

RELEASE 2002 ENHANCEMENTS
PRELIMINARY LIST

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PRELIMINARY LIST OF RELEASE 2002 ENHANCEMENTS

This list briefly describes the new products and enhancements that Innovative has scheduled for inclusion in Release 2002. Note that this is a preliminary announcement only. There will be amendments to this list as development progresses. Within each category, enhancements will be grouped by the phase in which they will be released, Phase 1, Phase 2, or Phase 3.

ACQUISITIONS

PHASE 2

- ☐ The extended approval plan will handle multiple-copy approval and firm orders.
- ☐ The staff user will be alerted if there are any holds on a title during invoice processing.
- ☐ It will be possible for the library to edit the use tax rates that the system uses.
- ☐ To facilitate shelf-ready processing from book vendors, with EDIFACT ordering, it will be possible to send location and fund details for each copy in a multi-copy order.

PHASE 3

Financial Functions

- ☐ Simplified Acquisitions will eliminate the need to post and to clear the payment history file. Those functions will occur automatically after invoice processing.
- ☐ Fund adjustments features will include new fund and new fiscal year appropriations as well as expenditure and encumbrance adjustments.
- ☐ Fund Activity Reports will provide a printed audit trail for current transactions.
- ☐ A foreign currency estimated price manager will recalculate the estimated price for orders based on fluctuations in conversion rates.

- ☐ An estimated price manager will recalculate the estimated price for orders based on the actual cost of previous payments.
- ☐ An increase in the maximum number of order record links will allow the library to attach up to 200 orders to each bibliographic record.
- ☐ An increase in the maximum number of payment sessions will allow the library to have up to 50 payment sessions for each accounting unit.

Management Functions

- ☐ Staff will be able to generate financial reports based on the library's fund hierarchies for the current fiscal year and the previous fiscal year(s).
- ☐ Vendor statistics tracking will allow the library to gauge vendor performance and record total vendor activity over time.
- ☐ With the currency conversion table, the library will be able to establish the conversion rate for each currency.
- ☐ With the Usetax table, the library will be able to establish its use tax rates.

Purchase Orders

- ☐ The EDIFACT orders feature will allow the library to transmit purchase orders in the EDIFACT format.
- ☐ Staff will be able to choose the specific ISBN to be used in an order. This enhances flexibility for consortium libraries.
- ☐ Purchase order printing will allow sorting of printed purchase orders for convenient bursting.

Vendor Maintenance

- ☐ The 30,000-vendor option will allow a library to store up to 30,000 vendors and introduces the enhanced flexibility of the new vendor record.

CATALOGING

PHASE 2

- ☐ The revamped Millennium Editor ("Quick Edit") offers:
 - the ability to open multiple record editing windows
 - "Transfer attached records" as part of the editor, not a separate program
 - the ability to edit records from an attached record summary. This includes the ability to change multiple records at once.
 - customizable appearance
 - expandable special fields (MARC tags 006, 007, and 008)
 - the ability to copy an existing record to create a new record
 - support for linking items to multiple bibliographic records
 - the ability to delete a bibliographic record and all of its attached records in one operation
 - the ability to turn non-MARC fields into MARC fields (and vice versa)
 - the ability to sort attached records by any field in the summary display (e.g., sort item records by volume) or by a predefined sort (location, call number, volume, and copy number) and preserve that order
 - easier and more consistent navigation between records while editing
 - the ability to import order data into items
 - session statistics during and at the conclusion of an editing session
 - the ability to see the public view (Web OPAC style) of a record

- ☐ Templates: The number of templates stored on the server has been increased to 1000 per record type. Additionally, each login may choose a list of 150 "Preferred Templates". Templates may be added and removed from this list by the user at any time. When creating new records, the user will select a template from the "Preferred Templates" list (if it exists). For libraries that have a large number of templates, this will make the selection of templates easier for those users who only need a subset of the total templates available.

