INTRODUCTION

Understanding and customizing the Login Manager (Manager-controlled options, Preferences and Settings) for the logins on your server is the key to optimizing the use of all Millennium modules for your library's particular needs, policies and practices. This tutorial is designed to be used as a guide for setting up new logins, and as a reference for later questions. It covers Manager-controlled options, Preferences and Settings as they are used in all Millennium applications.

The tutorial as a whole can be used in different ways.

Step-by step
For the new system administrator, or for the customer who is just beginning to implement their Millennium system, it can be followed in a step-by-step manner, using the **« previous** and **next »** navigation icons, in which case it will cover all options in all modules, following the structure of the Manager-controlled options, Preferences and Settings tabs.

Module based approach
A second way to use the tutorial, particularly suited to the department supervisor who is primarily interested in a single module, is to use the module based approach. Using the Millennium Modules menu, select the module (Circulation, for example) in which you are interested. An image of the tabs used by that module, including the options appropriate for that module, can be used for links. In that case you would use the browser's Back button to return you to the Millennium Modules menu page, and then you would choose the next tab.

Reference guide
Finally, customers who wish to use the tutorial as a reference guide to information about the uses or consequences of a particular setting can use the Manager-controlled options, Preferences and Settings menus to go directly to the page with the information about the setting in question.

close window

NAVIGATION & REQUIREMENTS

- Links near the top of each page lists each section in the tutorial, with your current location. You can select a different section from the link.
- At any time you can select from the drop down menus on the navigation bar across the top of each page.
- Links to pages outside the tutorial open in a separate browser window. To return to the tutorial, close the external link window, or click on the tutorial window to make it active.
- Hot Tips are used to highlight information that either illustrates or expands a point in the tutorial text.
- Moving graphic examples are included on some pages. To view them you need the Flash plugin on your computer.
- You can download the *latest* **Flash Player** from Adobe web site

Recommended Web Browsers for optimal viewing

- Internet Explorer 6.0 and above
- Mozilla Firefox 1.5 and above
- Mac: Safari 1.2 and above

Printing

You can print individual tutorial pages and screens from within a Web browser using the '**Printer friendly page**' icon

PRINTER
FRIENDLY
PAGE

The complete tutorial can also be printed in PDF format. To view and print it you need Adobe Acrobat Reader software which you can download from

Please contact us if you have questions, comments or problems.

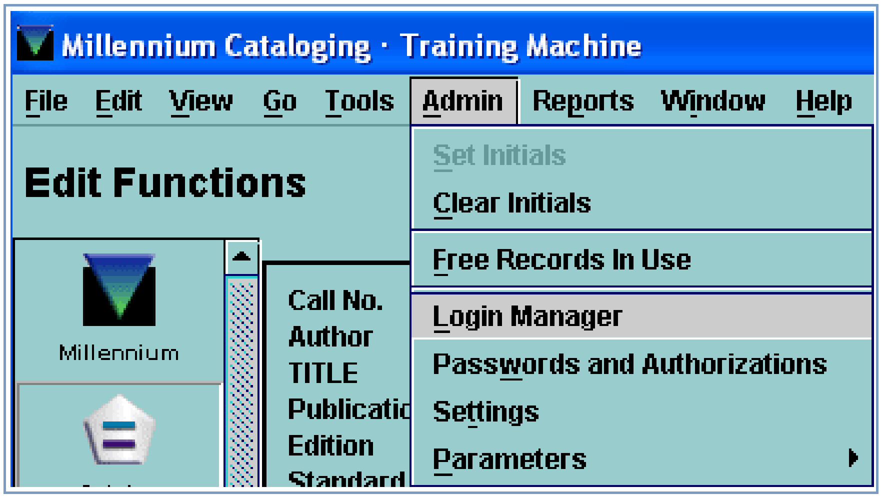
close window

CREATING A LOGIN

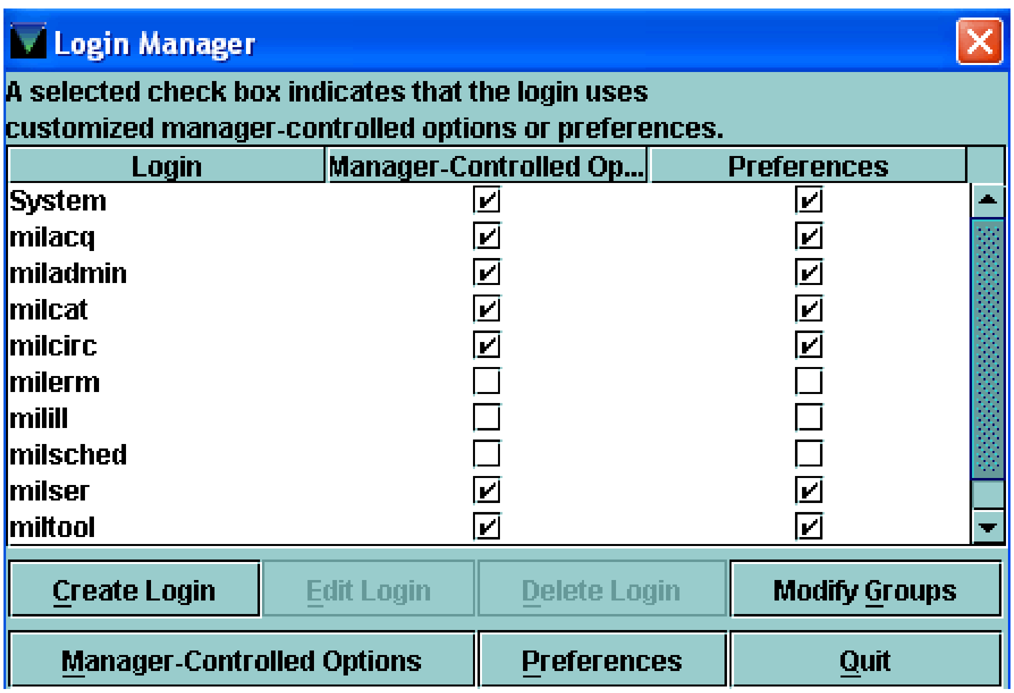
Each login associated with a Millennium module can have different sets of options defined. Before you start customizing your Millennium modules you need to set up your logins.

Millennium logins are created from within the Login Manager. To access the Login Manager, you must be authorized for function 187 (Login Manager). To work with logins, you need to be authorized for the following:
721 (Create Login)
722 (Edit Login)
723 (Delete Login)

To open the Login Manager, choose **Admin | Login Manager** from the top menu within any Millennium module.



All Millennium logins that are currently setup will display, along with buttons for creating, editing and deleting logins:



All Millennium modules and the Millennium control bar have default logins on new systems, as follows:

milacq - Millennium Acquisitions
miladmin - Millennium Administration
milcat - Millennium Cataloging
milcirc - Millennium Circulation
milerm - Millennium Electronic Resource Management
milill - Millennium Inter-Library Loan
milser - Millennium Serials
miltool - Millennium Control bar

The setup on your system will differ based on the modules your organization has acquired.

> The default logins are usually used during training. The password is always the same as the login name. After training you can adjust or delete them. You should at minimum change passwords, since all systems have the same default setup.

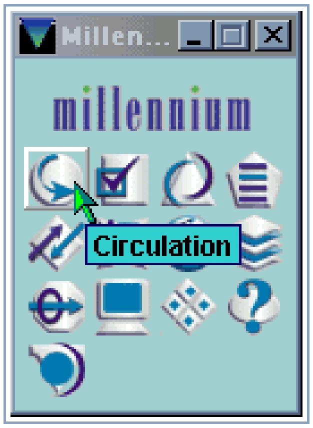
To edit an existing login, highlight the login name in the list and press **Edit Login** button, or use keyboard alternative **Alt-E**.
To create a new login, press button **Create Login**, or use keyboard alternative **Alt-C**. For detailed instructions on how to maintain Millennium logins, refer to the Innovative Guide and Reference, Page # 106352: Millennium Login Administration.

Logins can be created as needed, depending on your organizational structure, access to printers, need for different options, etc.

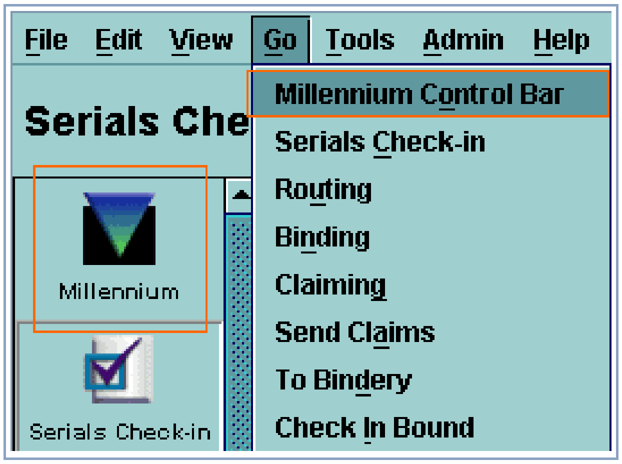
NOTE: Logins for the WebPAC and character-based system applications must be set with the System Administration character-based function. For instructions, refer to the Innovative Guide and Reference, starting at Page #101722: Login Administration

Important note about use of Millennium control bar

The Millennium control bar is a small window of icons on your desktop. The icons represent all of the Millennium applications your organization uses, as well as other applications such as WebPAC and the Innovative Guide and Reference. Clicking an icon on the Millennium control bar starts an application in a new window. The control bar itself does not use a user license, but each Millennium module opened uses a license (just as they do if you were to open multiple modules from a desktop icon).
Icon descriptions can be viewed by placing the cursor over an icon:



The Millennium control bar can be accessed in two ways:
1. From within any Millennium module, click on the **Millennium** icon at the top of the navigation bar, or use menu **Go | Millennium Control Bar**:



2. Use a login associated with Millennium control bar. The login will launch the control bar, from which any module can be accessed.

In both cases, the customized settings for the login that was originally used to open Millennium will apply to all modules that are subsequently launched from the control bar.

close window

OVERVIEW OF CUSTOMIZING OPTIONS

There are three ways of customizing a Millennium login:

Manager-controlled options

Manager-controlled options define the behavior of a Millennium module for a particular login.

Manager-controlled options are controlled from the Login Manager.
To access the Login Manager, you must be authorized for function 187 (Login Manager).
To open the Login Manager, choose **Admin | Login Manager** from the top menu within any Millennium module.
Manager-controlled options vary slightly between each module.

You can customize the Manager-controlled options for any login regardless of what module you are logged into, but you will only see the tabs and options that are associated with the module you are currently using. For example, if you are logged in to Millennium Cataloging, and want to customize a circulation login, you will not see the Due Slips, Sounds and other tabs that are specific to circulation logins. It is therefore recommended that you be logged into the module for which you plan to customize logins.

> Manager-controlled options can be copied from one login to another.

> When a module is accessed from Millennium control bar, the original login's Manager-controlled options are used. Launch all modules likely to be used by that login and modify the module specific values as desired.

Some Manager-controlled options override corresponding system options, while others interact with them. For example, you will not see the Due Slips tab in Millennium Circulation if Circulation option *Check-out: Print date due slips* is set to NEVER.
Relations between Manager-controlled options and specific system options are discussed in the corresponding tutorial sections.

Preferences

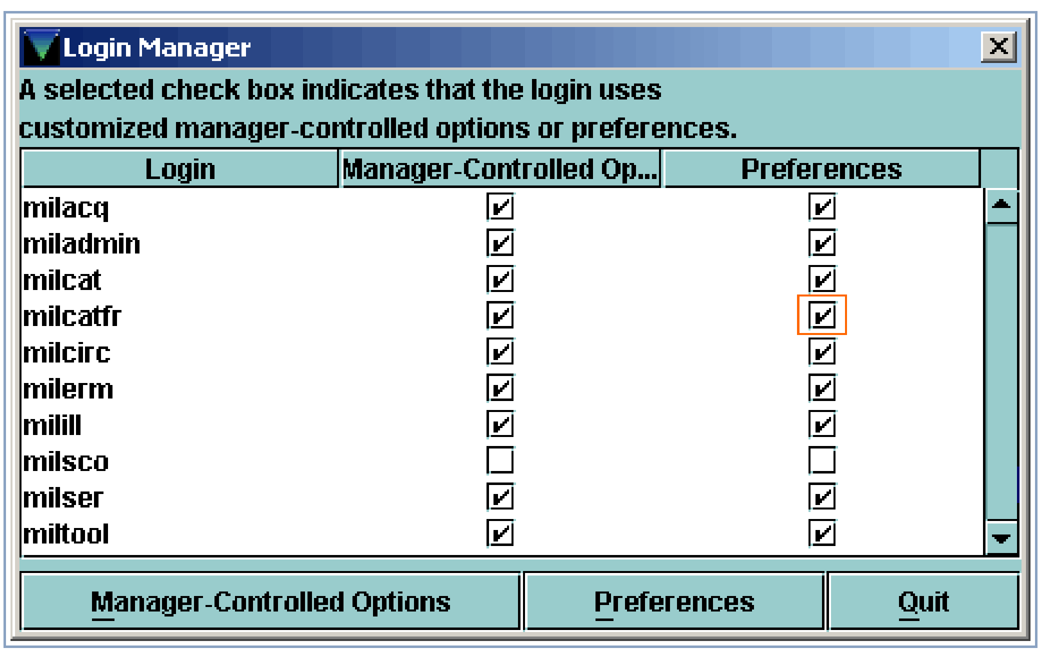
Preferences control the appearance of the module. e.g. colors and fonts, for a particular login.

Preferences are also controlled from the Login Manager, and accessed in the same way as Manager-controlled options. In addition, you can enable access from the **Edit** menu, using a setting on the Setup tab in Manager-controlled options.

Preferences work the same in all modules, and can be modified from the Login Manager for any login irrespective of what module you are logged in to. (Note that the elements in the Colors section vary slightly between the modules)

When a module is accessed from Millennium control bar, the original login's Preferences are used.

NOTE: It is very important that you define a customized set of Preferences for all logins before you make permanent changes to Settings (see below). That is, there must be a check in the box for Preferences associated with that login.



> Preferences can be copied from one login to another.

Settings

Settings control additional options and behavior within each module, e.g. the use of templates. Settings are accessed via the menu **Admin | Settings**.
As opposed to Manager-controlled options and Preferences, Settings can easily be changed by any user for a current session. To save changed Settings *permanently*, you must be authorized for function 176 (Save Settings (Millennium)). You can only save Settings for the login you are currently using.

NOTE: Before you save permanently, make sure you have defined Preferences, or the saved Settings will apply to ALL logins that don't have customized Preferences.

Settings vary slightly between each module.

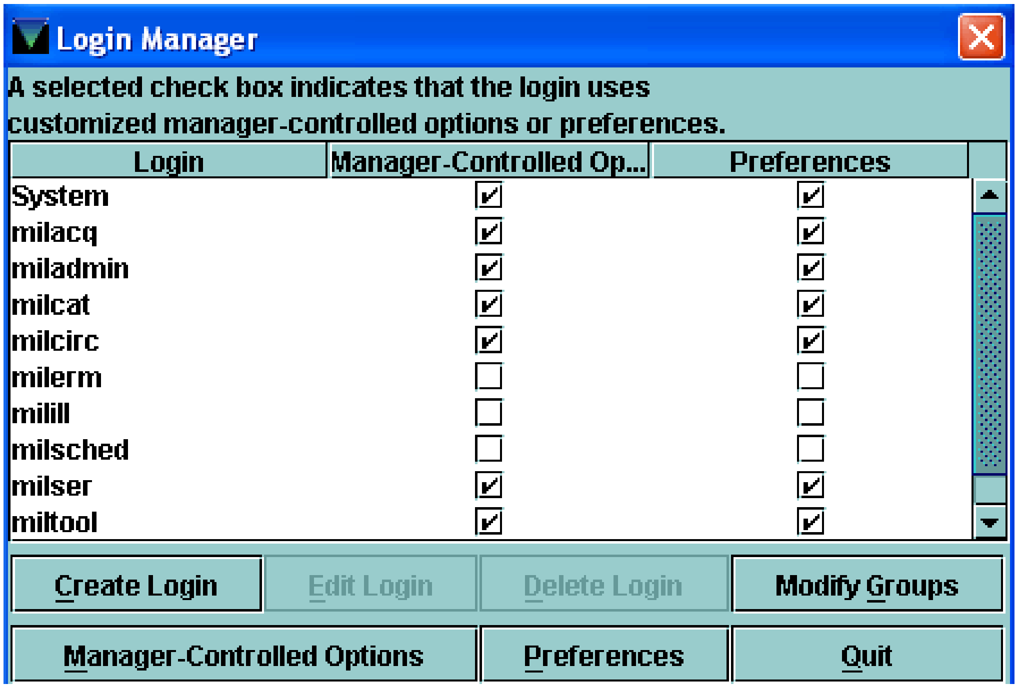
When a module is accessed from Millennium control bar, the original login's Settings are used. However, some settings can have unique default values in each Millennium application, even though the applications are launched from a single login through the Millennium control bar.

close window

WORKING WITH LOGIN MANAGER

- Copying Manager-controlled options or Preferences
- Deleting customized Manager-controlled options or Preferences

Access the Login Manager from the top menu, **Admin | Login Manager**.
You will see a window looking like this, with all the logins associated with a Millennium application listed:



The *System* entry at the top is not an actual login. It merely serves as a placeholder for the default option settings for all logins. New logins have blank check boxes, which means they are not yet customized. You can use your Millennium system without ever changing anything in either Manager-controlled options or Preferences, but you will most likely want to customize at least some options. See also the discussion in the previous section about the relationship between customizing Preferences and Settings. "Uncustomized" logins use the *System* defaults.

The list is divided into three columns: Login, Manager-Controlled Options and Preferences. When a line is highlighted you can see a thin, white space between each column.

Depending on what you want to do, it is important that you place the cursor in the correct column:

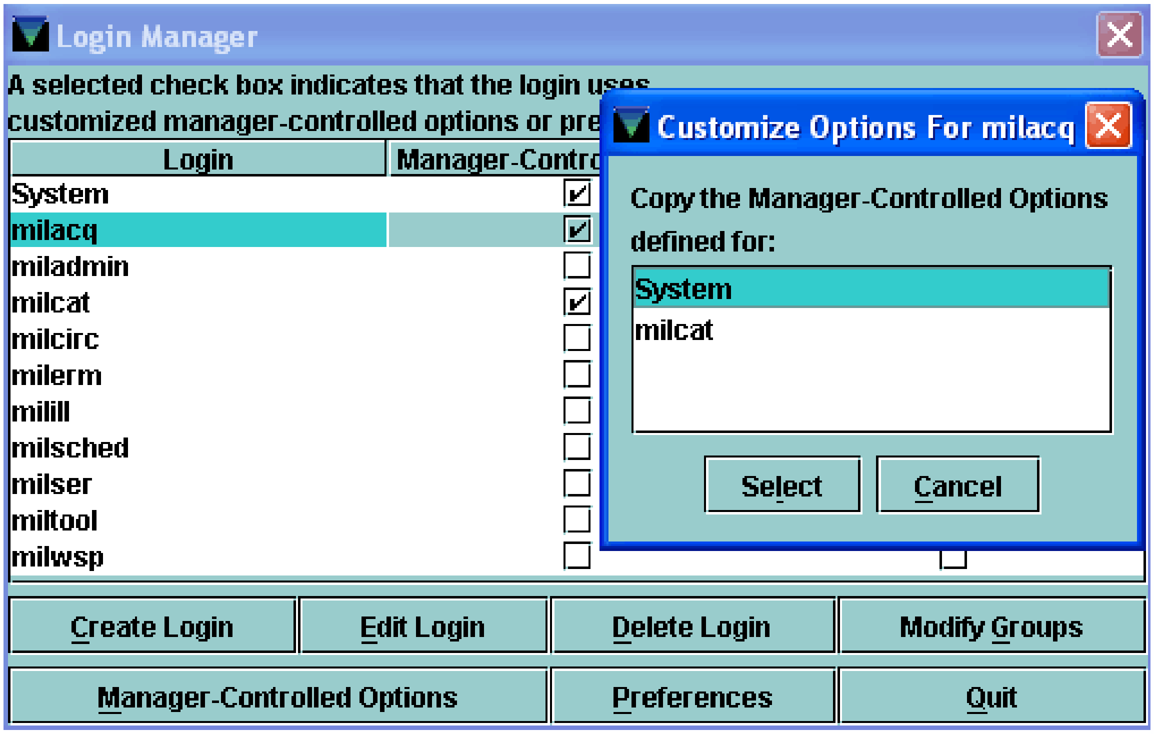
- If you are customizing Manager-controlled options or Preferences for a login for the first time, click in the checkbox in the appropriate column.
- If you are editing a login that is customized already: select the login by clicking on the line in the Login column. Then click on the **Manager-Controlled Options** button, or use keyboard alternative **Alt-M**, alternatively click on the **Preferences** button or use keyboard **Alt-P**.

If you happen to click in another column than Login, you will be asked if you want to delete customized settings.

close window

COPYING MANAGER-CONTROLLED OPTIONS OR PREFERENCES

When you customize Manager-controlled options or Preferences for a login for the first time you will be asked to copy an existing login. Using Manager-controlled options as an example: select the line for the login you want to customize. Click in the checkbox for Manager-controlled options. You will see a dialog similar to this:



The very first time, before you have customized any of the logins, you will only have the System "login" as an option. After that, all logins with customized settings will be available in the list. Highlight the login you wish to copy and press **Select**, or use keyboard **Alt-L**.

> To streamline your work: edit the *System* settings first. You will then avoid doing the same changes each time you customize a new login. Remember that if you are working with Manager-controlled options, you should be logged in to the module for which you want to customize logins, or you will not see all tabs and options.

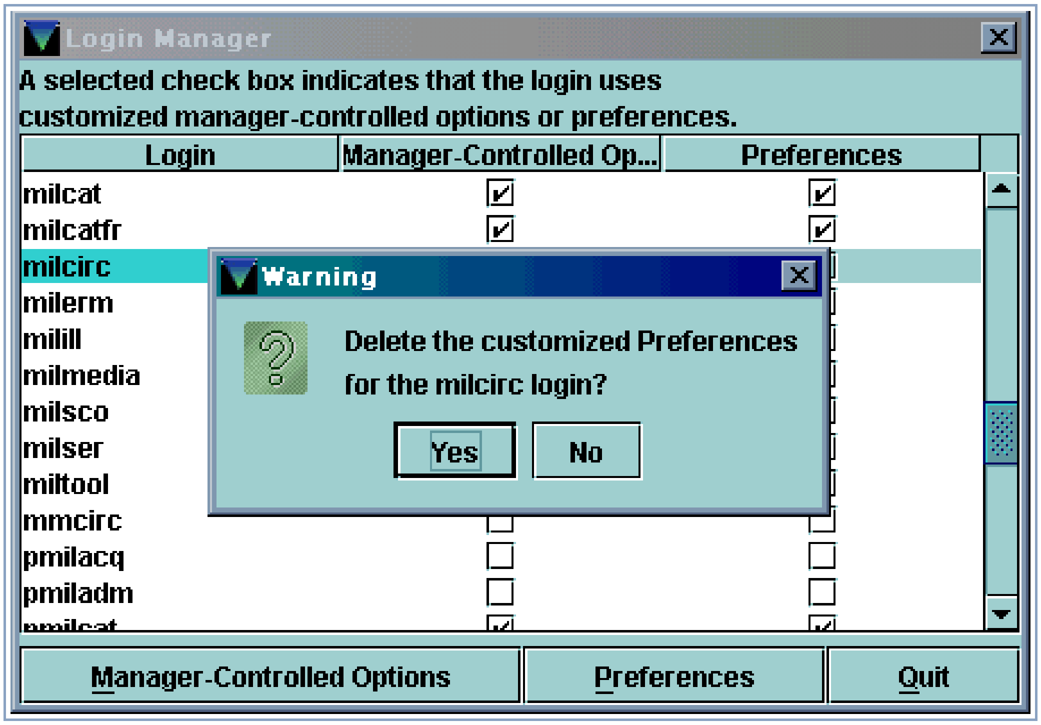
> Tips for large sites: create standard logins, or edit the default Millennium login for each module, so that you can use them for the purpose of copying. That will make it much easier to customize a number of logins that will use the same settings.

close window

DELETING CUSTOMIZED MANAGER-CONTROLLED OPTIONS OR PREFERENCES

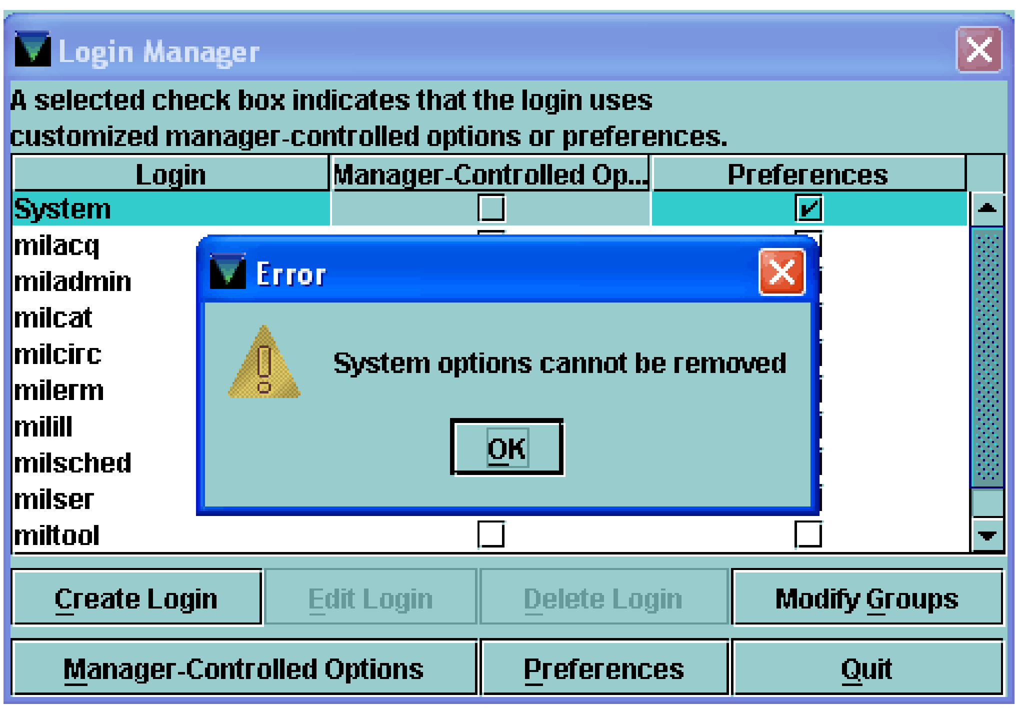
If you have customized Manager-controlled options or Preferences for a login, but later want to reset either of them, you can do so by clicking in the checkbox in the appropriate column.

The system prompts you to confirm the deletion of the current settings:



Press **Yes**, or use keyboard **Alt-Y** to remove those settings for the login. The login returns to using the Manager-controlled options or Preferences associated with *System*, until you customize it again.

NOTE: the system does not allow you to delete the Manager-controlled options or Preferences for the *System* "login":



close window

INTRODUCTION TO MILLENNIUM MODULES

For the system administrator or department supervisor who is primarily interested in setting up logins for a single module, it may be easier to use the tutorial in a module-specific way. This section is a guide to the Login Manager by module. For each module you will find links to appropriate pages in two of the main sections of this tutorial: *Manager-controlled options* and *Settings*.

Preferences are the same for all modules, and are therefore not listed in this section. The only exception is the Colors section on the **Colors and Fonts** tab.

Each of the modules is listed with both a graphic image and a list of the applicable tabs. Note that some options will only appear if the library has acquired or installed certain products. These are noted in the explanation of the setting or the tab.
Use the links to view descriptions of tabs and corresponding options applicable for each module. To get back to the module menu, use your browser's Back button, or the drop down menu on the navigation bar. The links will take you to the main page for a particular tab. In *Manager-controlled options* options may vary between modules on each tab. At the top of each page describing the various options, you will find icons indicating the modules in which each option appear.

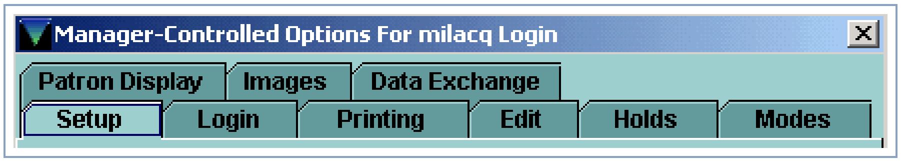
Millennium also uses system options set on the character-based system. On the following pages you will find references to the Innovative Guide and Reference and other documentation applicable for a particular module regarding system options.

close window

ACQUISITIONS - MANAGER CONTROLLED OPTIONS

- Data Exchange
- Edit
- Holds
- Images
- Login
- Modes
- Patron Display
- Printing
- Setup

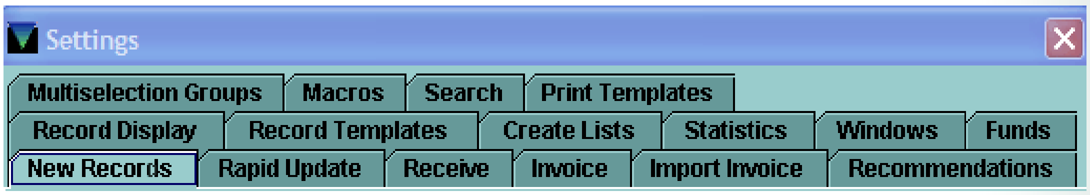
Use the link on the left or click on a tab in the image below to go to the page for the topic of your choice. In order to continue with the tabs associated with Acquisitions you will need to use your browser's BACK button to return to this menu page.



