplicate values, ISBN, LCCN,OCLC control number that may need to be merged.	No functionality. Is or will there be any Database 'housekeeping' mechanism in place?
102	1	Circulation - Checkin/out	System provides a batch check-in utility that can be accessed by external materials handling systems to manipulate batches of item records, change statuses in batch, etc.	Ability to to do a "batch check in" of all the items that are checked out to a group of patrons in a electronic list (without having to go pull up each individual patron record
7	3	Circulation - Holds	System allows creation and modification of requesting rules that determine whether a patron can place a hold on an item. Requesting rules may evaluate patron type, current number of holds, current patron account balance, item type, item status, owning location code, and other criteria. For example, requesting rules may prohibit patrons from placing holds on on-order CD titles, but allow patrons to place holds on other on-order titles. Requesting rules also specify whether staff with specific privileges or roles can override specific criteria.	Does not prevent a user from placing a hold on a local available copy.
133	3	Circulation - Holds	Ability to place hold on a several items, and have them arrive in order. (I.e., hold B is not triggered until hold A is filled, checked out, and returned.)	No functionality

136	3	Circulation - Holds	Cancel holds as a batch operation from a list of holds, titles, or items, with option to disable notices.	No functionality
137	3	Circulation - Holds	System supports mail delivery of holds. Patrons have the option to select mail delivery and provide a delivery address. Charges for mail delivery are added to the patron's account. Do not allow the patron to select mail delivery if the outstanding charges exceed a specified amount.	No functionality
138	3	Circulation - Holds	Ability to maintain a central "just in time" collection, in which holds are serviced from a warehouse. For example, popular titles with a short lifespan, and books that are often assigned at schools.	Like our shipping department -- example would be shipping all of our reserve pool materials right from the West End (not making it into the libraries). -- Possible holds setups implications - owning locations, etc.. -- set up test scenario.
139	3	Circulation - Holds	When placing a hold for a patron on a specific author, system displays staff alert if books by the same author are on order and facilitates placement of holds on those books.	No functionality or plans
140	3	Circulation - Holds	Ability to place holds for a group of patrons on a group of one or more bibliographic records. For example, select a group of historical novels and place holds for all members of the group "Historical Fiction Fans".	No functionality.
141	1	Circulation - Holds	Ability for staff to simultaneously place item-level holds on all or selected copies attached to a single bibliographic record.	No functionality
142	3	Circulation - Holds	Select multiple items from search results and place holds on all selected items at one time.	No functionality
149	1	Circulation - Holds	View a list of canceled holds for a patron, including date/time canceled and who canceled them.	Partial gap - you can see the the cancelled hold and the reason, but you can not replace the hold from this list.
152	3	Circulation - Holds	Disallow placing a hold if there is a copy at the local library with an available status. The assumption is that the patron should be able to find the item on the shelf and check it out.	Does not exist
153	policy decision	Circulation - Holds	Fill holds using a preference for items to be picked up at the owning location. If an item is checked in, it will go to the first person in the queue that wants to pick it up at the library that owns the item, then to patrons that wish to pick it up at other locations. The objective is to reduce the number of items in transit.	No functionality. Opportunistic hold capture will fill holds if an item is checked in at the pickup location, but it does not consider the owning location.

119	3	Circulation - Self Check	Ability to view holds and patron position vs. number of circulating copies at self check-out station.	Ability to view holds and patron position vs. number of circulating copies at self check-out station.
120	1	Circulation - Self Check	Self check-out station displays holds ready for pickup, then removes each hold as the item is checked out.	Does not display holds ready for pickup.
121	1	Circulation - Self Check	Ability to view and pay fines at self check-out stations, with fines highly visible during normal check-out process.	No fine payments
122	1	Circulation - Self Check	Ability to print lists from self check-out stations, including: checked-out items in order of due date; held items; paid and unpaid fines.	No printing available
103	3	Circulation Policies	Libraries may optionally choose to charge fines for overdue items even on days the library is closed.	Ability for a library to charge fines on a day they are closed if they want to.
113	1	Circulation Policies	Define item/copy status as OPAC visible or suppressed.	Partial gap. Cannot restrict visibility by specific workgroup. Individual bib records cannot be suppressed. Bib records with no attached items can be suppressed by bib record source. How do you know the bib record source from the bib record? Copy locations, copy statuses, and individual copies can be suppressed from the OPAC
146	3	Circulation Policies	automatic billing, by pickup location, for hold pickups, and/or for holds that were not picked up and canceled.	can do with grocery bill but looking for automatic process
147	3	Circulation Policies	automatic billing, by registering library, for speciality library cards (i.e. donor plus) or replacements	can do with grocery bill but looking for automatic process
148	3	Circulation Policies	define an optional grace period, by circulating library, for return of overdue material before a fine is charged.	We can set up one grace period that is global. It is not by library or by item type at this time. It's done on the server, not via any policies in the staff client.
150	3	Circulation/Holds	System supports floating collections. Items in a floating collection stay at the location where they are checked in, rather than automatically returning to an owning location.	Floating collections? Can this be set by org unit?

100	1	Fines and Bills	Any staff member can adjust existing fine amounts or reinstate fines that have been waived.	No. Can edit a note for a grocery bill that was added, but the only change to an existing bill is to void it. Can not reinstate a fine that has been voided or waived.
124	2	Fines and Bills	If a patron is paying an outstanding fine balance over a period of time, and has promised to pay a certain amount towards their balance each week, month, etc. Track the amount the patron has promised to pay and the date they have promised to pay it. Alert staff when the patron record is retrieved and in a report if the patron has not paid as promised.	no functionality
167	2	Fines and Bills	Add charges to a patron record that do not count against patron blocks until a specified event happens or it is released by staff. For example, add a charge for an ILL item that does not count against the outstanding balance for the customer and prevent them from using other library services until they have a chance to come in and pick up the item. The charges should be added to the patron's balance when the patron picks up the item, or if the hold expires and is not picked up.	No functionalitiy.
31	1	General Features	The catalog home page is configured by the Library. The system includes modular components (e.g. widgets) that can be added to library pages, including: a search box; buttons for browsing the collection; library news and events; library event calendar; a toggle to limit searches to available items; library branch information; lists of currently popular items; lists of new items; personalized recommendations; a chat box; current holds status; current checked-out item status, and events at the patron's home library.	Parital gap. This should be handled by OPAC customization on the back end, but can't be done through the staff interface. OPAC supports different skins that change the appearance of the catalog and are accessed by a different URL.
53	1	General Features	Ability to specify default value, data validation, automatic formatting, and required status for any field.	Can't validate statistical categories or make them required.
54	2	General Features	System supports administrator-programmable and user-programmable macros and/or keyboard shortcuts. Shortcut keys may be assigned to macros (e.g. 'Insert Field') or to text strings. Macros are centrally managed on server, can be imported from and exported to individual users, and can be restricted for use and/or editing through centrally-managed permissions.	No keyboard macros. Automation with AutoIT very difficult since there are no window titles or visible text.
55	2	General Features	Staff can create a customized toolbar of icons used for editing and cataloging functions, such as Insert Row, Delete Row.	No user customizable toolbars
56	2	General Features	Ability to tab through fields while creating and editing all record types.	No user customizable tab order

