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| **Sort order options for selection lists, purchase orders, and invoices in the Acquisitions Interface**: |
| **Software Requirements Specifications for the Evergreen Integrated Library System** |
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Contents

[1. Introduction 2](#_Toc430876364)

[1.1 Purpose and Perspective 2](#_Toc430876365)

[1.2 Product Scope and Features 2](#_Toc430876366)

[1.3 Intended Audience 2](#_Toc430876367)

[1.4 User Classes and Characteristics 3](#_Toc430876368)

[1.5 Operating Environment 3](#_Toc430876369)

[1.6 Design and Implementation Constraints 3](#_Toc430876370)

[1.7 Assumptions and Dependencies 3](#_Toc430876371)

[2. System Functional Requirements 3](#_Toc430876372)

[3. System Nonfunctional Requirements 5](#_Toc430876373)

[3.1 Branding Requirements 5](#_Toc430876374)

[3.1.1 Branding 5](#_Toc430876375)

[3.1.2 Usability 5](#_Toc430876376)

[3.1.3 Understandability 5](#_Toc430876377)

[3.1.4 Promptness 5](#_Toc430876378)

[3.1.5 Internationalization and Localization (I18N and L10N) 6](#_Toc430876379)

[3.2 Performance Requirements 7](#_Toc430876380)

[3.2.1 Response Time 7](#_Toc430876381)

[3.2.2 Efficiency 7](#_Toc430876382)

[3.3 Operational and Environmental Requirements 7](#_Toc430876383)

[3.3.1 Compatibility 7](#_Toc430876384)

[3.4 Security Requirements 7](#_Toc430876385)

[3.4.1 Access 7](#_Toc430876386)

# 1. Introduction

## 1.1 Purpose and Perspective

This Software Requirements Specification (SRS) describes the functional and nonfunctional requirements for adding the ability to sort selection lists, purchase orders, and invoices in the Acquisitions Interface of the Evergreen Integrated Library System (ILS) by various fields.

The requirements in this SRS presuppose the general data structures and functionality of the Evergreen ILS.

Adding this functionality will streamline workflow for Evergreen acquisitions users, allowing them to more efficiently search and process selection lists, purchase orders and invoices.

## 1.2 Product Scope and Features

When processing selection lists, purchase orders, and invoices, acquisitions staff need the ability to sort the lists in order to easily and efficiently find specific items. Currently, none of the three are sortable and staff must scroll through to find the desired line item. This can be time consuming and inefficient for large orders. Acquisitions staff desire the ability to sort these three key lists by author, title, publisher, and order identifier.

## 1.3 Intended Audience

This SRS is intended both for local library staff who may contribute additional requirements or commentary, and for software project managers and developers who will implement the requirements. As such, it aims for a high level of readability for a non-technical audience, while providing enough specificity to be useful to a software developer.

It is assumed that when software development occurs, it will be in a highly collaborative and iterative environment in which end-users have multiple opportunities to review and refine the user interface and software functionality in terms of whether it meets requirements defined in this software requirements specification.

It is also assumed that the reader has a general understanding of Library services and processes and does not require definition of common Library terminology. Where needed, the Evergreen Acquisitions Community will provide definitions to assist developers in understanding library terminology.

## 1.4 User Classes and Characteristics

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| --- | --- |
| Library Acquisitions Staff | Library Acquisitions Staff include librarians, library technicians, and others who participate in the ordering, receiving, and payment of library materials. |
| Evergreen Acquisitions Community | Any library or library staff member at an Evergreen library that has implemented or is planning to implement the acquisitions interface for the Evergreen integrated library system (ILS). |

## 1.5 Operating Environment

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| OE-1: | Evergreen is an open source integrated library system (ILS) that is a management system for library materials and patron records. It provides several interfaces including those for cataloging, circulation, acquisitions, and a public facing catalog (OPAC). |
| OE-2: | The Evergreen ILS generally operates on a Linux or Solaris server.  |

## 1.6 Design and Implementation Constraints

None of the requirements in this document are intended to limit design options except for those constraints delineated below. Rather, these requirements are intended to specify and identify design characteristics desired by the Evergreen Community for sort options within the acquisitions interface.

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| CO-1: | User rights and privileges will be controlled through security groups and/or “roles” that allow access control for individuals, workgroups, and arbitrary Staff groups. |
| CO-2: | User rights and privileges are assigned by Local Administrators or Consortium staff. |
| CO-3 | Evergreen is licensed under GNU General Public License (GNU GPL), version 2.0 or later. |

## 1.7 Assumptions and Dependencies

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| --- | --- |
| AS-1 | The standard for input of bibliographic data is currently USMARC21. The Evergreen ILS stores USMARC21 as MARCXML. |
| DE-1: | The Evergreen ILS is an enterprise-level Library Automation System.  |