ACQUISITIONS - SETTINGS

- Create Lists
- Funds
- Import Invoice
- Invoice
- Macros
- Multiselection Groups
- New Records
- Print Templates
- Rapid Update
- Receive
- Recommendations
- Record Display
- Record Templates
- Search
- Statistics
- Windows

Use the link on the left or click on a tab in the image below to go to the page for the topic of your choice. In order to continue with the tabs associated with Acquisitions you will need to use your browser's BACK button to return to this menu page.



Millennium Acquisitions uses many Acquisitions options set on the character-based system. Refer to the Innovative Guide and Reference, Page # 100712: Acquisitions Options Used by Millennium Acquisitions.

close window

ADMINISTRATION MANAGER CONTROLLED OPTIONS

- Data Exchange
- Edit
- Holds
- Images
- Login
- Modes
- Printing
- Setup
- Web Master

Use the link on the left or click on a tab in the image below to go to the page for the topic of your choice. In order to continue with the tabs associated with Administration you will need to use your browser's BACK button to return to this menu page.

ADMINISTRATION SETTINGS

- Create Lists
- Invoice
- Macros
- Print Templates
- Record Templates
- Statistics
- Web Options

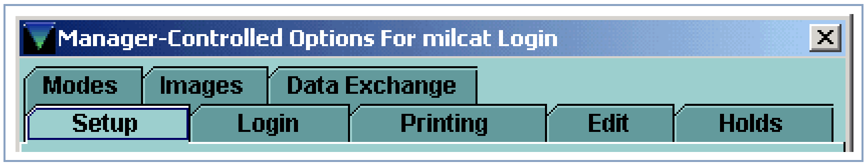
Use the link on the left or click on a tab in the image below to go to the page for the topic of your choice. In order to continue with the tabs associated with Administration you will need to use your browser's BACK button to return to this menu page.

close window

CATALOGING - MANAGER CONTROLLED OPTIONS

- Data Exchange
- Edit
- Holds
- Images
- Login
- Modes
- Printing
- Setup

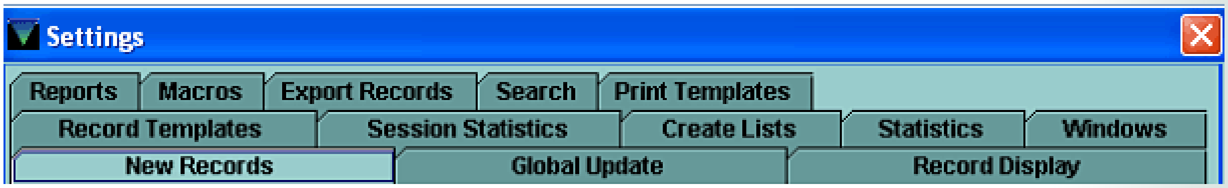
Use the link on the left or click on a tab in the image below to go to the page for the topic of your choice. In order to continue with the tabs associated with Cataloging you will need to use your browser's BACK button to return to this menu page.



CATALOGING - SETTINGS

- Create Lists
- Export Records
- Global Update
- Macros
- New Records
- Print Templates
- Record Display
- Record Templates
- Reports
- Search
- Session Statistics
- Statistics
- Windows

Use the link on the left or click on a tab in the image below to go to the page for the topic of your choice. In order to continue with the tabs associated with Cataloging you will need to use your browser's BACK button to return to this menu page.



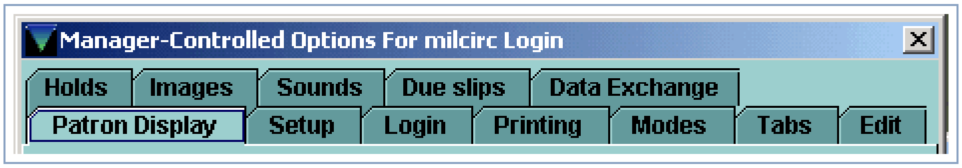
Millennium uses most of the Database Maintencance options set on the character-based system. The few system options *not* used by Millennium are:
New Item Record (Multiple): Increment copy number
New Item Record (Multiple): Restart copy number with each location
Define batch label queues
Number of seconds for which password is valid
Use PASSWORDS and AUTHORIZATIONS functions 101-199
These options do not have corresponding options in the Login Manager, they are governed by other settings, some hardcoded, some customizable at the time of use.

close window

CIRCULATION - MANAGER CONTROLLED OPTIONS

- Data Exchange
- Edit
- Holds
- Images
- Login
- Modes
- Patron Display
- Printing
- Setup
- Sounds
- Tabs

Use the link on the left or click on a tab in the image below to go to the page for the topic of your choice. In order to continue with the tabs associated with Circulation you will need to use your browser's BACK button to return to this menu page.



CIRCULATION - SETTINGS

- Create Lists
- Macros
- New Records
- On-the-fly Records
- Print Templates
- Record Display
- Record Templates
- Search
- Statistics
- Windows

Use the link on the left or click on a tab in the image below to go to the page for the topic of your choice. In order to continue with the tabs associated with Circulation you will need to use your browser's BACK button to return to this menu page.

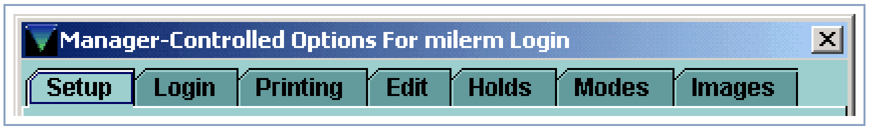
Circulation options set on the character-based system are used by Millennium to a varying extent. Some control Millennium behavior, while some Manager-controlled options override corresponding Circulation options, and others interact with them. Relations between specific Manager-controlled options and Circulation options are discussed in the corresponding tutorial sections. For a comprehensive overview of all Circulation options and their use, refer to Customer Information Resource Circulation Options That Can Be Options Grouped on CSDirect.

close window

ERM - MANAGER CONTROLLED OPTIONS

- Edit
- Holds
- Images
- Login
- Modes
- Printing
- Setup

Use the link on the left or click on a tab in the image below to go to the page for the topic of your choice. In order to continue with the tabs associated with ERM you will need to use your browser's BACK button to return to this menu page.



ERM - SETTINGS

- Create Lists
- Global Update
- Macros
- New Records
- Print Templates
- Record Display
- Record Templates
- Search
- Statistics
- Windows

Use the link on the left or click on a tab in the image below to go to the page for the topic of your choice. In order to continue with the tabs associated with ERM you will need to use your browser's BACK button to return to this menu page.

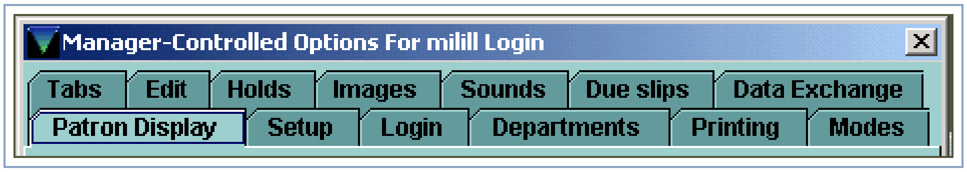
Millennium Electronic Resource Management does not have any options set on the character-based system.

close window

ILL MANAGER CONTROLLED OPTIONS

- Data Exchange
- Departments
- Due Slips
- Edit
- Holds
- Images
- Login
- Modes
- Patron Display
- Printing
- Setup
- Sounds

Use the link on the left or click on a tab in the image below to go to the page for the topic of your choice. In order to continue with the tabs associated with ILL you will need to use your browser's BACK button to return to this menu page.



ILL SETTINGS

- Create Lists
- Macros
- New Records
- On-the-fly Records
- Print Templates
- Record Display
- Record Templates
- Search
- Statistics
- Windows

Use the link on the left or click on a tab in the image below to go to the page for the topic of your choice. In order to continue with the tabs associated with ILL you will need to use your browser's BACK button to return to this menu page.

Some options in Millennium Inter-Library Loans are governed by Circulation options set on the character-based system.

close window

SERIALS MANAGER CONTROLLED OPTIONS

- Edit
- Holds
- Images
- Login
- Modes
- Printing
- Setup
- Tabs

Use the link on the left or click on a tab in the image below to go to the page for the topic of your choice. In order to continue with the tabs associated with Serials you will need to use your browser's BACK button to return to this menu page.

SERIALS SETTINGS

- Claiming
- Create Lists
- Macros
- New Records
- Print Templates
- Rapid Update
- Record Display
- Record Templates
- Search
- Statistics
- Windows

Use the link on the left or click on a tab in the image below to go to the page for the topic of your choice. In order to continue with the tabs associated with Serials you will need to use your browser's BACK button to return to this menu page.

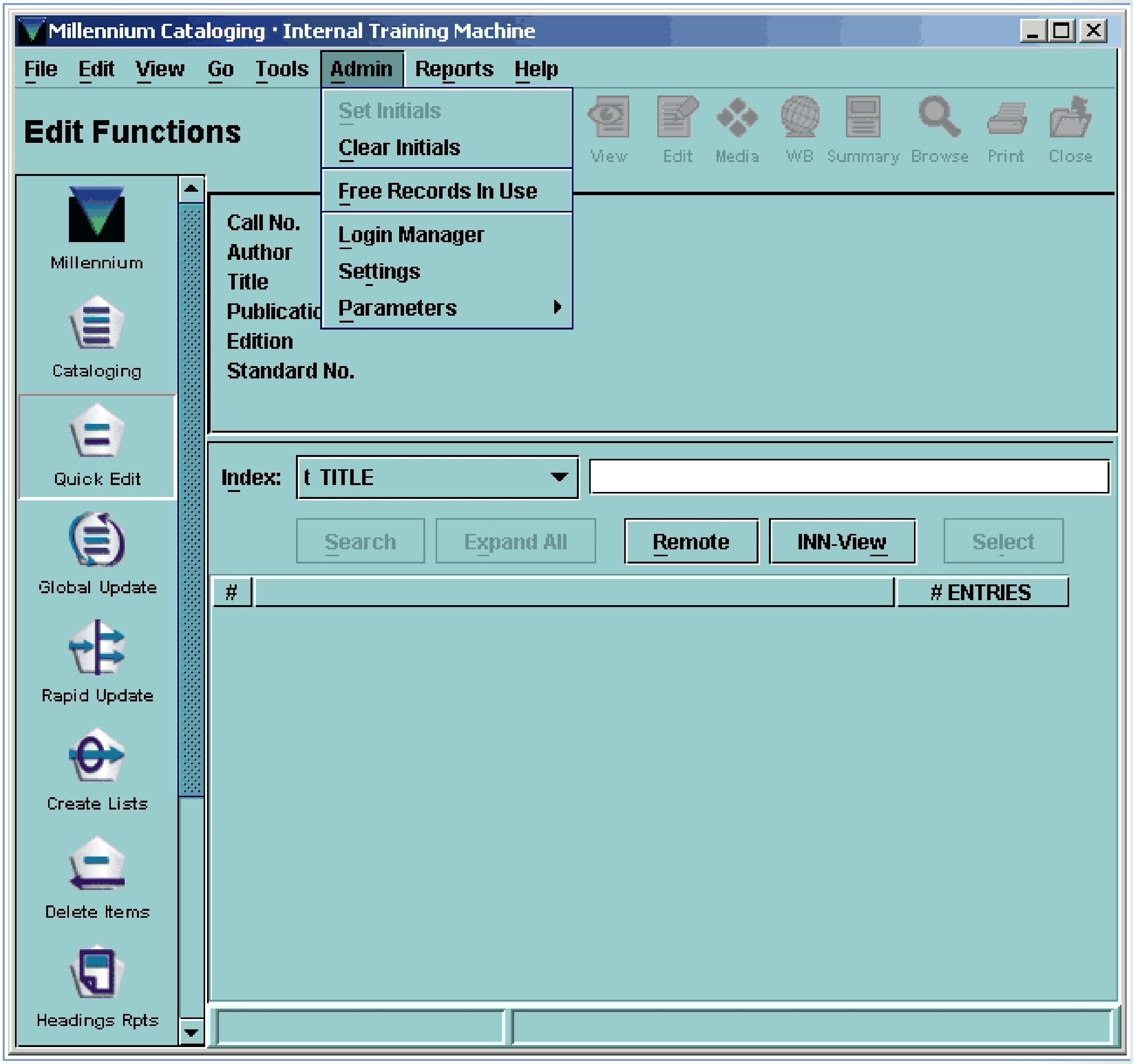
Millennium uses all the Serials options set on the character-based system. They are all related to label printing.

close window

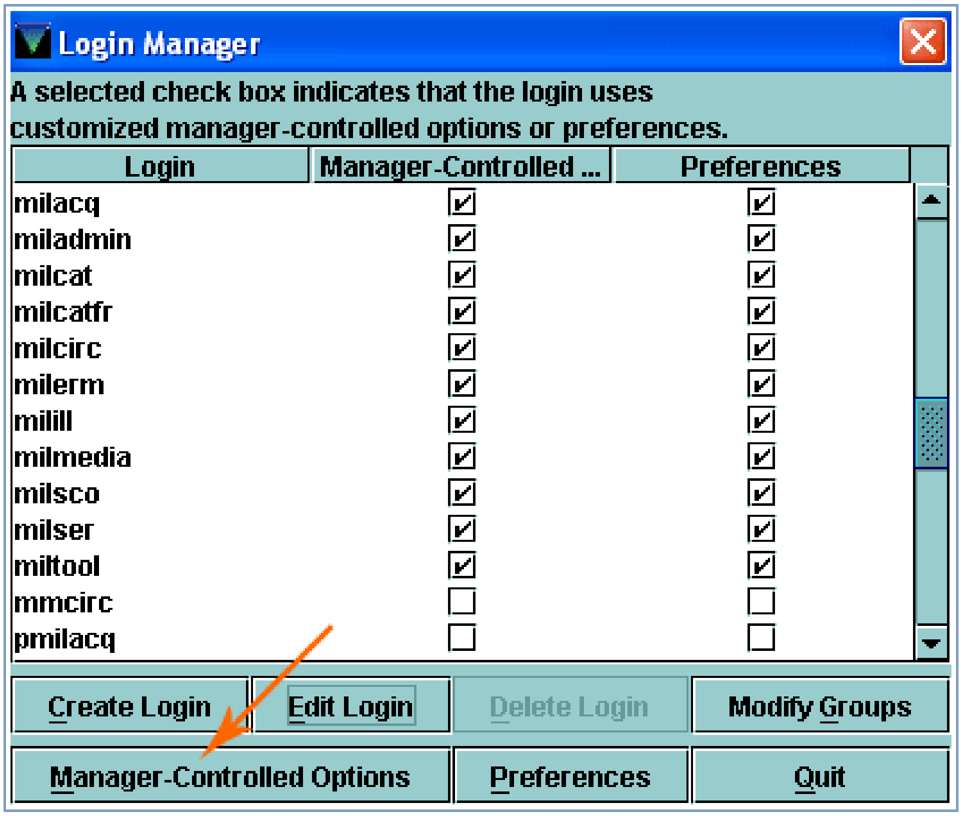
INTRODUCTION TO MANAGER CONTROLLED OPTIONS

Manager-controlled options define the behavior of a Millennium module for a particular login.

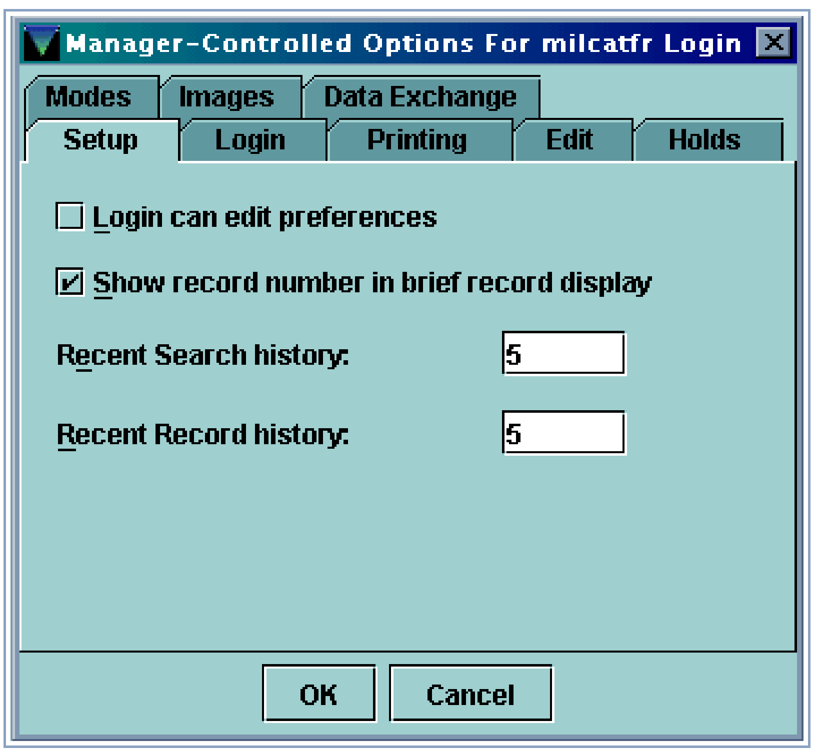
Manager-controlled options are set from the Login Manager. To access the Login Manager, you must be authorized for function 187 (Login Manager).
To open the Login Manager, choose **Admin » Login Manager** from within any Millennium module.



Select the login you want to customize, and press **Manager-controlled options** button.



A screen similar to the following will appear. (This example is from Millennium Cataloging):



Related options are grouped on tabs. Tabs and corresponding options vary between each module. You can customize the Manager-controlled options for any login irrespective of what module you are logged in to, but you will only see the tabs and options that are associated with the module you are currently using. For example, if you are logged in to Millennium Cataloging, but want to customize a circulation login, you will not see the *Due Slips, Sounds* and other tabs that are specific to circulation logins. Likewise, you will not see the option *Recent Patron history* on the **Setup** tab for a Cataloging login.
It is therefore recommended that you be logged in to the module for which you plan to customize logins.

When a module is accessed from the Millennium control bar, Manager-controlled options are determined by the login that was originally used to access Millennium. Therefore it is recommended that all modules likely to be accessed by a certain login via the control bar -

either by way of a login that invokes the control bar, or via another module - have the appropriate options set for that login.

> You can, for example, launch a Millennium Circulation session and customize any login that is likely to access circulation, either directly or from the control bar, from that initial login.

Tabs appear in each module as shown in this table:

TABS	MODULE						
	ACQ	ADM	CAT	CIRC	ERM	ILL	SER
Data Exchange	X	X	X	X		X	
Departments						X	
Due Slips				X		X	
Edit	X	X	X	X	X	X	X
Holds	X	X	X	X	X	X	X
Images	X	X	X	X	X	X	X
Login	X	X	X	X	X	X	X
Modes	X	X	X	X	X	X	X
Patron Display	X			X		X	
Pickup Anywhere				X			
Printing	X	X	X	X	X	X	X
Setup	X	X	X	X	X	X	X
Sounds				X		X	
Tabs				X		X	X
Web Master		X					

At the top of the tutorial pages you will find icons indicating the modules in which each option appear.

ALL - this icon is used if the option appears in all modules. Module specific icons have different colors and the module name indicated on them, e.g. ACQ

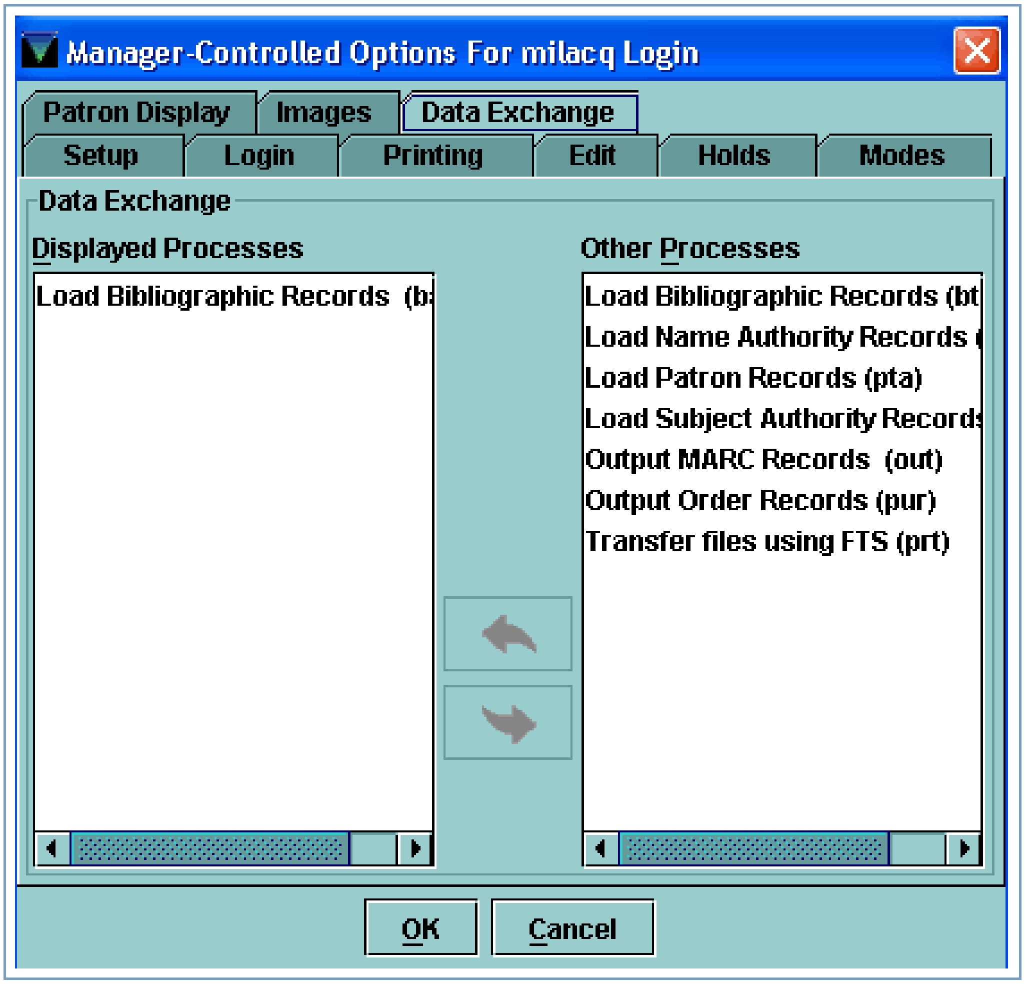
Some Manager-controlled options override corresponding system options, while others interact with them. For example, you will not see the Due Slips tab in Millennium Circulation if Circulation option *Check-out: Print date due slips* is set to NEVER.
Relations between Manager-controlled options and specific System Options are discussed in the appropriate tutorial sections.

Refer to section Working with the Login Manager for instructions on how to edit or copy Manager-controlled options.

close window

DATA EXCHANGE

The **Data Exchange** tab looks similar to the following:



This is where you define the import and export processes (load tables) that are available in the Data Exchange mode.

NOTE: In Millennium Acquisitions, **Data Exchange** is a submode to **Import Invoices**.

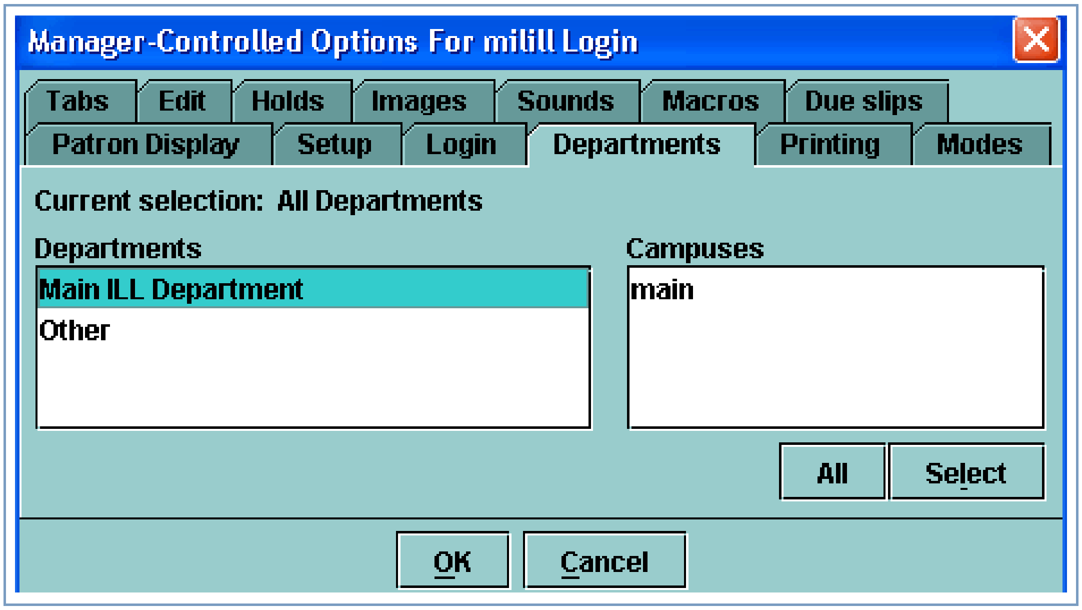
NOTE: The names of the processes that are available to you in **Data Exchange** are customized for each library.

Processes listed under *Displayed Processes* are available for users of this login to import and export data in **Data Exchange** mode. To move a process, highlight it, then use left or right arrow to move it to the other list.

close window

DEPARTMENTS

The **Departments** tab will look similar to this:



Libraries with multiple ILL departments, also called *units*, can assign names to each department and specify the patron home library location code(s) served by each department. The initial setup for this is done by Innovative when Millennium Inter-Library Loans is installed on your system.

For information about the ILL setup, refer to the Innovative Guide and Reference, Page# 100177 Setting Up ILL. If there is a need to change existing setup, contact Innovative.

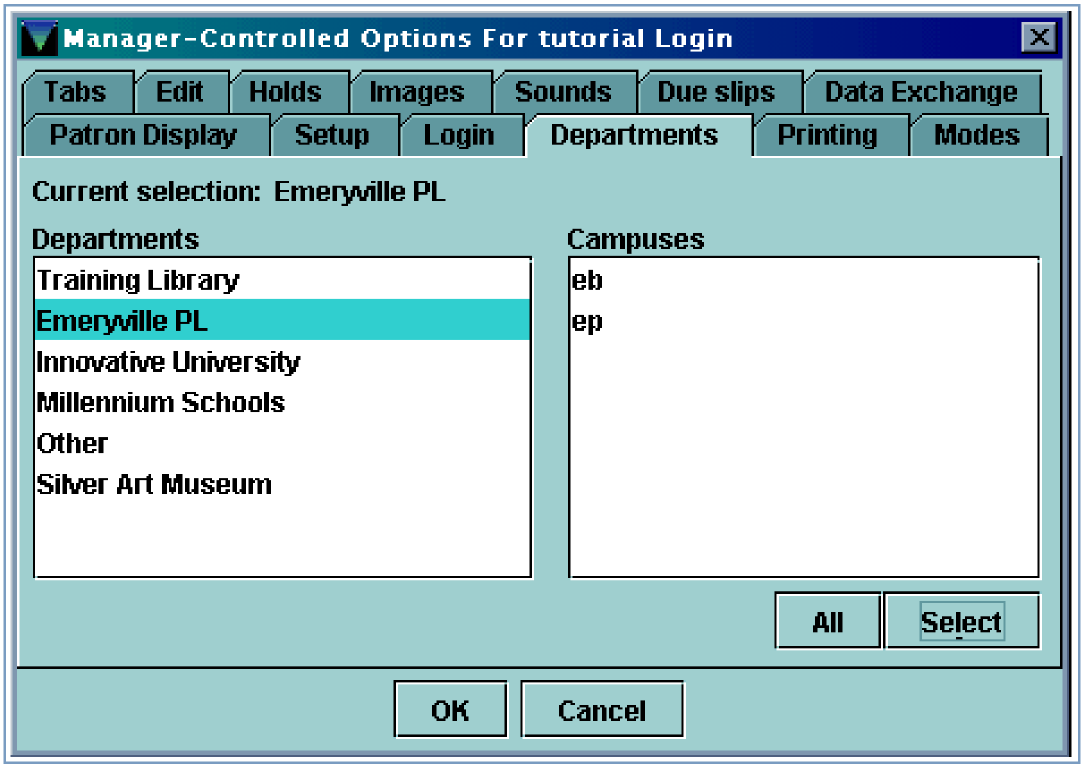
The **Departments** tab is used to limit the scope of logins. When you associate a login with a department, you limit the scope of the login to records and requests associated with that department, based on the home library location in the patron record.

> Requests from patrons with 'none' as their home library will appear in the **Other** department.

NOTE: If your library does not have multiple ILL departments, the only option in the table will be **Other**.

close window

DEPARTMENTS/CAMPUSES



Current selection at the top of the tab displays which department, if any, is currently selected for the login.

Departments column - lists the departments that are defined for your system.

Campuses column - lists the location codes associated with a specific department. To see a list of the campuses, i.e. locations, associated with a department, select the department name in the **Departments** column. The campuses/locations that belong to that department display in the **Campuses** column.