57	2	General Features	Ability to create and edit views (i.e. custom layouts) to hide fields, tabs, and command buttons that should not be used. Visible fields can be sized and ordered. Views can be assigned to users individually or via user groups or roles.	In general, user interface needs to be improved.
58	1	General Features	System provides a user-friendly interface for designing queries against all record types. Staff can select fields to query; select values from picklist of possible values; select regular expressions from drop-down menu, and use a full range of Boolean operators. Administrators control staff access to tables and fields.	There is still no way to populate buckets using a query from the staff client. Bib records buckets is the only one that has a query at all, and it is less functional than the catalog search. There is nothing for copy, user, or call number buckets. You can't copy or merge contents of buckets.
61	1	General Features	Update a group of item records based on user criteria. For example, update the status, shelving location, or local call number.	Partial gap. There is some functionality to update item attributes in a small group, but noting for other record types.
62	2	General Features	Display a list of recently viewed records with one click access.	Can retrieve the last patron or catalog record, but would like to go back to the last 3 – 6 records.
64	1	General Features	Patron record display includes the following views: summary with fines, messages and blocks; check-out; checked out items; holds; check-in; linked patrons; custom.	Patron records display in staff client times out and closes automatically after a specified idle period. This is to help prevent items from accidentally being checked out to the wrong patron.
49	1	ILL	ILL module is completely integrated with the rest of the system and with external interlibrary loan systems (OCLC, Sirsi Dynix URSA, Innovative InnReach, Relais ILL, Auto-Graphics AGent Resource Sharing, etc.). To the extent that the external system supports it, the ILL module is able to use borrower records and item records from the external system, to avoid the necessity of manually creating temporary records. Imported records can easily be distinguished from non-ILL records, and can be included or excluded in queries and reports.	ILL Functionality is slated for post 2.0 development and called Fulfillment (inter-ILS resource sharing)
143	3	OPAC - My Account	Prohibit users from placing holds on items they already have checked out or on hold – by patron type	No functionality

156	1	OPAC - My Account	View request (hold) status in My Account. Display information about holds, hold status, wait time, and recently cancelled holds	Partial gap. Shows outstanding holds, and status. Cannot see information about expired holds. Cannot see wait time estimate. Cannot sort or select by status, for example select holds that are ready for pickup.
48	2	OPAC Administration	Provide search reports on number of hits, search terms, searches with zero results, etc.	No information about web search statistics in reporting module. Examples would be number of searches for a specific term, searches by location, and searches with no results.
1	1	OPAC My Account	Ability to sort checked out items by click on the column heading to sort by the values in the column	Can't sort checked out items
2	3	OPAC My Account	Ability to sort holds by click on the column heading to sort by the values in the column	Can't sort items on hold
5	1	OPAC My Account	Patrons can choose to keep history of items held and/or checked out. By default, no check-out history is maintained. If enabled, history is visible through the patron account and can be searched. Patron can export history to file, printer, or email, in any of several formats defined by the Library. Patron can clear individual items or all items from the history, and can set a parameter to retain items for X months. Opting out deletes existing history, with appropriate warnings to patron. Library may set parameters for saving items, e.g. file size limit. Staff can not view patron history.	No reading history available in My Account
8	1	OPAC My Account	Patrons have the ability to select multiple items from a saved list and request them all at one time	Need to individually place holds on items in bookbag – can't multi select and place holds at once.
12	3	OPAC My Account	System supports creation of web templates for different types of patrons - those who want a simple interface, those who want advanced features, those mainly interested in children's services, etc. System allows patrons to switch and customize interfaces.	No functionality

17	Policy Decision	OPAC My Account	System provides a log of patron activities in the patron account. Activities might include placing a hold, freezing or unfreezing a hold, subscribing to an RSS feed, signing up for a book alert, etc. Patrons can delete activities or purge the activity log, but this does not remove activities from the system. Library can specify which types of activities are included; whether patron can opt in or out, and retention policy for patron activities.	Partial gap - holds history is available via reports, but nothing is currently available for patrons
19	1	OPAC My Account	System provides ability for patrons to subscribe to specific authors, subject headings, magazine titles, or series. When a relevant item is ordered and released to the catalog, the item is added to a patron item list and/or a patron hold is automatically placed.	Patron subscriptions to specific authors, subject headings, magazine titles, or series and place holds when a new title is added
20	1	OPAC My Account	Patron can create multiple title lists. If a patron is not logged into his/her account, the list is purged when the session cookie times out. If a patron logs into his/her account, lists are saved to the patron account and remain accessible until deleted	Partial gap. Patron can save book bags to my account, and can share them via email link if they choose. If you are not logged in, there is no way to save a list of titles equivalent to the current book cart functionality. Book Bags can not be exported to a file or printed.
26	3	OPAC My Account	System provides recommendations and event notifications and reminders, based on patron's stated preferences, borrowing patterns, home library, and demographic information.	No functionality
30	3	OPAC My Account	System supports creation of web templates for different types of patrons - those who want a simple interface, those who want advanced features, those mainly interested in children's services, etc. System allows patrons to switch and customize interfaces.	No functionality
157	1	OPAC My Account	Patrons can choose to keep history of items held and/or checked out. By default, no check-out history is maintained. If enabled, history is visible through the patron account and can be searched. Patron can export history to file, printer, or email, in any of several formats defined by the Library. Patron can clear individual items or all items from the history, and can set a parameter to retain items for X months. Opting out deletes existing history, with appropriate warnings to patron. Library may set parameters for saving items, e.g. file size limit. Staff can not view patron history.	Patron can opt in to keep a history of items checked out and holds

63	1	Patron Maintenance	Patron record display includes the following views: summary with fines, messages and blocks; check-out; checked out items; holds; check-in; linked patrons; custom.	Partial gap - view are there, but can not be customized in the staff client.
189	3	Patron Maintenance	Patrons have can opt out of receiving library information such as fundrasing appeals and event announcements	No functionality
81	1	Patron Notifications	Ability to consolidate multiple notices within a single email, phone call, or mailing per patron per day.	Doesn't appear to be a way to consolidate multiple notices for the same patron on the same day into a single email, phone call, or mailing
104	1	Patron Notifications	Ability to consolidate multiple notices within a single email, phone call, or mailing per patron per day.	consolidate multiple notices for the same patron on the same day into one notice
105	2	Patron Notifications	Notice contents are fully configurable by library and can differ between email, SMS, RSS, telephoned, and mailed notices. Content may included calculated fields, e.g. a link to the patron's home library location, or differing information based on patron type.	Partial Gap - notices must be set up on the back and and can't a set up in the staff client.
106	3	Patron Notifications	Ability to cancel unsend notices before they are sent. Ability to search pending notices by item barcode.	No functionality
107	3	Patron Notifications	Ability to cancel unsend notices before they are sent. Ability to search pending notices by item barcode.	Cancel individual email notifications before they are sent
108	3	Patron Notifications	Ability for patron to waive specific types of notices (e.g. courtesy notices or first overdue notices). Ability to make some types of notices mandatory (e.g. final overdue notice).	Patrons should have the ability to choose to opt out of being notified
114	1	Patron Notifications	System provides a telephone notification system, by which patrons receive automated telephone calls for specified events, e.g. courtesy notices, overdue notices, hold pickup notices. The telephone notification system supports multiple trunks.	Should be there for the KCLS development, but we haven't seen it.
117	1	Patron Notifications	Patrons can indicate their preferred notification method (i.e. phone, email, text, mail).	No notice preference in the patron record. Is this a problem in the OPAC too? Or just Client

118	1	Patron Registration	Patrons can register for a library card online. Patrons are immediately granted a library card barcode and (if configured as a system setting) a PIN. Library can configure default patron type for online registrations, which can then be used to restrict access until the patron further authenticates his/her account. Library specifies the fields that appear on the online registration form, and which fields are required. System provides a utility to convert patron information to uppercase before writing it to the database.	No patron self registration
125	2	Patron Search	Ability to search patron records using any field, multiple fields (AND/OR), whole or partial fields.	Looks like it essentially does stemming for patron searches – tried this with name, phone number, zip code. But don't see a way to do a search for a field that contains something that isn't the start of the string. For example, everyone with a certain phone number.
40	1	Search Indexes	On indexed fields, provide ability to perform an exact search with truncation, and browse related index alphabetically to show near matches in the alphabet.	Fuzzy matching - specific search types can be configured to display the nearest matches in browse mode. For example, when executing a subject search without any results, the system displays nearest matches in the index, and allows browsing up and down the
111	3	Search Limits	Limit search to suppressed or hidden titles, not visible in OPAC.	Can only limit to available under Search Library
155	1	Search Limits	Search Limits for a location should default to the entire catalog for remote users	This is defaulting to the home library in the patron record as soon as the patron logs in to My Account
159	1	Search Limits	Search limits for a location should default to the local library for catalog searches located in the library	Workstation registration should do this for staff interface. How will this work for the public OPACs? This will work the way that it currently does until patron logs into My Acct at which time they will be scoped to home library