- ☐ Staff will be able to process the URL Checker report within Millennium Cataloging so that detected URL errors can be easily updated in the bibliographic record. Note that the URL Checker is a separately available product.

- ☐ The Millennium batch label printing program will allow staff to queue spine and book labels to a batch label queue. This will enable printing sheets of laser printer labels.
- ☐ Cataloging will employ improved locking of review files while they are being used by an update program (Global Update, Rapid Update, etc.).
- ☐ Cataloging will support the SAB (Sveriges Allmänna Biblioteksförening) Classification System. This includes a new call number index rule and the ability to input SAB call numbers in SCAT tables for statistical reporting purposes. Associated setup fees apply.
- ☐ The Cataloging Workstation for Windows will honor the **New Records: Always check for duplication for record types** Database Maintenance option setting.

CIRCULATION

PHASE 2

- ☐ Millennium Circulation will offer the ability to produce the following types of circulation notices:
 - Overdue
 - Hourly overdue
 - Recall
 - Hold pickup/cancellation
 - Paging slips/Item paging lists
 - Bills/fines
 - INN-Reach paging and pickup slips

The remaining types of notices will be available in a future release of Millennium Circulation.

- ☐ Title level recalls will be supported in Millennium Circulation.
- ☐ Item Home Pickup: This feature will use a new loan rule element to determine whether patrons may specify a hold pickup location or must pick up held items at the item owning location.

- ☐ The Interface to Third Party Self Checkout Device (310I) product will be enhanced and renamed to reflect improved support for other staff devices such as sorters and automated check-in systems that use the SIP2 (Standard Interchange Protocol, Version 2) protocol. The new product name is SIP2 Circulation Device Interface (310I). Among the enhancements is support for the "Alert" element in Millennium's SIP2 Checkin Response for items with holds, alerting the check-in device to the requirement for special handling of the held item.
- ☐ The new PAT AGENCY field in the patron record will be incorporated into the automatic patron blocks table so that the combination of PAT AGENCY and P TYPE will determine the blocks that apply to a patron. The prerequisite for this feature is the Consortium Management Extensions product.
- ☐ To avoid having to check in all "in transit" items, the library will be able to specify a number of hours after which the system will automatically clear an item's "in transit" status.
- ☐ Users at INN-Reach or Inter-Library Loan libraries with barcode validity checking enabled will have the option to disable barcode validity checking when they check in and check out items.
- ☐ Millennium Circulation will be enhanced to use the "hold pickup locations" table, already in use in the OPAC, to display possible hold pickup locations.
- ☐ The option to print notices for all locations in Millennium Circulation will require a new, separate password.
- ☐ Notice Charge: To recoup some of the cost of producing notices, libraries may automatically apply a charge for each printed overdue notice to the patron's record.
- ☐ The library will be able to customize the date due slip by login. The library can determine which fields in the item record will be printed, how many spaces on the slip to allocate for that field, and in what order the fields will be printed.

- ☐ When performing financial functions in the Circulation Desk mode, the fines tab will dynamically reflect changes without requiring closing the patron's record and reopening it.

PHASE 3

- ☐ A new fixed-length field will be added to the patron record to store the date of last circulation activity, as opposed to the existing "last updated" date.
- ☐ The text of circulation notices will be enhanced to allow more lines of text and blank lines.
- ☐ A new system option will allow libraries to specify which fields will appear in the brief patron display in Millennium Circulation.
- ☐ Staff will be able to view patron records that are in use by the system.
- ☐ Selected additional circulation parameters may be viewed from the "Information About the System" menu, including the rule determiner table, the file of notice texts, the hours open table, the days closed table, and the locations served file.
- ☐ Receipts for partial payments will show the original amount of the charge, the amount paid, and the amount remaining.

COURSE RESERVES

PHASE 2

- ☐ Course Reserves maintenance will allow bibliographic records, and thus all of their items, to be placed on reserve.