To associate your login with a department:

- Select the name in the **Departments** column
- Press the **Select** button. Your selection displays in the **Current selection** field.

If you want the login to access requests from all campuses/departments/locations, choose the **All** button (or highlight the **Other** entry in the **Departments** column and press **Select**).

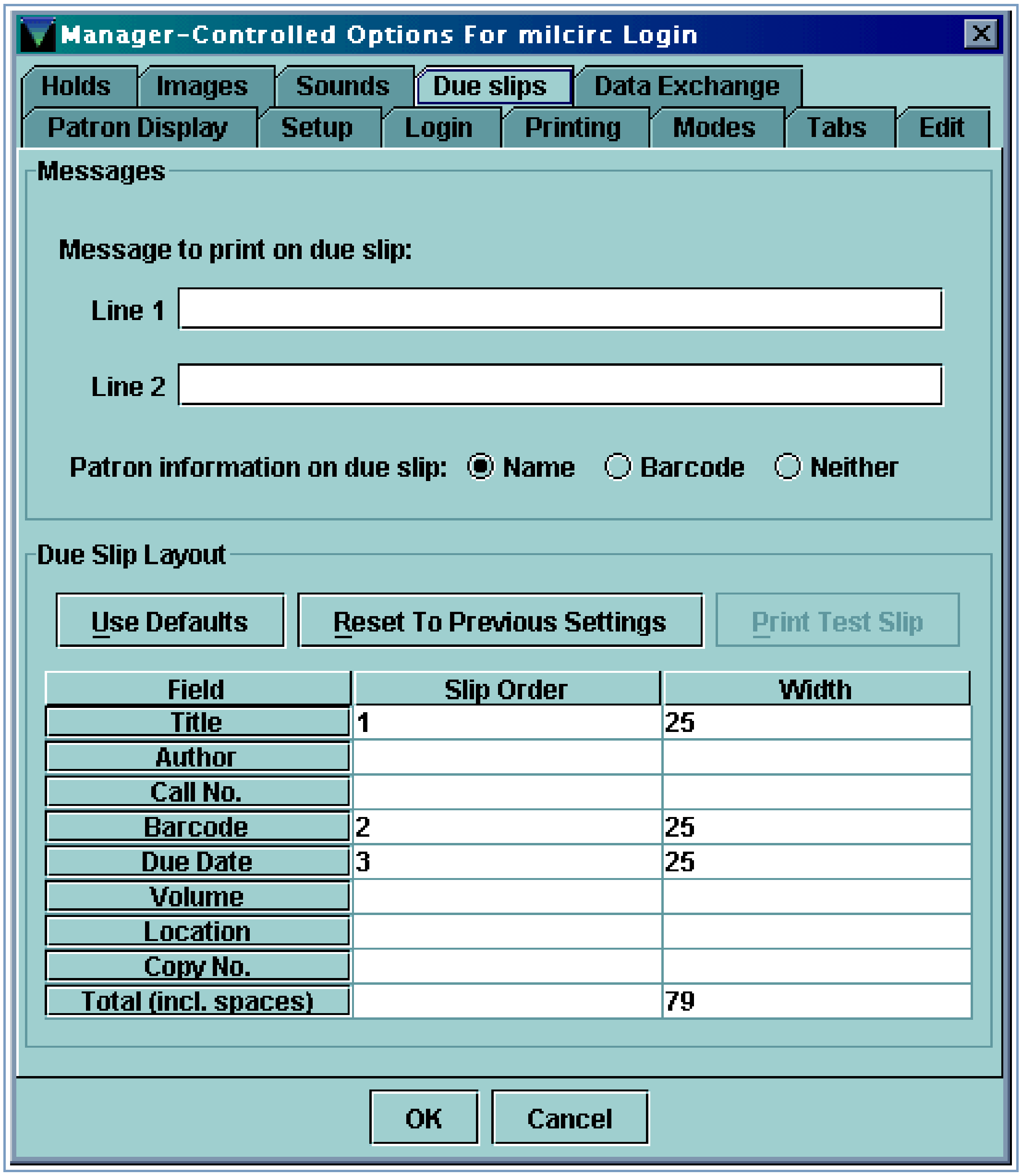
> Statistics on **Filled** and **Cancelled** requests will report only for the department associated with the login. To gather statistics for the whole system, use a login associated with **All** departments.

NOTE: A change to this option does not take effect until you start a new session.

close window

DUE SLIPS

The **Due Slips** tab contains the following options:

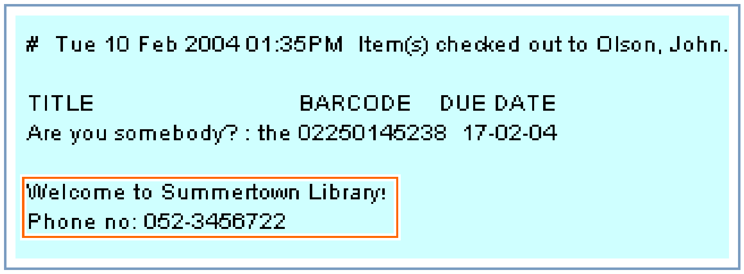


NOTE: This tab will not appear if Circulation option *Check-out: Print date due slips* is set to **NEVER**.

close window

MESSAGE TO PRINT ON DUE SLIP

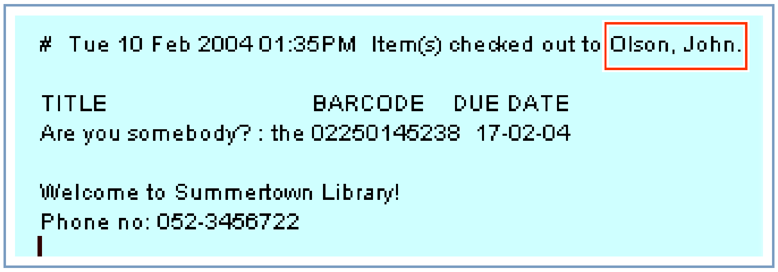
This option allows you to include two lines of information on the bottom of date due slips. Both lines can contain a maximum of 40 characters. Line 1 appears before Line 2.



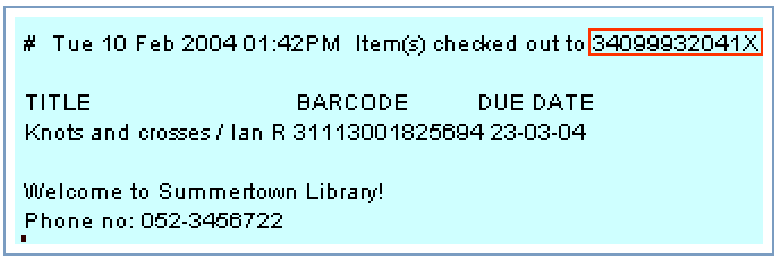
close window

PATRON INFORMATION ON DUE SLIP

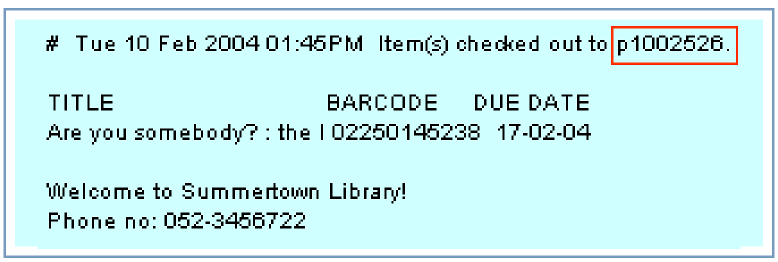
This option determines what patron information the system includes on date due slips.
If you select the **Name** button, the system includes the patron's name on date due slips.



If you select the **Barcode** button, the system includes the patron's barcode number on date due slips.

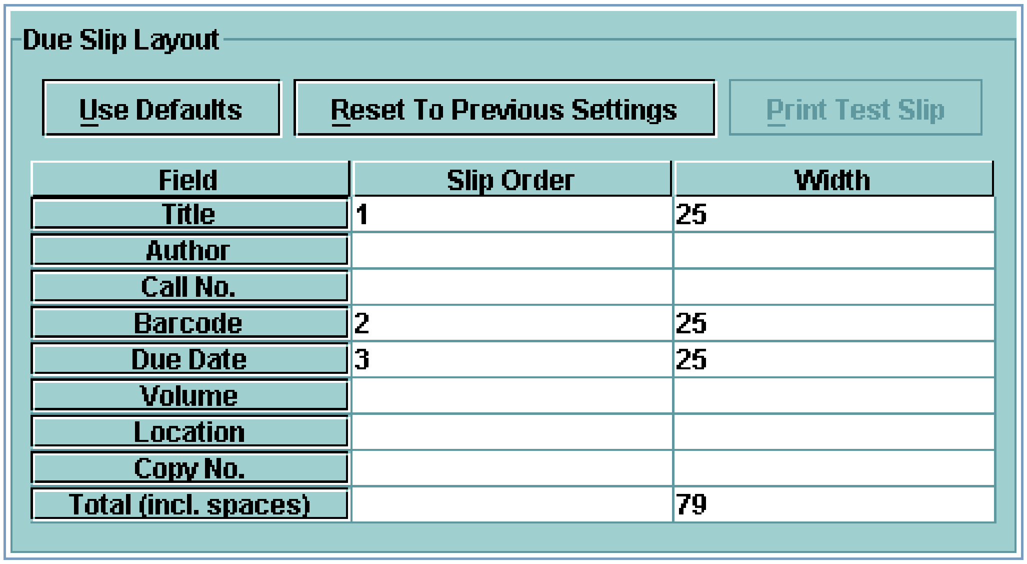


If you select the **Neither** button, the system includes the patron record number on date due slips.



close window

DUE SLIP LAYOUT



You can customize your due slips by using this option. You can determine:

- Which of the listed fixed- and variable-length fields are included on due slips
- The order in which the fields appear
- How many spaces are allotted for each field

To add a field to the due slip:

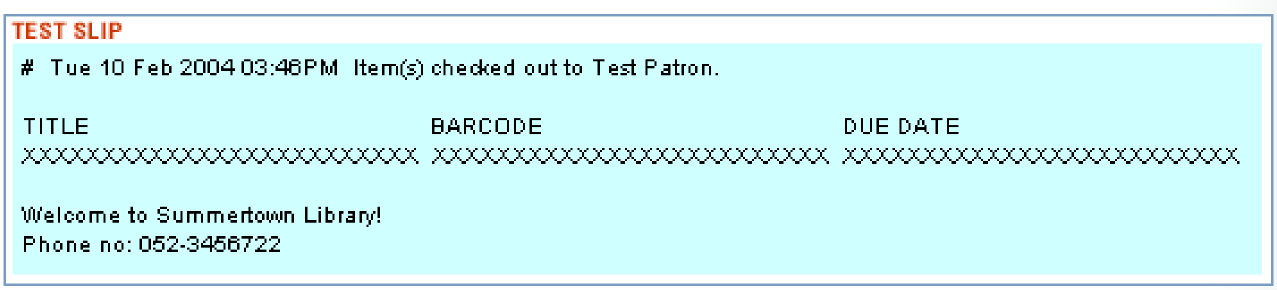
1. Double click and enter a number in its **Slip Order** cell. If more than one field has the same order number, the system warns you when you choose the **OK** button, and will not allow you to save until you have corrected one of the fields.
2. Double click and enter the number of spaces it can occupy in its **Width** cell. Note that the **Total** field adjusts automatically. The number in the **Total** field represents the total number of spaces currently allocated for the due slip, including spaces between fields. The width of the due slip cannot exceed 130 spaces. If you allot more than 130 spaces, the system warns you when you choose the **OK** button, and will not allow you to save until you have corrected the number.

If you print date due slips on a 40-column printer, Millennium prints each field on a separate line. The field width has to be adjusted to the printer width.

To edit the value for an existing field, double click on the entry that you want to alter and re-key its value.

To remove an entry, double click on it and press the <Delete> or <Backspace> key. Remove the values in both columns.

Buttons:
Use Defaults - return the table to its default settings (as seen on the image above).
Reset to Previous Settings - return the table to its last saved form, i.e. the values that were specified when you last chose the **OK** button.
Print Test Slip - print a test due slip. Note: you can print a test slip only for the login that you used to launch your current Millennium session. If you edit the settings for another login, **Print Test Slip** is disabled.

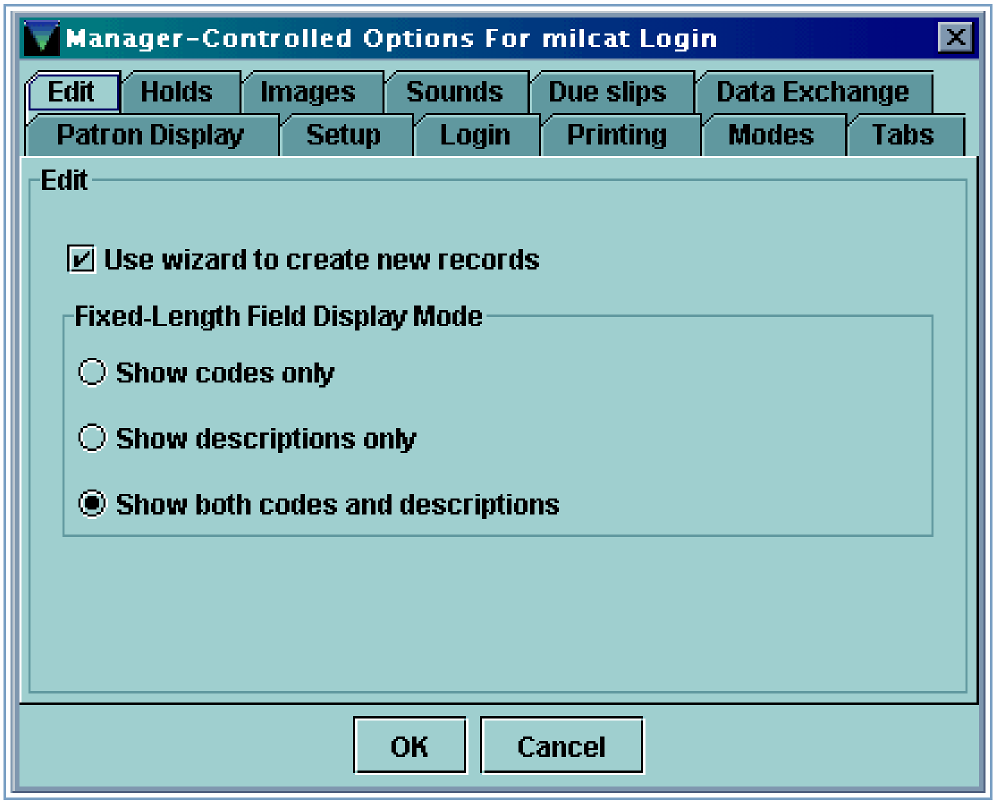


NOTE: A change to this option does not take effect until you start a new session.

close window

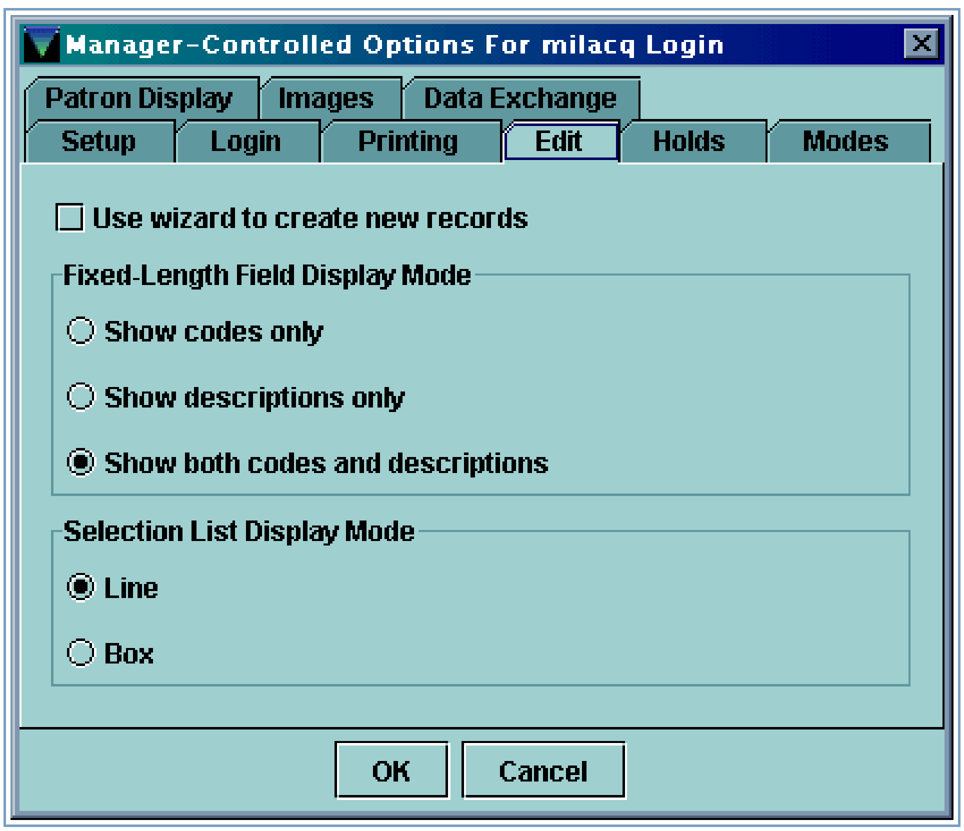
EDIT

The **Edit** tab contains the following options in most Millennium modules:

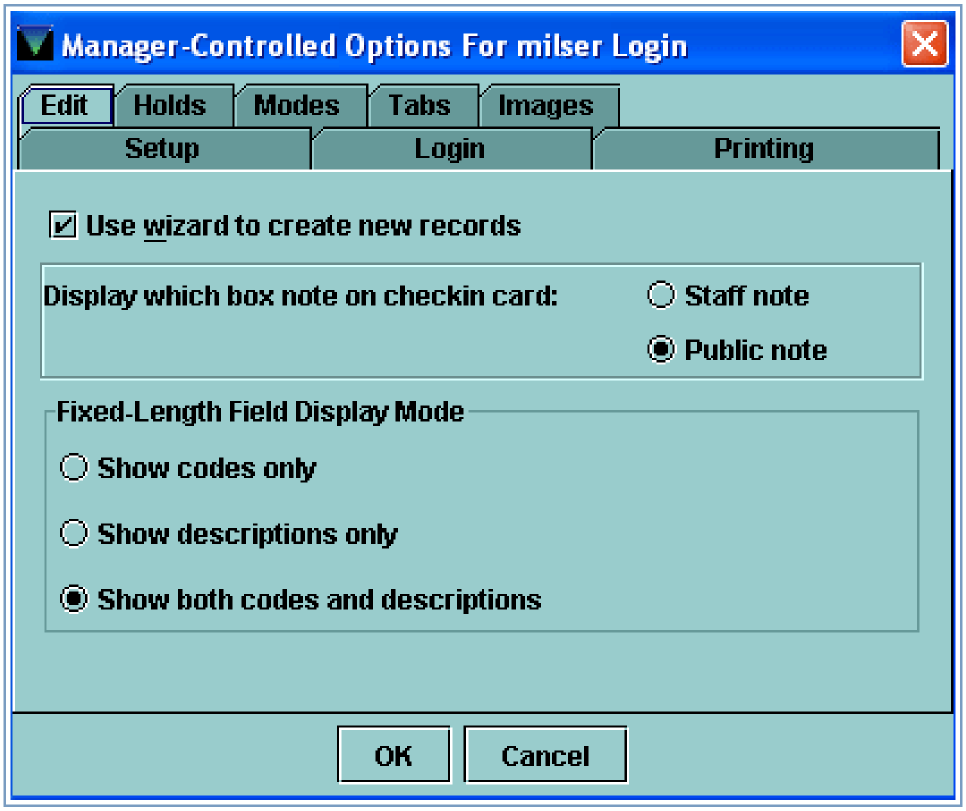


Millennium Acquisitions and Administration look slightly different.

Millennium Acquisitions:



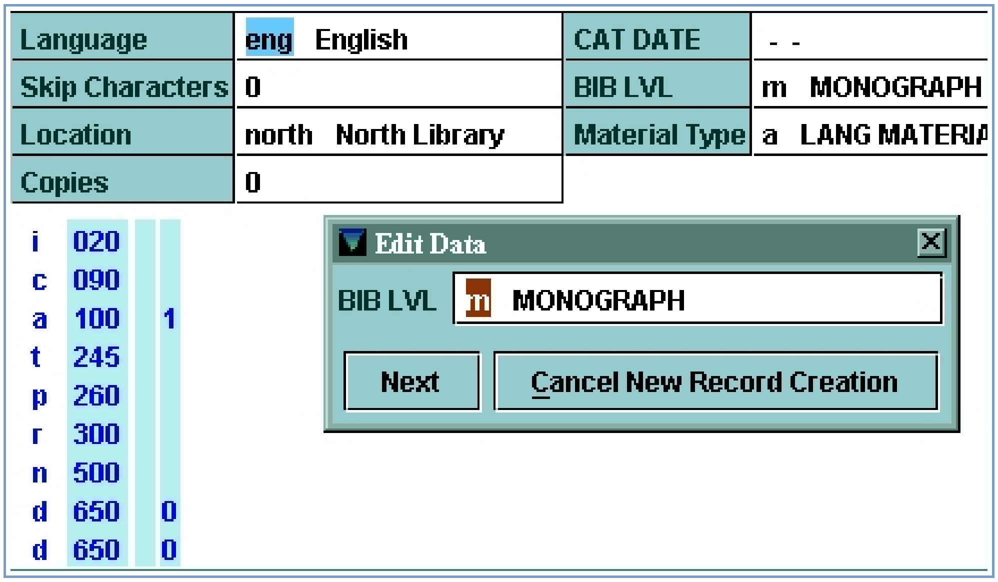
Millennium Serials:



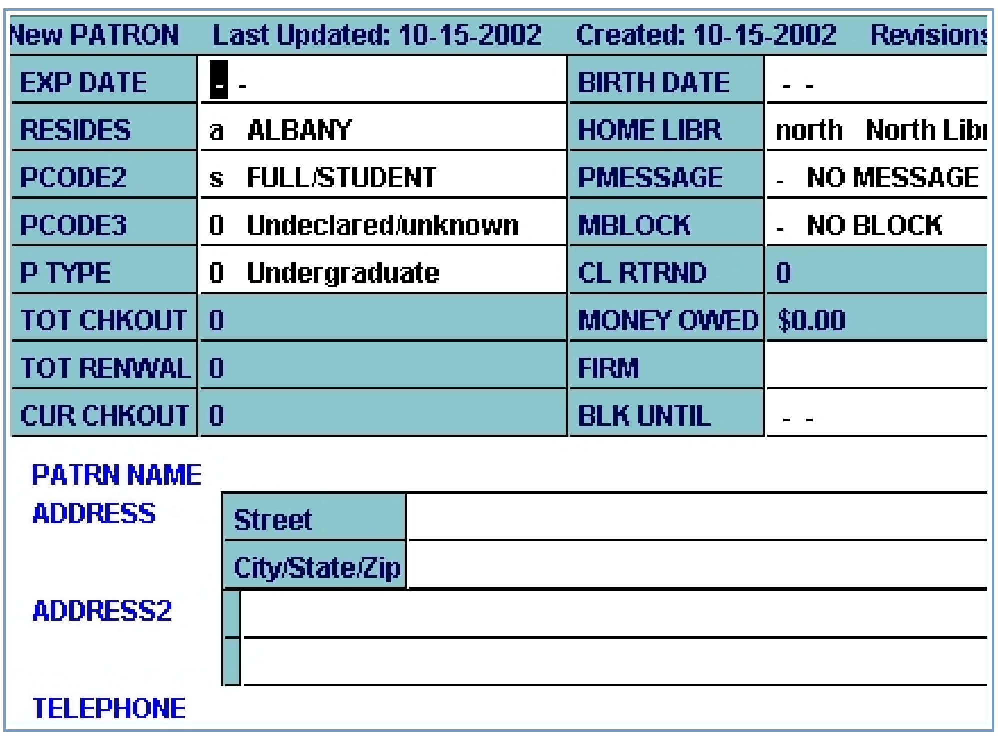
close window

USE WIZARD TO CREATE NEW RECORDS

With the Wizard turned on, when creating a new record you fill in boxes as specified by prompts in the new record template you have selected.



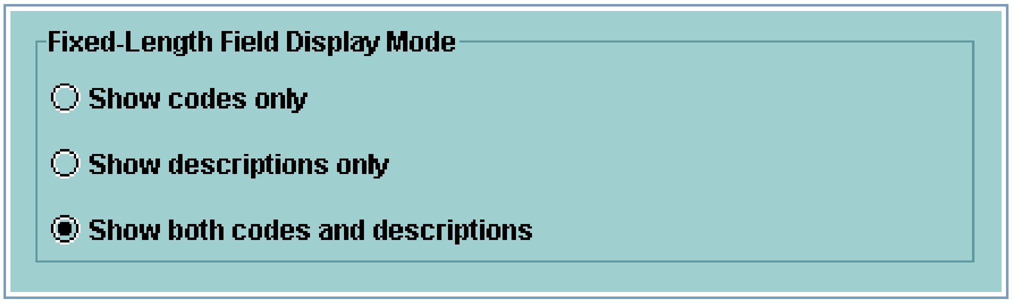
If this option is not selected, you select a template and key directly into a record workform, without prompts.



For information about adding new templates to the system, refer to the Innovative Guide and Reference, Page # 105825: Managing Templates for New Records

close window

FIXED-LENGTH FIELD DISPLAY MODE



This option governs the display of the fixed-length fields.

Show codes only
Content will display as code only, and valid values are offered in code order. For example in the Language field you will see code *eng*, but not description *English*.

b10136927	Last Updated: 12-05-2004	Created: 09-04-2004		Revisions: 3	
Language	eng	Cat. Date	- -	Bib Code 3	-
Skip	0	Bib Level	m	Country	xxu
Location	iu	Material Type	a		

Show descriptions only
Content will display as description only, and valid values are offered in description order. For example in the Language field you will see description *English*, but not code *eng*.

b10136927	Last Updated: 12-05-2004	Created: 09-04-2004		Revisions: 3	
Language	English	Cat. Date	- -	Bib Code 3	-
Skip	0	Bib Level	MONOGRAPH	Country	U.S. (:
Location	Innovative Univ. Library	Material Type	PRINTED MAT		

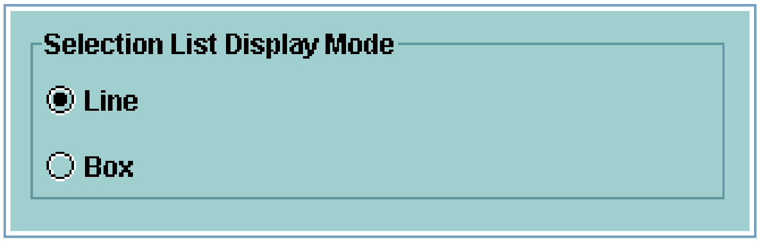
Show both codes and descriptions
Content will display as both code and description, and valid values are offered in either order, depending on whether code or description is selected. For example in the Language field you will see *eng English*.

b10136927	Last Updated: 12-05-2004	Created: 09-04-2004		Revisions: 3	
Language	eng English	Cat. Date	- -	Bib Code 3	-
Skip	0	Bib Level	m MONOGRAPH	Country	xxu
Location	iu Innovative Univ. Library	Material Type	a PRINTED MAT		

NOTE: A change to this option does not take effect until you start a new session.

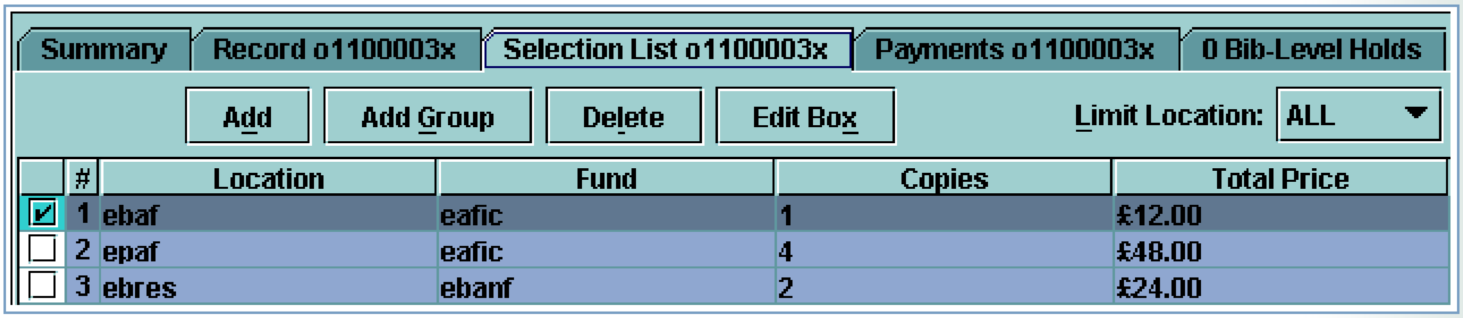
close window

SELECTION LIST DISPLAY MODE

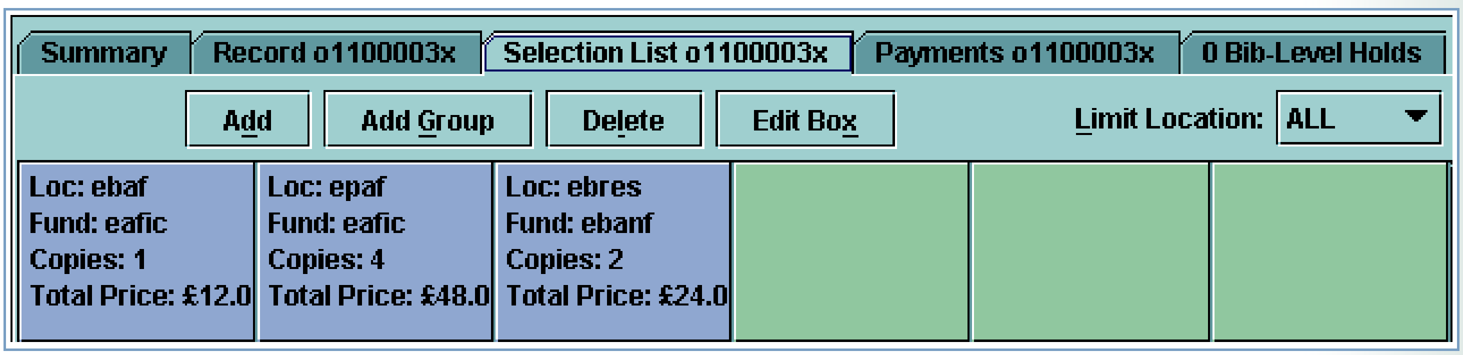


When you view the **Selection List** tab for an order record or view a particular title in **Selection List** mode, you can display copy information in a **line** view or a **box** view. This setting determines the default view for the login. However, regardless of the default setting, you can toggle between views while you are looking at the selection list information by right clicking on a line or a box.