14	1	Search Results	Ranking can be adjusted based on the field where the search term occurs and the number of occurrences. Fields in the bib record can be weighted differently.	Limited relevancy ranking can be done on the database side, not the staff client. Cannot boost relevancy based on popularity factors such as number of items, checkouts, or holds.
37	2	Search Results	Patrons can enter reviews of items, which other OPAC patron can choose to display. Staff can choose to approve patron reviews before they are public. Patrons can edit and delete their own reviews.	Dan Scott has done some work on this and posted some code - "toward a more social OPAC" but haven't seen anything implemented
38	2	Search Results	Patron can rate items by clicking one of 5 icons to indicate a rating. Patron can see and change their own ratings. OPAC displays the average rating and number of ratings for a title.	Dan Scott has done some work on this and posted some code - "toward a more social OPAC" but haven't seen anything implemented
39	3 - duplicating Facebook?	Search Results	System provides a platform and system interface for creating and sharing patron content, including photos, video, and blog entries	Partial gap. Kent County library system http://catalog.kentcountylibrary.org implemented Evergreen with LibraryThing tags, but nothing with locally entered tags.
41	1	Search Results	Search results and item lists display user defined material type icons. Material type is defined in a locally defined field in the bib record.	User defined material type icons. They are currently defined by the MARC Leader 06 and 07, which is not specific enough.
42	1	Search Results	Option to group series together the way formats and editions are and display one entry in the results list for each series. Click the series title to view individual titles in the series.	Ability to sort series so that they appear in order by volume. Even better, have an option to group series together the way formats and editions are.
43	1	Search Results	Group search results by edition. For example, the print, large print, and book on CD editions of the same title would be grouped together in the search results, with appropriate material type icons.	Advanced search has an option to group formats and editions. Why not add it to the basic search – may next to limit to available?

45	1	Search Results	Option to select all or select multiple titles from results and operate on all selected items as a group - i.e. request, save to list, etc.	There is no option on the results list to select all titles or select multiple titles and add them to a bookbag, email them, or place a request. Each title must be dealt with individually
47	1	Search Results	Empty search results screens are fully customizable, with ability to specify different screens for different types of search. For example, keyword searches and subject browse searches may have different empty results screens. Each empty results screen can include custom links, buttons, widgets, and applications.	This can be done on the back end with OPAC customization
50	3	Search Results	System provides an administrative setting to enable (or disable) ability to toggle highlighting of search terms in search results screens.	This is supposed to be a setting in Ver 2.0, but we can't find how to turn it on.
9	1	Search Terms	Patrons can save their favorite searches. Favorite searches are accessible in patron account. Favorite searches can be edited, copied, deleted, and printed in a friendly format defined by the Library. Favorite searches can be used to generate RSS feeds or book alerts.	Save preferred searches and notify patrons if there are new results for a search.
10	3	Search Terms	Ability to create pre-defined searches and provide them to users. Users can modify and save searches, and can limit and refine searches from the initial search results screen.	Customizable predefined search templates
15	2	Search Terms	System remembers patrons' search types and defaults to preferred search types on search pages and in search type menus. Patrons can manually specify and save preferred search types.	Patron can not select a preferred search type (i.e. keyword, title, advanced)--IN My account . According to ESI, there is work in progress on this.

23	1	Search Terms	Limit search to a user defined material type stored in the bib record. For example, limit search to DVDs	Format search limit is populated from the MARC Leader 06 and 07. The categories are Books, Large Print Books, Audiobooks, Videorecordings, Music, and Electronic Resources. It does not allow selection by the type of media, such as DVDs, or Compact Disc. We would like to be able to do this with the main format selector for our current material types. We need to understand what it would take to do this and where our material type data would need to be to do this.
24	3	Search Terms	Ability to limit searches by one or more reading levels, as defined by library. Reading levels may be defined at will, based on MARC Audience field, item call number, owning library, internal or external metadata, and other information in the bibliographic and item record.	Cannot set a search scope for age group (Juvenile, Adult, Teen). OPAC Search scope by audience level. The scope that we currently use is based on copy locations rather than data in the bib or item records. The scopes identified are Juvenile, Teen,
25	1	Search Terms	Limit search to a group of libraries defined by the system administrator. For example, all libraries in a region.	Cannot set a search scope for Region
27	3	Search Terms	Ability to limit searches by one or more reading levels, as defined by library. Reading levels may be defined at will, based on MARC Audience field, item call number, owning library, internal or external metadata, and other information in the bibliographic and item record.	Partial gap - Advanced search can limit by the audience level in the MARC record - refer to Gap Nbr 24
28	3	Search Terms	System tracks patron and staff searches separately, and administrators can review and publish a dynamic list of the most popular search types, search terms, limits, and sorts.	Automatically identify several (i.e. top ten) searches for the day and display those searches.
34	1	Search Terms	Refine an initial search (for each, through the use of facets) and display a "bread crumb" trail of the added search criteria. Provide the ability to back up through the trail.	Can't refine search from original search criteria and keep a "bread crumb" trail of the criteria.

60	1	Search Terms	Ability to search using Boolean search criteria with AND, OR, NOT operators. Search criteria can be nested using parentheses.	Search using regular expressions
110	2	Search Terms	Search for titles using the number of outstanding holds as search criteria. For example, search for titles with more than 10 holds	Can't use number of holds as a search criteria. Would need to use a report.
112	1	Search Terms	System supports number searches, including call number, ISBN, OCLC number, government document number, standard music number, UPC code, barcode number, bibliographic record number, title control number, and item record number.	Partial Gap. Shelf browse can search by call number but not any other item field such as create date or updated date. You would need to use reports.
127	1	Serials	Set up user defined fields in checkin records with a controlled vocabulary (drop down list). The fields can be designated as required fields when an order is created or edited	No user defined fields
168	1	Serials	Ability to flag an item to print a routing slip at next check in. Especially for routing periodicals to specific staff members. Routing slip should print on check in. Include title, check in date, staff name, and department.	Routing slip functionality is in progress but not currently available. Streams can be routed differently.
170	1	Serials	Ability to format date display in serials records, e.g. 'Mon YYYY' or 'YYYY MON'.	Can't customize the date display in the caption unless you edit it for each individual issue. Date label generated for a year, month day caption with enumeration is example: v.177:no.28(year2011:monthJan.day10)
171	1	Serials	A serials holdings record holds bibliographic and holdings information for serials subscriptions. A holdings record includes a summary of holdings statement field, including library locations that can be edited and reordered in any order.	Holdings info is difficult to get to. Need to go the Alternate Serial Control view to get to the holding record.
172	3	Serials	Automatic processing of serials that cease publication	no functionality
173	1	Serials	System provides a flexible and precise way to catalog and control serial items, such as magazines, encyclopedias, television series, serial novels, etc. The serial title, volume/year, and issue/episode must be stored in a way that 1) provides holdings information in a clear and readable way, 2) makes the sequence of issues/episodes clear, 3) allows patrons to request specific titles, volumes, or issues, and 4) can be updated in a non-labor-intensive way.	A separate volume must be created for each issue to allow patrons to place holds on individual issues. This is being addressed in the MassLNC SOW CAT-08-14: Identifying Volumes in a Multi-Volume Set

