

ACQUISITIONS GROUP DISCUSSION SESSION

Eugenie Ng (LingnanU) - moderator

1. In character-based version, the Library needs to purchase order records for use. No such requirement in MilAcq. If the Library decides not to switch to Millennium Acquisitions as yet, and it's usable order records are running out, is there the need for the Library to purchase new order records for use? (CU).

A: If a library has purchased the unlimited data license for order and checkin records, then they do not need to pay for additional order or checkin records. The telnet and Millennium interfaces use the same order records.

2. What is III's time frame for making all financial functions available in MilAcq.? (CU).

A: All of the financial functions (except for fiscal close and the voucher output option) will be available with Release 2002 Phase 3.

3. Have tested the ACQ Fund and Vendor functions but some problems exist that cannot be resolved.

- Cannot specify level of hierarchies displayed in detail and generate printed report. Can only generate result as that displayed on the screen.

A: This feature will be available in Millennium Acquisitions with Release 2002 Phase 3.

- Screen messes up after printing

A: This problem should be reported to the Customer Services Help Desk.

- For the vendor display, cannot view Vendor name in Chinese (under Eng Window+IE+Richwin)

A: We have not been able to recreate this problem. We can view the Chinese Vendor names in Millennium Acquisitions with no problem. More details are required about this problem which should be reported to the Customer Services Help Desk in order to perform the necessary diagnostics.

- Search invoice: Case sensitive. Prefer non-case sensitive. (IEd)

A: Please provide more information about this issue. This problem should be reported to the Customer Services Help Desk.

4. Inaccuracy in disencumbrance, especially when dealing with partial payments. (IEd)

A: This problem should be reported to the Customer Services Help Desk.

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5. On invoice register, can total amount posted to each external account be listed in both local and original currency?(IEd)

A: No. This should be pursued as an enhancement request.

6. How to do keyword search under invoice processing? At present, tag "W" was removed and "X" is interpreted as X-record instead of tag for Adv. Boolean(IEd).

A: The option to perform advanced keyword searches for invoice processing is available in Millennium Acquisitions. If the option is not working, the problem should be reported to the Customer services Help Desk.

7. Creating order records
- The prompt for creating item record, not the order record, comes up right after the bib. is created.

A: This is a Settings setup issue. See the section on Settings in the User Manual.

- It is not convenient to change the E Price as we need to calculate and key in the amount in the E Price field and x field. Ideally the prompt for currency appears when the cursor.

A: This should be pursued as an enhancement request.

- Price alert does not show the decimal for cents (i.e. \$1200 instead of 12.00). This is confusing (LU).

A: This problem should be reported to the Customer Services Help Desk.

8. Processing invoices
- Need to go all the way back to step 1 to select currency if the currency of next invoice is different, this will increase invoice-processing time.

A: This should be pursued as an enhancement request.

- Need to key in the total for an item, it will be helpful if the total will come up automatically after the price, the shipping charge have been keyed in (LU).

A: The INNOPAC and Millennium versions of invoice processing intentionally do not provide the invoice total amount. This allows the user to check that the on-line invoice total matches the printed invoice total.

9. To receive an item
- If we hit ENTER when the barcode field is blank, an alert will come up but the item record disappears. It will help if the record stay and we can avoid doing it all over again (LU).

A: This should be pursued as an enhancement request.

10. Chinese Characters

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- Some Chinese characters can't be displayed properly, e.g. 𠄎, the character with "213549" internal code.

A: This was missing from our Unicode table. Has been added in the next release.

- To key in the character -P in MilAcq will get "275163" (simplified character code) instead of "215163" (LU).

A: More information is required in order to diagnose this problem. The Chinese character doesn't display in this document. Could the library furnish more information?

11. Could we have the choice to use keyboard or mouse when working with MilAcq? (LU).

A: Yes, keyboard equivalents can be specified for most MILACQ functions.