Selection List Display in **Line** mode:



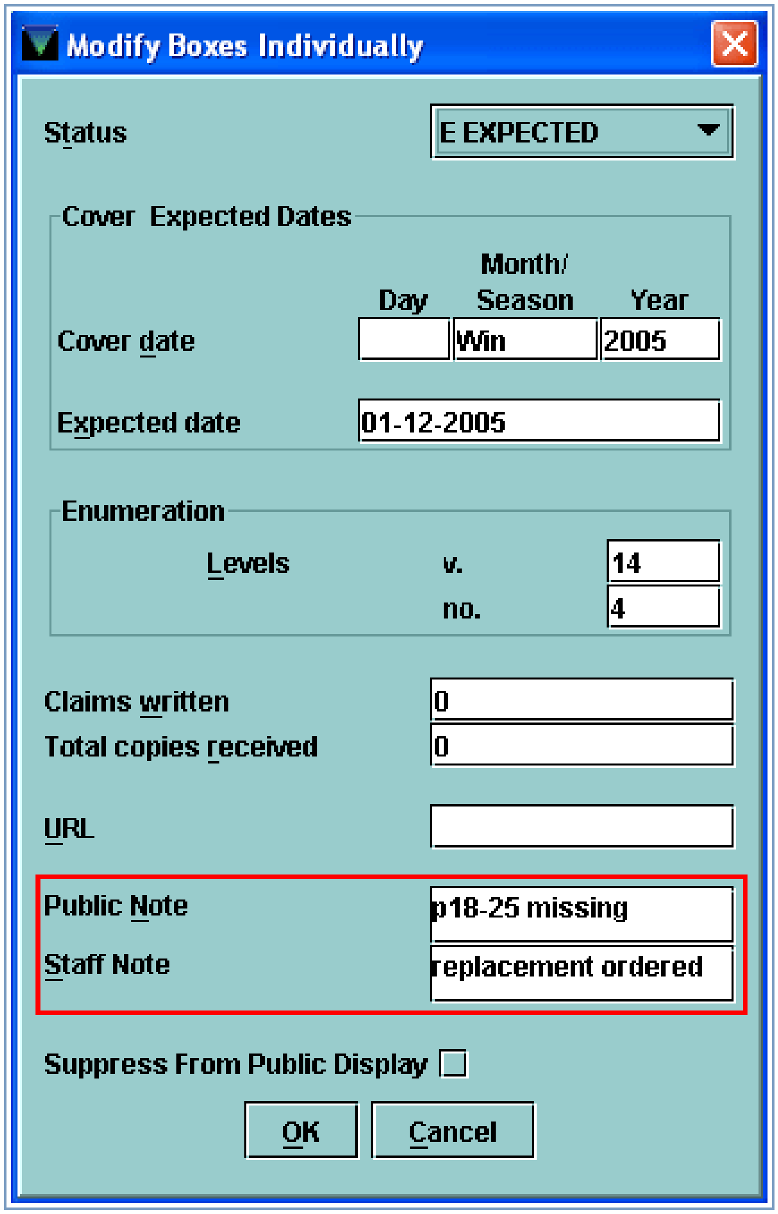
Selection List Display in **Box** mode:



close window

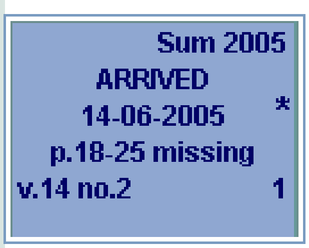
ADD SUPPLEMENTS AND INDEXES

Issue boxes on the checkin card have a *Public Note* and a *Staff Note*:



With this option you specify whether the *Public Note* or the *Staff Note* displays on the checkin card box.

Public Note displaying:



The asterisk indicates there is another note. If you hover over the box both notes will display.

Staff Note displaying:

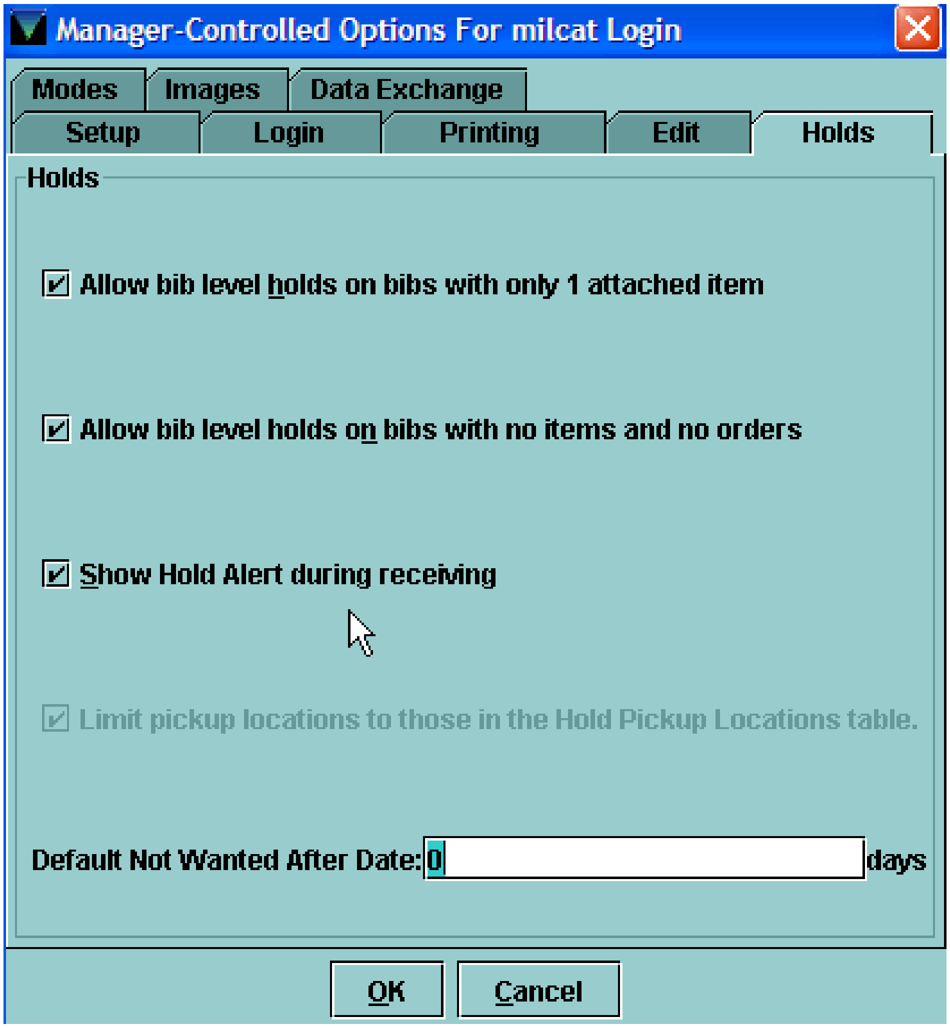
NOTE: This setting only affects the staff client. In the WebPAC, the *Public Note* will always display.

For detailed information about box notes, refer to the Innovative Guide and Reference, Page # 100489: Overview of Checkin Card Fields.

close window

HOLDS

The **Holds** tab contains the following options in all modules:



Make sure the default matches your circulation policy. Do not make exceptions for any logins, unless there is a special reason.

For further information about holds, refer to the Innovative Guide and Reference, Page # 100098: Placing Holds

close window

ALLOW BIB LEVEL HOLDS ON BIBS WITH ONLY 1 ATTACHED ITEM

If this option is selected, staff are allowed to place a title-level hold on a bibliographic record, even if that record has only one attached item record.

If this option is *not* selected, staff must place an ITEM-level hold when there is only one attached item record.

NOTE: This option overrides Circulation Option *Holds: Title level hold even if only one copy*

> Rules for patron placed holds in the WebPAC are governed by the "Hold Level" section of Web Server option REQUEST.

close window

ALLOW BIB LEVEL HOLDS ON BIBS WITH NO ITEMS AND NO ORDERS

If this option is selected, staff are allowed to place a title-level hold on a bibliographic record, even if that record has no attached item or order records.

If this option is not selected, it is not possible to place a hold on a record that has no items or orders attached.

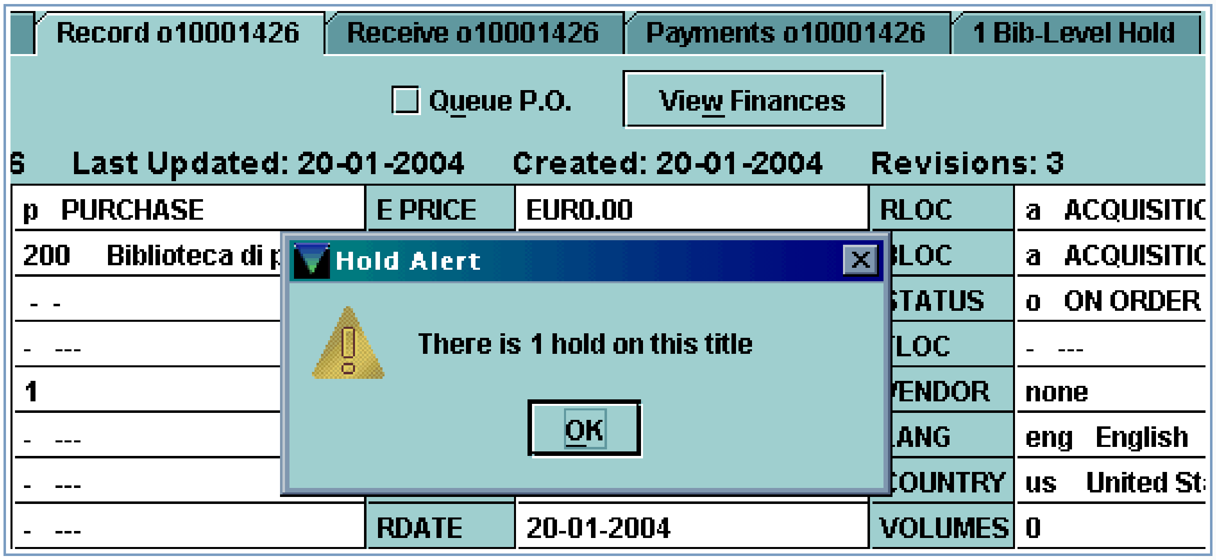
> To prevent a patron from placing title-level holds on a bibliographic record with no attached item or order records, when requesting from the WebPAC, set the BIBREQUEST Web Server option to "false".

close window

SHOW HOLD ALERT DURING RECEIVING

If this option is selected, the system provides a message to alert staff of any title-level holds when receving an order using one of the following methods:

- **Rapid Receive** mode, **Receive and Create items** submode in Millennium Acquisitions
- **Rapid Receive** mode, **Rapid Update** submode, **Update Single Record** option in Millennium Acquisitions
- Manually updating the **RDATE** field on the **Record** tab in any module where you can access order records



Note that the alert message does not appear if staff receive the order via **Rapid Update (Update Multiple Records** option), or the **Receive** tab in **Orders** mode in Millennium Acquisitions or in another Millennium module.

For additional information about receiving orders in Millennium Acquisitions, refer to the Innovative Guide and Reference, Page # 100628: Receiving Acquisitions

close window

LIMIT PICKUP LOCATIONS TO THOSE IN THE HOLD PICKUP LOCATIONS TABLE

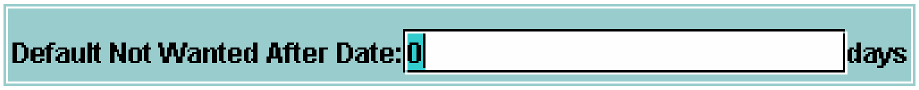
If this option is enabled, staff will be offered a selection of pickup locations from the Hold Pickup Locations table when placing a hold. This table allows a library that has multiple locations defined within a single building, but only one hold pickup location in that building, to create a hold pickup location name to which all the location codes in the building are assigned.

> Make sure you have completed the setup of your Hold Pickup Locations table before you select this option, or staff may not be able to choose an appropriate pickup location. If this option is enabled and the Hold Pickup Locations table is empty, the system will not offer any pickup locations in the holds dialog.

If this option is *not* selected, staff choose pickup locations from the Branch (location) codes table, i.e. all your location codes are listed.

close window

DEFAULT NOT WANTED AFTER DATE



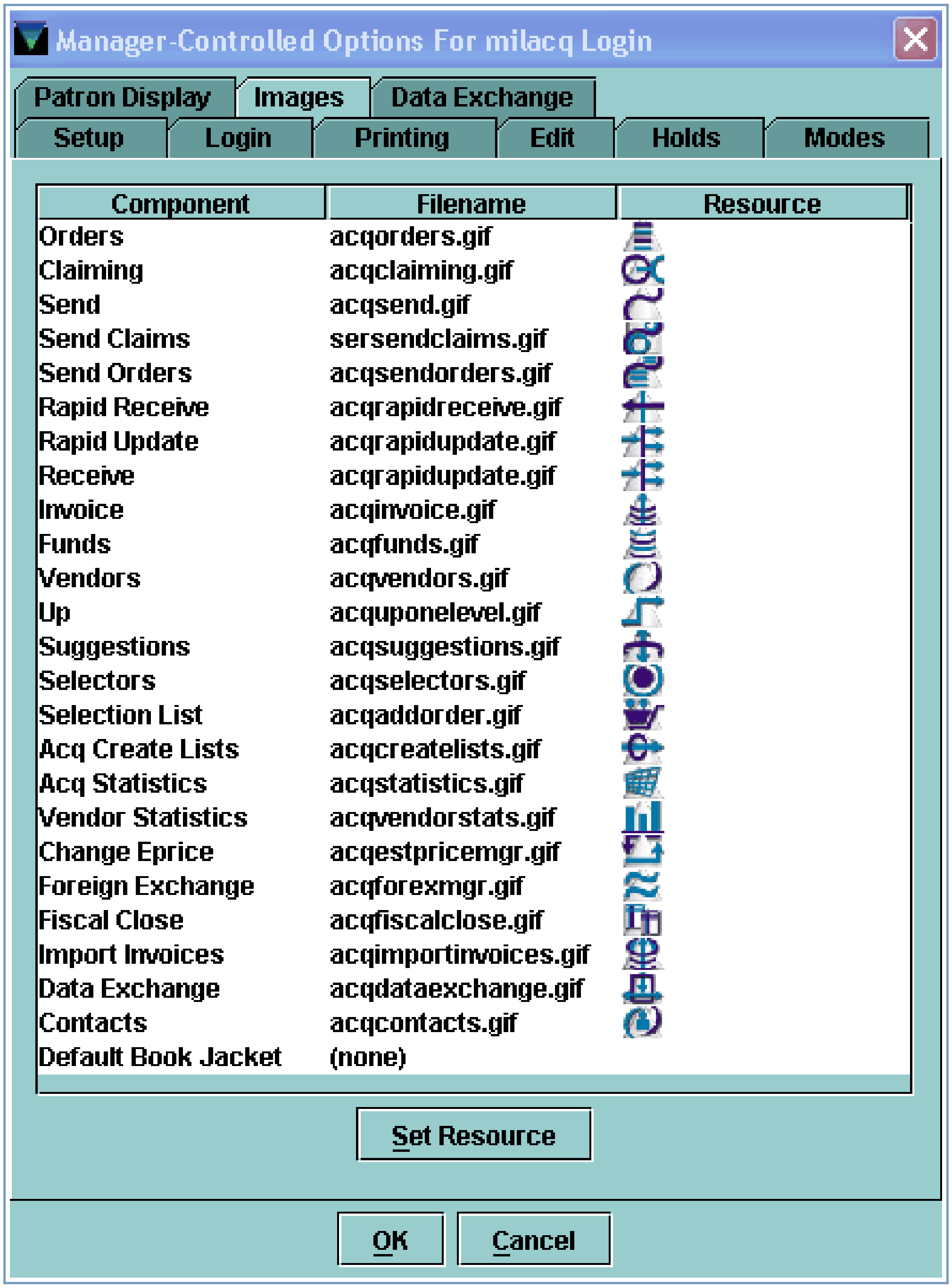
If you enter a number between 1 and 999 in this field, a default date displays in the Not Wanted After Date dialog when you place an Item-level or Title-level Hold. This default date is calculated by adding the number of days to the date you are placing the hold; for instance, if you enter 30 into the Default Not Wanted After Date field and you place a hold on 04-16-2008, the date displays as 05-16-2008, i.e. 30 days later. Note that you can always edit the Not Wanted After date suggested by the system when placing holds.

A maximum value of 365 is recommended for the Default Not Wanted After Date field. If the number is set to 0, no default Not Wanted After date is calculated.

close window

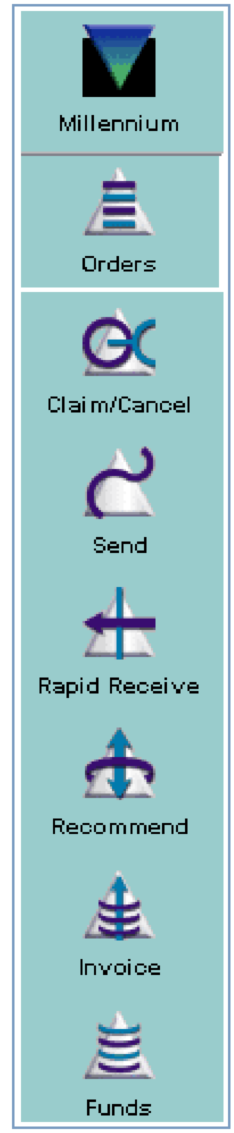
IMAGES

The **Images** tab displays a list similar to the following (this example is from Millennium Acquisitions):



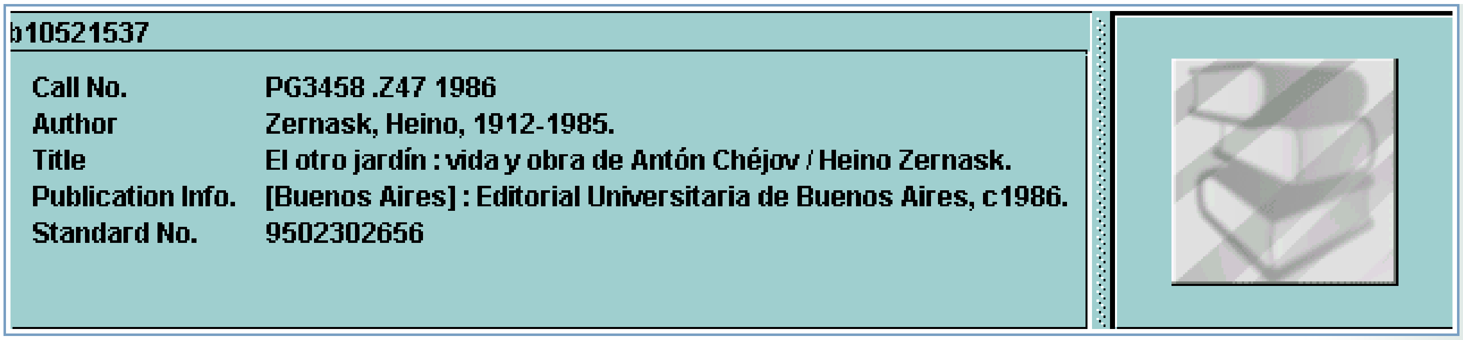
Component	Filename	Resource
Orders	acqorders.gif	
Claiming	acqclaiming.gif	
Send	acqsend.gif	
Send Claims	sersendclaims.gif	
Send Orders	acqsendorders.gif	
Rapid Receive	acqrapidreceive.gif	
Rapid Update	acqrapidupdate.gif	
Receive	acqrapidupdate.gif	
Invoice	acqinvoice.gif	
Funds	acqfunds.gif	
Vendors	acqvendors.gif	
Up	acquponelevel.gif	
Suggestions	acqsuggestions.gif	
Selectors	acqselectors.gif	
Selection List	acqaddorder.gif	
Acq Create Lists	acqcreatelists.gif	
Acq Statistics	acqstatistics.gif	
Vendor Statistics	acqvendorstats.gif	
Change Eprice	acqestpricemgr.gif	
Foreign Exchange	acqforexmgr.gif	
Fiscal Close	acqfiscalclose.gif	
Import Invoices	acqimportinvoices.gif	
Data Exchange	acqdataexchange.gif	
Contacts	acqcontacts.gif	
Default Book Jacket	(none)	

Navigation bar and corresponding default images (this example is from Millennium Acquisitions):



The files listed are those that define the graphic images that appear on the Millennium navigation bars and as default book jacket.

Default book jacket image (displays when the title specific book jacket is not found):



Use the following steps to change an image file:

1. Highlight the component you want to change and click on **Set Resource**.
2. Click on **Select** to use one of the default images in Millennium.
3. Click on **Import** to use an external image file stored on the workstation or on the network.

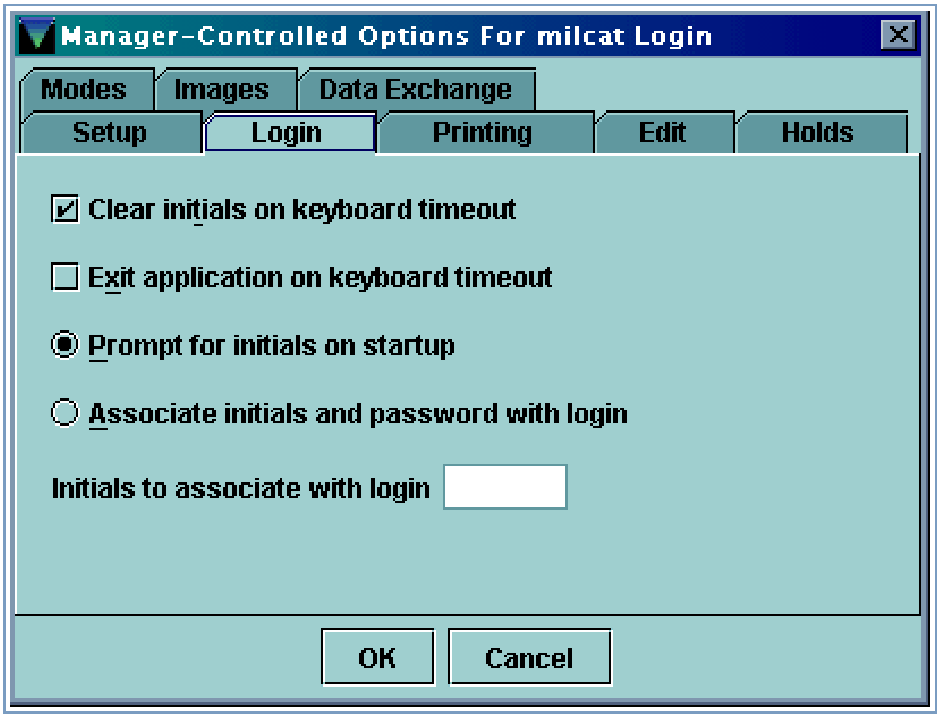
For detailed information about defining images, refer to the Innovative Guide and Reference, Page # 100023: Defining the Images that Display in the Navigation Bar.

NOTE: A change to this option does not take effect until you start a new session.

close window

IMAGES

The **Login** tab contains the following options in most modules:



close window

CLEAR INITIALS ON KEYBOARD TIMEOUT

If this option is selected, the system clears the current initials after the keyboard timeout period expires, and you are prompted to enter initials again. Note, however, that the application is not closed.

The keyboard timeout is set from the Login Administration. Refer to the Innovative Guide and Reference, Page # 100310: Setting Keyboard Timeout Periods for details.

close window

EXIT APPLICATION ON KEYBOARD TIMEOUT

If this option is selected, the system closes the application and releases the user license after the keyboard timeout period expires.

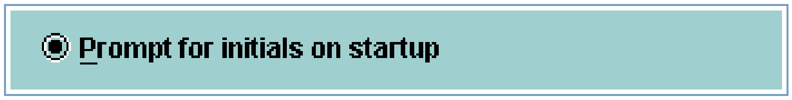
The Clear initials on keyboard timeout and **Exit application on keyboard timeout** checkboxes may be selected in any combination to control the application's behavior when the keyboard timeout period expires. However, if **Exit application on keyboard timeout** is selected, **Clear initials on keyboard timeout** has no function, since the application will close anyway.

If neither option is selected, the application will merely go back to default mode when the keyboard timeout period expires.

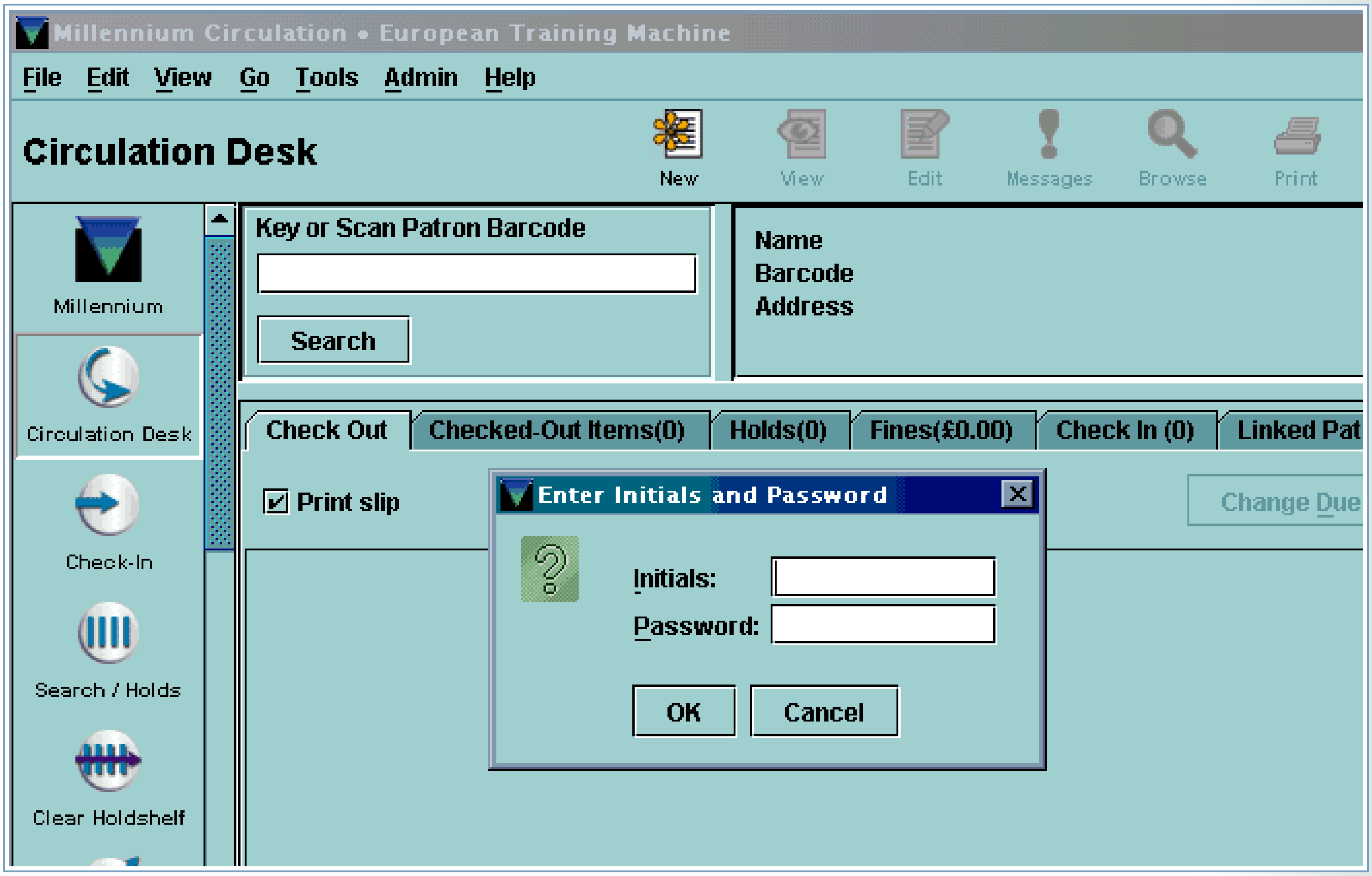
If the login has no keyboard timeout set, the application will stay open on the screen where you leave it.

close window

PROMPT FOR INITIALS ON STARTUP



If this option is selected the system prompts you to set the initials at the beginning of a new session. If your library has multiple accounting/serials units, you will be prompted for initials at the beginning of the login process. If not, you will be prompted when the client has finished loading:



If your library has multiple accounting/serials units, you will be placed in the unit associated with your initials.