174	1	Serials	Identify serials issues that are not received when expected. Send claiming report to vendor.	no functionality
175	1	Serials	Provide a process to delete or archive old issues on a subscription record	no functionality
178	1	Serials	store the vendor title number to facilitate the claiming and reordering process.	no place to record vendor title number in subscription record
180	1	Serials	link serials subscription records to purchase orders	no functionality
182	1	Serials	List and edit serials issues by status (expected, received, late)	no status display for serials issuances
186	1	Serials	report of serials subscriptions by vendor	No vendor recorded for serials subscriptions. Could be addressed by a link to a purchase order.
187	1	Serials	report of serials vendor performance - how many issues were late, claimed, not received in a given time period	No vendor recorded for serials subscriptions. Could be addressed by a serials claiming process.
192	2	Serials	Receiving new issue causes previous issue to go automatically into holdable status.	No functionality
194	1	Serials	Information from the serials holdings record can be displayed in the OPAC in a customizable, user-friendly way. Specifically, summary holdings statement is easily browsable, issues are listed in reverse chronological order, and patron can easily place holds on first available copy.	Subscriptions can be flagged to be visible in OPAC, but they don't display with the current default skin. Would require OPAC customization.
13	3	System Administration	Ability to set separate session lengths based on browser IP address ranges. For example, web sessions expire sooner for public computers inside the Library than for remote computers.	Evergreen has a session length timeout, but not customizable based on workstation or IP range so that shared public PCs have a shorter timeout.
51	??	System Administration	System provides full support for SNMP and supports monitoring of system resources, including disk space, CPU load, memory load, system processes, system interfaces and ports. Alert thresholds are configurable. Alerts can be sent via administrative dashboards, email messages, and text messages. Alerts can be sent to unlimited number of recipients via any or all alert methods.	No system monitoring tools available within the application. All system monitoring must be done at the OS level.

109	2	System Administration	Unlimited number of temporary record sets (aka buckets, query result sets, selection lists, etc.). Record sets can be the basis for batch field updates or for deleting original records; can be used as a limiting scope for subsequent queries; and can be exported.	Run a query to get record and put them all into a copy bucket
144	2	System Administration	Search any MARC tag and subfield for the specified search value.	Yes, it has to be done at the database level. There's nothing currently in the staff client for this.
145	1	System Administration	Specify required fields and default values for item and patron records. This could be done with templates for different record types. Templates should be created by users. Templates can be linked to a staff account so that records created using that account use the linked template.	Item templates can be created in the staff client and are stored locally. They can be exported and imported. Bibliographic templates can be set up on the server side. No templates for other record types.
151	1	System Administration	Specify required fields and default values for item and patron records. This could be done with templates for different record types. Templates should be created by users. Templates can be linked to a staff account so that records created using that account use the linked template.	Does not exist for patrons but does exist for items and bibs
3	1	System Interfaces	System interfaces with third-party ecommerce gateway providers and leading shopping cart software solutions and supports multiple forms of payment (e.g. Paypal, credit cards, electronic checks). Payment forms, if provided by the system, are customizable. System records and stores transaction number, patron record number, IP address, date/time stamp, configurable payment type, payment amount, transaction description, and transaction status (success/failure). System provides option to print and/or email a configurable transaction confirmation to patron, including the vendor transaction number and other payment details.	No option to pay online
21	1	System Interfaces	System supports RSS feeds for patron notifications, including hold notifications, overdue notifications, lost materials, etc.	RSS feeds for patron notifications
36	2	System Interfaces	System interfaces with external event management software. Patrons can sign up for events online, import events from the library website in standard calendar formats, receive reminders by email or text message, and evaluate or comment on events online. Events can be included in search scopes. Library defines message format, including data fields to include. Patrons may opt out of event notifications.	Interface to external event management software to display library events

116	2	System Interfaces	System supports interactive text message processing. Patrons can register text-messaging device through patron account, and access account information by text messaging. For example, patrons can text keywords such as "checked out", "due soon", "overdue", "on hold", "hold shelf", "balance", "help", etc. and receive corresponding information by text message. Patrons can renew items and cancel holds by text message.	Should be there for the KCLS development, but we haven't seen it.
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System Gap List					
Priority	Functional Area	Function		Description	Number
1	System	General Features	Not Available	Allow systemwide and per-user setting of default tab order in search and editing screens. For example, user may select which search field the cursor is in at the beginning of a new search.	SYS-GF-00101
1	System	General Features	Not Available	Automatically enter date, user, and location in messages and notes.	SYS-GF-00102
1	System	General Features	Available in Ver 1.6	Ability to specify default value, data validation, automatic formatting, and required status for any field.	SYS-GF-00103
1	System	General Features	Available in Ver 1.6	Ability to customize items that appear on displays, default sort orders, colors, etc.	SYS-GF-00104
3	System	General Features	Not Available	Each functional screen can be assigned a unique color palette, to provide a visual clue to which function staff is using. Color palettes are assigned on a systemwide basis. Functions requiring color customization include check-in, capture holds, backdating, fine waiving, check-out, and pull list. Special cases requiring color changes include unpaid fines, fines above block limit, known bad email address, known bad address.	SYS-GF-00105
1	System	General Features	Planned for Ver 2.0	System supports addition of custom, context-sensitive help on any page.	SYS-GF-00106
1	System	General Features	Available in Ver 1.6	Ability to count and track record deletions (e.g. item records, patron records) per location and per system.	SYS-GF-00107
1	System	General Features	Not Available	Ability to delete all record types singly or via batch processing, with capability to recover or restore deleted data.	SYS-GF-00108
1	System	General Features	Available in Ver 1.6	Ability to sort by any column in any list (search results, etc.).	SYS-GF-00109
1	System	General Features	Available in Ver 1.6	Patron and item record screens provide 'print record', 'print screen', and 'print selected items' options.	SYS-GF-00110

1	System	General Features		The catalog website, patron account website, and related components use standards-compliant HTML, XHTML, XML, CSS, JAVA, ASP.NET, and/or ColdFusion code which is fully within the control of the Library. Global and contextual navigation elements are fully customizable. The web architecture supports the embedding of custom code, widgets, and data extracted from external APIs. Catalog website and related components must be Section 508 compliant.	SYS-GF-00111
1	System	General Features	Available in Ver 1.6	Support for individual and shared staff login accounts; access to modules is granted by use of "roles" or "privileges" that allow each account to access as many (or as few) modules as needed. Individual logins allow user-level preferences and audit trail.	SYS-GF-00112
2 option for local libraries	System	General Features	Available in Ver 1.6	Unlimited number of temporary record sets (aka buckets, query result sets, selection lists, etc.). Record sets can be the basis for batch field updates or for deleting original records; can be used as a limiting scope for subsequent queries; and can be exported.	SYS-GF-00113
1	System	General Features		System supports administrator-programmable and user-programmable macros and/or keyboard shortcuts. Shortcut keys may be assigned to macros (e.g. 'Insert Field') or to text strings. Macros are centrally managed on server, can be imported from and exported to individual users, and can be restricted for use and/or editing through centrally-managed permissions.	SYS-GF-00114
2	System	General Features	Available in Ver 1.6	System creates a transaction log when records are updated or deleted during batch processes.	SYS-GF-00115
3	System	General Features		Ability to display edited fields in a highlighted color until changes are saved.	SYS-GF-00116
3?	System	General Features	Available in Ver 1.6	Display a list of recently viewed records with one click access.	SYS-GF-00117

1	System	General Features	Not Available	Ability to create and edit views (i.e. custom layouts) to hide fields, tabs, and command buttons that should not be used. Visible fields can be sized and ordered. Views can be assigned to users individually or via user groups or roles.	SYS-GF-00118
1 if applies to customers	System	General Features	Available in Ver 1.6	Show login identification at top of screen.	SYS-GF-00119
3	System	General Features	Available in Ver 1.6	Staff can create a customized toolbar of icons used for editing and cataloging functions, such as Insert Row, Delete Row.	SYS-GF-00120
1	System	General Features	Available in Ver 1.6	Ability to view two or more records simultaneously, aligned either horizontally or vertically. Ability to copy and paste between records.	SYS-GF-00121
1	System	General Features	Available in Ver 1.6	All screens support copy and paste.	SYS-GF-00122
1	System	General Features	Available in Ver 1.6	All modules support barcode scanning consistently; for example the existence of an auto-return suffix has the same effect in all modules.	SYS-GF-00123
1	System	General Features	Available in Ver 1.6	Ability to tab through fields while creating and editing all record types.	SYS-GF-00124
2	System	General Features	Not Available	Ability to create links to external resources (e.g. allmusic.com, imdb.com) in the staff interface. Links will act like bookmarklets, taking values from search fields and performing a search against the target website.	SYS-GF-00125
No	System	General Features	Available in Ver 1.6	Ability to suppress patron name on all displays, on a per-system or per-patron basis. Patron may select option to display or mask patron name through patron account settings.	SYS-GF-00126
1 is this create list?	System	General Features	Available in Ver 1.6	System provides a user-friendly interface for designing queries against all record types. Staff can select fields to query; select values from picklist of possible values; select regular expressions from drop-down menu, and use a full range of Boolean operators. Administrators control staff access to tables and fields.	SYS-GF-00127

