Minutes - Archway Cluster Meeting

St. Louis Community College

Meramec Campus

April 18, 2000

Attending:

Members: Paul Talaski, Carol Warrington, Stephanie Tolson, Bonnie Sanquinet, Linda Bigelow, Loretta Ponzar, Fran Stumpf, Joan Clarke, Becky Grady, Cathye Dierberg, Kathy Schlump; Guests: Ying Li; Mobius: Robin Kespohl.

Archway Meeting

- Reference meeting, April 26th - Reference librarians from the Archway cluster are invited to attend the morning portion of the meeting at St. Louis Community College, Florissant Valley Campus, TC204. When the group breaks for lunch the reference librarians will break out of the meeting to discuss reference agenda items in the Librarys classroom. Box lunches will be provided. A count of additional reference librarians attending indicated: 2 SC, 1 JC, 1 EC, 2 FP, 2 M, 4 FV. Robin Kespohl will want to get input from the reference librarians during the morning session on the following Webpac screens: use of AVAILABLE status; suggestions for label use (i.e. Campus Users) and item status codes (i.e. Best sellers, Archives) for section c of the Automatic Request Processing Worksheet; drop-down web server options. The cluster agreed with Joan Clarke´s suggestion on agenda items for the afternoon reference agenda: recommendations on Archway screen design; sharing of ideas on college´s catalog page design; sharing of ideas on help screens; sharing of ideas on training. Cathy Reilly was designated the reference librarian to lead the afternoon meeting of reference librarians.
- Remote access - Ezproxy was reported on by Carol Warrington. She felt it was something that the cluster may want to use to work with the API software. The cost of Ezproxy is $495 per server. Each of the institutions in the cluster would need to have this software running on their server. It is compatible with Windows NT and Linux operating systems.
- INNReach Go Live Date - The group decided on September 27, 2000.
- Extended meeting schedule - June 16th at SCCCC (last attended by Robin), July 14th at FP (am only).
- OPAC design - Carol Warrington reported that SLCC is basing its local catalog design off of the Millennium template.
- Circulation training - III Circulation Training is scheduled for June 6-7 at Jefferson College. A discussion ensued regarding SLCC desire to have three additional people in the room and moving the training to Florissant Valley. The group decided not to change the location until Bonnie Sanquinet confirmed accommodation for additional people with Mark Wahrenbrock and III. The equipment needs for training would remain the same: 4 computers for trainees, 1 computer for trainer, and 1 printer.
- Cathye Dierberg mentioned that Robin Kespohl had clarified that fact that the visiting patron option provided access to monographs only. Cathye also reported that St. Louis Community College administration is favoring support of the visiting patron option being turned on.

Mobius Meeting

1. Testpac evaluation - Robin Kespohl asked if there were any questions regarding Testpac following last weeks training. She reviewed a few items.
   - Worksheet - the worksheet to help with evaluating the Testpac was distributed along with an information sheet on the Archway Testpac that identified records that contained specific MARC fields for testing.
   - Assignments for index checking - SLCC indicated that they were planning on testing the entire Testpac. Robin identified a range of record numbers that should be used to test scoping to Meramec holdings and indicated that scoping did not work in the Web Testpac because IP parameters had not been setup. Scoping would have to be tested in the character mode. Other Archway members were alerted that only St. Louis Community College records were in the Testpac. This will allow all to evaluate the indexing.

- Archway Implementation Calendar was distributed. Some institutions asked Robin for details on how to identify call numbers prior to their database load. Robin will communicate with them directly. St. Charles indicated that they would not be doing an automatic patron load on May 11th due to changes in institutional IT priorities. Robin will work with them to key in patron records. St. Louis Community College requested an earlier serial load date than June 12th. Robin will investigate and report back.