Note that if you enable this option, the system automatically disables the [Associate initials and password with login](#) option.

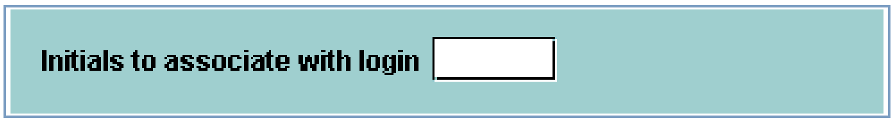

close window

ASSOCIATE INITIALS AND PASSWORD WITH LOGIN/INITIALS TO ASSOCIATE WITH LOGIN

If this option is selected, the **Initials to associate with login** must be filled in to make the setting work correctly. The system will then automatically associate the login with the initials you enter here, and you will not be prompted to enter initials at the beginning of a session.

Note that if you enable this option, the system automatically disables the Prompt for initials on startup option.

INITIALS TO ASSOCIATE WITH LOGIN CIRC ILL



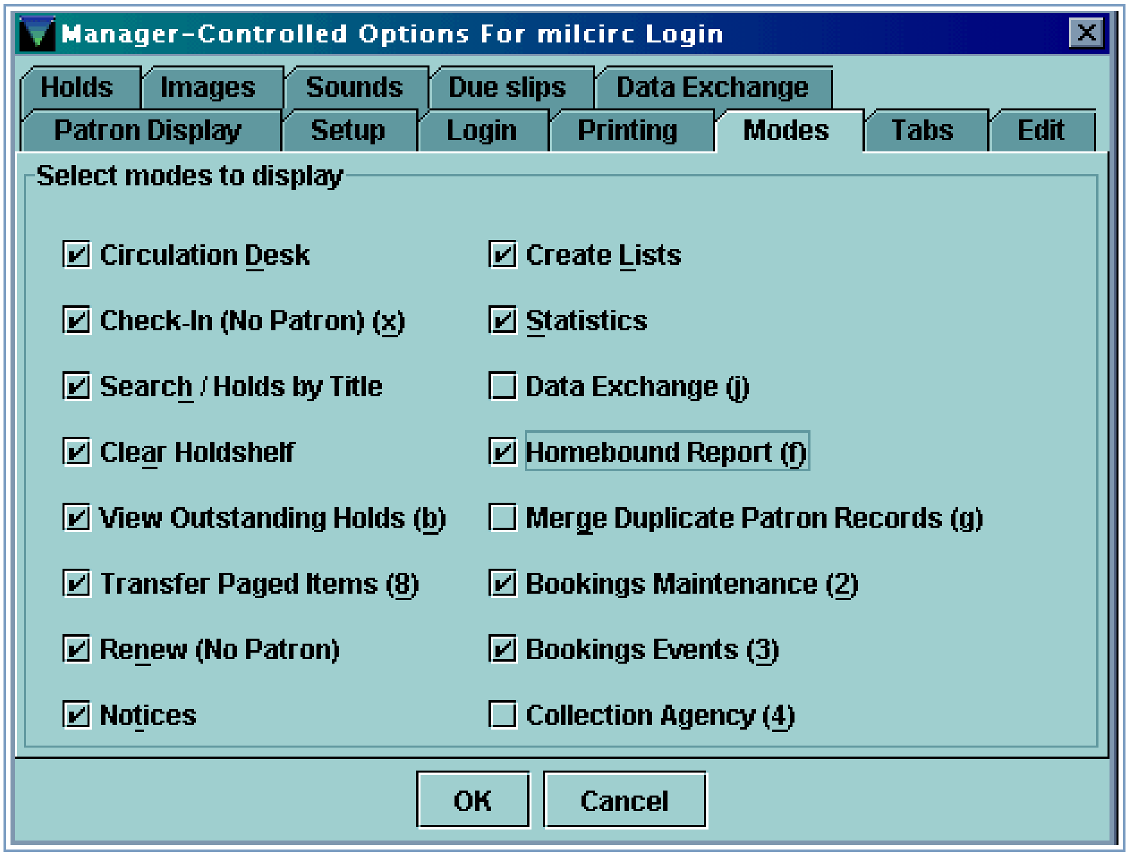
Millennium Circulation and Inter-Library Loans logins do not have an **Associate initials and password with login** checkbox. For these modules you associate initals with login by filling in the initials box only. If you fill in initials in the box, the system will automatically associate the login with the initials entered here, and there will be no prompt for initials at the beginning of a session.

Note that if you enable this option, you need to disable the Prompt for initials on startup option, or the box will be cleared automatically and you will still be prompted for initials when you start a session.

close window

MODES

The **Modes** tab displays a list similar to the following. The example is from Millennium Circulation:



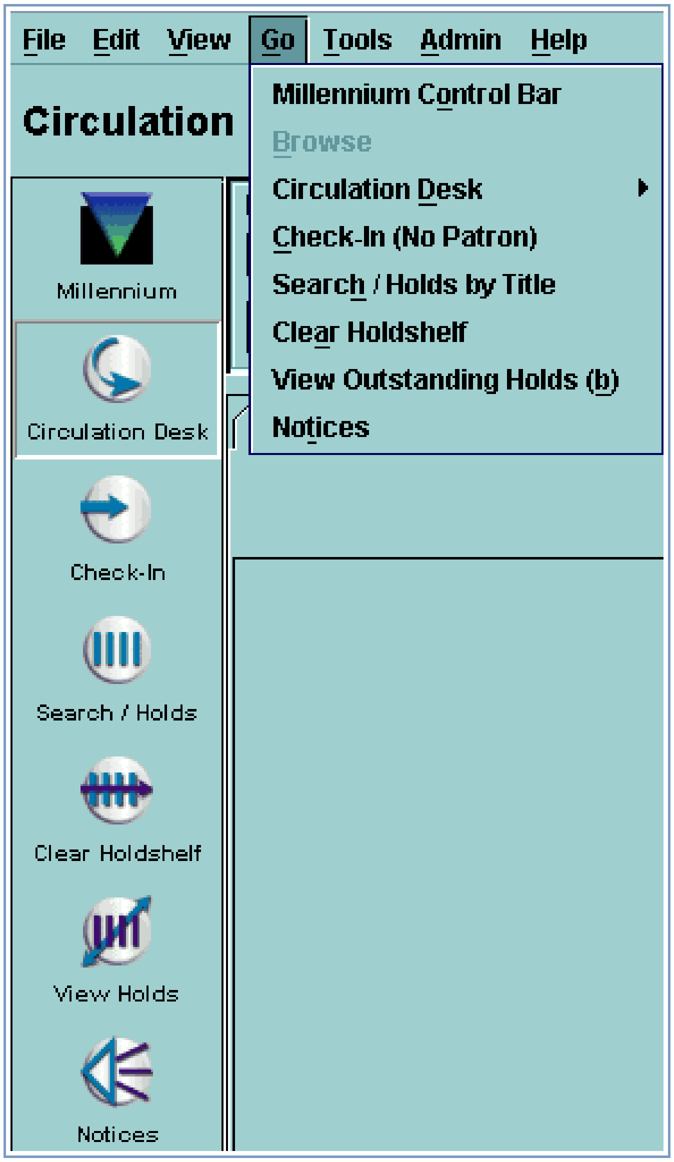
The content varies depending on the modes available on your system. Some options appear only if your library has acquired a certain product. For example the **Homebound Report** mode in the example above is available only if your library has the "Homebound Patron Services" product.

The checkboxes you select govern which modes display for the login to access.

NOTE: In Millennium Circulation, enabling/disabling **Renew (No Patron)** overrides the setting of Circulation option *Renewals: Allow renewal by item barcode?*

> If **Circulation Desk** mode is not checked in Millennium Circulation and Inter-Library Loans, the Tabs tab is automatically disabled.

Modes can be accessed from the navigation bar, or from the **Go** menu.



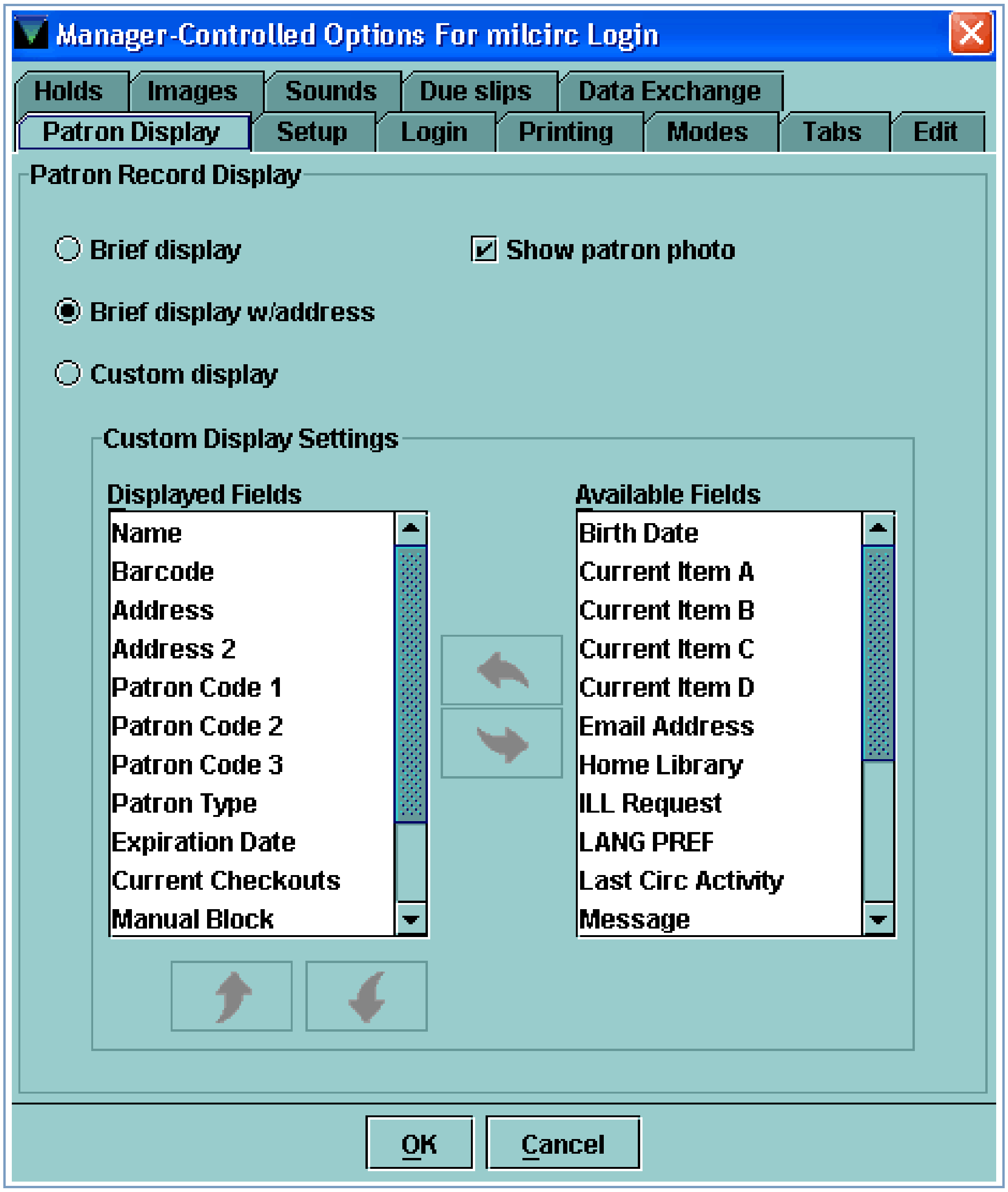
When you start a new session or clear your initials, your Millennium module switches to its default mode. Millennium uses the first enabled mode that appears in the navigation bar or **Go** menu as its default mode.

NOTE: Changes do not take effect until you start a new session.

close window

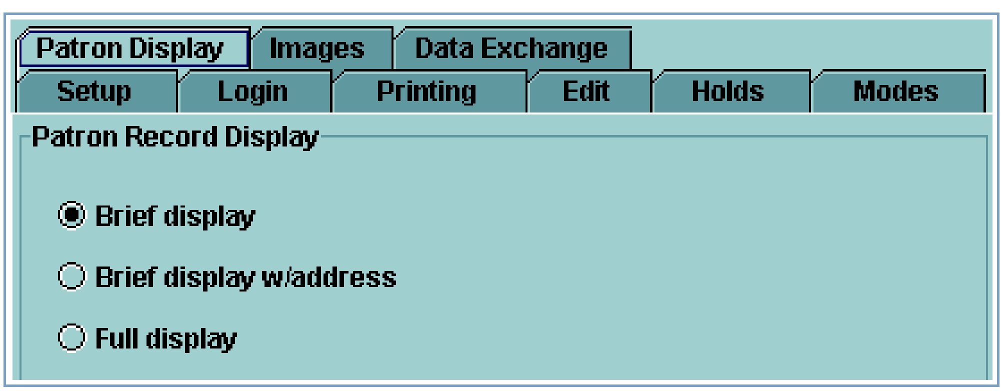
PATRON DISPLAY

The **Patron Display** tab contains the following options in Millennium Circulation and Millennium Inter-Library Loans:



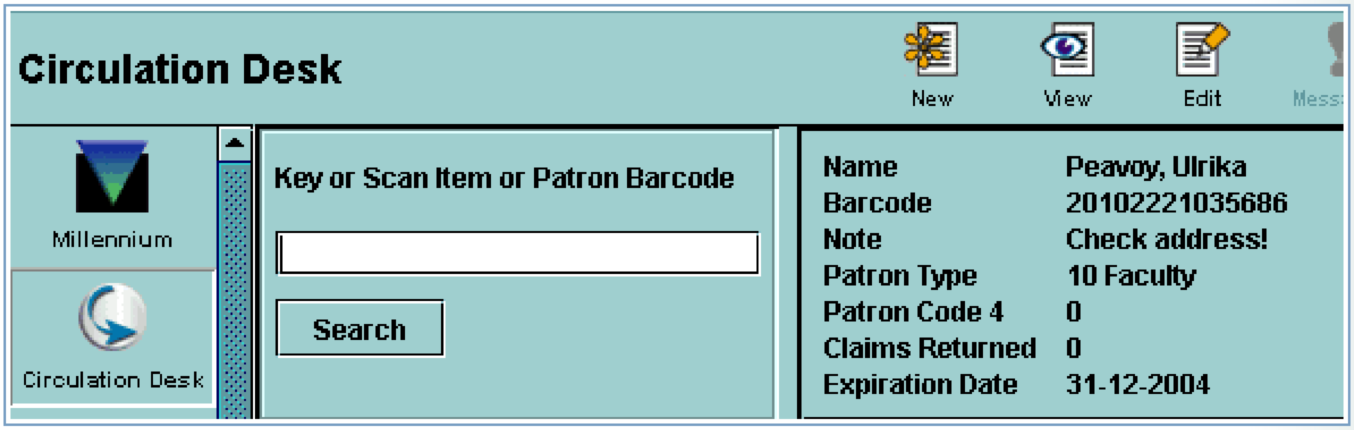
The **Show patron photo** option will only be included if your library has acquired the Patron Images product.

In Millennium Acquisitions the tab looks different:



The options determine the information that Millennium displays in the upper part of the screen for patron records in the following modes:

Millennium Circulation - **Circulation Desk** mode.
Millennium Inter-Library Loans - **Circulation Desk** and **Enter Requests** modes.
Millennium Acquisitions - **Recommend** mode, **Selectors** submode.



NOTE: In Millennium Circulation these options override Circulation options *Display patron demerits and blocked until date* and *Check-out: display patron address.*

close window

BRIEF DISPLAY

◉ Brief display

If this option is selected, the patron record's NAME, BARCODE, NOTE, P TYPE, CL RTRND, and EXP DATE fields will display.

Additionally, if your library has acquired PCODE4, Millennium will include that field in the display.

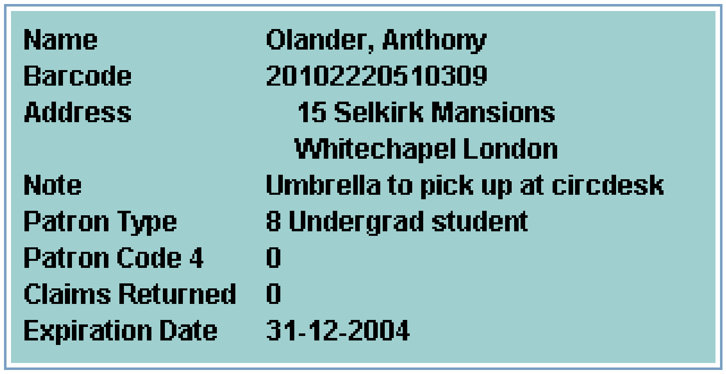
Name	Peavoy, Ulrika
Barcode	20102221035686
Note	Check address!
Patron Type	10 Faculty
Patron Code 4	0
Claims Returned	0
Expiration Date	31-12-2010

close window

BRIEF DISPLAY W/ADDRESS

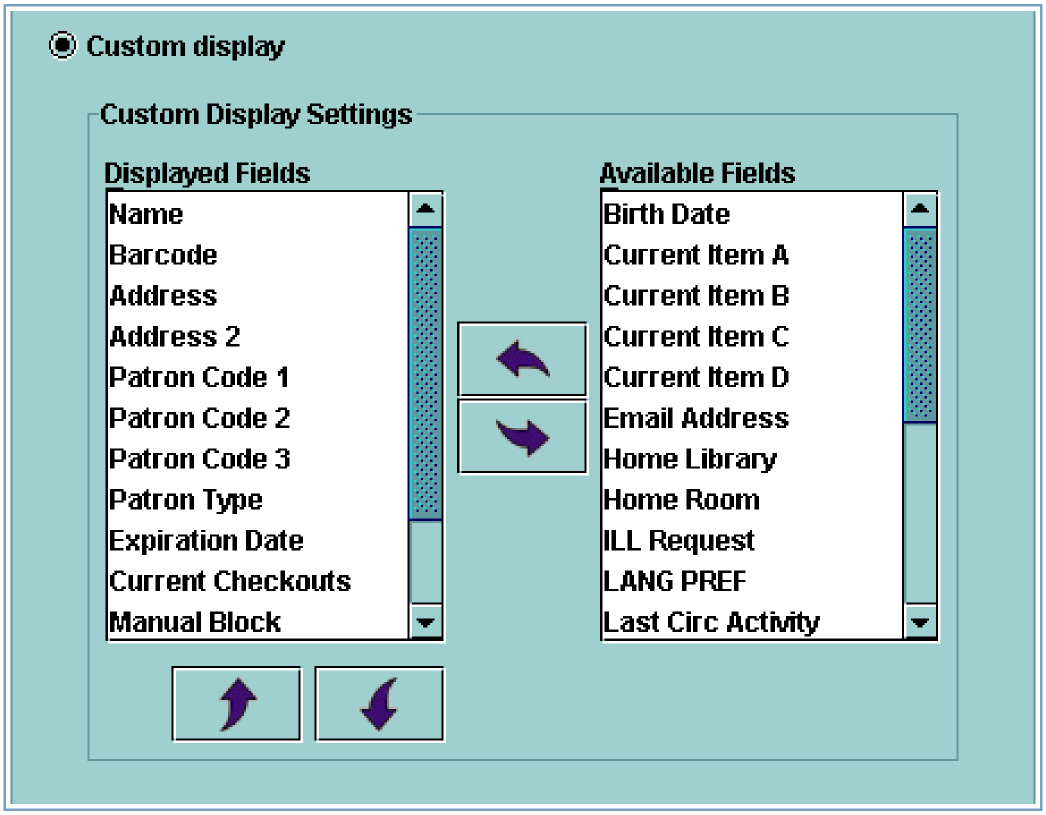
If this option is selected, the patron record's NAME, BARCODE, NOTE, ADDRESS, TELEPHONE, P TYPE, CL RTRND, and EXP DATE fields will display.

Additionally, if your library has acquired PCODE4, Millennium will include that field in the display.



close window

CUSTOM DISPLAY



When this option is selected, you can create a customized list of [fixed- and variable-length fields] from the patron record to display in **Circulation Desk** mode. (In Millennium Inter-Library Loans also in **Enter Requests** mode)

- The **Displayed Fields** list shows the fields that Millennium will display, and the order in which they will display.
- The **Available Fields** list shows the other fields Millennium can display.

Note that Millennium will not include the PAT IMAGE or PIN variable-length fields in either list, regardless if they are enabled in your system.

To move a field from one list to the other:

1. Select the field to move.
2. Choose the left or right arrow button.
3. Millennium moves the field to the other list.

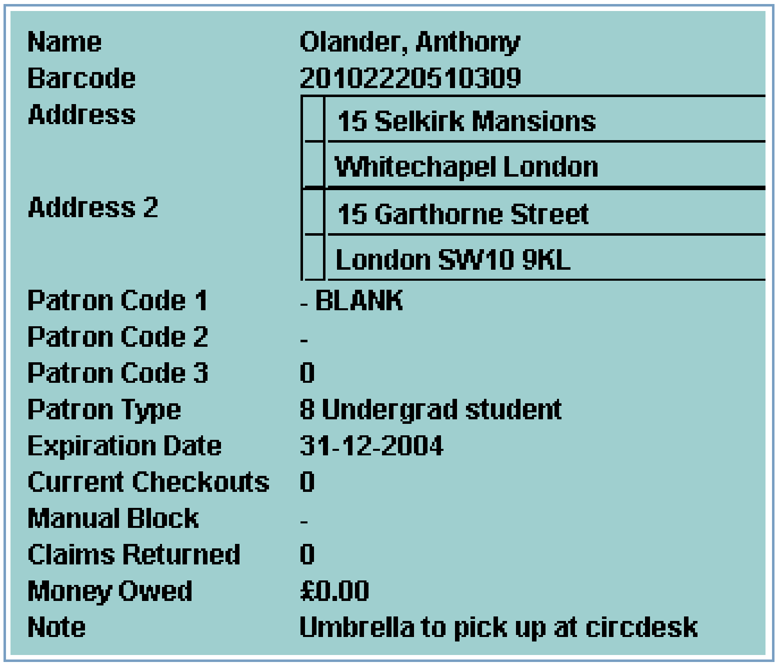
To reorder the display of fields:

1. In the **Displayed Fields** list, select the field to reorder.
2. Choose the up or down arrow button.
3. Millennium moves the field up or down in the list, one step at a time.

close window

FULL DISPLAY

If this option is selected, the patron record's NAME, BARCODE, ADDRESS, ADDRESS2, PCODE1, PCODE2, PCODE3, P TYPE, EXP DATE, CUR CHKOUT, MBLOCK, CL RTRND, MONEY OWED and NOTE fields will display.



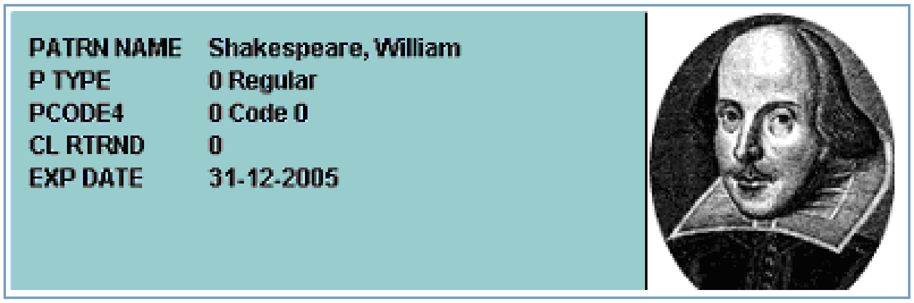
Name	Olander, Anthony
Barcode	20102220510309
Address	15 Selkirk Mansions Whitechapel London
Address 2	15 Garthorne Street London SW10 9KL
Patron Code 1	- BLANK
Patron Code 2	-
Patron Code 3	0
Patron Type	8 Undergrad student
Expiration Date	31-12-2004
Current Checkouts	0
Manual Block	-
Claims Returned	0
Money Owed	£0.00
Note	Umbrella to pick up at circdesk

close window

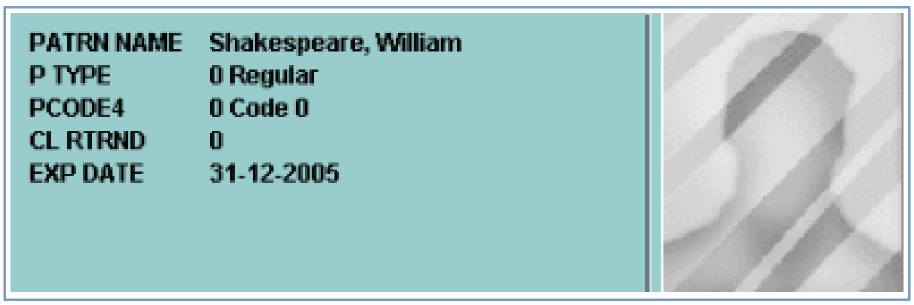
SHOW PATRON PHOTO

NOTE: The option to display patron photographs will only appear if your library has acquired the Patron Images product.

If this option is enabled, patron photos will appear as follows:
Millennium Circulation - **Circulation Desk, Check out to remote site, Check out to visiting patron**, and **Count Use - Photocopies by Patron** modes, as applicable.
Millennium Inter-Library Loans - **Circulation Desk** and **Enter Requests** modes.



If the system cannot find a photograph associated with the patron record, a dummy image displays.

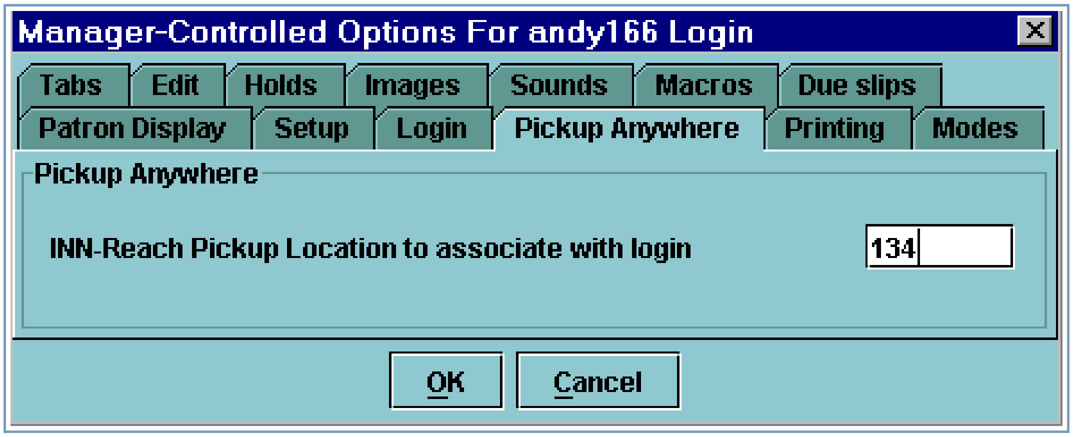


For information on how to configure the system to display patron photographs, refer to the Innovative Guide and Reference, Page # 105363: Patron Images

close window

PICKUP ANYWHERE

The **Pickup Anywhere** tab contains the following option:



NOTE: This tab will only appear if your site belongs to a Local Server that has acquired the *Pickup Anywhere for INN-Reach* product.

The Central System Administrator assigns every Pickup Anywhere location a unique key. To access **Pickup Anywhere** mode and the Pickup Anywhere database on the INN-Reach Central Server, you must use this option to assign the key to your login.

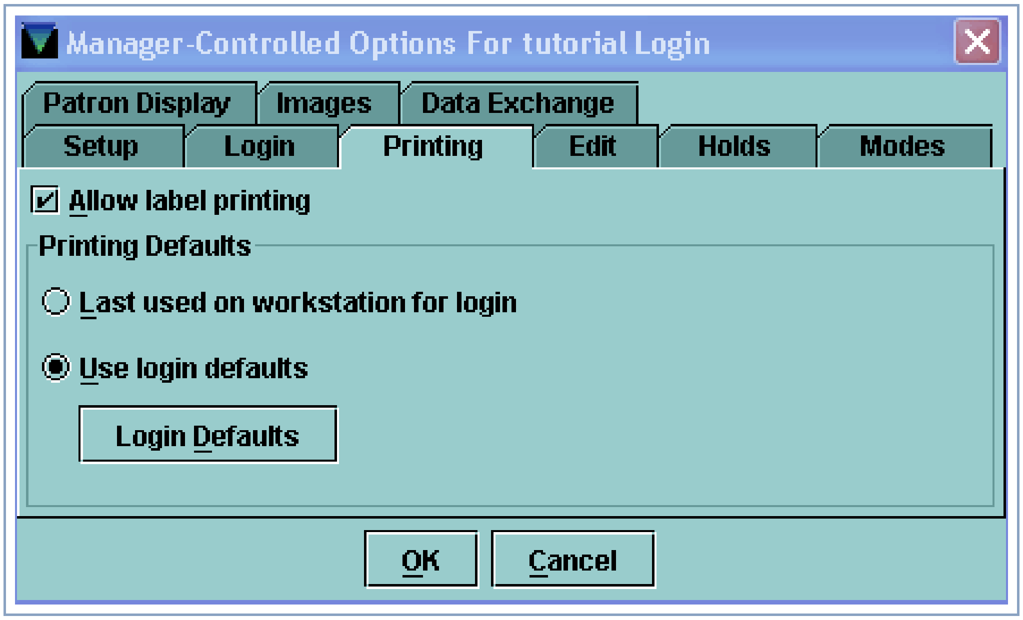
If your Local Server belongs to more than one INN-Reach System, the **Pickup Anywhere** tab also contains an INN-Reach Central Machine drop-down list, containing the name of each INN-Reach Central Server to which your Local Server contributes.