1	System	General Features	Available in Ver 1.6	URLs in bibliographic and item records are clickable, and launch in a new web-browser window when clicked.	SYS-GF-00128
1	System	General Features	Not Available	Update groups of records based on users entered criteria.	SYS-GF-00129
3	System	General Features	Available in Ver 1.6	Audible beep for user alerts and when barcode is scanned, when a local hold is triggered, when a transit hold is triggered, and when check-in is complete. Audio signals can be customized for each trigger, on a systemwide basis. Audio signals can be disabled for the current session or the current user.	SYS-GF-00130
1	System	General Features	Not Available	Prompt to save unsaved data on a screen before closing the screen.	SYS-GF-00132
1	System	General Features	Available in Ver 1.6	System stores a last updated date for all records.	SYS-GF-00133
1	System	General Features	Available in Ver 1.6	System records a created date for all records.	SYS-GF-00134
3	System	General Features	Not Available	Ability to undo the last transaction	SYS-GF-00135
1	System	General Features	Available in Ver 1.6	No limitations on the size or number of records other than that imposed by infrastructure (i.e. available storage space).	SYS-GF-00136
1	System	General Features	Available in Ver 1.6	Ability for multiple staff members and patrons to simultaneously access and update patron and item records, including on staff terminals, on self check-out stations, and in OPAC. Depend on assigned privileges, staff can view all patron and item fields; pa	SYS-GF-00137
1	System	General Features	Available in Ver 1.6	Consistent date format used throughout the application	SYS-GF-00138
1	System	General Features		Specify required fields and default values for item and patron records. This could be done with templates for different record types. Templates should be created by users. Templates can be linked to a staff account so that records created using that account use the linked template.	SYS-GF-00139

Additional OPAC Gaps			
Number	Priority	Description	Functional Area
PAT-0030	1	Cover Images	OPAC/DESIGN
PAT-0040	1	Font size needs to be adjustable	OPAC/DESIGN
PAT-0060	1	Ability to place holds on a group of items	OPAC/HOLDS
PAT-0070	1	Consistent font sizes and page sizes in the mobile catalog	MOBILE CATALOG
PAT-0080	1	Terminology is consistent throughout the catalog	OPAC/DESIGN
PAT-0100	1	Ability to email a list of items	OPAC/MY ACCOUNT
PAT-0110	1	Ability to display an alias rather than a library card number when logged into My Account	OPAC/MY ACCOUNT
PAT-0160	1	Ability to limit the search to a specific library	OPAC/SEARCHING
PAT-0170	1	Ability to display call numbers on the initial results screen	OPAC/SEARCHING
PAT-0180	1	Location drop down should be labeled and accessible at any screen	OPAC/SEARCHING
PAT-0210	1	Ability to thoroughly customize the Advanced Search page, in terms of design	OPAC/SEARCHING
PAT-0220	1	Ability to get back to search results page with one click, and an obvious link.	OPAC/SEARCHING
PAT-0240	1	Would like to be able to choose how many results display in my results list.	OPAC/SEARCHING
PAT-0260	1	Ability to customize "no results" page, including design and functionality (e.g. a truly powerful spell check that goes beyond the first word of a phrase, does not suggest the word that was just searched, and only suggests words that will actually find something in the catalog.)	OPAC/SEARCHING
PAT-0260a	1	Don't let the catalog suggest the same thing I just searched when it doesn't find any hits.	OPAC/SEARCHING
PAT-0280	1	Ability to customize the format indicators, e.g. icons and terminology associated with the icons, such as DVD and VHS and score	OPAC/SEARCHING
PAT-0330	1	Ability to save favorite searches	OPAC/MY ACCOUNT
PAT-0340	1	An Amazon-like auto-complete	OPAC/SEARCHING
PAT-0530	1	Ability to refine searches with facets	OPAC/SEARCHING
PAT-0540	1	Ability to customize the facets on the results page, eg. have them all on the same side of the page	OPAC/DESIGN
PAT-0390	1	Ability to set my own default search type, e.g. author, title or keyword	OPAC/MY ACCOUNT
		Based on our experience with the out of the box product, scoping location must work.	OPAC/SEARCHING

PAT-0430	1	Ability to customize the full record display	OPAC/SEARCHING
PAT-0470	3	Ability to browse in google books from the catalog (a la Grand Rapids Evergreen)	OPAC/ENHANCED CONTENT
PAT-0480	2	Ability to discover new items in a variety of ways, including e.g. RSS, a link on the catalog, emails, etc.	OPAC/ENHANCED CONTENT
PAT-0490	2	Ability to offer personalized recommendations	OPAC/ENHANCED CONTENT
PAT-0500	1	No evidence of proximity searching.	OPAC
PAT-0510	1	Time out clears patron search history on the OPAC	OPAC/SEARCH HISTORY
PAT-0520	1	Constistency across all modules - standardization	SYSTEM DESIGN
PAT-0530	1	Ability to set default pick-up location	OPAC/MY ACCOUNT

Additional Circulation Functionality Gaps			
Nbr	Priority	Change Description	Category
Cir-010	1	Standardization of function within the module (across modules too)--ex: refresh/apply/save/copy/paste	Circulation/General functionality
Cir-020	1	Consistent navigation toolbars across the module (s)	Circulation/General functionality
Cir-030	2.5	Customize consortium practices and add external links within the circ module--ex: lost/paid form, IMDb, Novelist	Circulation/General functionality
Cir-040	1	Improved and more efficient interface--hide fields, searching for patron data/retrieve patron	Circulation/General functionality
Cir-050	1	All item statuses must be available from Actions list	Circulation/General functionality
Cir-060	3	Ability to undo transactions	Circulation/General functionality
Cir-070	3	Support internal messaging between patrons/staff--ex. Card in lostbox at SA	Circulation/General functionality
Cir-080	3	Ability to track/note who does what/when--individual log ins	Circulation/General functionality
Cir-090	3	Ability to auto-fill fields based on log ins	Circulation/Patron registration
Cir-100	1	Ability to tab through fields while creating/editing patron records	Circulation/Patron registration
Cir-110	1	Prominent alerts for duplicate names/addresses/phone, etc.	Circulation/Patron registration
Cir-120	1	Ability to force format fields, ex: phone	Circulation/Patron registration
Cir-130	1	Ability to add electronic signature to record	Circulation/Patron registration
Cir-140	2	Ability to customize order of patron registration fields	Circulation/Patron registration
Cir-150	3	Ability to add photo ID to record	Circulation/Patron registration
Cir-160	3	Ability to run registration renewal report by library	Circulation/Patron registration
Cir-170	1	Online card registration	Circulation/Patron registration
Cir-180	3	Fine history for patrons in OPAC/ My Account	Circulation/Fines/Bills
Cir-190	1	Ability to check in items from patron record--with a straightforward function	Circulation/Checkin
Cir-200	1	Ability to checkin damaged, lost or billed items and alert staff	Circulation/Checkin
Cir-210	2	Set auto print for renewals within and out of patron record	Circulation/Renew
Cir-220	1	Ability to adjust existing fine amounts or reinstate fines that have been waived	Circulation/Fines/Bills
Cir-230	1	Consolidate billing notices	Circulation/Fines/Bills
Cir-240	1	Ability to waive charges during check in	Circulation/Fines/Bills
Cir-250	1	More options for Claims returned	Circulation/Fines/Bills
Cir-260	3	Ability to pay by credit card within staff module	Circulation/Fines/Bills
Cir-270	3	Ability to auto-bill, ex: replacement cards, holds not picked up	Circulation/Fines/Bills
Cir-280	1.5	Notices go to person financially responsible and card holder	Circulation/Fines/Bills
Cir-290	2	Home library triggers UMS submission	Circulation/Fines/Bills
Cir-300	1	Post boolean searching (Amazon)	Circulation/OPAC Search
Cir-310	1	Ability of staff to place holds on order records	Circulation/Holds
Cir-320	1	Ability of staff to place holds on specific volumes	Circulation/Holds
Cir-330	3	Ability to bulk hold	Circulation/Holds