2. Data Input:
   - Locations served (SA-2) (A>A>C>S) - each institution must input their information, but only one institution is allowed to input data at a time.
   - Login Setup (SA-4) (A>A>L>L>L) - Robin has completed input for the Webpac data. Check: are all location codes listed, are codes correct? Notify Robin if codes are missing or incorrect. Is label correct? Correct label (A>A>S>B) Each institutions must input their individual (e.g. technical services) logins. If anyone has trouble inputting logins, Robin would like them to stop and call her.
   - Branch Location codes (M>I>C>B) - Robin instructed all to take the locations served table and make sure all codes were represented here. She asked that we review labels for spelling and spacing. Most institutions will need to make a change in Branch Management from the mailing address code=1 to their appropriate address code (this is the return address that will print on notices). Change default mailing address from 1 to correct # (A>A>S>A). The information that should go into Email Source is the login for the person who prints notices.
   - JC and SCCCC need to complete mailing addresses (C9).

3. Data Input II (before circulation training):

   - Patron Type (C-1) (before patron load) (A>A>S>N>T) - Each institution must input their information, but only one institution is allowed to input data at a time.
   - Item Type (C-2) MCO has completed Archway input.
   - Rule Selection Table (C-3) (A>A>C>R) - Does not have to be any order. Each institution must input their information, but only one institution is allowed to input data at a time.
   - Patron Block Table (C4) (A>A>C>B - same as above.
   - Days Closed (C5) (A>A>C>A) - same as above.
   - Hours Open (C6) (A>A>C>H) - same as above.
   - Text of Circulation Notices (C8) (A>A>C>N) need to be input in order EC, JC, SCCCC, SLCC and placeholders established. EC will start and call JC when they have finished, then JC will then contact next in line. Robin asked that this be completed by April 25th.
   - Return Addresses (C9) (A>A>C>A) need to add login that will send notices and email address for bounced e-mail.
   - Loan Rules (C11) (A>A>C>L) need to be put in order with placeholders after circulation starts NEVER DELETE A LOAN RULE

4. Automated request processing

   - Start date - June 27, 2000
   - Worksheet - Robin led us through the worksheet and emphasized that that we needed to complete the parameters by July 2000.
     - Calculate "not wanted after" date: Yes Days after which the hold should expire: 180
     - Prevent ALL requests on items records based on location code? Y/N Robin indicated that we could choose a total of 20 rules and cluster uniformity was not required. The cluster will continue to work on this. Robin suggested that work on: Prevent ALL requests on Item records based on an item status code? Y/N The status messages will require uniformity in the cluster. Item e. Allow requesting of AVAILABLE items only? NO

5. INNReach start date? Not less than 3 months from go live date. September 27th was agreed upon.

6. Training by MCO will be mid-September 2000.

7. Web Server Options

BODYPARAM, background=white, link=blue, visiting link=purple.
- BROWSE, Itag
- CHECKIN_BGCOLOR, default
- CHECKIN_FONTCOLOR, default
- CLEAR_PRIVATE_INFO, Yes
- DROP_DOWN, Use as previously defined
- EXTENDED, l=location, publication date
- FLD_LABEL_VERBATIM, Yes
- FORM_FOCUS, default
- FRAMEURL, 1 frame
- HOLDING_2NDSCREEN, No
- HOLDINGS_POS, author, title, publisher, edition
- ILL_HOME, n/a
- INDEX_EXT, cgilh
- ITEMOUT_MSG, due date
- KEYWORD_COLOR, red, all
- LINK856TEST [_LANG], link to web version
- LOCKSCOPE, scope set true
- MARC, yes
- NEWPIN_MSG, Please enter or create your pin number
- NOSEARCH, nub
- OFFER_HISTORY, true
- PATRON_FIELDS, name address phone
- PSTARTOVER, return to scope page
- RECORDFRAME, comment out
- REQUEST Hold level=denyiflocalavail, pickup location=ask
- RESET_SCOPE, yes
- SORT_ITEMS, true
- STATGROUP, login
- SUPPRESS_CARD, no
- SUPPRESS_OPTION, encycpd, email, ill_home
- SUPPRESS_YEAR, no
- TIMEOUT, 300 seconds=5 minutes
- XSTARTOVER (_LANG), not used
- EXPORT OPTIONS, Brief_Export and Brief Export_Chkin - Carol Warrington volunteered to draft; others are to bring suggestions for other export options to the next meeting.

8. Other - Robin suggested that cluster members beginning thinking about what they want the Archway information page to have on it. She suggested that we review Arthur and Merlin´s pages at http://sequoia.lso.missouri.edu/mobius1/arthur.htm.