



Second

Hong Kong
Innovative Users

Annual Meeting

Web Site: <http://lib1000.ln.edu.hk/hkiug/>

*Organized by
The Hong Kong Innovative Users Group*

*Venue: Cho Yiu Conference Hall,
The Chinese University of Hong Kong
December 10-11, 2001*

Second Hong Kong Innovative Users Annual Meeting

Programme

Date : 10 December, 2001

Session A

Venue: Cho Yiu Conference Hall, G/F University Administration Building
The Chinese University of Hong Kong

- | | |
|------------------|--|
| 8:45 - 9:00 AM | Registration |
| 9:00 - 9:30 AM | Opening Remarks by Dr. Colin Storey, Chairman of JULAC Announcements, general information, and III company updates by Mr. Aaron Blazer of Innovative Interfaces Inc. |
| 9:30 - 10:15 AM | III Demo & Presentation: Release 2002 |
| 10:15 - 10:30 AM | Group Photo |
| 10:30 - 11:00 AM | Break |
| 11:00 - 11:45 AM | Presentation - " The use of Smart Card and Patron API in CUHK Libraries" presented by Mr. Paul Lau, Mr. Ernest Yik and Mr. Kevin Leung of CUHK |
| 11:45 - 12:30 AM | Presentation - "Projects involve Tamino and INNOPAC" presented by Mr. K.T. Lam and Mr. Edward Spodick of HKUST |
| 12:30 - 2:00 PM | Lunch at Shaw College Staff Dining Room |

Second Hong Kong Innovative Users Annual Meeting

Programme

Date : 10 December, 2001

Session B

Venue: Cho Yiu Conference Hall, G/F University Administration Building
The Chinese University of Hong Kong

2:00 - 3:00 PM Group Discussion ---

Acquisitions

***Location: User Education Room 2, University Library, CUHK**
(Moderator: Ms. Eugenie Ng of LU)

Cataloguing

***Location: User Education Room 1, University Library, CUHK**
(Moderator: Ms. Maria Lau of CUHK)

Circulation

***Location: Cho Yiu Conference Hall, CUHK**
(Moderator: Ms. Lucinda Wong of HKU)

Serials

***Location: Rm 126, Institute of Chinese Studies, CUHK**
(Moderator: Ms. Venia Mak of LU)

3:00 - 3:30 PM Break

3:30 - 4:45 PM Summary of Group Discussions;
Update on III Customer Service, Q & A on INNOPAC modules
by Ms. Katrina Anderson of Innovative Interface Inc.

4:45 - 5:30 PM Presentation - "How to use WebPAC for new book selection
and collection development: The HKBU Library experience"
presented by Mr. Y.O. Li of HKBU

5:30 PM End of day one's programme

Second Hong Kong Innovative Users Annual Meeting

Programme

Date : 11 December, 2001

Session C

Venue: Cho Yiu Conference Hall, G/F University Administration Building
Chinese University of Hong Kong

- | | |
|------------------|---|
| 9:00 - 9:45 AM | III Demo & Presentation: XML in Innovative Systems (XML Harveste), Batch Checkin, Wireless solutions (Millennium AirPAC) |
| 9:45 - 10:30 AM | Presentation - "INNOPAC at Waseda University Library: 3 years experience in Japan" presented by Mr. Masatsugu Kaneko of Waseda University |
| 10:30 - 11:00 AM | Break |
| 11:00 - 11:45 AM | Presentation - "Latest developments of the HKCAN Project" presented by Ms. Maria Lau and Mr. Patrick Lo, HKCAN Group |
| 11:45 - 12:30 PM | Presentation - "InnoFace : Extra functions and interface for Innopac Library System -- Fung Ping Shan Library experiment" presented by Mr. Lo Tin-king and Mr. Chan Wai-ming of HKU |
| 12:30 - 1:45 PM | Lunch at Shaw College Staff Dining Room |

Second Hong Kong Innovative Users Annual Meeting

Programme

Date : 11 December, 2001

Session D

Venue: Cho Yiu Conference Hall, G/F University Administration Building
The Chinese University of Hong Kong