Cir-340	3	System prevents user from placing hold on local available copy	Circulation/Holds
Cir-350	1	Ability to place holds via patron name	Circulation/Holds
Cir-360	1	Barcode needs to be prominent	Circulation/Searching
Cir-370	1	OPAC speed needs addressed	Circulation/Seaching
Cir-380	1	Dead ends need addressed	Circulation/Searching
Cir-390	1	Ability for staff to search without book jackets	Circulation/Searching
Cir-400	1	Abiltiy for staff to search for journal titles	Circulation/Searching
Cir-410	1	Development of new process for pull list to be printed on yellow labels	Circulation/Pull list
Cir-420	1	Clear holds shelf report needs to report holds cancelled by staff and patrons	Circulation/Hold shelf
Cir-430	1	Development of a cleared status so items don't automatically move to the holdshelf	Circulation/Hold shelf
Cir-440	1	Abiltiy to pay fines at the self-check station	Circulation/Self check

Additional Acquisitions/Serials gaps			
	Priority	Change Description	Category
ACQ 0010	1	Must have access to all acquisitions functionality through header rather than going through admin/server administration, etc.	Acquisitions
ACQ 0020	1	Permissions must be able to be delineated by individual staff position	Acquisitions
ACQ 0030	1	Must have ability to view and change acquisitions permissions as we received many error messages, probably due to hidden or missing permissions	Acquisitions
ACQ 0040	1	Inconsistencies in overall functionality must be cleaned up, for example, sometimes you can hit the 'enter' key and sometimes 'search' must be clicked.	Acquisitions
ACQ 0050	1	Must have OCLC login and password embedded for county libraries to search/import records	Acquisitions
ACQ 0060	1	Must have the ability to have coding in each order record for reports and tracking information, i.e. what is currently in Codes 1-3 in Millennium	Acquisitions
ACQ 0070	1	Must have the ability to suppress order records and bib records	Acquisitions
ACQ 0080	1	Must have the ability to edit note fields in an order record	Acquisitions
ACQ 0090	1	Vendor should display by name or code rather than by system-generated number	Acquisitions
ACQ 0100	1	Cancellation reasons must be refined to straight forward acquisitions reasons	Acquisitions
ACQ 0110	1	Scroll bars should not appear and disappear at random in every aspect of acquisitions	Acquisitions
ACQ 0110	1	Patrons must be able to place holds on order records	Acquisitions
ACQ 0120	1	Must be able to create standing orders and serial orders	Acquisitions
ACQ 0130	1	Order records must be able to display multiple pay fields	Acquisitions
ACQ 0140	1	When searching in Acquisitions, should be able to use "is" instead of "contains" - this is too broad of a search	Acquisitions searching
ACQ 0150	1	Must be able to search for titles in acquisitions mode, not have to go into cataloging	Acquisitions searching

ACQ 0160	1	Must be able to search by common fields such as ISBN, title, ISSN, and author more easily	Acquisitions searching
ACQ 0170	1	"Line Item Attribute" in Acquisitions Search/Select Search Field must be moved to top of list	Acquisitions searching
ACQ 0180	1	Searching for purchase orders in the Acquisitions Search mode must be made less cumbersome	Acquisitions searching
ACQ 0190	1	Must be able to duplicate funding source	Funds
ACQ 0200	1	Need to see encumbrances, expenditures and balances on top screen instead of having to go into each fund	Funds
ACQ 0210	1	The following columns do not need to appear on the funds page: Year, Org Unit, Currency Type, Active, Balance Stop Percent, Balance Warning Percent, Propagate and Rollover	Funds
ACQ 0220	1	Following columns DO need to appear on the funds page: Appropriation, Expenditure, Encumbrance, Free Balance and Cash Balance	Funds
ACQ 0230	1	Each accounting unit needs the ability to delete funds - was not able to test this	Funds
ACQ 0240	1	Each accounting unit needs the ability to edit funds - was not able to test this	Funds
ACQ 0250	1	Each accounting unit should only see its funds - currently this is not possible	Funds
ACQ 0260	1	Issues involved with occasional system freezing when creating funds must be resolved	Funds
ACQ 0270	1	Each accounting unit's funds must be in alpha-numeric order	Funds
ACQ 0280	1	When adding a new fund to the existing list of funds, the order should re-sort to alpha-numeric order	Funds
ACQ 0290	1	Must have ability to link finance office coding to acquisitions fund codes, i.e. "external fund codes" in Millennium	Funds
ACQ 0300	1	Must be able to receive electronic invoices	Invoicing
ACQ 0310	1	Must be able to edit an order record (which includes fund and location) at any time	Ordering
ACQ 0320	1	Must be able to have order types such as proforma, subscription, standing order, etc.	Ordering

ACQ 0330	1	Must be able to have order form in an order record such as book, periodical, music CD, score, etc.	Ordering
ACQ 0340	1	Must be able to code orders by acquisition type such as purchase, gift, prepaid, credit card purchase, etc.	Ordering
ACQ 0350	1	Must be able to print standardized order form	Ordering
ACQ 0360	1	The account number should not dictate EDI ordering versus printing the order	Ordering
ACQ 0370	1	Must be able to have a variety of order statuses including ones that do not encumber funds such as serial no encumbrance, fully paid, etc.	Ordering/Funds
ACQ 0380	1	Should not be prompted "Is prepayment required" in every order creation	Ordering/Vendors
ACQ 0390	1	Must be able to receive partial shipments	Receiving
ACQ 0400	1	Each accounting unit must be able to create its own reports on funds and fund activity	Reports
ACQ 0410	1	Must be able to report daily activity to CLP's finance office	Reports
ACQ 0420	1	A reports module similar to the current Web management reports must be developed	Reports
ACQ 0430	1	An easier way to do custom reports (via a module like create list) must be developed	Reports
ACQ 0440	1	Must have ability to manually cancel order	Acquisitions
ACQ 0450	1	Must have ability to add additional appropriations to existing fund	Funds
ACQ 0460	1	Must have ability to run order status reports at will	Reports
ACQ 0470	1	The eiNetwork must develop Evergreen training classes and manuals for staff similar to what they offer now for the various III modules.	Training
ACQ 0480	1	Terminology must be corrected to "vendors" from "providers"	Vendors
ACQ 0490	1	Each accounting unit must be able to view only its vendor list	Vendors
ACQ 0500	1	Each accounting unit's vendors must be in alpha-numeric order	Vendors