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12. Repeated problems were found when using M > ITEM (Multiple) to attach multiple items (up to 31). In one case, items could not be retrieved after completing all the steps. In another we tried to change the barcode number of an item created by M>ITEM (Multiple) function. It was found that a Bib. record was retrieved with the
13. deleted barcode, however deleted barcode did not appear when calling up (hit "S") in the record summary. (This is found in the character-based version, we have not tested with MilAcq.) (LU).

A: This problem should be reported to the Customer Services Help Desk.

14. Could we have the card display instead of line display for "Field" at CREATE LIST? (LU).

A: This should be pursued as an enhancement request.

CATALOGUING GROUP DISCUSSION SESSION

Maria Lau (CU) - moderator

1. Multiple Search

- Records found from Remote databases should display the source i.e. university name as well. Don't just mingle them together. Otherwise, we have to go through them one by one.

A: This will be available in Release 2003.

- Should add the ability to overlay local record directly. (GuiCAT has this ability)(IEd).

A: This will be available in Release 2003.

2. Authority verification

- Millennium should be able to verify name, title and subject headings when editing records. (IEd).

A: This will be available in Release 2003.

3. Unicode

- If Unicode can support less Chinese characters than CCCII, some characters which can now be displayed normally can't be displayed in Chinese character form. They will be displayed as internal code e.g. {272b4e}. How will III handle this problem as it's a nuisance to our users.
- Does III have a list of characters that can't be supported by Unicode? (IEd).

A: We are looking into the above 2 issues. We have to develop a count to see the extent of the problem. Unicode has added many new characters in the latest release so some of it may require expanding our Unicode table. There is also the issue of characters that are in CCCII and not EACC and vice versa. Innovative is currently working on a project to update the Unicode mapping tables. More details about this project will be provided shortly.

4. CJK handling: Could more guidelines for handling of CJK be added to the manual? (HKU).

A: Yes, we are working on this and hope to improve the documentation in the next couple of months. The documentation may be posted on CSDirect rather than the manual.

5. When outputting IIIRECORD in XML format, CJK is in brace code form. Should allow output in UTF-8 and UTF-16 encoding. (UST).

A: This is on the list of desirable future WebOPAC enhancements, but has not yet been selected for development.

6. CJK - sorting by pinyin

Current sorting order is:

1. Numerals
2. CJK with Pinyin
3. English Alphabets
4. CJK without Pinyin

For example:

- | | | |
|---|-----------------------|---------|
| 1 | mytest 1997 | 1 entry |
| 2 | mytest {21364c} | 1 entry |
| 3 | mytest apple | 1 entry |
| 4 | mytest {692573} | 1 entry |

Note: {21364c} is a chinese character and has a pinyin value
 {692573} is a japanese kana and therefore does not have a pinyin value
 It is strange that #3 is sorted after #2. (UST).

A: The reason that #3 is sorted after #2 is that our romanization table gives {21364c} a value of “AA,” which sorts before “apple” . The Japanese character sorts after apple because a “{” is after the alpha characters in the standard ASCII sort.

7. CJK punctuations - should be ignored during indexing and sorting.

Example:

- | | | |
|---|---------------------------|---------|
| 1 | mytest apple | 1 entry |
| 2 | mytest orange | 1 entry |
| 3 | mytest{212b3a}apple | 1 entry |

Note: {212b3a} is a Chinese colon.
 It is strange that #3 is after #2.

A: A fix for this is pending and we are working on expediting this fix.

8. Tag 880 Problems in bibliographic record
- search results list - display of CJK title in tag 880 instead of romanized title in regular tag

A: When a search is done in Chinese characters, the expanded browse should show the title from 880 fields (which is in Chinese characters) NOT the first t-tagged field in record (which is in Romanized form). This is on the list of desirable future enhancements, but has not yet been selected for development.

- review list - failure to identify and manipulate fields

A: This is on a list of projects to do if time permits after completing all other projects selected for Release 2003.