- | | |
|----------------|--|
| 1:45 - 2:30 PM | Library Visit Option A - United College Wu Chung Multimedia Library Option B - CUHK University Library |
| 2:30 - 3:30 PM | III demo & presentation: Millennium Access Plus (MAP), Unicode implementation |
| 3:30 - 4:00 PM | Presentation - "Implementing a shared INNOPAC" presented by Mr. Xiao Xiaobo & Ms. Li Juan of Xiao Jiaotong University (in Putonghua) |
| 4:00 - 4:15 PM | Break |
| 4:15 - 4:45 PM | Presentation - "Innovative and our current initiatives in Asia" presented by Mr. Petros Demetriou of Innovative Interface Inc. |
| 4:45 - 5:00 PM | Conclusion. Closing Remarks by Dr. Colin Storey, Chairman of JULAC |
| 5:00 PM | End of day two's programme |

Notes

1. There are also on site Vendor Exhibitions at the G/F, Main University Library of CUHK during the two days.

The vendors include: EBSCO
InfoAccess
Lexis-Nexis
SilverPlatter / Ovid
SmartalSolutions

2. All sessions and the conference lunches are free of charge.
3. Presentation of III products & services are given by Ms. Katrina Anderson, Mr. Aaron Blazer and Mr. Petros Demetriou of Innovative Interfaces Inc.

Second Hong Kong Innovative Users Annual Meeting

Questions to Innovative

GENERAL

1. Please ask III the enhancements in hand and in plan for the interlibrary loan module. **(cuhk)**
2. Millennium Telephone renewal system. Are there any problems that could be experienced by novice users in Asia. **(hkied)**
3. Would like to know more about III's products/strategies on using new or future technology, like the 3G mobile phone, WAP, or (MAP which will be discussed). **(hkied)**
4. Could III highlight the differences between the existing telnet version and Millennium version, especially on: What telnet can do that Millennium CANNOT do. We would like a list of what Millennium cannot do so that we know how long the parallel run should be. **(hkied)**
5. What are III's latest enhancement priorities re the different modules. **(hkied)**
6. Would like to have clarity on printing functions in all Millennium modules. **(hkied)**
7. Operating System Version Support. We received notification from Compaq that support for our INNOPAC AlphaServer's current Digital Unix OS version 4.0D will be terminated in March next year. They strongly recommended that we upgrade to the currently shipping version (5.1A) as soon as possible. Version 5.1A has been available for one year.

The highest Digital Unix OS version supported by Innovative is 4.0F, which according to Compaq's schedule will be retired one year after the termination of 4.0D (around June 2003).

If we upgrade to 4.0F now, we will have to upgrade once again in one year's time. The best solution would be for Innovative to increase the pace of their support for newer Digital Unix OS versions, so that we could upgrade directly to version 5.1A within the next six months.

There were a number of emails between us and III since March 2001 on this issue. The following was the reply from Steve Bade on 20 April 2001:

"We cannot provide any sort of time frame for if or when Innovative will support version 5.0A or 5.1 of the Digital Unix operating system at this time. We are constantly reviewing development by the OS vendors, and considering which new OSes to deploy our applications on. Thank you for your input and the detail about the choices you are faced with. --Steve"
(hkust)
8. In a review file, one cannot move forward/backward on the list by holding down the arrow keys. This is possible in other Millennium browse list windows. **(Inu)**

Second Hong Kong Innovative Users Annual Meeting

WebPAC

ADVANCED SEARCH

1. Can we choose to have those more frequently used material types, e.g. ebooks, electronic journals, etc to be displayed more prominently, in bold, with specific icons or colors etc. (polyu)

Answer: Yes, but it would mean using static html pages. If changes were made to the files which control material type, eg. a new material type is added, these changes would not be reflected and you would have to manually change the html in those events.

2. In Telnet mode, the search key for "Advanced Search" is "X". Is there any alternative key to replace it? It is inconvenient for user to switch between the small and capital letters. (polyu)

Answer: No. The upper case key is what identifies the Advanced Search index.