# 2. System Functional Requirements

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| --- | --- | --- |
| **Req ID:**  | **Sort-01** | **Priority:** |
| **Name:** | **Support varied centralized and distributed policies and procedures** |
| **Description:** | Evergreen libraries have varying structures and may consist of single libraries, multiple branch single systems, or consortium with multiple systems and multiple branches. Any process needs to be scalable for future member growth, whether in additional library systems or branches added or increases in patrons and bibliographic items. |
| **Req ID:**  | **SORT-02** | **Priority:** |
| **Name:** | **Multiple users** |
| **Description:** | Allows multiple users simultaneous access to interface; allows successive requests from users in same login session. |
| **Req ID:**  | **SORT-03** | **Priority:** |
| **Name:** | **Permissions** |
| **Description:** | The Evergreen system provides distinct permissions limiting who can utilize specific functionality, including creating, editing, and otherwise managing selection lists, purchase orders (PO), and invoices. System and local administrators have the ability to assign the permission(s) for acquisitions functionality. Development of sorting capabilities should be within the permission structure for the acquisitions interface.  |
| **Req ID:**  | **SORT-04** | **Priority:** |
| **Name:** | **Sort by title of work** |
| **Description:** | Any selection list, PO, or invoice should be sortable by title of work (MARC field 245) in the MARC order record. It is desired that sort order take into consideration initial articles and/or non-filing indicators in the MARC record. The sort order should have option of A-Z or Z-A. Titles beginning with numerals or symbols should be sorted first in A-Z sort order and last in Z-A. Numerals should be in numerical order (0-9 or 9-0). Symbols may not be orderable so may be system default.  |
| **Req ID:**  | **SORT-05** | **Priority:** |
| **Name:** | **Sort by author of work** |
| **Description:** | Any selection list, PO, or invoice should be sortable by author of work (MARC fields 1XX) in the MARC order record. The sort order should have option of A-Z or Z-A. Names beginning with numerals or symbols should be sorted first in A-Z sort order and last in Z-A. Numerals should be in numerical order (0-9 or 9-0). Symbols may not be orderable so may be system default. |
| **Req ID:**  | **SORT-06** | **Priority:** |
| **Name:** | **Sort by publisher** |
| **Description:** | Any selection list, PO, or invoice should be sortable by publisher (MARC fields 260 or 264 |b) in the MARC order record. The sort order should have option of A-Z or Z-A. Publisher names beginning with numerals or symbols should be sorted first in A-Z sort order and last in Z-A. Numerals should be in numerical order (0-9 or 9-0). Symbols may not be orderable so may be system default. |
| **Req ID:**  | **SORT-07** | **Priority:** |
| **Name:** | **Sort by order identifier** |
| **Description:** | Any selection list, PO, or invoice should be sortable by (order) identifier: ISBN (MARC field 020), ISSN (MARC field 022), or UPC (MARC field 024). The sort order will be numerical and have the option 0-9 or 9-0. |
| **Req ID:**  | **SORT-08** | **Priority:** |
| **Name:** | **Return to default** |
| **Description:** | After sorting, staff should be able to return to original, default sort, if desired.  |
| **Req ID:**  | **SORT-09** | **Priority:** |
| **Name:** | **Printing** |
| **Description:** | Where print functionality exists, staff should be able to print in selected sort order. |
| **Req ID:**  | **SORT-10** | **Priority:**  |
| **Name:** | **Sort via dropdown menu** |
| **Description:** | Sorting should be accessible in a dropdown menu at start of selection list, PO, or invoice. Dropdown menu should provide sort order options: Title (A-Z, Z-A), Author (A-Z, Z-A), Publisher (A-Z, Z-A), Identifier (0-9 or 9-0) similar to sort results dropdown menu in advanced search. |
| **Req ID:**  | **SORT-11** | **Priority:**  |
| **Name:** | **Size of lists** |
| **Description:** | Sorting should occur in any size list and should strive to not adversely affect system response times or performance. |
| **Req ID:**  | **SORT-12** | **Priority:**  |
| **Name:** |  |
| **Description:** |  |
| **Req ID:**  | **SORT-13** | **Priority:** |
| **Name:** |  |
| **Description:** |  |

# 3. System Nonfunctional Requirements

## 3.1 Branding Requirements

### 3.1.1 Branding

* User interface for new development shall comply with Evergreen branding, colors, and font styles.

### 3.1.2 Usability

* All menus and other interfaces must have a format consistent with Evergreen.
* Menus and areas of interaction should be intuitive, easy to use, and not require excessive learning time.
* Nothing should preclude user ability to change font size and color to take advantage of browser based accessibility tools for visual or other impairments.

### 3.1.3 Understandability

* Where possible, new menus and other user interface elements should use simple and natural dialogue.

### 3.1.4 Promptness

* The interface should have no undue delay in accepting and responding to requests with the understanding that local implementation factors could have uncontrolled and negative impact on system response time.

### 3.1.5 Internationalization and Localization (I18N and L10N)

* While I18N and L10N are desirable, lack of time and funds may preclude including complete internationalization and localization.
* Evergreen has been implemented internationally by libraries with multiple language communities. Access to the Evergreen interfaces and reports in national and native languages is required by those communities.
* Nothing here should prevent later Internationalization and Localization (I18N and L10N).

## 3.2 Performance Requirements

### 3.2.1 Response Time

* Application loading, screen open and refresh times, accepting and responding to commands, and other functionality should have response times that are consistent and without undue delay.
* Users should have minimum wait times for system response where that time is controllable by the software within system hardware architecture.
* System response time should not negatively impact user workflow.

### 3.2.2 Efficiency

* Sorting should not negatively impact overall Evergreen system resources.
* Sorting should not monopolize Evergreen system resources.

## 3.3 Operational and Environmental Requirements

### 3.3.1 Compatibility

* Sorting should interact seamlessly with Evergreen Library Management System and its operating systems.
* Sorting shall be compatible with standard screen reading software such as JAWS and ZoomText**.**
* Sorting shall be United States Rehabilitation Act Section 508 or better compliant.

## 3.4 Security Requirements

### 3.4.1 Access

* Login is required to access the acquisitions interface.
* Sorting should not have negative impact on the permission structure for related functionality.