- in tag 880 during list creation, sorting and outputting.
- limiting a search - failure of limiting a search by words found in tag 880.(UST)

A: This is on the list of desirable future enhancements, but has not yet been selected for development.

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9. CREATE LISTS:

- When we sort a review file by record #, we would like the system to alert us and also to identify the duplicate records in the file (duplicate records are records which appear more than once in a review file, usually as a result when additional records are appended to an existing file) (CityU).

A: This has been added to the list of possible future enhancements.

- Enhance the create list function so that we can create a review file based on the criteria that a specified MARC field appears more than once in a single record. For example, to find non-repeatable fields in a record which appear more than once in a single record, such as two 245 fields, etc. which may contain different data. (The Delete Duplicate Field command currently available in Millennium Global Update could only retrieve duplicate MARC fields with identical contents)(CityU).

A: This has been added to the list of possible future enhancements.

10. Export of review list in XML format.(UST)

A: This has been added to the list of possible future enhancements.

11. Global updating in Milcat:

- Enhance global updating to allow us to append a subfield to an existing variable field in a review file. For example, append subfield "d" with the data "CPV" to an existing 040 field (CityU).

A: This is already on the list of potential future enhancements, but has not been selected for development yet.

- Enhance global updating to allow us to insert special field such as 006 and 007 (CityU).

A: This has been added to the list of possible future enhancements.

12. Creating new bib. Records:

- In creating a new bib. record, when click on "NEXT" button, sometimes we get a tag label and its corresponding Marc tag and indicators (t TITLE 245 10), sometimes only the tag label and the Marc tag (t TITLE 245), sometimes no Marc tag at all (t TITLE blank) (LU).

A: This is a result of how the template being used is set up. If different defaults are desired, the user needs only change the template.

- At creating new record mode, the cursor appears after the second indicator, it will be more convenient if it is at the position of the first indicator. At the Edit mode, the cursor goes backward, not forward after inputting the first indicator (LU).

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A: In Release 2002 Phase 2, this should no longer be an issue.

- Records created in character-based version can be modified in the full-screen editor, but records created in MilAcq cannot, need to click on 'insert' to add a new tag/field. (LU).

A: One can always use keyboard shortcuts in Millennium for button actions--they don't always "need to click on 'insert'". The Release 2002, the Phase 2 editor removes the "Insert" button in favor of <ENTER> for adding a new field.

End

CIRCULATION GROUP DISCUSSION SESSION

Edward Spodick (UST) - moderator

1. What is the progress on the development of the "coming due" notices? (HKU)

A: This development is scheduled for 2003.

2. Can we add a course reserve record to an item without first cancelling all the attached holds on it? (HKU)

A: No. This should be pursued as an enhancement request.

3. When displaying holds for a patron while at check-out mode, can we display the pick-up by date in addition to the title, location, call number/barcode display? (HKU).

A: In Millennium Circulation. This information is currently available by right-clicking on the item, and selecting "View holds on this item." This will bring up the summary panel, which will show any pertinent holdshelf information in the status bar. We are negotiating with another site who has asked for this to show in the patron record hold tab, explaining that it is available as described above, and adding another column (that would usually not have any data in it, as it would only show if the item is on the holdshelf) may slow down the display of the table while the system queries the holdshelf file.

4. Existing program does not allow staff to collect money on a batch of overdue items loaned to different patrons, will this be treated as priority in the next enhancement?

A: In Millennium Circulation. In Release 2002 Phase 2, there is a new login option to allow the collection of monies from multiple patron while in the circ desk mode. This is to accommodate families returning a pile of items without requiring going into each patron's record. This new option is found in the Login Manager/Manager Controlled Options/Setup Tab/Collect money for multiple patrons checkbox. Turning this on will accumulate the fines until the patron session is closed.

5. Is it possible to set a default to skip the display of choosing Yes or No in receipt printing after collection of fine? At present the display prompt up every time payment is made and hold the window screen for 10 to 15 minutes (IEd).