3. Would III add a print option for Webpac? At the moment, only telnet OPAC has the printing function but webpac does not. There are printing problems using Internet browser such as "data missing". (hkied)

4. META CHARSET.

Email sent to John McCullough on 27 September 2001:

By the way, we have a long-time problem related to the WebOPAC encoding. We reported via help desk way back in 1999 and got the reply that it would be considered as an enhancement request. But, so far there is no progress. May be you can help:

If we access WebOPAC via port 80, the character encoding is BIG5; 1080 is GB; 1081 is EACC/CCCII; 1082 is UTF-8. However, the web page that WebOPAC sends back to the web browser does not contain a META tag with CHARSET, telling the browser what encoding the page contains. Because of this missing information, Chinese characters and diacritics are usually not correctly displayed in the first time. Users will have to guess which encoding is in the page and manually set it in the web browser in order to have the subsequent page displayed correctly.

This should be completely unnecessary if WebOPAC can insert something like the following in the <HEAD>:

```
<META http-equiv="Content-Type" content="text/html; charset=UTF-8"/>
```

Since the encoding is well defined by the port number, WebOPAC should have no problem inserting a correct CHARSET value to this meta tag. By doing so, both Netscape and IE should be able to display the page in the required encoding.

Do you aware of any programming work being done on this problem?
Or, did we miss something in our WWWOPTIONS file?

John McCullough's reply on 17 October 2001:

K.T., your notion that the WebOPAC should generate charset META tags in its HTML is one we are hearing more and more from customers. I will try to expedite the delivery of this development and will keep you posted on its progress.

(hkust)

Second Hong Kong Innovative Users Annual Meeting

CJK

1. CJK Sorting

INNOPAC currently has a VERY CONFUSING sorting order for CJK:

| | Example |
|--------------------|------------|
| Numerals | 1997 |
| CJK with Pinyin | AA{21364c} |
| English Alphabets | apple |
| CJK without Pinyin | {224333} |

It is very strange to have English alphabets separated by "CJK with Pinyin" and to have CJK entries separated by English alphabets. The more natural order should be:

| | Example |
|--------------------|------------|
| Numerals | 1997 |
| English Alphabets | apple |
| CJK without Pinyin | {224333} |
| CJK with Pinyin | AA{21364c} |

[Note: "CJK without pinyin" include those CJK that are non Chinese and those that have missing Pinyin value in the III pinyin table].

Please redesign the sorting to make this natural order work.

This is a CRITICAL design problem and needs to be fixed without delay.

We reported this to Betsy Graham on 16 February 2001. The following was her reply on August 9 2001:

"#3 in which you complain about CJK sorting is not something that I am able to address now. If the Pinyin sorting is unacceptable to you I am very happy to turn it off and leave you with the new longer entries and the variant sorting that you have had for years, but I cannot now begin on a redesign of how we sort Chinese characters. You really do need to decide if you can accept this situation, or ask me to remove the Pinyin sorting."

And K.T.'s comment to Besty 10 August 2001:

"If you know Chinese, you definitely will share our feeling that sorting of Chinese by internal EACC code value is not meaningful. III has tried to satisfy our needs by offering other sorting methods like pinyin and radicals. I hope III will continue to improve on this and don't give up. By turning off this feature will not solve anything. If III does not positively start the redesign now, then the headache will never be gone!"

(hkust)

2. CJK punctuation should not be indexed.

CJK punctuation should not be indexed and should not be included for sorting. The following are the CJK punctuations that need to be handled:

212328
212329
21232D
212A46
212B25
212B26

Second Hong Kong Innovative Users Annual Meeting

212B31
212B32
212B33
212B34
212B35
212B38
212B39
212B3A
212B3B
212B3D
212B59
692126
692152
692153
692154
692155
6F7625

We reported this to Betsy Graham on 16 February 2001. The following was her reply on August 9 2001:

"For #6, I will make sure that my list of Chinese characters representing punctuation includes all of the ones that you list here. I am hoping to make progress on this problem in Release 2002. I know that this is a problem with or without Pinyin sorting and does not matter for your decision on Pinyin."