For further information, refer to the Innovative Guide and Reference, Page # 105482: Pickup Anywhere for INN-Reach

close window

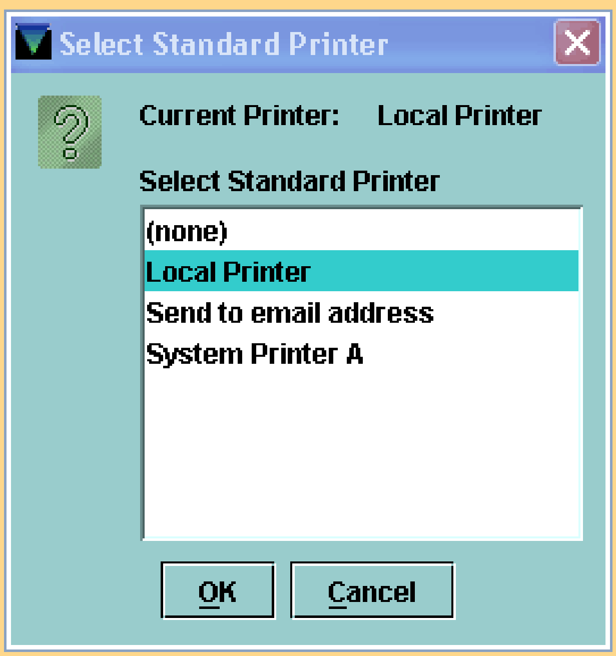
PRINTING

The **Printing** tab displays a screen similar to the following:



NOTE: Settings for printing will not be meaningful if no printers are associated with the login.
If a login has not been assigned any printers, the system displays a message when the login attempts to print or set the current printer: *No printers are available*.
Refer to the Innovative Guide and Reference, Page # 106351: Millennium Login Administration for information about associating printers with a login.

Your *Available Printers* in the Login Administration may include several printers defined as "local" or "attached". Only one of these needs to be associated with the login to enable the **Local Printer** option in Millennium. Local printers are attached to the Millennium workstation, either through a direct connection (e.g. a parallel or USB printer port) or over a local-area network. The system will use your workstation's printer settings to find the physical printer(s).



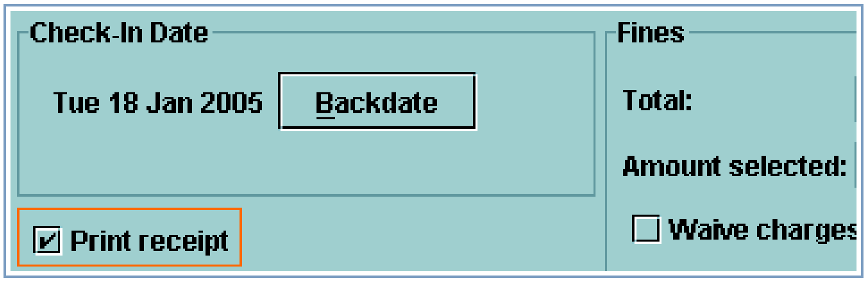
Printing can be done to a local printer, a system printer, to email or to file. Note the distinction between the physical printers used, and the printing categories that Millennium uses to define different types of print jobs.

For general information, refer to the Innovative Guide and Reference, Page # 104056: Printing in Millennium.

close window

PRINT RECEIPTS FOR CHECKED-IN ITEMS

If this option is checked, the system marks the **Print receipt** check box each time the **Check In** tab is shown.



A receipt of the checked-in items will print automatically after you have finished the check-in procedure and choose to **Close** the patron record. To disable the receipt printing temporarily, uncheck the box before you start checking in items from a new patron.

If this option is not selected, the **Print receipt** check box will not be checked by default. To enable check-in receipt printing temporarily, check the box before you start checking in items from a new patron.

close window

ALLOW LABEL PRINTING

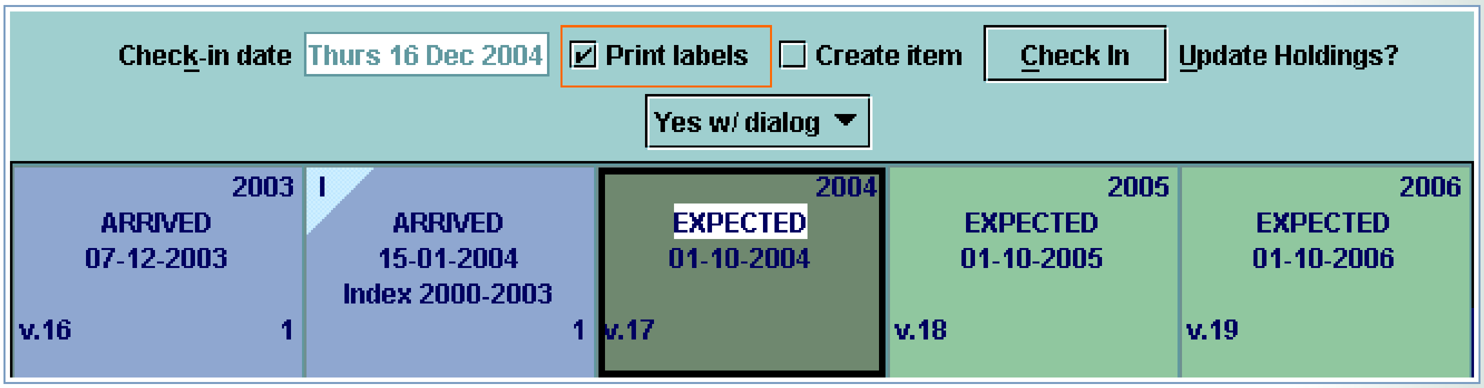
This setting controls the ability to print spine-, pocket- and routing labels during serials checkin.

NOTE: Printing of monographic labels is not governed by this option, but is always available for users with appropriate authorization.

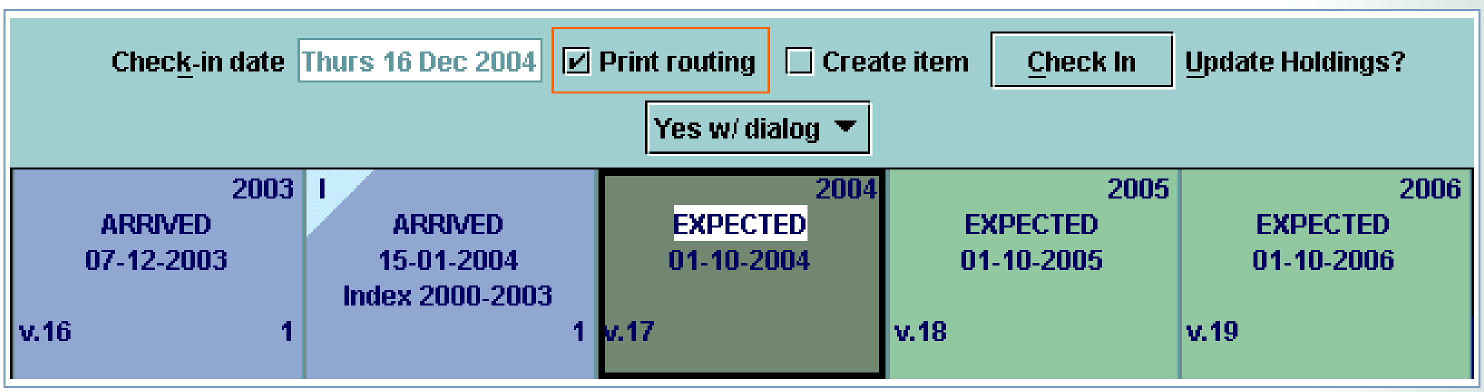
To enable serials checkin label printing, the following must be true:

- **Allow label printing** checkbox in Login Manager is checked.
- LABEL TYPE fixed-length field in the holdings/checkin record is set to a value other than "n" and/or the record has a Routing List associated with it.

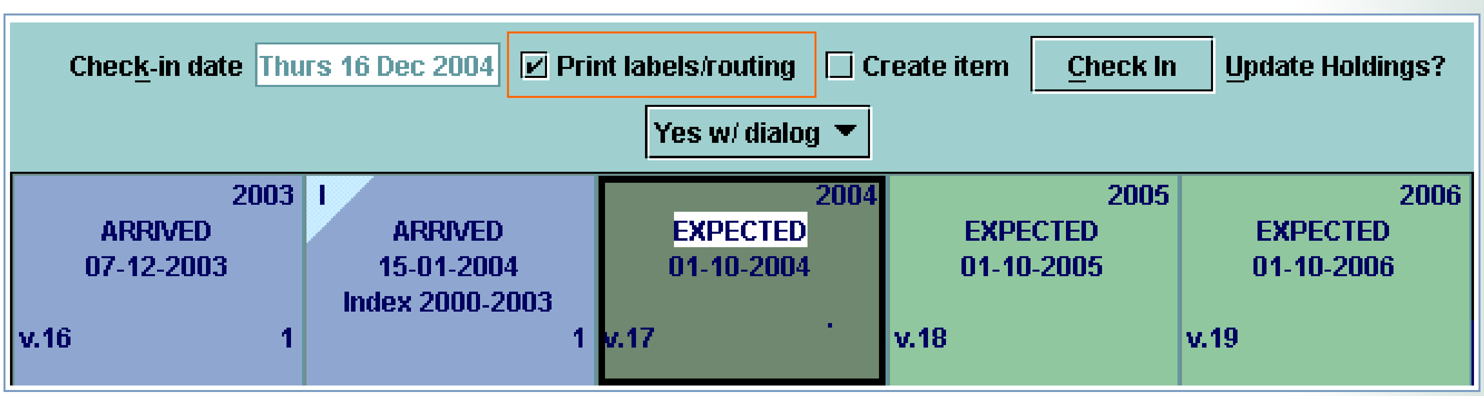
Example 1: **Allow label printing** is enabled, and LABEL TYPE fixed-length field in the holdings/checkin record is set to a value other than "n":



Example 2: **Allow label printing** is enabled, and holdings/checkin record has a routing list associated with it:



Example 3: **Allow label printing** is enabled, LABEL TYPE fixed-length field in the holdings/checkin record is set to a value other than "n", and the record has a routing list associated with it:

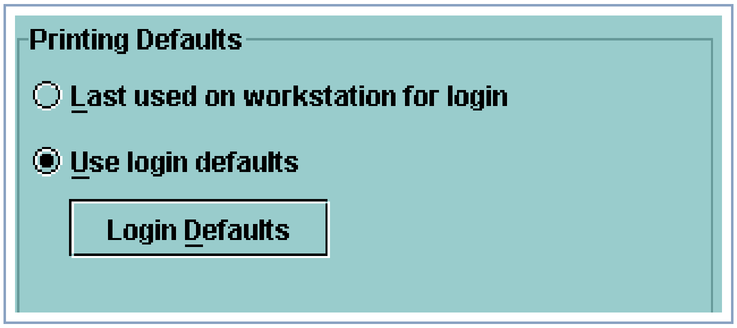


Leave this setting unchecked if you want to disable serials checkin label printing for the login.

For additional information, refer to the Innovative Guide and Reference, Page # 100434: Printing Serials Labels during Check-in

close window

PRINTING DEFAULTS



These options allow you to specify how the system remembers choice of printer and printer settings.

close window

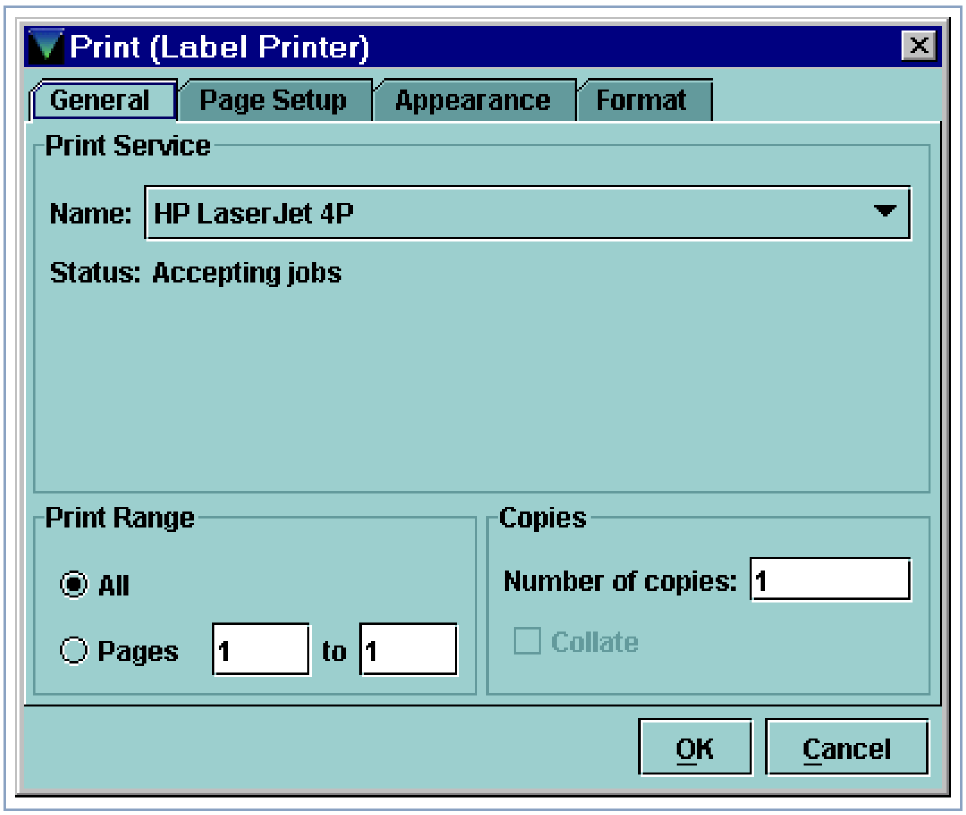
LAST USED ON WORKSTATION FOR LOGIN

Use this option if you want the system to store the choice of printer that is made while someone uses the login on a particular workstation. With this option enabled, the choice of printer for each Printing category is stored on the workstation and will be saved and re-used for the login on that workstation. Note, however, that if the same login is used on a different workstation, the choice of printer(s) may be different.
Each login on a particular workstation can have its own choice of printer(s), i.e. if the same workstation is used to run different logins (e.g. for different modules), different printers can be used.

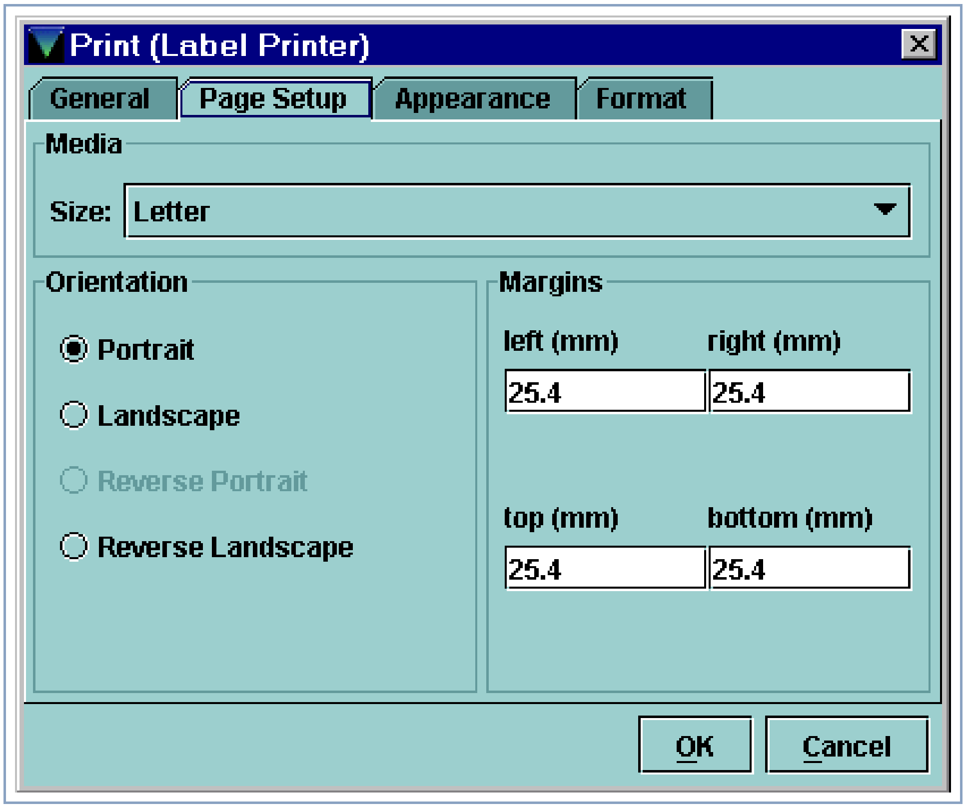
Note about Local Printers: If the default printer is a local printer, the options you set for that printer are stored on the workstation as well. Many more user-configurable settings are available for local printers than for any other printer type (e.g. for a system printer). The options that you may choose are based on the capabilities of the printer. For example, if the printer cannot print in color, the **Color** button on the **Appearance** tab will not be available.

When you choose a local printer for the first time or change the printer via **File » Select Printer**, Millennium presents a dialog with four tabs:

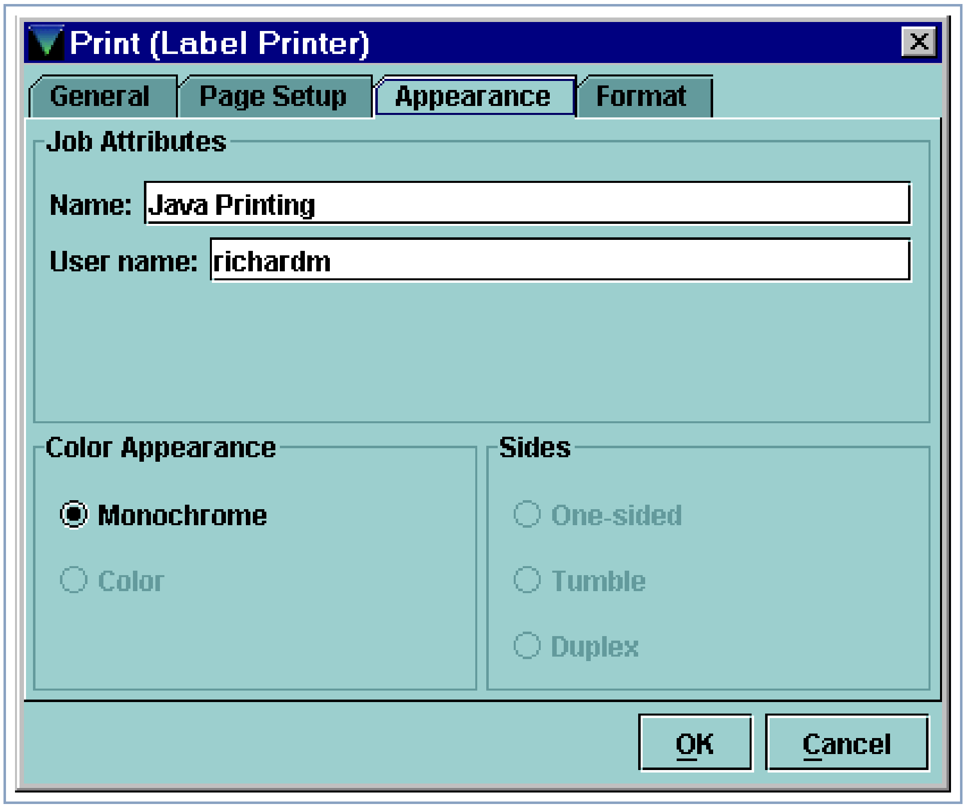
- **General**: This tab allows you to select any of the local printers available to your workstation, the range of pages to print, and the number of copies to print.



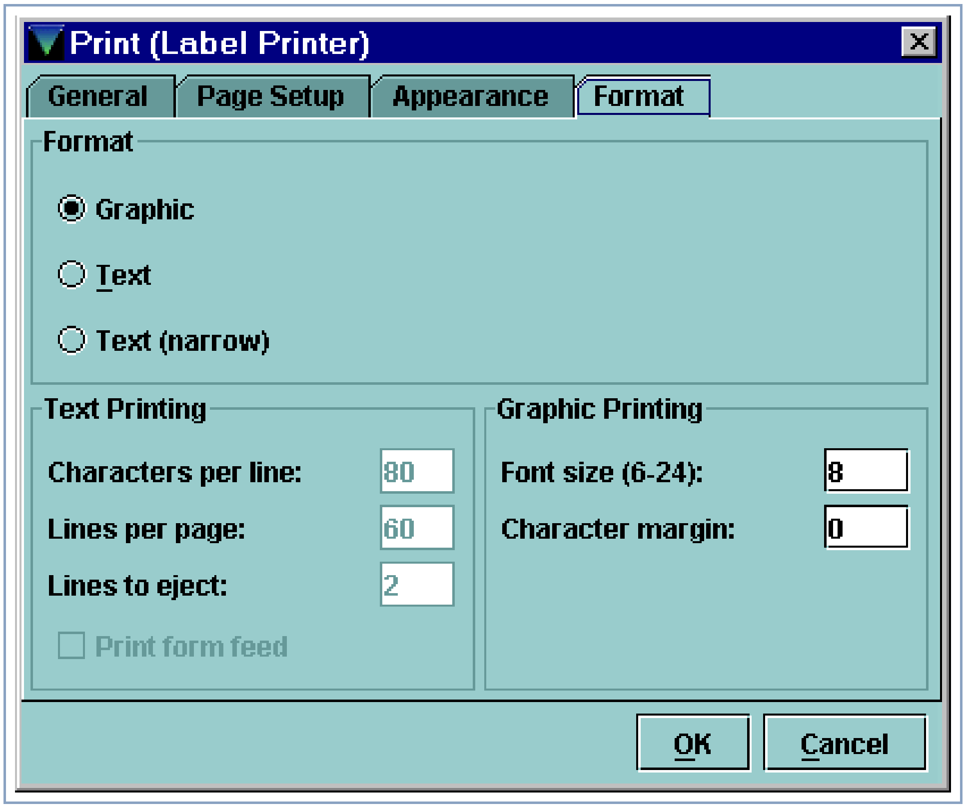
- **Page Setup**: This tab allows you to specify the paper size, direction of printing, and page margins. You can choose only those options that are supported by the printer.



- **Appearance**. This tab allows you to specify special printer features, such as color printing and non-standard paper-handling, if the printer supports them.



- **Format**. This tab allows you to specify text or graphic printing and page layout for each. The **Text (narrow)** option is for 40-column printing.



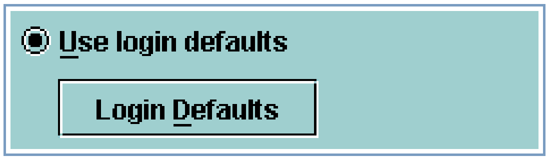
If the **Last used on workstation** option is selected, the choice of local printer and its settings are remembered when modified, and stored on the workstation where the change took place. Otherwise, if the Use login defaults option is selected, these options are not retained between sessions.

If staff wants to select another printer than the one that is currently used as the default on the workstation, they can do so from the **File » Select Printer** menu. Note that the printer that was *last used* during a session will be the default the next time someone logs in with the same login.

NOTE: Support for local printers and access to their capabilities is based on the workstation operating system's support for the particular printer(s) available to your workstation. This means that manufacturer-specific printer drivers must be installed on the workstation before Millennium can access the printers.

close window

USE LOGIN DEFAULTS

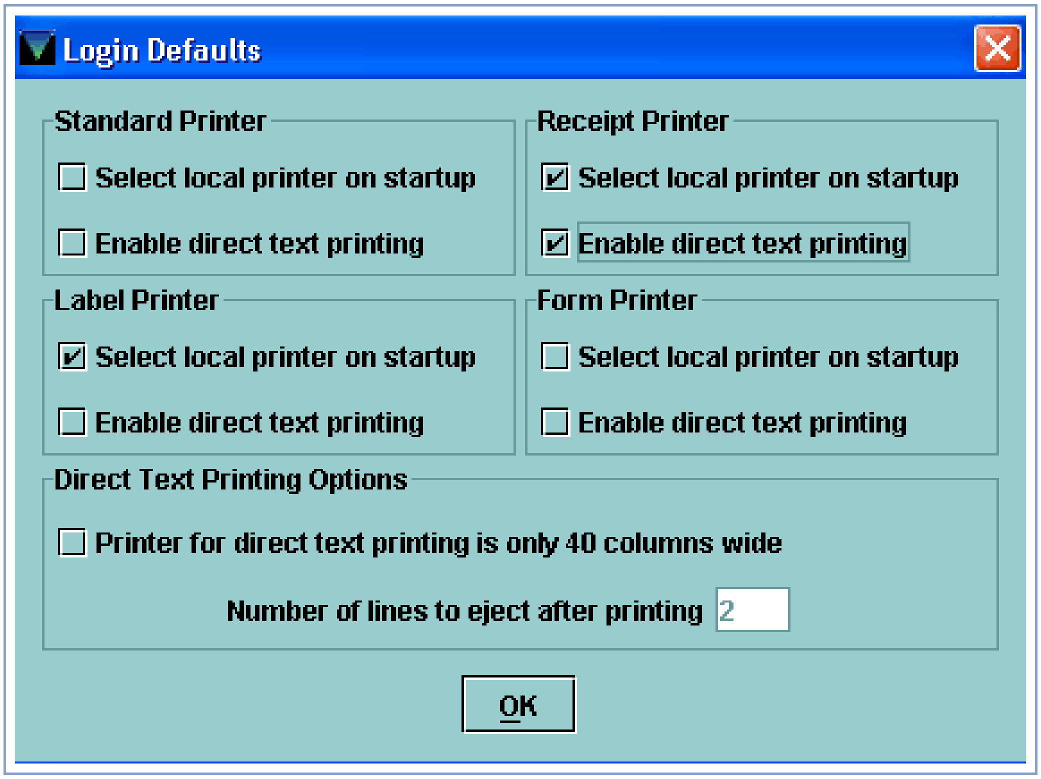


When you select **Use login defaults**, the selection of physical printer or **local** printer settings discussed in the previous step, are not retained between the sessions. The user can modify settings during the session when choosing a local printer, but the system does not save the changes after the user logs out.

The **Use login defaults** option allows you to set general printing defaults for the login. These settings are stored on the server, making them available to the login on whichever workstation is used. Click on the **Login Defaults** button and the system presents the settings.

close window

PRINTING CATEGORIES

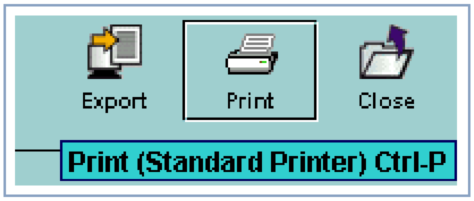


Wherever you have an option to print in Millennium, the type of printing that will take place is defined by the system, as follows:

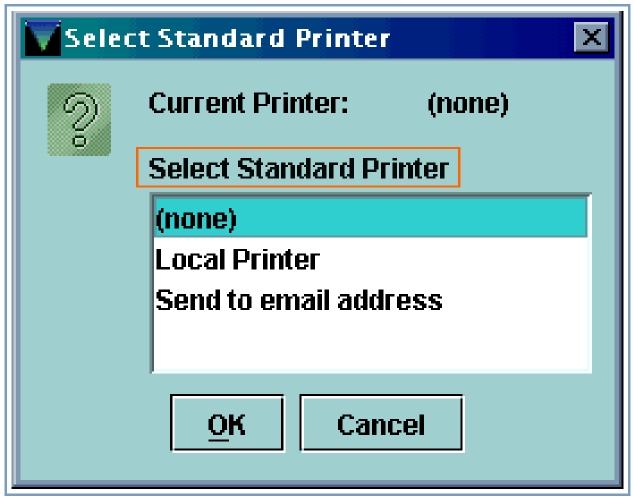
Standard printer - browse displays, records, tables, files, lists
Label printer - spine & pocket labels for monographs and serials, routing slips
Receipt printer - receipts, e.g checkout/checkin receipts, fine payments
Form printer - circulation notices, claims, purchase orders

Note that the table above reflects the four *categories* of printing in Millennium. You do not necessarily need separate, designated printers for all purposes. For example, you can use the same physical printer to print browse displays as you do for printing receipts.

Print icons and most **Print** buttons will display what type of printing the system will perform in the current situation, if you place the cursor over it.



This information is also displayed in print dialogs.