A: If this is referring to the Print or OK buttons on the receipt dialog box, this currently cannot be changed. This would be an enhancement request.

6. Telnet CIR. Can view e-mail hold item list be sorted by Call no. to facilitate staff to check the availability of books on hold shelf easily? (IEd).

A: Sorting does not work for paging slips in the character-based notices. However, Millennium Notices, available in Release 2002 Phase 2, does allow sorting of these

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notices by call number, as well as other criteria from the item, bib, or patron records. The character-based system is no longer being enhanced.

7. Renew & Add Fines

When a user renews an overdue item at the counter, the system prompted "Renew and Add Fines". However the fines will not add the "Fines" tab immediately. We have to close the user account and then open it once again to collect fines (LU).

A: This problem has been fixed in Release 2002 Phase 2. Items checked in with fines will automatically post the fines to the fines tab for collection.

8. Expiration date for hold shelf items displayed on the "item Record" tab rather than "Item-Level Holds" tab. It is inconvenient. (LU).

A: The information about holdshelf status in Release 2002 Phase 2 is found in the status bar, and is visible from the summary tab, the item tab, and the item-level holds tab.

9. Hourly backdate is not available as sometimes we will backdate items several hours earlier. (LU).

A: This should be pursued as an enhancement request.

10. Global update of patron records is available in the Cat module rather than in the Circulation module. (LU).

A: This should be pursued as an enhancement request.

11. Bulk Check-in.

It would be more convenient for counter staff if the hold information can be displayed at the "Status" bar when processing bulk check-ins. (LU).

A: This should be pursued as an enhancement request.

End

SERIALS GROUP DISCUSSION SESSION

Ms Venia Mak (LingnanU) - moderator

1. Checkin: Innopac is now unable to handle the following, can it be revised?
 - Unable to key in the range of dates for weekly publication in checkin boxes.

A: This should be pursued as an enhancement request.

- Checkin card unable to handle issue no. greater than 999 (e.g. 5889-6001)

A: This feature is available in Millennium Serials

- Unable to handle CJK label printing after merge the accounting unit.

A: The library should contact the Help Desk to discuss a resolution of this problem.

- OPAC display unable to handle the display of PField (display username/password simultaneously), X-field (the space of the message has been messed up) OPAC note (unable to display two OPAC notes) (HKU).

A: The library should contact the Help Desk to discuss a resolution of this problem.

2. Scanning SICI number: Innopac allows retrieving records by scanning the issue's SICI number. However, this function can only be used in the checkin mode. Can the function be added to the update mode and the binding mode of the serials module? (HKU).

A: This feature is available in Millennium Serials

3. Checkin: Innopac is now unable to handle the following, can it be revised?
 - Unable to key in the date range for weekly publication in checkin boxes.
 - Checkin card unable to handle issue no. greater than 999 (e.g. 5889-6001)
 - Unable to handle CJK label printing after merge the accounting unit.
 - OPAC display unable to handle the display of PField (display username/password simultaneously), X-field (the space of the message has been messed up) OPAC note (unable to display two OPAC notes) (HKU).

A: See #1. above.

4. Review file: Review file can only be generated by searching the checkin + bib. records or order + bib records. Is it possible to allow generating records by using criteria in checkin + bib + order record. (HKU)

A: No, it is not possible. This should be pursued as an enhancement request.

5. Order:

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- HKUL has created the Rfield to link the relations between checkin + orders. Is there any function in the Millennium version that can show the relationship of checkin and order.

A: In Millennium Serials a link is maintained between the checkin record and a specific order record. The user can specify the linked order record in the card parameters.

- Can foreign currency amount be displayed when processing the payment?

A: This feature is available in Millennium Acquisitions.

- For the vendor records, can more characters be allowed in one line (now the max. is 28)?