And K.T.'s comment to Besty on 10 August 2001:

"It is to my surprise that this little software fix requires a whole year to work on, notice that Release 2001 is just recently released."

(hkust,lnu)

Second Hong Kong Innovative Users Annual Meeting

CATALOGUING

1. Can we jump directly to Z39.50 Searching Multiple Systems when we are updating a bib record? Right now we can access III authority file when we are Verifying Headings. (cuhk)

Sample screen:

B12306423 Last updated: 31-01-98 Created: 20-10-95 Revision: 4

You searched for the SUBJECT: social work education congresses

Nearby SUBJECTS are:

- 1 Social Work Education China Hong Kong 14 entries
- 2 Social Work Education China Hong Kong Congresses 2 entries
- 3 Social Work Education China Hong Kong Periodicals 1 entry

Please type the NUMBER of the heading you want, or

A > Browse AUTHORITY file at Innovative D > DISPLAY Title and Call No.

F > Go FORWARD T > Display Title and Author

B > Go BACKWARD J > JUMP

P > PRINT Q > QUIT

2. When will the following CJK-Z39.50 features available? (Inu)

2.1 Exporting records as a batch file--(NOT yet available).

2.2 Automatic overlaying of duplicate records--(NOT yet available).

2.3 Problem in MilCAT - When importing CJK records, all 880 fields are discarded.

3. Can more information from local authority records be displayed instead of just heading choosing. When verifying heading, we can select a heading from the authority. Only heading is displayed and function in dialogue box only offers a choice for heading selection. It will be helpful if other authority information are displayed or offers choice to view the whole authority record. (cuhk)

Sample screen:

B12306423 Last updated: 31-01-98 Created: 20-10-95 Revision: 4

YOUR heading is:

650 0|aSocial work education|xCongresses.

Heading selected from the INDEX is:

150 0|aSocial work education

Heading selected from the index with YOUR extended information is:

150 0|aSocial work education|xCongresses.

| I > Use heading from the INDEX

| Y > Use heading with YOUR extended information

| Q > QUIT

| Choose one (I,Y,Q)

4. 7XX Enhancement in authority records (HKCAN). (Inu)

5. When will INNOPAC be able to support create list based on specified 880 fields? (cityu)

6. When will INNOPAC be able to support listing of specified 880 data in review files? (cityu)

7. When will INNOPAC install the romanization function (T function in Catalogue Data Maintenance in the character-based system) in GUICAT? (cityu)

8. When will the Romanization function in authority module be available? (Inu)

9. How to extract from the database the titles that have various editions? (cityu)

Second Hong Kong Innovative Users Annual Meeting

ACQUISITIONS

1. Price shown on electronic order file is in Hong Kong currency instead of foreign currency. This will confuse our vendors. Foreign currency is automatically shown on the printed blue order form. **(polyu)**
2. Vendor performance. It is very important to have additional time interval of statistics of delivery time e.g. 3/5/6/7/9/10/11 weeks other than existing intervals of 2/4/8/12/16/17+ weeks. **(polyu)**
3. FTP (Receive approvals and firm order data from book vendor). Only one file is allowed to be transferred each time. Most of the time, we need to transfer two files for each shipment. **(polyu)**
4. Update record. Providing log file for update history can facilitate monitoring work. **(polyu)**
5. Vendor note. Only 30 characters are allowed in transmitting electronic order. In some occasions, it is not sufficient enough for us to input essential information, e.g. product ID:12345; Rush/No TP; with CD-ROM; with supplement; 1st conference; special price until 12-Oct-2001; Publisher contact no. xxxxxxxx... etc. **(polyu)**
6. Vendor address. Only five lines with 29 characters in each line are allowed. In some occasions, it is not sufficient enough for us to input full address of vendor, e.g. Academic & Professional Book Centre (35 characters) **(polyu)**
Unit C, 5/F Casey Aberdeen Ctr (30 characters)
20 Wong Chuk Hang Road
Aberdeen
Hong Kong

On the Millennium version (Me):