ACQ 0510	1	When adding a new vendor to the existing list of vendors, the order should re-sort to alpha-numeric order	Vendors
ACQ 0520	1	Must be able to include vendor account number and other information in all vendor records, not just the EDI vendors	Vendors
ACQ 0530	1	Must be able to send EDI orders to other vendors besides Baker & Taylor and Ingram	Vendors
ACQ 0540	1	Need to be able to tell if an edit in any acquisitions function has been saved - there is no verification by the system	Vendors
ACQ 0550	1	"New Provider" and "Delete Selected" buttons should not disappear when scrolling or using the 'next' and 'back' button at the top of the vendor list ; Freeze header	Vendors
ACQ 0560	1	Larger batch loads of MARC records are necessary. The current limit of 40 records is not acceptable.	Acquisitions
ACQ 0570	1	The Connexion Client/Evergreen interface must allow overlay of existing MARC records.	Acquisitions
ACQ 0580	1	Must have search ability for publisher's numbers, UPC codes, and OCLC numbers.	Acquisitions
ACQ 0590	1	Must have the ability to work on item records in Acquisitions.	Acquisitions
ACQ 0600	1	Must have the ability to retain previous searches.	Acquisitions
ACQ 0610	1	Must have title searching capability	Acquisitions
SER 0010	1	Serials is not functional so it could not be tested	Serials
SER/ACQ 0010	1	Must be able to claim on serials	Serials/Acquisitions

Additional Cataloging Functionality Gaps			
Nbr	Priority	Change Description	Category
CAT 0200	1	Must be able to place holds on on-order bib records. On-order bib records must display in the OPAC.	Acquisitions / Holds
CAT 0210	1	Need the ability to update acquisitions records to an item records	Acquisitions / Holds
CAT 0010	1	Authority Control is listed in Master gap list, however it is important to note that : 1. Authorized users must be able to search and browse authority records. 2. Authorized users must be able to import, edit, and delete individual authority records. 3. Authority record cross-references must display in the OPAC.	Authority Control
CAT 0080	1	There must be a separate field for call number prefixes as it impacts on shelf browser sorting.	Call Number Structure
CAT 0081	1	The system must be able to tell the difference between Dewey and LC call numbers., and sort them separately.	Call Number Structure
CAT 0082	1	Various spacing conventions must be normalized for sorting purposes.	Call Number Structure
CAT 0100	1	Sorting must be done in proper Dewey or LC schema, not the straight ASCII it is now.	Call Number Structure
CAT 0150	1	Copy (item) level holds must be possible for the patron using the OPAC interface.	Call Number Structure / Holds
CAT 0310	1	Must be able to suppress both bibliographic records and copy (aka item) records.	Catalog Display
CAT 0390	3	Address the following miscellaneous catalog display issues that do not affect searching -- 1. The first added entry (700) improperly displays as the "author" when the record has a title main entry. 2. Records that contain non-Roman scripts improperly display numbering at the start of the title (245) field. 3. Leading words are added at the start of the physical description (300) field. 4. Adult and juvenile headings are all lumped together in one display.	Catalog Display
CAT 0420	1	Locations with multiple branches must display correctly according to their physical location.	Catalog Display
CAT 0421	1	856 subfield z information must display in the OPAC as a clickable link that leads users to the website in question	Catalog Display
CAT 0440	3	The system must be able to accept and display new MARC RDA fields and subfields correctly.	Catalog Display
CAT 0110	2	Shelf browser display must be redesigned from the three column rows to one item per row for better patron and staff usability.	Catalog Display

CAT 0030	2	Catalogers (and perhaps other staff) should be able to choose a streamlined screen without bookjacket covers .	Catalog Search
CAT 0040	1	Catalogers need a default search choice of exact title.	Catalog Search
CAT 0230	1	Need an option to retain and redo previous searches (up to the last 5?)	Catalog search
CAT 0300	1	When a user begins a new search, the system should automatically clear all the search boxes rather than retaining previous search terms and moving them down one row.	Catalog Search
CAT 0320	2	The system should allow catalogers to search by OCLC number without entering and "ocm" or "ocn" prefix.	Catalog Search
CAT 0330	1	The system must retain bibliographic records for e-resources, microforms, etc. even though they do not have copy records attached , and patrons must be able to access these records in the OPAC.	Catalog Search
CAT 0340	1	505 field subfield t's and 700 author-title added entry subfield t's must be indexed and included in "title contains" searches; leading articles of 505 field subfield t's must be automatically skipped in these searches.	Catalog Search
CAT 0350	1	655 genre headings must be indexed for subject searches.	Catalog Search
CAT 0370	1	ISSN in quick search must work.	Catalog Search
CAT 0380	1	Provide the option to do a catalog search by journal title.	Catalog Search
CAT 0381	1	Titles in serial linking entry fields (780, 785, etc.) must be indexed and included in "title contains" searches	Catalog Search
CAT 0382	1	Titles in series fields (440 and 8XX) must be indexed and included in "title contains" searches	Catalog Search
CAT 0090	1	It should be possible to save all edits to the Item attribute record with one SAVE button.	Copy Records
CAT 0170	1	Staff must be able to access an item's item status screen with additional search options, such as title, author, and also directly from holdings maintenance and the edit item attribute screens.	Copy Records
CAT 0220	1	Need capability for multiple bib records to share one item record or the ability for multiple item records to share the same barcode. ("Bound with" materials)	Copy Records
CAT 0240	1	The holdings maintenance screen needs to be redesigned for easier viewing (boxed grid format?) and it must be easier to tell the difference between volume and copy records at a glance (different colors?), and be sortable by columns.	Copy Records
CAT 0060	1	008 fields must have drop down boxes with valid choices for each field .	Marc Editor
CAT 0070	1	Catalogers should not be able to close MARC edit screen without being prompted to save their changes.	Marc Editor

CAT 0120	1	The Marc Editor screen should automatically supply subfield a as the first subfield for each tag unless the user enters a different value.	Marc Editor
	1	The Marc Editor must allow catalogers to move fields up and down easily within a record.	Marc Editor
CAT 0360	1	Must have the ability to enter diacritics.	Marc Editor
CAT 0400	2	Turn off spell-checking (i.e. red underlining) in the MARC Editor Flat-Text Editor format.	Marc Editor
CAT 0410	2	Marc Editor must have working undo function.	Marc Editor
CAT 0180	1	Cataloging permissions must be structured in tiers. Adding items to a record already in the catalog does not require MARC editing. Another set of permissions should be given to only catalogers with demonstrated skill importing and editing MARC records.	Permissions
CAT 0430	1	Provide a function similar to III Data Exchange to allow for the extraction of MARC records for digitization projects, etc.	Record Export
CAT 0020	2	In order to enable sorting results in date order, the Z39.50 search must pull date information from the 008 Date1 field rather than the 260 subfield c.	Record Import
CAT 0130	1	Larger batch loads of MARC records are necessary. The current 40 record limit is not acceptable.	Record Import
CAT 0270	1	The sporadic failure of the Z39.50 "fetch more results" function must be resolved.	Record Import
CAT 0280	1	The Connexion Client/Evergreen interface must allow overlay of existing MARC records.	Record Import
CAT 0285	1	Must have OCLC login and password embedded for county libraries to search/import records	Record Import
CAT 0290	1	The sporadic failure of the "record collision" function must be resolved so that catalogers are properly alerted when they try to import duplicate records from OCLC.	Record Import
CAT0050	1	Publisher number and UPC searches must be added to the default Z39.50 search choices. Current method (raw search) is cumbersome and is a completely antiquated user interface.	Record Import
CAT 0140	1	Functionality to mark an item withdrawn and to do a monthly process ,to both count and actually remove the item from the catalog, must be implemented.	Reports
CAT 0160	1	A reports module similar to the current Web management reports must be developed.	Reports
CAT 0190	1	An easier way to do custom reports (via a module like create list) must be developed.	Reports
CAT 0250	1	Statistical fields (itype, level) must populate based on other copy field entries	Statistics

