

## WILO Coordinators Meeting Minutes

November 17, 2003

1:30 p.m.

Rockhurst University

Attendance: Kathleen Finegan, Avila University; Laurie Hathman, Rockhurst University; Kenette Harder and John Young, William Jewell; Serge Danielson-Francois, Saint Paul School of Theology; Susan Beyer, Midwestern Baptist Theological Seminary; Ted Ostazewski, Metropolitan Community Colleges

### Site Updates:

Avila University library will be closed from January 5-20<sup>th</sup> for installation of new carpeting. AU will encourage their patrons to pick up items at other WILO locations. WILO libraries will instruct patrons not to try to be a Visiting Patron or request items through Patron Initiated Borrowing that is solely owned by Avila. Avila has requested that MCO suppress their records in the MOBIUS Union Catalog during this period.

### Release 2002 Phase 3 Issues:

See attached handouts for information on the decisions made regarding the newest upgrade.

Additional information:

- Jim Dutton indicated that the Millennium key tags could be removed from each module.
- Jim Dutton indicated WILO could change the summary displays on each module so that the columns that display are in the order preferred by each cluster. Currently there is no column in cataloging which displays the call number in the bib summary. He suggested that this be added. The circulation module has a column for bookings that could be removed if no sites use this option. Midwestern Baptist Theological Seminary and William Jewell are investigating bookings to possibly implement so this would not be removed until they make a decision on usage.
- William Jewell reported they are not seeing the internal notes while viewing the check-in records in their millennium session. There is no problem with the display of the public notes in the OPAC. Midwestern reported that they are seeing it, but they will investigate this. If this was a cluster decision each site that uses internal notes should see them.

### MARS Reports

Kenette will forward MARS reports to each site.

**Next Meeting**—January 29, 2004 at Avila University

### Administrative Information

Records in Use by System—

- Records in use can be freed automatically at regular intervals (usually an overnight process) (#105471) There is currently a problem with this, so this will not be considered at this time.

Statistics-- WILO cluster wants this

- A new report offers a new column that totals the number of checkouts and the number of renewals to provide the total number of items circulated. (#105436)

### **Millennium General**

Create Lists-- WILO cluster wants this. Only in Acquisitions and Serials. If problems arise everyone will be notified and we can turn it off. Not in circulation since it would affect IN-REACH.

- Staff are able to limit a range of records searched and retrieved in Millennium Create Lists to only records within their current scope. (#105528) *Note: Most logins are not scoped.*

Indexing—see attached table with re-ordered index list.

- It is possible to specify which indexes are available for searching in each Millennium application (including GUICAT). It also is possible to specify the order in which those indexes appear. (#100660)

### **Acquisitions – General**

- Simplified Acquisitions—This is a library decision if they want to implement it. Simplified Acquisitions eliminates the need to post and to clear the payment history file. If turned on, the library will no longer have a transaction history file or an audit trail. (#105494)

### **Acquisitions – Millennium**

Sessions—This is a library decision if they want to implement it.

- Libraries can request an increase in the maximum number of payment sessions—up to 50 payment sessions for each accounting unit.

### **Cataloging**

Authority Records-- WILO cluster wants this

- Staff have the ability to copy authority records in Millennium Cataloging to MeSH and genre index options (children's already available).

### **Circulation**

Course Reserves--

- The Course Reserves number is stored in MARC local field 999 unless cluster decides differently. WILO is already set up for this, so nothing needs to be done.

Electronic Reserves-- WILO cluster wants this

- The system has the ability to restrict access to electronic reserves based on course password. (#105542, # 103178)

Holds-- WILO cluster wants this

- Library Priority Table (#105410) This table would be set to equal priority for all the sites.
- Page Pickup Location First (#105102)

Login Manager-- WILO cluster wants this

- A new option removes claims returned notes for checked-in items. This is cluster-wide. (#104104)

## **Media Management**

Web Display-- WILO cluster wants this

- Clusters have the ability to customize the patron verification form and specify their own copyright statement. (#105398) Any site that will use Electronic Reserves will get approval from the Coordinators first on language used in the form.
- Web OPAC is enhanced to improve printing from Electronic Course Reserves/Imaging. (#102174)
- Clusters have the ability to turn off printing and saving in the image viewer. (#102174)

## **Web OPAC**

My Millennium-- WILO cluster wants this

- Clusters can allow My Millennium users to access Electronic Course Reserves without re-verifying themselves. (#102171)
- 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. (#102171) Send Kenette the patron types you wish to specify.
- Web OPAC can offer My Millennium selectively, i.e., only to certain patron types. (#102171) Send Kenette the patron types you wish to specify.
- The library can define display properties for the "You are logged in as:" My Millennium message. (#102171)

Searching

- A new "Mark All On Page" button is available for Web OPAC browse screens. The maximum number allowed for marking will be controlled by a new Web OPAC option. (#102168) MCO Help Desk did not know the maximum number so they are checking on this.
- The library will be able to set the default maximum size of the search results set for phrase searches. (#102168) This is 32,000 now and will remain the same.
- Browse screens can offer alternate sorting options such as call number, author, and chronological order. (#102168) *There are problems with this.*
- If 0XX fields are indexed, the values can become hyperlinks. (#102168) WILO wants the 001 and 020 fields available to be hyperlinked.
- 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). Set the AVS automatic quote insertion option. (#105417)—WILO voted to leave this as is.

- Clusters can specify the advanced search help page to which the Modify Search button links. (#102170) WILO voted to leave this as is.
- Clusters that want to offer a broader set of advanced search results can skip the adjacency search in favor of the "and" search. Set the AVS performs adjacency search option. (#105479) WILO voted to turn this on. If it doesn't work as we hope we'll turn it off.

### **Record Display**

- The cluster can customize different bibliographic record displays for different scopes, e.g., an academic view, public view, or kids' view. (#105418) WILO voted NO on this.
- Web OPAC can support long field name labels in the record display. WILO voted NO on this.
- Support for relator code translation for all supported MARC types can be added. WILO voted NO on this.

### **Checkin Records**

- Web OPAC can support the display of hyperlinked 856 fields in checkin records on the holdings summary display, rather than on the checkin card display. (#102168) WILO voted YES on this.