7. Can we have partial receiving option? Currently the default assumes complete receiving of multiple copies/volumes, we need to accept the default and delete records for unfilled items afterwards. **(Inu)**
8. Ordering & Receiving in foreign currency (the exchange rate calculation is not working) **(Inu)**
9. It will be nice to have a choice of using key board or mouse in all the modes. **(Inu)**
10. Key map of the text based version can be set to work a marco, similar function appears in the Me version but it doesn't work at all in the training session. Could we have it fixed? Also would like to know if Me keeps all functionalities of the key map, e.g. key map can insert long strings or a marc tag (tag no. + content of the tag). **(Inu)**
11. Can we have the Z39.5 access at UPDATE records in ACQ mode? (Currently we have access through the CAT mode but we can't attach order records using the CAT mode.) **(Inu)**
12. Can we search record by barcode at U > UPDATE records of the order & Receiving Mode? **(Inu)**

Second Hong Kong Innovative Users Annual Meeting

CIRCULATION

1. Can we add a note field in item record? It is not the same as MESSAGE which is used for alerting the Circulation. Note field can be used for recording in-house information on certain item. (cuhk)
Sample of item record :
Tag of new field? INVALID FIELD TAG, some valid tags are:
b Barcode m MESSAGE
c CALL NO. v VOLUME
f ACC #
Press <SPACE> to continue
2. Could INNOPAC provide a record of the items that a patron/program has checked out and returned in the past 2/3 years? (cityu)
3. "Coming due" notices. At last year's HKIUG meeting, III informed us that the "coming due" notice was already on their enhancement list. We would like to know the stage of development of such notices. Will they be available soon? Users sometimes request that we send out such notices to alert them which items are due in a few days' time. We think that such notices will enhance our service and cut down on the processing of overdues. (hku, polyu)
4. Overdue level of overdue notice for recalled items. Currently, III sets the overdue level of an overdue notice for a recalled item as 7. HKUL sets blocking of a patron when he or she has an item reaching the overdue level of 4, which means the item is overdue for more than 30 days. When we started the recall service, we noticed that patrons who had only one recalled item overdue for one day would be immediately blocked from borrowing more books or renewing other non-overdue books. Needless to say, we, as well as staff in branches, received lots of complaints for that blocking. We also thought the blocking was rather harsh and asked if it could be removed. III replied that in order to prevent a block from being implemented by the patron block table based on level of overdue, we must set the blocking level number higher than 7, say 8. If we, however, set the blocking level at 8, then not only would patrons with overdue recalled items not be blocked, patrons with billed items (normal long overdue items of 30+ days) would also not be blocked. We do not want the latter to happen. What we want is the same treatment for all kinds of overdues, no matter whether they are recalled items or not. In other words, patrons will only be blocked when their overdues, whether it is a recalled item or not, have become billed items. Could III do an enhancement to allow that? (hku)
5. Status of cancelled holds is changed to "transferred" (c555798). After the recent new release of III, we found that when a patron cancelled a hold when the item was already on the holdshelf, or when staff cancelled a hold when it was not picked up after 7 days, the status of the item in the OPAC would be changed from "on holdshelf" to "transferred". Normally, the status should be changed to "available". The status "transferred" is misleading to users, and perhaps staff as well. When a user gets such an item from the open shelves and borrow it at the circulation counter, we have to do either a check-out or check-in to clear the "transferred" status. Then the user can borrow the item. We first reported this problem to William who reported it to III on 14 Sept. William had to emailed them again on 20 Sept. before they replied on 3 Oct. that it was a known issue and was being pursued for a fix. Now more than a month has gone by without any trace of a fix. The problem is still here. If the problem still exists when we have the HKIUG meeting, could you please ask them if a fix will be found soon? (hku)
6. Is there any indication for item which is check-in with the backdate function? (polyu)
7. Can we make a review file based on item's last checkin date? (polyu)
8. There's no "lchkin" field in the "U > Output USER-selected format" which is useful for making weeding list (telnet mode). (Inu)
9. Regular cleanup of III bug of 1 item record attached to 2 patrons? (polyu)
10. No "physical" address in email notices? (polyu)
11. Actual Book renewal date to be indicated in the item record? (polyu)