INN-REACH

PHASE 3

- ☐ Secure Patron Verification: Verification between the central INN-Reach server and the local sites will now incorporate secure communications.

- ☐ Web OPAC enhancements for INN-Reach: These enhancements include the ability to customize the INN-Reach request screen. For additional enhancements, see the Web OPAC section.
- ☐ Requesting to Own Site: Allowing patrons to request items available at their own sites will be an option that may be implemented by site, rather than system-wide. If a site allows patrons to request from their own sites, the site will become the preferred lender rather than using priorities or load balancing.
- ☐ Renewal at Owning Site: Items will be renewable at the library that owns the item. The new due date will be communicated to the patron site and the virtual item will be updated with the new due date.
- ☐ Canceled Orders: When order records are canceled on a local site, the central INN-Reach system will be updated with the cancellation information.
- ☐ BCODE mapping: As records are loaded from local sites to the central INN-Reach system, the values in the BCODE fields can be mapped to INN-Reach central values.
- ☐ Status display upon checkout: For local sites that participate in INN-Reach systems by contributing only holdings level data, when a request is processed on the local system, the circulation status can be changed to a circulation status text rather than to the processing due date.

INVENTORY CONTROL

PHASE 2

- ☐ The Inventory Control function can be modified to process barcodes that vary in length.
- ☐ The system can include entire barcodes in the Barcode column of Inventory Reports. Previously, the system included the last six digits of barcodes only.

MANAGEMENT INFORMATION

PHASE 3

- ☐ Circulation statistics will combine new check-out transactions and renewals for a total number of check-outs. A new report will offer a new column that totals the number of check-outs and the number of renewals to provide the total number of items circulated.
- ☐ The system will record login statistics for libraries that have purchased unlimited OPAC users.

MATERIALS BOOKING

PHASE 3

- ☐ When a staff user places a booking that ends at the library's closing time, the system will no longer ask "Library closed. OK to book item?"

MILLENNIUM GENERAL

PHASE 2

- ☐ The Create Lists mode will be available in all Millennium modules, enabling authorized staff to view and edit records in a review file.
- ☐ Millennium Create Lists allows individually selected records to be added to an existing review file.
- ☐ The revamped record editor allows customization of its appearance, the ability to copy records, transfer attached records, etc. (see the Cataloging section for a more complete description).
- ☐ Records selected from a Millennium browse display will consistently offer easy navigation to the NEXT or PREVIOUS record in the browse display without the need to return to the original browse display.

PHASE 3

- ☐ Network bandwidth requirements for Millennium will be greatly reduced, particularly at session startup, through the use of local disk caching by Millennium clients of frequently used information from the Millennium server.

- ☐ The Millennium control bar will be available for Millennium libraries running one or more of the Java staff Millennium clients. This new program allows users to launch applications from a new control bar, rather than from the desktop or browser. The Millennium control bar will be able to launch the Web OPAC and Web Reports in addition to the Java modules themselves: Millennium Circulation, Millennium Serials, Millennium Acquisitions, Millennium Cataloging, Millennium Inter-Library Loan, and Millennium Media.
- ☐ Millennium client programs will communicate with the Millennium server using secure socket connections, greatly enhancing the security of the communication through the use of data encryption.
- ☐ Millennium applications will allow the renaming of fixed- and variable-length fields using longer, more descriptive values for display in the graphical Millennium environment. Older values will be retained for continued display in the character-based programs.

MILLENNIUM MEDIA

PHASE 2

- ☐ The new Millennium Media product will port existing functionality from the Windows-based Scanning Workstation into a Java-based imaging client. It will include:
 - the ability to enter publisher information, printing and viewing information
 - scanning and automatic document feeder (ADF) support from TWAIN compliant devices
 - file importing and saving
 - support for multi-page scanning and saving
 - a basic level of image manipulation: cropping and rotating
 - the ability to choose resolution and bit depth
- ☐ Libraries will be able to import and save digital files in more formats, including TIFF, PDF, and JPG.
- ☐ Staff will be better able to manipulate multiple page image sets, including inserting, deleting, and adding pages within a particular set for both scanning and importing.