A: There is a new product option, which may be purchased with Release 2002, phase 2, to expand the vendor file to 30,000 vendor records. The ability to allow more characters in one line is available with this option. To allow this feature we have taken this opportunity to introduce a new record type for vendors. As we progress, this architecture will allow greater flexibility in adding new fields and features. For example, In Release 2002 we are adding a language field and a URL field so the library can keep track of the preferred language of the vendor and store the address of the vendor's website right in the vendor record. This is really just a beginning for what we can do with the vendor file in the future.

- Can the price in the e-invoice be inserted automatically in the E-price field?

A: No, it is not possible. This should be pursued as an enhancement request.

6. Binding:

- date of sending to bindery does not print on the "Pull slip", can this be added to the new version?

A: No, it is not possible. This should be pursued as an enhancement request.

- For cross year publication, need to modify the pub. year manually when issues cover more than a year. (e.g. 1999-2000), can this be generated automatically by the system?

A: This feature is available in Millennium Serials

- HKUL is using 2 classification schemes, now the system is unable to support the print format of 2 schemes. Is the new version able to handle?

A: No, it is not possible. This should be pursued as an enhancement request.

- If the issue is supplement, can this information be printed on the "pull slip"? (HKU)

A: No, it is not possible. This should be pursued as an enhancement request.

7. Claims:

- Is it possible to update a range of boxes that are not adjacent at the same time?

A: This feature is available in Millennium Serials

- When doing batch claims, can the boxes be rapid updated?

A: This feature is available in Millennium Serials Claiming mode.

- How many ways are provided by the systems for extracting data from the awaiting claim file? (HKU)

A: This feature is available in Millennium Create Lists. The library should contact the Help Desk and request that the claims-awaiting-printing be made available as a review file.

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8. Serials Chekins. The third level of the volume, issue number and the alternate enumeration function cannot work properly, such as v., no., pt., etc. The issue number cannot be incremented after selecting the third level enumeration. (IEd)

A: The library should contact the Help Desk to discuss a resolution of this problem.

9. The “Refresh Expected Dates” function of the expected date is to set new expected dates by extrapolating from ARRIVED issues. But the function is not working. (IEd)

A: The library should contact the Help Desk to discuss a resolution of this problem.

10. Send Claims. We cannot print the claim letter since the FTP function is not working (IEd).

A: The library should contact the Help Desk to discuss a resolution of this problem.

11. Binding. Cannot print the binding slip properly and unable to modify the characters to Chinese on the binding slips. Thus, some strange characters appear. (IEd)

A: The library should contact the Help Desk to discuss a resolution of this problem.

12. Create List. The Millennium version does not support output list to other format. We cannot list the records in the review file into Output USER-selected format. This format is used to convert data into excel worksheet. (IEd)

A: This feature will be available in Millennium Create Lists in Release 2002, Phase 3.

13. We cannot limit the payment to those made within a particular time period which is available in character-based system. For example, the record contains more than one

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payment history and we only want to list the payment for this year, we cannot limit that payment by paid date or invoice date in Millennium. (IEd)

A: This feature will be available in Millennium Create Lists in Release 2002 Phase 2.

14. All fields from check-in card are not available for Create List. The check-in card information such as Cover date, Transaction date, other box information cannot be searched in Millennium. (IEd).

A: This feature will be available in Millennium Create Lists in Release 2002 Phase 3

15. Creating Checkin Cards (# 100495). Cover date cannot displays “Chinese” (LU).

A: The library should contact the Help Desk to discuss a resolution of this problem.

16. Printing Serials Labels for an Issue (#104079). If the record has a “routing list”, when we print out a serial label, the system will automatically print a routing list on another serial label (LU).

A: The library should contact the Help Desk to discuss a resolution of this problem.

17. Response Time. Slow response time, and the system hangs easily, esp. when we type wrong information. For example, if we default to receive 2 copies and we request to print 3 labels, the system will hang immediately (LU).

A: The library should contact the Help Desk to discuss a resolution of this problem. (Note that there are significant performance improvements in Release 2002 Phase 2.)