Second Hong Kong Innovative Users Annual Meeting

12. Actual hold until date to be indicated in circulation pickup notice? **(polyu)**
13. Currently, fines can be adjusted by anyone, please password protected this function. **(Inu)**
14. Mblock message does not display when we scan in the patron barcode. The messages will ONLY be displayed when we try to checkout or renew items. **(Inu)**
15. In Millennium, cannot display the LAST pickup date in the Hold tab unless we access the Search/Holds function which is password protected. **(Inu)**
16. Is it possible to display the hold information on the status line when we checkin items on hold ? **(Inu)**
17. "Create List" function not available through the MilCirc module. **(Inu)**
18. Incorrect checkout counters (Tot chkout not equal to curitemA+curitemB+curitemC+curitemD) occur quite frequently. **(Inu)**
19. In the Offline MilCirc module, a patron barcode is not accepted when it is found within the 3 previous ones. **(Inu)**

COURSE RESERVES

20. Can we customize the width of the display fields to suit the needs of different circulation counters? In the case of the Course Reserves Counter, we want to view the Due Date and Time in full. Extending the length of the Due Date field on every transaction is very inconvenient to our counter staff. **(polyu)**
21. Printout of the Millennium Course Reserves does not include the item barcode and total checkout. Whereas, printouts generated from character-based Course Reserves do not have this problem. Will you please enhance? **(polyu)**

SERIALS

1. Is it possible for INNOPAC to circulate current issue without creating OTF or dummy bib. Record?
(**cuhk**)
2. Electronic Payment. Can Millennium Serials extend the length of invoice number from 7 characters to 16? (**hku**)
3. Bind serials/update records. Can Millennium Serials activate the "bar-code scanner" function for title searching both in "Bind Serials" & "Update records"? (**hku**)
Remarks: [When using bar code scanner to scan the "ISSN bar-code" for title searching, this works in Serials Check-in]
4. Bind serials. (**hku**)
 - 4.1 Can exact issue date and number be listed when using Review file to extract title(s) with status of "To bind" with specific date?
 - 4.2 Can volume designation on the binding slip be printed as we defined?
 - 4.3 Can "Overlap cover year" (e.g.2001/2002) on the binding slip as the "cover year" shown in check-in box(es)?
 - 4.4 When generating binding slips, can Millennium Serials be shown the current date/Initials in binding slip?
5. Print serials check-in pocket label. Can serials check-in pocket label print function be separated from a routing label function? (**hku**)
6. Vendor file maintenance. Can Millennium Serials extend the print length of "Vendor name" from 28 characters to 38? (**hku**)
7. Claim overdue issues. Can Millennium Serials print the field "Identity" against the claim slip?
(**hku**)
8. The millennium version supports URL links for individual issues of a journal title. Who are the vendors or publishers that can automatically load these URLs into INNOPAC? (**polyu**)
9. The URL links for individual issues are only displayed in the checkin boxes. These boxes are not shown on the first level display. Users may not know about these links if they do not click for the checkin boxes. How can we inform our users on the OPAC display about these links? (**polyu**)
10. SISAC. Can Millenium Serials activate the SISAC check-in function in both "Serials check in" and "Update records"? Besides, SISAC check-in is not useful to those libraries (like us) which adapt the multi-record approach (i.e. one for printed, one for electronic). Will III consider to enhance this function? (**lnu**)
11. Print claims. Currently, we do not use standard claim slips. In addition, it is found that even though we generate the claims with A4 paper, the layout is strange and odd. We need to amend claims manually. Will III consider to amend the layout for libraries which prefer to print claims on A4 papers? (**lnu**)

Second Hong Kong Innovative Users Annual Meeting

List of Participants

The Chinese University of Hong Kong

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Second Hong Kong Innovative Users Annual Meeting

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Second Hong Kong Innovative Users Annual Meeting

List of Participants

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Second Hong Kong Innovative Users Annual Meeting

List of Participants

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Second Hong Kong Innovative Users Annual Meeting