PHASE 3

- ☐ The system will have the ability to restrict access to electronic reserves based on course password.
- ☐ Web OPAC will be enhanced to improve printing from Electronic Course Reserves/Imaging.

ORACLE**PHASE 3**

- ☐ Additional information will be put into Oracle tables for access by ODBC/SQL applications. This information includes:
 - Funds: The fund information will be moved into an Oracle table.
 - Vendors: The vendors information will be moved into an Oracle table.
 - Locations: The location information will be moved into an Oracle table.
 - Circulation Transactions: The circulation transaction information will be moved into an Oracle table.

REFERENCE DATABASES**PHASE 3**

- ☐ After a change to the wwwoptions file in Reference Databases, the system will prompt this message, as is done in the main INNOPAC: "If you have made changes to this file, restart all World Wide Web Server processes in "RESTART a TERMINAL" in order for the changes to take effect. Press <SPACE> to continue".
- ☐ INN-View: Navigation controls will be added so that patrons are offered a return to their local catalog after accessing an INN-View database.

SERIALS

PHASE 2

- ☐ The library will be able to define a checkin message for each checkin record.
- ☐ A feature-rich sort option for sending claims will allow the user to sort claims by any field in the related records.
- ☐ It will be possible to copy circulation statistics from items checked in from the bindery and add the total circulation statistics to the new item record.
- ☐ A "claim-all" option will be added to allow the user to queue all of the claimable issues with one command.
- ☐ A new option will be added to update the summary holdings statement during serials checkin.
- ☐ It will be possible to limit the modes and tabs that display for each login.

SYSTEM

PHASE 2

- ☐ For libraries storing patron images on their Millennium servers, the Patron API will include in the patron data output a URL referring to the patron image so that remote devices, such as library card printers, can access that URL to obtain images directly from the Millennium server.
- ☐ Swedish language Millennium systems will support the inter-filing of the letters V and W.
- ☐ A new system shutdown selection will offer the ability to reboot the system automatically instead of requiring a shutdown and power cycle to perform a reboot.

PHASE 3

- ☐ An automatic nightly process will check for and clear records that are unnecessarily set to "in-use-by-system".
- ☐ A new function will allow authorized users to view a list of all records that are "in-use-by-system".
- ☐ Authorized users will be able to add new network system printers to the system, eliminating both the requirement to contact Innovative to perform this setup and the associated charge for the setup service.
- ☐ When using the "Email Printer" (sending print output to an email address), the user will have an opportunity to enter a free-text comment to be included in the body of the message preceding the print data.

URL CHECKER**PHASE 2**

- ☐ The URL Checker will recognize as valid the referral of one URL to a different server and no longer report this condition as an error.
- ☐ The report from the URL Checker can now be viewed within Millennium Cataloging. This report can now be used to directly edit and update URLs within records.
- ☐ Staff will be able to process the URL Checker report within Millennium Cataloging so that detected URL errors can be easily updated in the bibliographic record.

WEB ACCESS MANAGEMENT**PHASE 1**

- ☐ Secure transmission of user information when using the proxy server.
- ☐ A new method of remote patron authentication, which does not require user configuration of the proxy in the browser. The new method is a rewriting proxy, which directly links the authenticated remote user to the licensed resource.