Enhancement / Suggestions (LU)

1. Checking in Serials (#100432)

Show a pop-up screen when checkin if individuals are on the routing list for this particular serial. It would help remind serials staff to route this serial (LU).

2. Checking in Bound Issues (#100450)

Can we choose “Delete Range of Boxes” without altering LIB HAS Field?

3. Inserting Boxes Before a Selected Box on a Checkin Card (#104075) or Adding Boxes to the End of a Checkin Card (#104071)

Add more options, i.e.

Inserting supplement boxes after a selected box

Inserting index boxes after a selected box

Inserting supplement boxes alternates after a group of selected box, i.e.

Issue 1	Supplement 1	Issue 2	Supplement 2	Issue 3	Supplement 3
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4. Summary Display

It would be better if we can view “all records” instead of “checkin” (LU).

End

WebOPAC GROUP DISCUSSION SESSION

Ms Shirley Leung (CU) - moderator

1. Can users choose to change the display order of the results list? (E.g. sort by publication year?) (LU).

A: Yes, 2002 phase 3 includes this feature:

Browse screens will offer alternate sorting options such as call number, author, and chronological order.

2. Can we add a button to mark all the items on the result list / a page of the result list instead of marking items one by one? (LU).

A: Yes, 2002 phase 3 includes this feature:

A new "Save All On Page" button will be available for Web OPAC browse screens. The maximum number allowed for marking will be controlled by a new WWWOPTION. Also, the "Save Marked Records" button will appear on the top and bottom of the Web OPAC screen so that patrons will more readily notice it.

3. When I call Z39.50 on its own, I can browse the results by using the "previous record" and "next record" buttons. When I call Z39.50 from the local search result button, the "previous record" or "next record" buttons are missing (LU).
4. Would like to configure the Advanced keyword search to provide users with preset choices by checkbox & pull-down menus. E.g. users can use drop-down menu to choose the keyword to appear in "any fields / author / title / subject / notes"; can enter more than one sets of keywords and choose from drop-down menu for "and / or / within #" connectors; can check a check box for truncation instead of typing the "*" (LU).

A: This can be done using Javascript. It is planned to be made generally available later next year as an item downloadable from CSDirect.

5. Advanced Keyword searches:

- On Chinese screen: When a search is limited by Publisher the search results in 'No entries found' although there are records in the system. Publisher is shown in character, such as {214265} {213058}... For example: keyword = 小學數學 and publisher limited to 新亞洲. (IEd).

A: A fix to this has been made in Release 2002, phase 2.

6. Implementation of <META> tag for CHARSET to specify the character encoding used in the WebOPAC pages

Example, for pages from the UTF-8 port, the following

<META> tag should be included:

<META http-equiv="Content-Type" content="text/html; charset=UTF-8"/>.(UST).

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**A: Yes, Release 2002 phase 3 includes this feature:
Meta tags (MIME headers) will be included in web pages to identify character set
and, for static pages, the last updated date.**

7. WebOPAC hit-list display problem: if an entry has multiple hits, irrelevant 245|c information (which is pulled out from one of its hits) is displayed after.

For example, search TITLE "collapse of communism"

You will retrieve a hit list similar to the following:

Num TITLES (1-2 of 2)

Entries

1 The Collapse of communism / [by the correspondents of
the New York times] ; edited by Bernard Gwertzman and
Michael T. Kaufman

2 The collapse of Communism in the Soviet Union / William E. 1
Watson

Notice that entry #1 found 3 hits and the string "/ [by the ..." is incorrectly displayed since it is from one of its hits. It is very misleading to the users as they will think that all three hits are "by the ...". (UST).

A: This should be fixed in Release 2002, phase 2

8. WebOPAC Z39.50 client: should provide option to mark retrieved records, or to save marked records" for export. This functionality is available in the character-based Z39.50 client interface, but not in the web version. (UST).

End