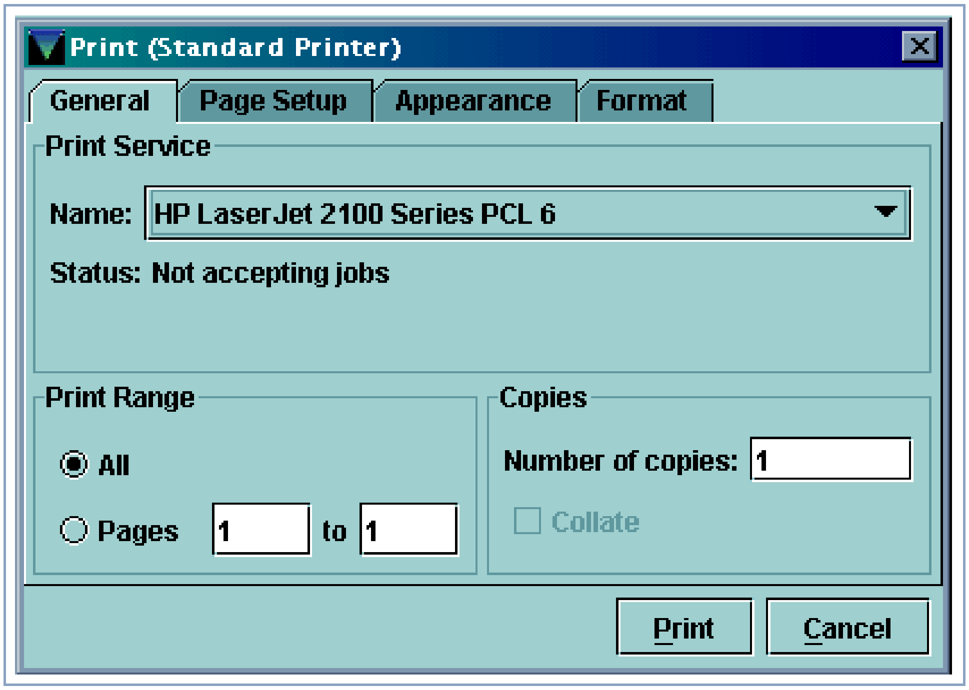


NOTE: Print Templates is a separate printing class that takes precedence when it is enabled for a certain output type. The setup is managed in the Print Templates tab in Settings.

close window

SELECT LOCAL PRINTER ON STARTUP

If this option is selected, the default printer for the printing category in question is automatically set to **Local Printer** when the login starts Millennium. Staff will be prompted to choose settings for the printer, including choice of printer if more than one is accessible, the first time of printing during the session:



NOTE: This option will only work if a "local" or "attached" printer is also associated with the login.

If this option is *not* selected, you will be prompted to choose a printer at the time of printing. The types of printers that appear in the Select Printer dialog are those that have been assigned to the login.

Whether or not you have this option selected, for most Millennium printing functions you can choose a printer for the current session from the **File » Select Printer** menu.

close window

ENABLE DIRECT TEXT PRINTING

This option determines whether print jobs sent to the **Local Printer** are output as text or as graphics. With direct text printing, the system outputs a stream of characters. Direct text printing is faster and easier to read, but cannot produce graphics. The system checks this option's value each time you print, so you may change the setting between print jobs.

Notes:

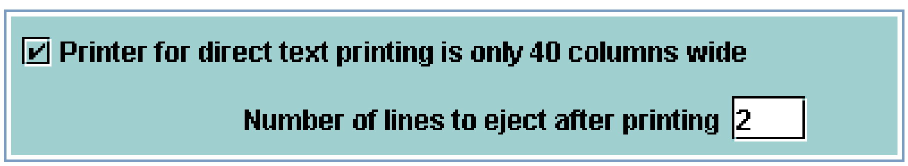
- Every printing category shares the same Direct Text Printing Options: **Printer for direct text printing is only 40 columns wide** and **Number of lines to eject after printing.** The direct text printing options selected for the login will apply for all print jobs (standard, receipt, label, form) sent to the local printer.
- If the attached local printer is a 40-column printer, also check the **Printer for direct text printing is only 40 columns wide** option.

Direct text printing is typically used for receipt printers, directly attached to Circulation Desk workstations.

PRINTER FOR DIRECT TEXT PRINTING IS ONLY 40 COLUMNS WIDE

Select this option if your attached local printer is only 40 columns wide. The system will allow you to select this option only if the **Enable direct text printing** option is checked.

NUMBER OF LINES TO EJECT AFTER PRINTING



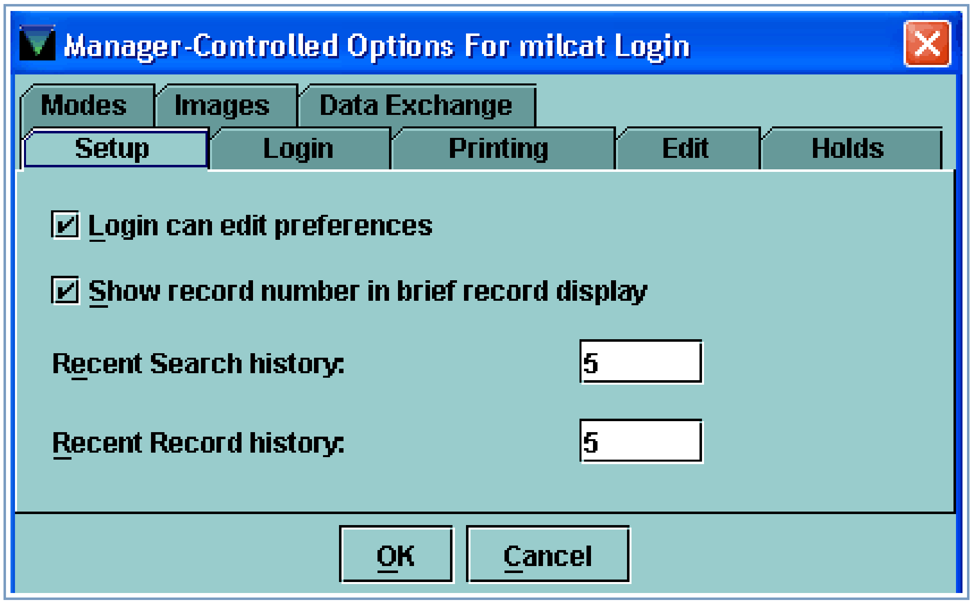
Specify the number of blank lines (up to 20) that the system should leave after each print job. The system will allow you to select this option only if the **Printer for direct text printing is only 40 columns wide** option is checked.

NOTE: This option overrides Circulation option *Number of lines between receipts for books.*

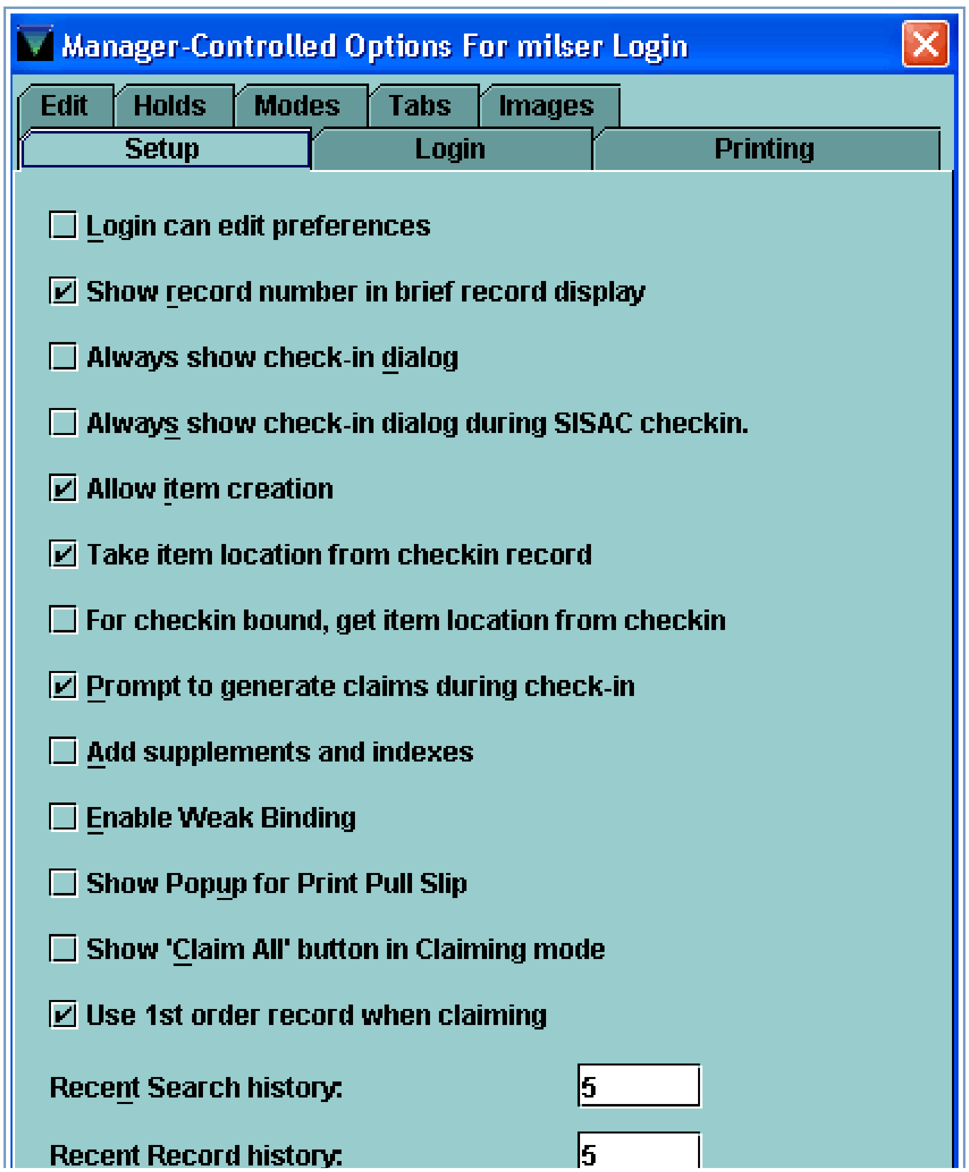
close window

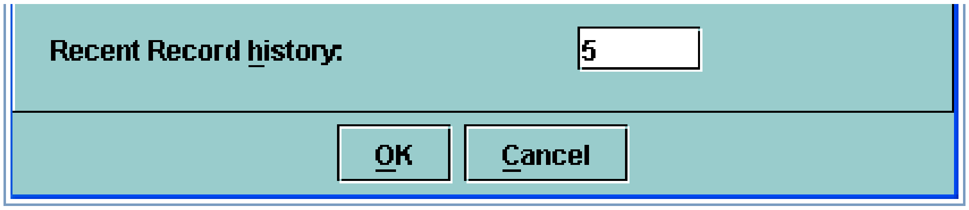
SETUP

The **Setup** tab contains various options, depending on module. Some modules only have a few basic options. The example is from Millennium Cataloging:



Other modules have many specific options, like Millennium Serials:

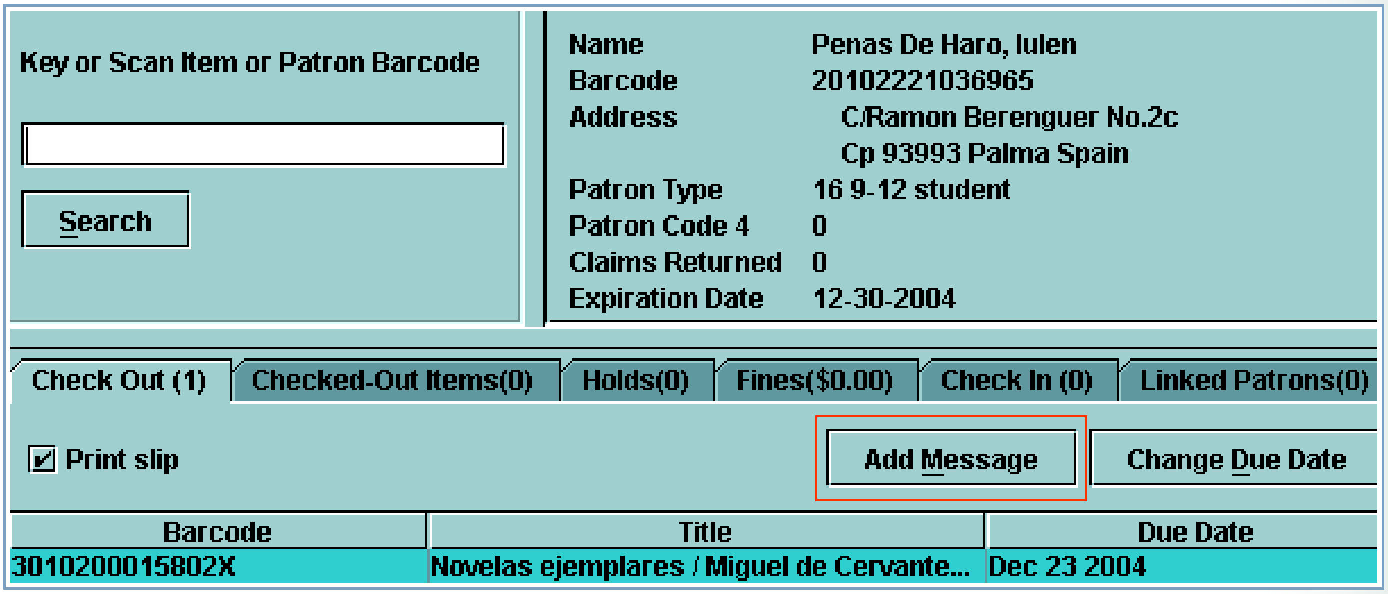


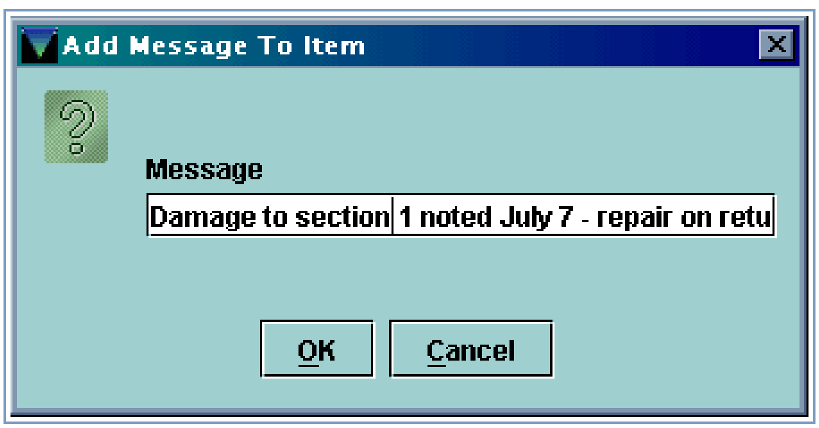


close window

ADD MESSAGE AT CHECKOUT

This option controls whether the **Add Message** button is displayed in the **Check Out** tab of **Circulation Desk** mode. Displaying the button allows authorized users to add a MESSAGE variable-length field to an item after checkout. The item messages display whenever the item is retrieved during a circulation transaction, e.g. at checkout, checkin or renewal.





For further information about this function, refer to the Innovative Guide and Reference, Page # 105953: [Adding Messages at Checkout].

NOTE: A change to this option does not take effect until you start a new session.

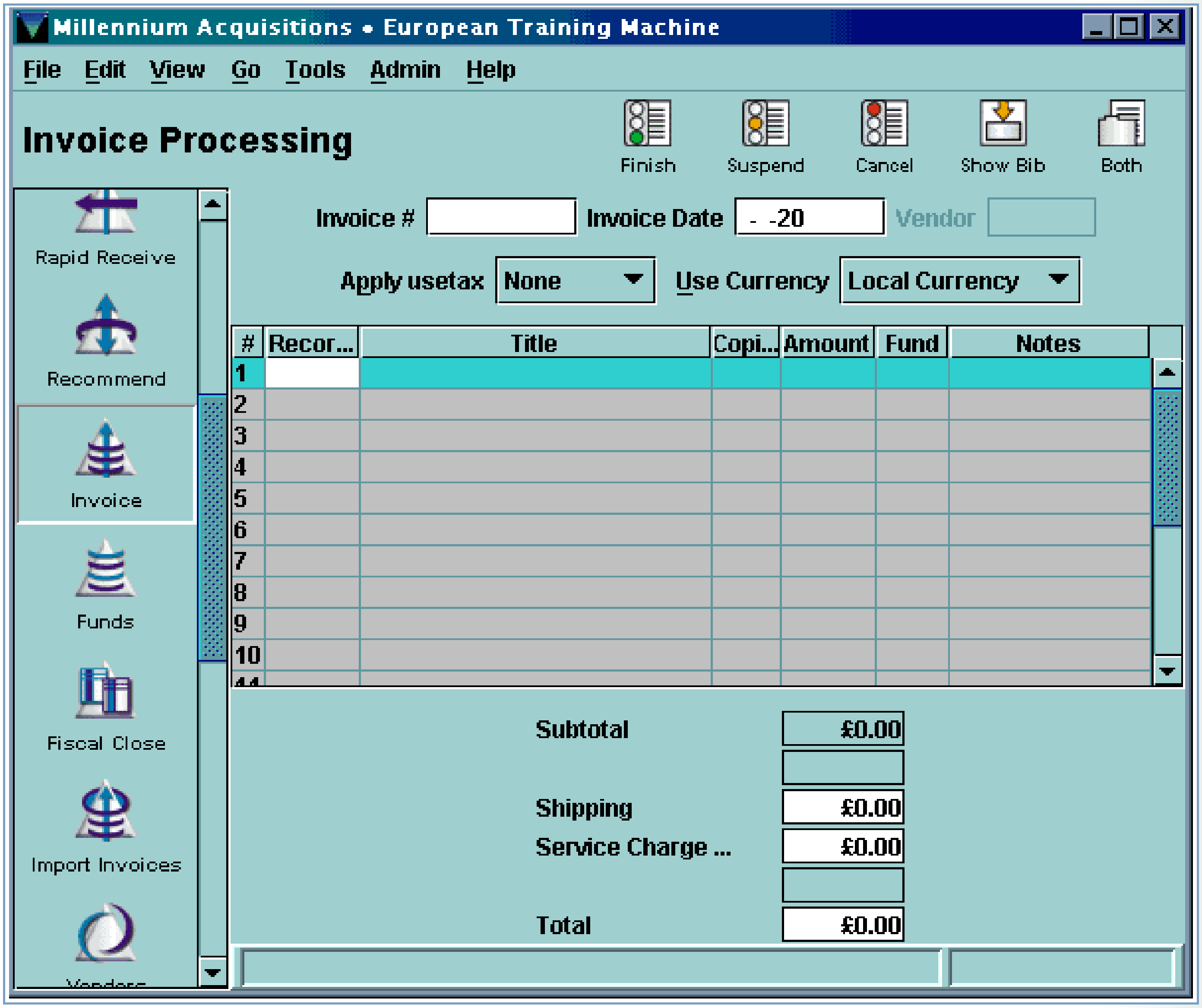
close window

HIDE THE BIBLIOGRAPHIC RECORD IN THE INVOICE DISPLAY

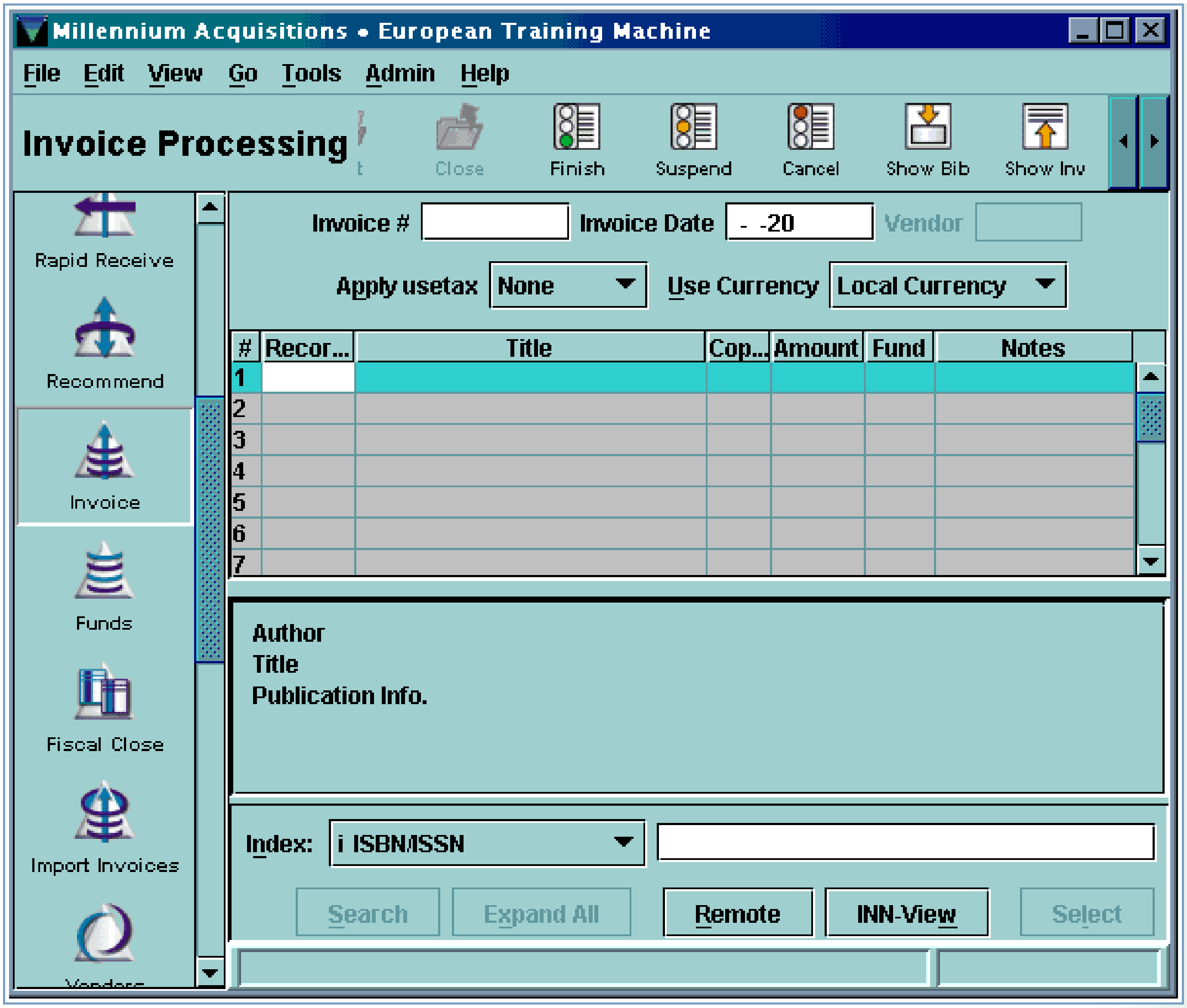
This option determines, for the default setting, whether the system maximizes the invoice display or splits the invoice display with a bibliographic record/search display. In either case, you can change this display interactively from the Invoice toolbar using the **Show Bib, Show Invoice** and **Both** options.

> The bibliographic record display is useful when you do not have the order record number available during invoice processing since it allows you to retrieve the order by searching the regular indexes. When the bibliographic window is hidden, you must retrieve the record by order number.

With this option checked, the bibliographic window is hidden:



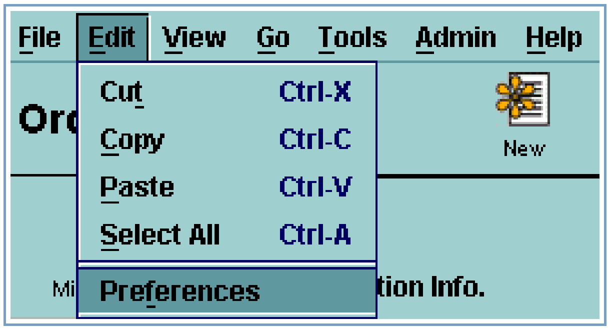
If this option is *not* checked, both the invoice and the bibliographic window will display:



close window

LOGIN CAN EDIT PREFERENCES

This option controls whether users of the login can change its Preferences using menu option **Edit » Preferences**.



The **Login can edit preferences** setting is designed to allow users who are not authorized to access the Login Manager the ability to customize their display and editor preferences. If your library is using shared logins (e.g. all or some of the catalogers are sharing the same login name), it is not recommended to select this option, since the changes a user can make to the Preferences will apply to all other users of that login.

If this option is not selected the user must be authorized for function 187 (Login Manager) to edit the Preferences from the Login Manager.

Refer to the Preferences section of this tutorial for more information about the settings in Preferences.

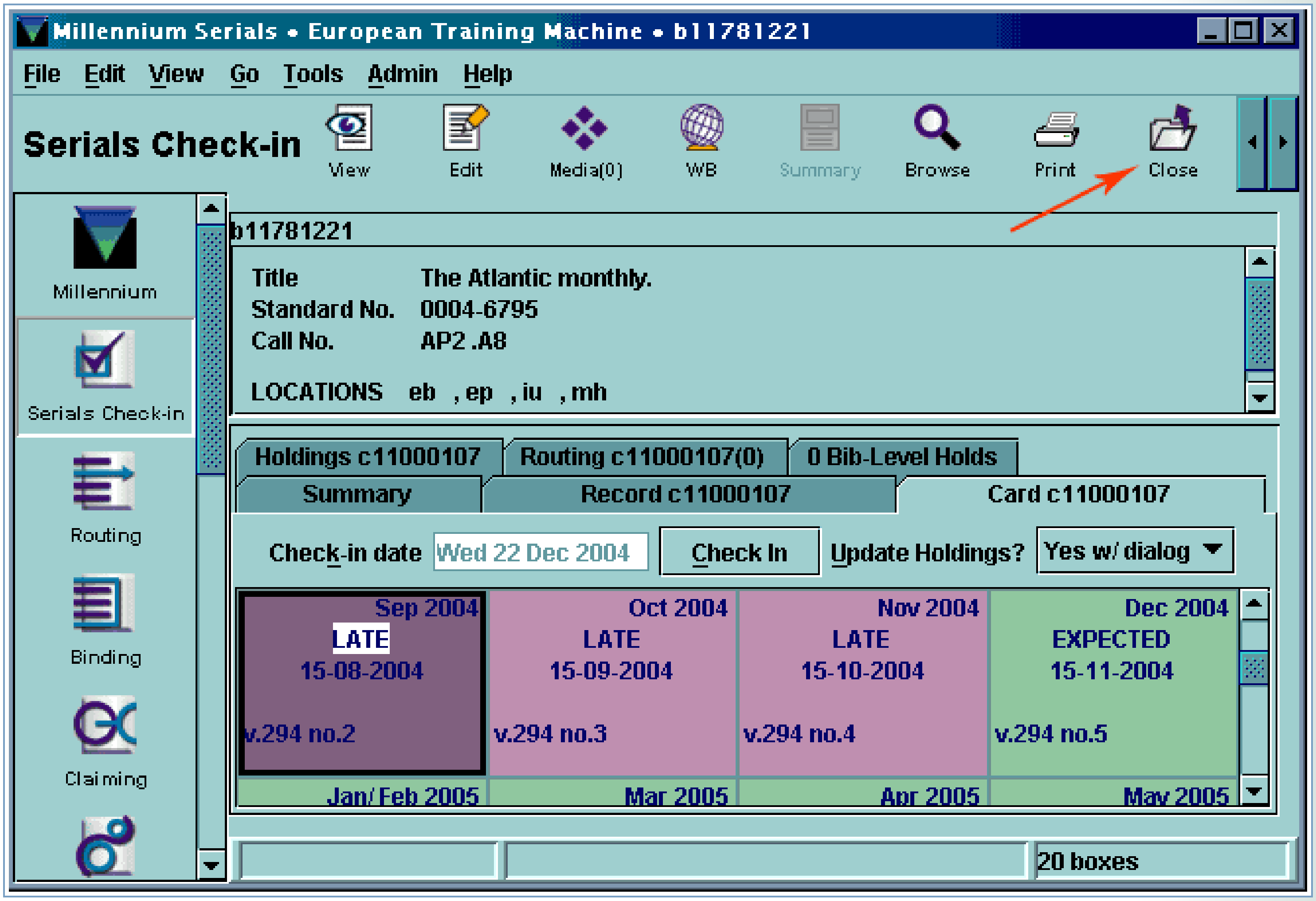
close window

PROMPT TO GENERATE CLAIMS DURING CHECKIN

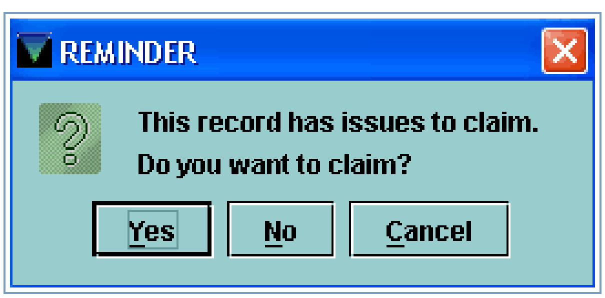
This setting determines whether the system prompts the user to claim late issues when exiting the **Card** tab after checking in serials.