WEB OPAC

PHASE 1

- ☐ SSL: The aim of this project is to protect sensitive patron information in the Web OPAC forms. The product will provide a Secured Socket connection for forms that contain sensitive information. Data entered on these forms will be encrypted before being sent to the server. An additional goal of this project is to remove or encrypt personal information that is currently displayed in the URLs generated by Web OPAC. Note that SSL certification must be acquired from a third party.
- ☐ Users can perform scoped searches of Z39.50 databases.
- ☐ Web OPAC will support the ability to batch request multiple titles, using export list as a "shopping cart".
- ☐ Libraries will be able to customize the Web OPAC patron record display.
- ☐ INN-Reach Central machine requests will no longer default to a pickup location.
- ☐ Libraries can define one URL for displaying a thumbnail image and a link to the full book jacket image on the bibliographic record display.
- ☐ Content Linking: Libraries can define one ISBN-based link from browse and record displays to a Web-based resource that uses a URL API.
- ☐ On scoped systems, Course Reserves searching by course or professor will obey and maintain the user's scope session. Associated setup fees will apply.
- ☐ Browse screens support customization of display attributes, including table borders, colors, font, and alignment.
- ☐ The library can define browse column labels for "Mark" and "Medium".
- ☐ Advanced Keyword Searching will fully support diacritic searching.

PHASE 2

- ☐ Item Home Pickup: This feature will use a new loan rule element to determine whether patrons may specify a hold pickup location or must pick up held items at the item owning location.
- ☐ Libraries will have the ability to customize the INN-Reach request screen.
- ☐ Record browse screens will include brief record displays, including holdings information, book jacket thumbnails, and resource links.
- ☐ The INN-Reach holdings display will be enhanced to provide customization of column headers, data, and color.
- ☐ Libraries can request that Innovative configure Web OPAC (and OPAC) search statistics to accumulate for more than 10 days.

PHASE 3

- ☐ The library can customize different bibliographic record displays for different scopes, e.g., an academic view, public view, kids' view.
- ☐ The system will record login statistics for sites that have purchased unlimited OPAC users.
- ☐ Libraries can allow My Millennium users to access Web Access Management databases and Electronic Course Reserves without re-verifying themselves.
- ☐ My Millennium Staff sessions can be set to ignore time-out options by patron type, allowing reference workstations to be set indefinitely to staff mode.
- ☐ Web OPAC can offer My Millennium selectively, i.e., only to certain patron types.
- ☐ The system will have the ability to restrict access to electronic reserves based on course password.

- ☐ Web OPAC will be enhanced to improve printing from Electronic Course Reserves/Imaging.
- ☐ Bath Profile Compliance at Level 0 for our Z39.50 client and server products.
- ☐ Web OPAC will support long field name labels in the record display.
- ☐ Web OPAC will support alternate email tags in the Millennium Alert feature.
- ☐ The library can define display properties for the "You are logged in as:" My Millennium message.
- ☐ Millennium Alert email feature will support keyword searches as well as phrase searches.
- ☐ Browse screens will offer alternate sorting options such as call number, author, and chronological order.
- ☐ Search results sets will be navigable by a hyperlinked pagination scheme similar to Web search engine results navigation.
- ☐ The "Save Marked Records" button will be copied from the bottom to the top of the Web OPAC screen so that patrons will more readily notice it.
- ☐ A message will be added to the top of the Web OPAC browse screen for a failed search indicating that no records were found that matched the search entered. This will make the contents of the result screen more understandable in the case where the "Your Entry Would Be Here" message is off the bottom of the screen.
- ☐ A new "Mark All" button will be available for Web OPAC browse screens. The maximum number allowed for marking will be controlled by a new WWWOPTION.

- ☐ The library will be able to set the default maximum size of the search results set.
- ☐ Support for relator code translation for all supported MARC types will be added.
- ☐ If 0XX fields are indexed, the values will become hyperlinks.
- ☐ Advanced searches that contain the string "not" will retrieve records with "not" in the indexed field, instead of treating "not" as a search operator. (If "and not" appears in the search string, it will still be treated as a search operator).
- ☐ Libraries will be able to control which advanced search help page the Modify Search button links to.
- ☐ Libraries that want to offer a broader set of advanced search results will be able to skip the adjacency search in favor of the "and" search.
- ☐ Web OPAC will support the display of hyperlinked 856 fields in checkin records on the holdings summary display, rather than on the checkin card display.
- ☐ With Release 2002 phase 3, you'll be able to customize your Web OPAC more easily. PureFTP will be installed to allow you to connect directly with your FTP or web site management tool of choice to move multiple files on and off the server. You can work in a familiar HTML editing environment such as Macromedia Dreamweaver and update your site without having to switch back and forth into the character-based system.