List of Participants

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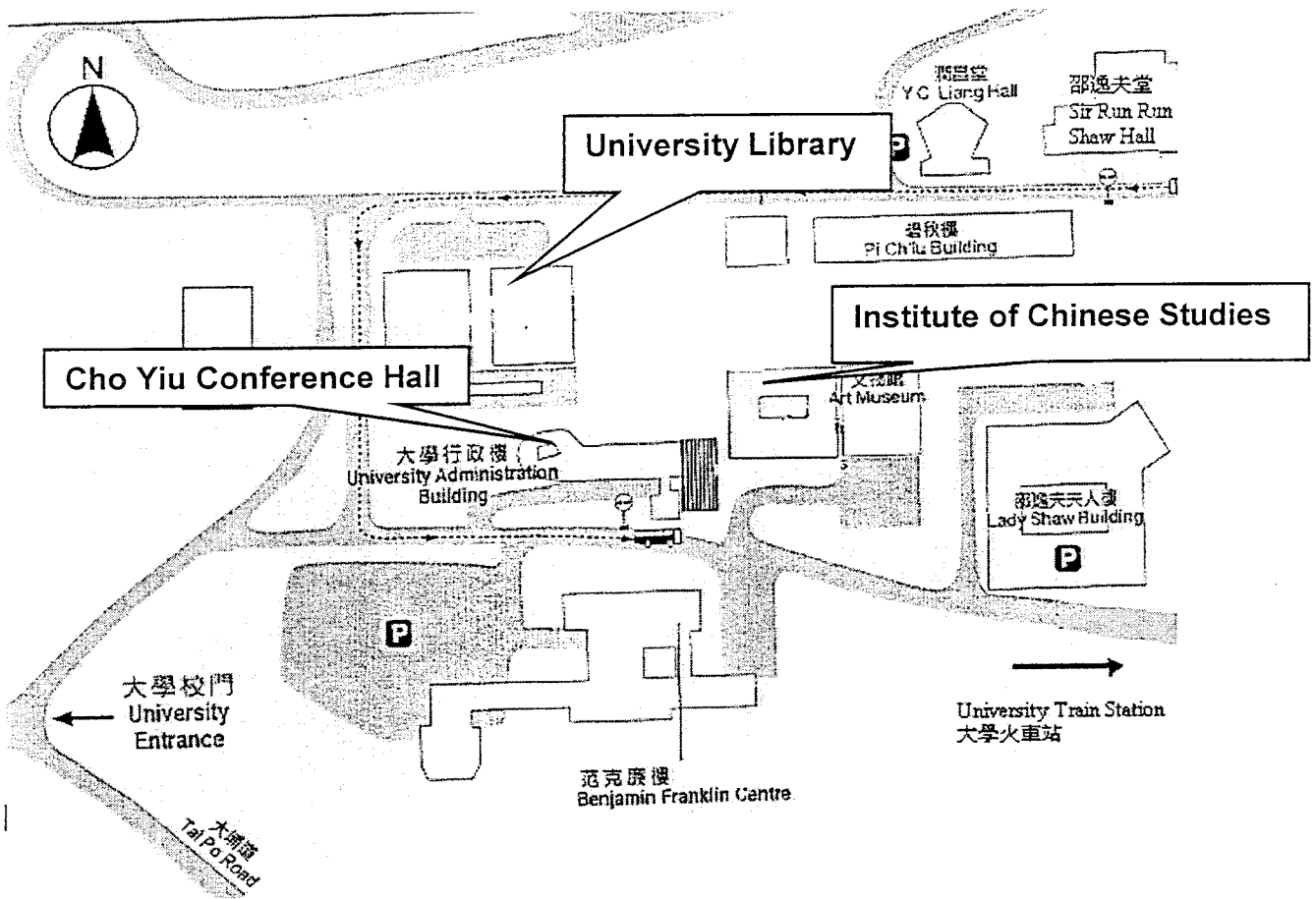
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Second Hong Kong Innovative Users Annual Meeting

CUHK Campus Map



CUHK Main Campus

Acknowledgment

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