KC Circ Issues 2/11			
Nbr	Priority	Description	Category
Circ01	2	Change/remove focus on payment tab, when tab is opened—Don't focus on Payment box. Don't have all lines checkmarked. (Problem of barcode scanning.)	BILLS
Circ03	2	Check-in of Lost and Paid item only voids reinstates old overdue fines. Should re-calculate all potential fines.	BILLS
Circ04	1	Forgiveness of charges and then check-in of item should not result in a refund amount for patron, currently it does. Should not give refunds for payment type of Forgive.	BILLS
Circ05	1	When choosing "Mark as Damaged" ILS should offer choice to not charge patron.	BILLS
Circ06	1	Print Lost and Paid receipts that meet state auditor requirements. Numbering scheme based on branch ID and sequential numbers.	BILLS
Circ07	3	Action for Claims Never Checked Out.	CKI
Circ08	3	Full set of audio signals during check-in, Local hold, IN transit hold, local item and In transit item should all have different audio signal.	CKI
Circ09	3	If CKI tries to put item On Holdshelf too soon after In Transit, we need system to leave In Transit as is. (To help us with mis-delivered items and premature pickup notices.)	CKI
Circ10	3	Finish the feature Scan Item as Missing Pieces.	CKI
Circ11	1	Allow a renewal when there are plenty of available copies.	CKO
Circ12	1	Email date due receipt to patron when requested.	CKO
Circ13	2	Edit Due Date should count as a renewal.	CKO
Circ14	1	Have max limit of checkout by circulation modifier, e.g., holiday books.	CKO
Circ15	1	Mistake of double scanning item barcode when checking out brings up dialog box of "Force CKO?", but there is no patron ID given of who the item is checked out to so cannot tell if a double scan mistake was made or not.	CKO
Circ17	1	Sorting ability still needed: In Items Out by due date. In Holds lists by numerical queue position.	CLIENT
Circ18	1	Copy and paste of barcodes still needed: Patron in Hold/Transit tab. Item in Bills history.	CLIENT
Circ19	2	Print screen, record, or selected items still needed: Selected items within Items Out. All of Quick Summary in Item Status.	CLIENT
Circ20	2	Still need ability to have Help pages and front page links.	CLIENT
Circ21	1	Return the red X for closing a window.	CLIENT
Circ22	2	Local Admin/Work Log to include actions of placing holds and accepting payments.	CLIENT
Circ23	2	Create report of rollovers—items failing to fill a hold X number of times. This report was suggested by Bill and Mike to replace our request for a counter in the item record.	HOLDS

Circ24	1	Allow patrons to place hold on title currently checked out.	HOLDS	
Circ25	3	Want landscape formatting of Hold slips	HOLDS	
Circ26	1	Still needed for Clear Hold Shelf report: List Behind the Desk holds separately. Allow sorting by Circulation Modifier and then by Name or Alias. Be able to reprint report.	HOLDS	
Circ27	3	Have tool for batch change of pickup location.	HOLDS	
Circ28	1	Canceled holds of items On Holdshelf need to appear on a report for pulling.	HOLDS	
Circ29	1	Need report to pull On Holdshelf items whose pickup location has been changed.	HOLDS	
Circ30	2	Uncancel a canceled hold needs to create a brand new hold.	HOLDS	
Circ31	2	The Shelf Expire Time needs to have stamp of 11:59 PM and the Closed Days table is consulted when calculating the date.	HOLDS	
Circ33	1	Add "patron cancellations via OPAC" to possible Cancel Cause list.	HOLDS	
Circ34	1	Get CHS to be part of Circulation Menu	HOLDS	
Circ35	1	Have copy-specific indicator on pull list.	HOLDS	
Circ36	1	Need display of Hold Note column on screens showing any holds queue.	HOLDS	
Circ37	2	When entering Hold Note, want option of "Print on Slip" to be auto-checked.	HOLDS	
Circ38	2	In hold queues, Last Notify Time column is always blank. We need the notice sent date.	HOLDS	
Circ39	3	Change values for field Copy Quality to: "Standard" or "No Supplemental".	ITEM	
Circ40	1	Still want new field of Hold Shelf Location. Location would be retained until the item is checked out or is put on another hold shelf.	ITEM	
Circ41	2	Need SCKI identification in CKI Location of Item Details.	ITEM	
Circ42		Need ToteCKI identification in CKI Location of Item Details.	ITEM	
Circ43	1	Need SCKO identification in CKO Location of Item Details.	ITEM	
Circ44	1	Do allow aborts of In Transit that used to have status of Missing.	ITEM	
Circ46		Change staff-applied blocks to be CR instead of CHR.	MESSAGES	
Circ47		Remove the BOO hold note failure error message.	MESSAGES	
Circ49	3	Staff applied blocks should not remove the color border around patron name when patron record is retrieved.	MESSAGES	
Circ50	1	The H-block should become two types of blocks on holds: (H1) Placing of new holds; (H2) Capturing of patron's existing holds.	MESSAGES	
Circ51	1	Manage bounced emails	NOTICES	
Circ52	1	Log all notices sent to patron. Link from patron record to log. Print log from patron record. Error Note: Holds list currently never has value in Last Notify Time column.	NOTICES	
Circ53	2	Still want daily count by notice type and by notice format.	NOTICES	
Circ54	1	Telephony should speak patron name for message delivered.	NOTICES	

Circ55	1	Add invalid address indicator to file sending of notices (to Unique).	NOTICES	
Circ56	1	After telephony is launched, check for patrons with no notice preferences.	NOTICES	
Circ57	3	Start Canceled Hold and Expired Hold notices.	NOTICES	
Circ58	1	If notice is being sent to a juvenile, include "To parents/guardians of" in the mailing address.	NOTICES	
Circ59	1	Notice preferences chosen by patron in My Account need to checkmark the corresponding choices in the patron record.	NOTICES and OPAC	
Circ60	3	Analyze last CKI and CKO dates before accepting transaction. And status change date.	OFFLINE	
Circ61	1	Staff OPAC - As well as suppressed bibs appearing, so should suppressed items.	OPAC	
Circ66	2	Implement Holds Overflow and a Wish List for purchase requests.	OPAC	
Circ67	2	Batch edit.	PATRON	
Circ68	1	Fields still wanted:Date record was last used for authentication or circulation. Date record was last updated.	PATRON	
Circ69	1	Patron record fields still wanted: "No Collections" indicator that may be turned on by staff. Mailing Authorization (can wait for mailing of holds development). Telephone Preferences: preferred time of day, no calls at all. Creation Date: constant display rather than hover. Last Update date (last authentication date for electronic use). Barcode Last Changed date. Last Circulation Activity date. Last Electronic Activity date. Checkout Counter: lifetime, but would not want this to cause slowdown (can drop this one per Karen). Address Alert: last discussion was about a table that is checked by the duplicate checker.	PATRON	
Circ70	2	Patron record fields still wanted: Bad Phone Number Marker. Bad Email Address Marker. Text Messaging Address (can wait for any SMS development).	PATRON	
Circ71	1	Be able to retrieve/search patron by record number.	PATRON	
Circ72	3	Zip Code table – needs to stick. Used for alerts and autofill.	PATRON	
Circ73	1	Save, Save & Clone – loss of notices preferences is happening.	PATRON	
Circ74	1	Edits in patron record – need immediate Refreshing so new parameters are applied.	PATRON	
Circ77	1	Need vertical tabbing in Search screen, or rearrangement of fields.	PATRON	
Circ78	1	Need order of Edit screen to be in better synch with application form.	PATRON	
Circ80	2	Need more than 50 results to display for Patron Search.	PATRON	
Circ81	2	When retrieving multiple patrons from Patron Search, need the STOP sign page to appear when necessary.	PATRON	
Circ82	1	We need a holds override for when fines threshold is exceeded. Needed for Outreach.	PERMISSION	
Circ83	1	We need a holds override for when the max holds limit is reached. Needed for ILL.	PERMISSION	

Circ84	2	Still need Pull List Stats by Branch: number of items, date printed.	REPORTS	
Circ85	2	Need a canned report to identify counts of SCKO and SCKI stations.	REPORTS	
Circ87	2	Need selfCKO audible cues for successful actions as well as unsuccessful actions (patron login and item checkout). Also a speed issue w/ items w/ holds. Can demo speed issue here at Service Center.	SCKO	
Circ89	2	Allow use of Usernames.	SCKO	
Circ92	1	Items fed to sorter at Preston should be routed to the Circulation Library if no hold is attached—regardless of the item's status. Item status should not have to be In Transit.	SIP	