WEB USER MANUAL

PHASE 2

- ☐ Searching in the Web User Manual will be faster and allow phrase and other search patterns.
- ☐ The Table of Contents and Index will load more quickly.

NEW PRODUCTS

- ☐ MAP: Millennium Access Plus
 - WAM (**PHASE 1**): A new method of remote patron authentication, which does not require user configuration of the proxy in the browser. The new method is a rewriting proxy, which directly links the authenticated remote user to the licensed resource.
 - MetaFind (**PHASE 2**): A single search interface works across multiple resources to return an integrated result set.
 - WebBridge (**PHASE 2**): A product that enables a smart linking capability between the library's resources. This can include content enrichment such as book jacket images and book reviews or to the appropriate copy of full-text journal articles or e-books. WebBridge can be launched from the Web OPAC, Millennium staff modules, or another digital resource such as an A&I or full-text database. WebBridge includes a management interface to define the relationships between resources and provides full statistics on the use of defined resources.

PHASE 2

- ☐ Organization Records: With this product, libraries can set up records for organizations and institutions. Staff can link one or more patron records to an organization record by inserting the barcode of the organization record into a new ORG ID field in the patron record. This enables the transfer of each patron's fines to the linked organization record. It is possible to display the fines in the fine detail window and to print bills and statements of charges.
- ☐ A report mode will provide a list of items overdue by patrons in library-defined groups. This product was originally developed to meet the needs of school libraries by providing a teacher a daily report of overdues for the students in his or her homeroom.
- ☐ A Web-based checkin server using XML technology will be used for checking in E-journals, and also for checking in print journals with an electronic "packing slip."
- ☐ Staff will have the ability to associate an OCR text file with a particular digital object and index the text file into the advanced keyword index. Millennium Media and AVS are prerequisites for this product.

- To facilitate the display of holdings for electronic journals, it will be possible to update summary holdings statements from a text file.
- Held Item Delivery: Patrons may specify that requested items be delivered to their home address or to another location for pickup. Libraries may charge patrons for the fulfillment of these deliveries. When the held items are scanned at a receiving station, they are automatically checked out to the patrons and mailing labels are printed.

PHASE 3

- AirPAC: This new product is an OPAC interface designed for users who are accessing the catalog using non-standard browser software, such as wireless Web browsers and screen-reading software for the visually impaired. AirPAC screens are formatted for and readable by wireless devices with Web capability. AirPAC is designed to be compliant with the Web Accessibility Standards (Section 508) of the U.S. Federal Rehabilitation Act and with the compliance checklist of the Web Accessibility Initiative working group of the W3 Consortium.
- The XML Harvester leverages XML and the EAD standard to provide an automated cataloging tool. The Harvester will include a Web crawler that can access directories of XML EAD records with MARC Encoding Analogs over the World Wide Web, and an EAD-to-MARC parser that loads the XML records into the catalog as bib records with hyperlinks back to the source document.
- It will be possible to store up to 30,000 vendors per accounting unit and to include a library-defined message with printed purchase orders and claims for each vendor.
- Infrared Beaming for Web OPAC: This new product allows the transfer of data from the Innovative system, through an IR-enabled client, to an IR-enabled device such as a Palm. Features include beaming due dates from My Millennium records to a client's calendar and exporting search results sets or patron data from an OPAC workstation.
- Legato Backup: This product will introduce support for a centralized Legato backup server to remotely back up (or when required, to restore), the Millennium server over the local network, eliminating the need to perform locally scheduled backups on the Millennium server.