When **Prompt to generate claims during checkin** is enabled:

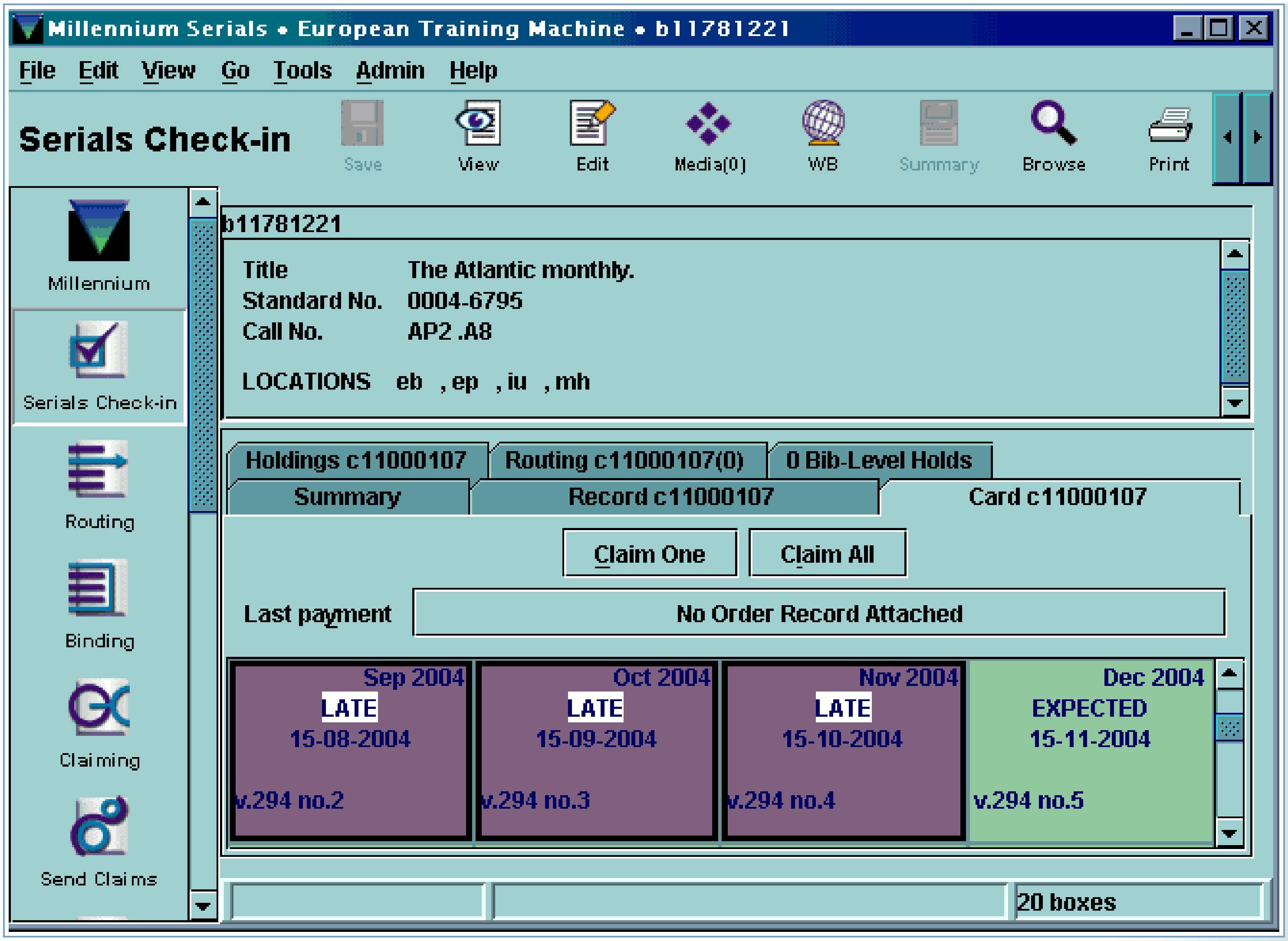
1. In checkin mode, click on **Close**:



2. The following message box will appear if there are late issues on the card:



3. Answering Yes brings up the Claim screen:



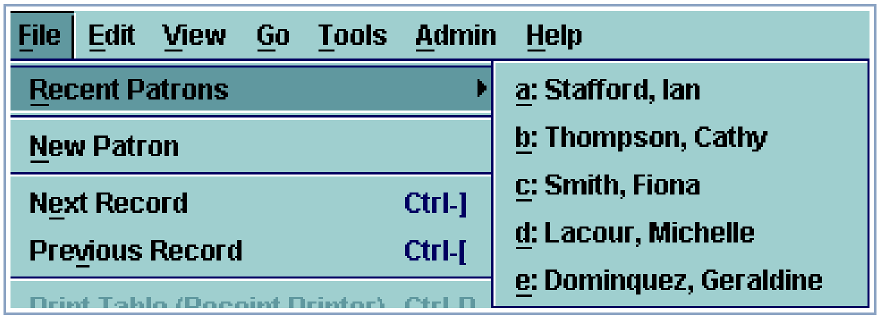
This way of claiming late issues can be used as a complement to the standard method applied in Claiming mode.

close window

RECENT PATRON HISTORY

The number entered in the box determines how many previous patrons the system remembers in menu **File » Recent Patrons** in **Circulation Desk** mode. The maximum number is 26.

Entries display with most recent record at the bottom of the list. Each patron name is preceded by an underlined letter, which could be used as a keyboard shortcut to retrieve the record again.

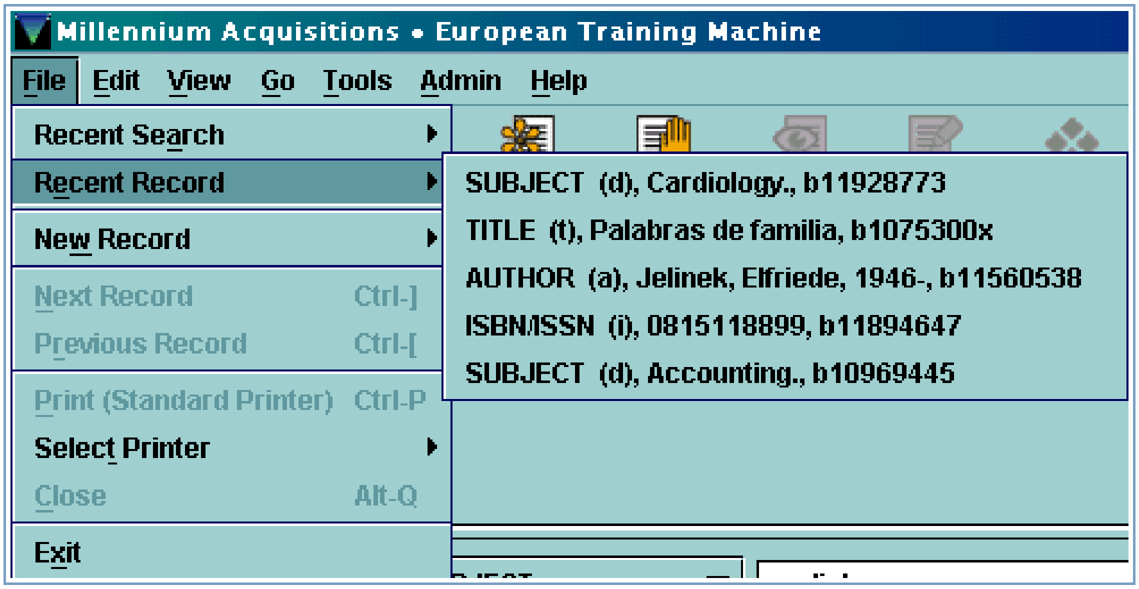


NOTE: If a patron record is retrieved from a search more than once within the number set, it retains its initial position in the history list.

close window

RECENT RECORD HISTORY

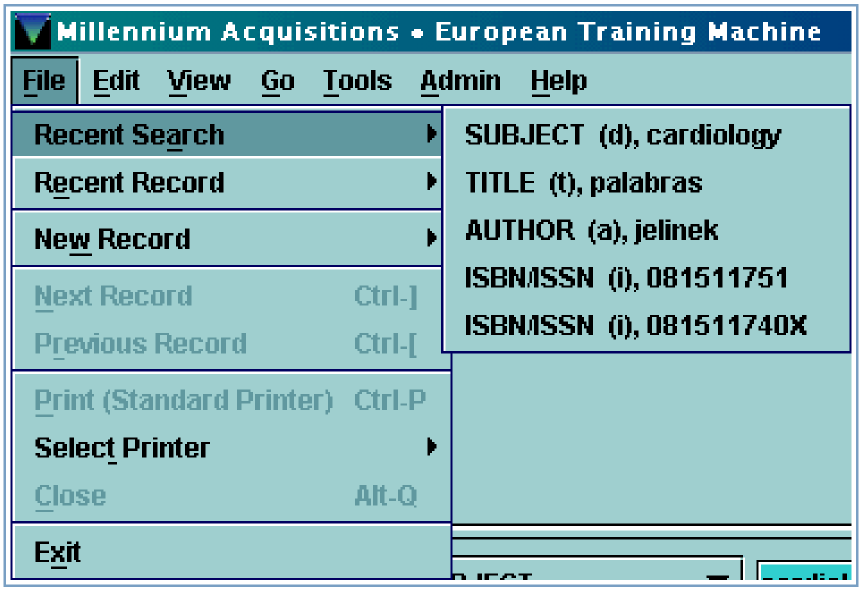
The number entered in the box determines how many previous records the system remembers in menu **File » Recent Record**. Entries display with most recent record at the top of the list.



[close window](#)

RECENT SEARCH HISTORY

The number entered in the box determines how many previous searches the system remembers in menu **File » Recent Search**. Entries display with most recent search at the top of the list.



close window

REMOVE CLAIMS RETURNED NOTES FOR CHECKED-IN ITEMS

If this option is selected, the system removes the claims returned notes in the patron and item records when the item is checked in. If the option is not selected, the claims returned notes remain in the records regardless of check-in.

NOTE: A change to this option does not take effect until you start a new session.

For detailed information about the **Claim Returned** function, refer to the Innovative Guide and Reference, Page # 100067: Claiming Items Returned

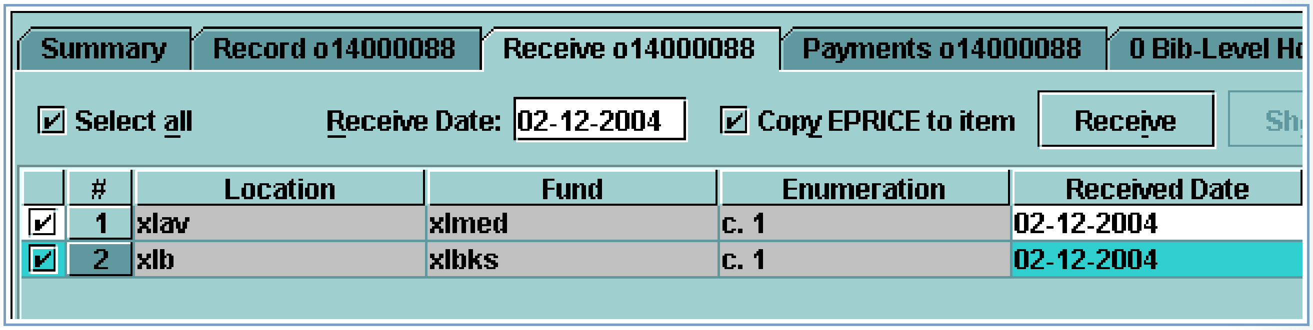
close window

RESTRICT RECEIVE AND CREATE ITEMS TO LOCATIONS SERVED

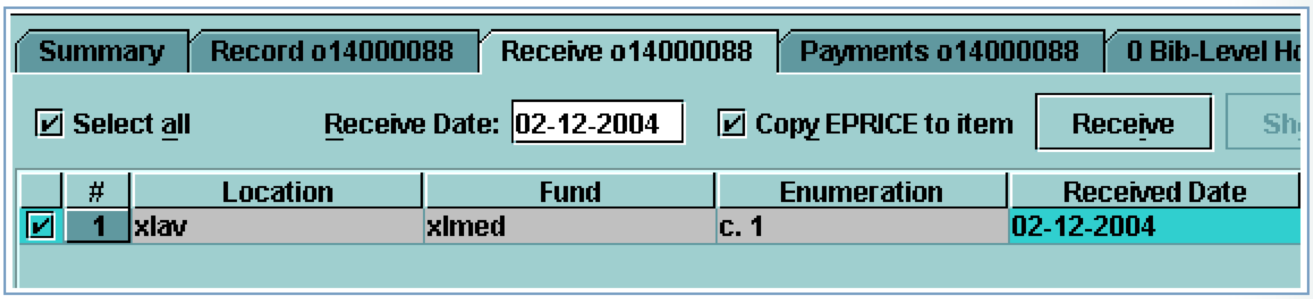
If this option is selected, the user can only receive copies with locations included in the Locations Served table associated with the user's initials. In **Rapid Receive, Receive and Create Items** submode, or on the **Receive** tab in **Orders** mode, the display will suppress copies where the location code is not included in the Locations Served entry associated with the user's initials.

In the example below, locations "xlav" and "xlb" belong to different Locations Served.

If this option is *not* enabled, the user can select and receive any copy:



If the option is enabled, the user can only view and receive copies belonging to the Locations Served entry associated with the user's initials:



NOTE: A change to this option does not take effect until you start a new session.

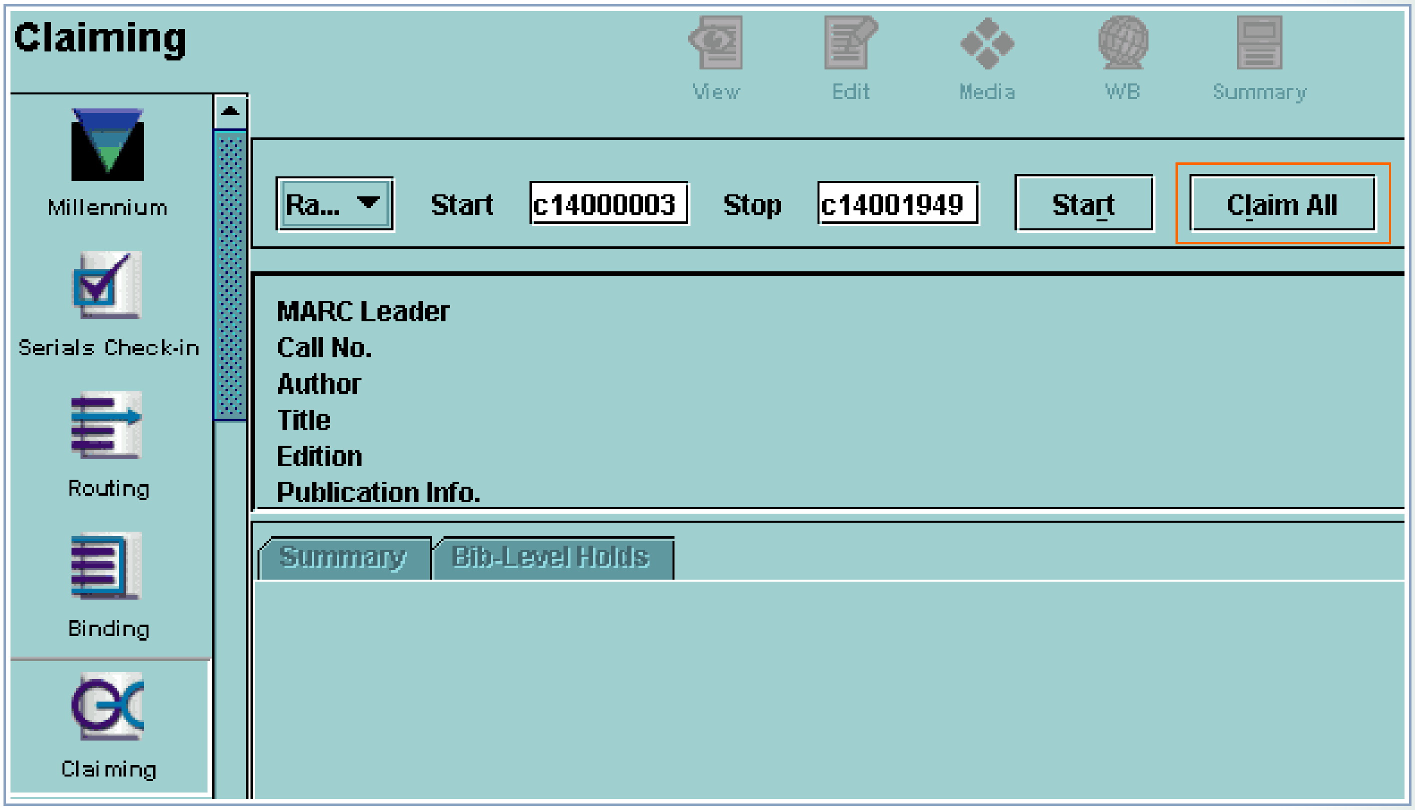
For information about associating initials with a Locations Served, refer to the Innovative Guide and Reference, Page # 106327: Passwords and Authorizations

For details about receiving orders, refer to the Innovative Guide and Reference, Page # 100629: Receiving Order Records and Creating Items

close window

SHOW "CLAIM ALL" BUTTON IN CLAIMING MODE

This setting determines whether the system displays the **Claim All** button in the Claiming mode of Millennium Serials and the Claim/Cancel mode of Millennium Acquisitions.



The **Claim All** button allows all orders or all late issues for holdings/checkin records in a given range to be automatically found and claimed with a single mouse-click.

The **Claim All** option provides a fast and efficient way of claiming serials or orders but with less control since the claim decision is made globally for a given range of records rather than on a title-by-title basis.

NOTE: Unwanted claims can be reviewed and removed from the list in **Send** mode, before claims are sent to the vendor.

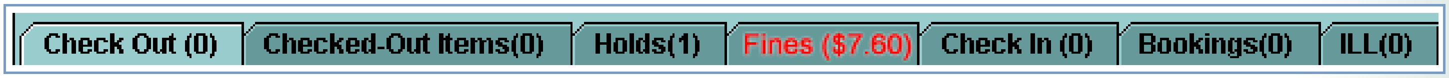
For additional information, refer to the Innovative Guide and Reference, Page # 100452: Claiming Serials and Page # 100651 Claiming and Cancelling Orders.

NOTE: A change to this option does not take effect until you start a new session.

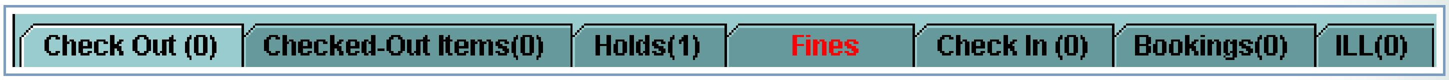
close window

SHOW AMOUNT OWED IN FINES TAB

If this option is selected, the system displays the amount of money owed by the patron in the **Fines** tab. This value is contained in the patron record's MONEY OWED field.



If this option is not selected, no amount will display in the **Fines** tab.



NOTE: A change to this option does not take effect until you start a new session.

In either case, the **Fines** tab will be red - or other color defined in Preferences - if the amount owed is greater than that set in Circulation option *Check-out: Display fines if money owed exceeds.*

close window

ADD SUPPLEMENTS AND INDEXES

This setting determines whether the system allows you to use separate definitions for serial issues, supplements, and indexes. If your library chooses not to use separate definitions, all pieces of a serial are treated as issues.

If your library chooses to utilize this distinction, Millennium Serials will store the different types of pieces in different MARC-tagged fields and allow you to define separate checkin card parameters for the issues, supplements, and indexes of each serial.

> For consistency reasons, it is recommended that you enable or disable the option to use supplements and indexes for **all** logins.

With this setting enabled, the checkin card maintenance options are affected as follows:

- **Creating checkin cards** - You define separate card parameters (e.g. frequency and cover date) for issues, supplements, and indexes.
- **Editing checkin card parameters** - You edit the card parameters (e.g. frequency and cover date) for issues, supplements, and indexes separately.
- **Adding or inserting checkin card boxes** - Millennium Serials has separate options for adding issues, supplements, and indexes.
- **Editing holdings** (LIB HAS fields) - The **Holdings** tab has separate entries for issues, supplements, and indexes.

The MARC 21 holdings fields for issues, supplements and indexes in holdings/checkin records are:

Piece Type	Defined by	Stored in	Description
Issues	853 field	863 field	The regular unit of the title
Supplements	854 field	864 field	Pieces published periodically to supplement issues
Indexes	855 field	865 field	Pieces that contain an index for the publication

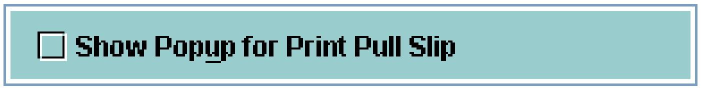
If the setting is disabled, supplements and indexes will be defined by an 853 field and stored in an 863 field, just like the regular issues.

If the setting is disabled, the user has to annotate a regular issue box with the information about indexes and supplements, e.g. create a separate box with the text "Supplement" or "Index" in the Box Note. Another approach would be to insert a Box Note saying "Includes index" or "Includes Supplement" on an existing issue box.

For additional information about how Millennium stores issues, indexes and supplements, refer to the Innovative Guide and Reference, Page # 100417: [Issues, Supplements, and Indexes]

close window

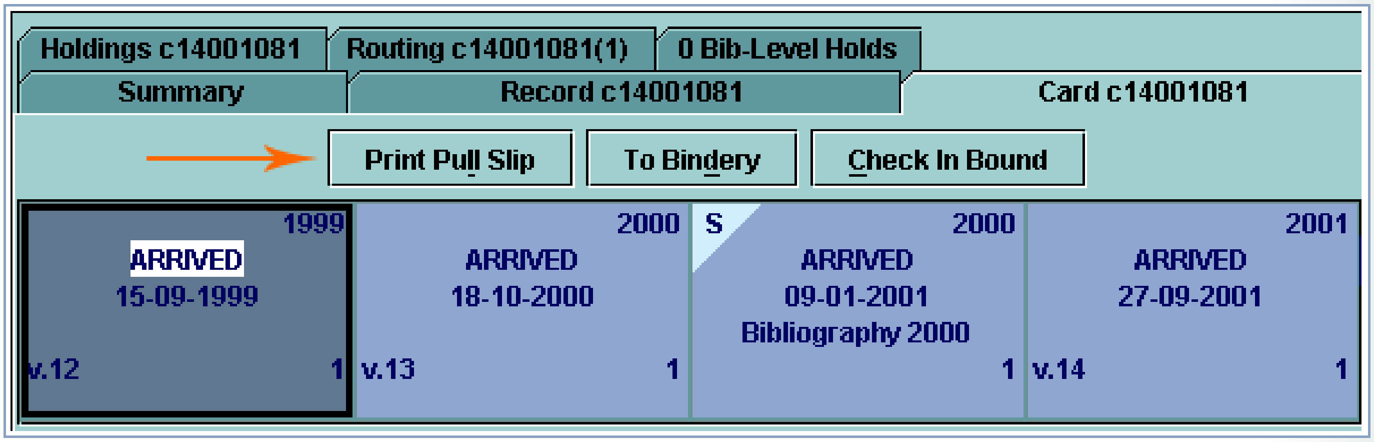
SHOW POP UP FOR PRINT PULL SLIP



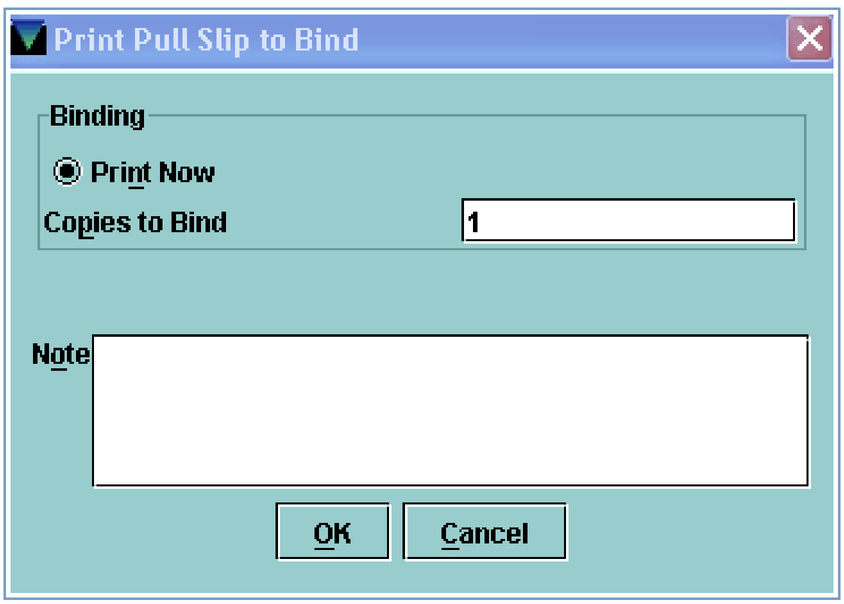
This setting determines whether the system displays the **Print Pull Slip to Bind** dialog when you print pull slips. This dialog allows the user to enter a Note on the pull slip. If this option is unchecked, the system does not display the **Print Pull Slip to Bind** dialog.

When **Show Popup for Print Pull Slip** option is checked:

1. In **Binding** mode, retrieve a record and click on **Print Pull Slip** button:

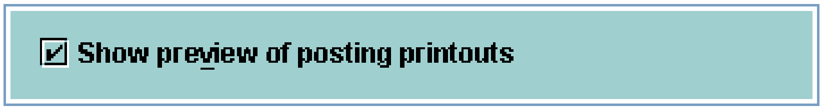


2. The following dialog box appears:



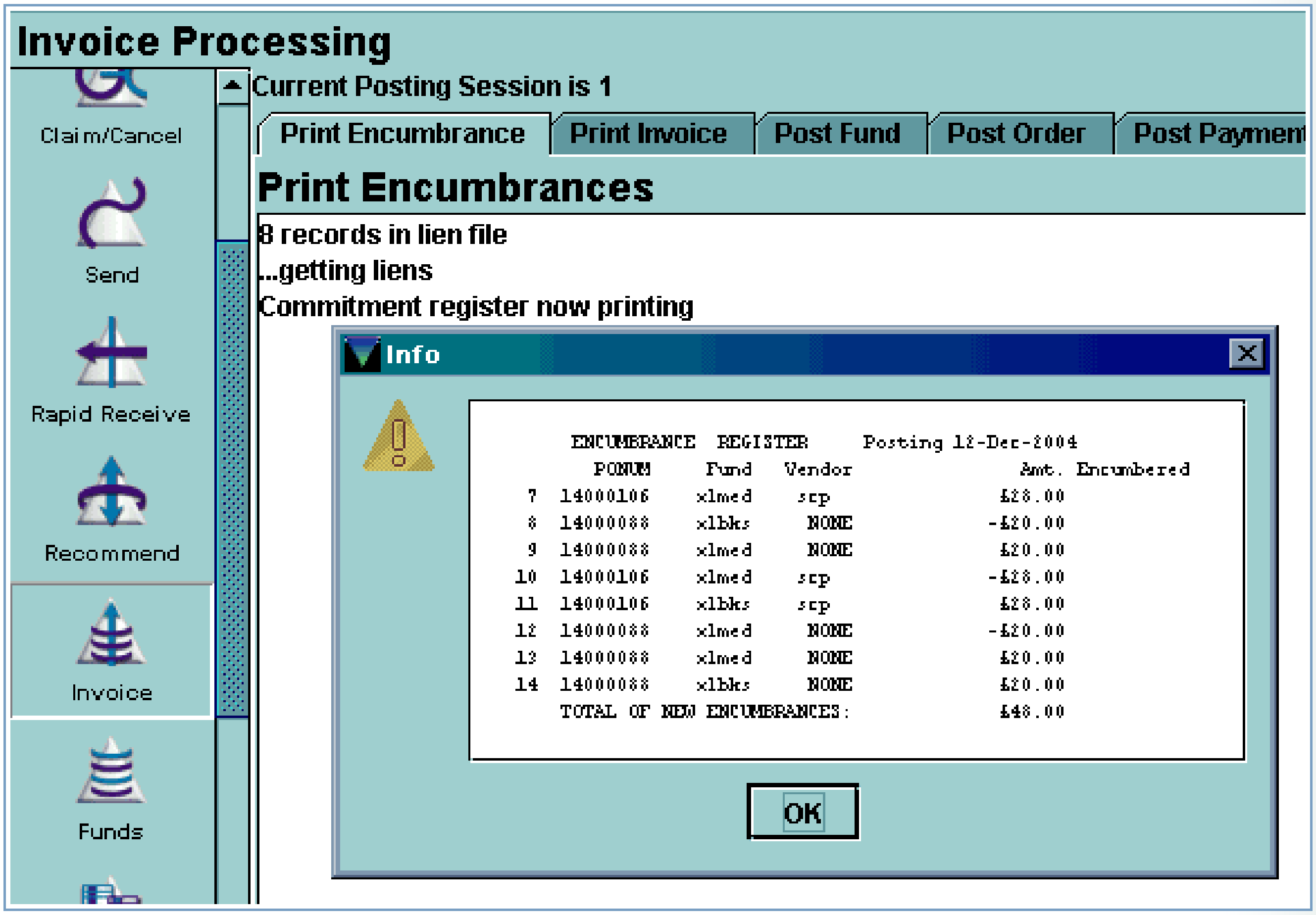
close window

SHOW PREVIEW OF POSTING PRINTOUTS



Select this option to display a popup during posting that will show a preview of the posting printouts. If you uncheck this option, the posting registers will print but not display on the screen during posting.

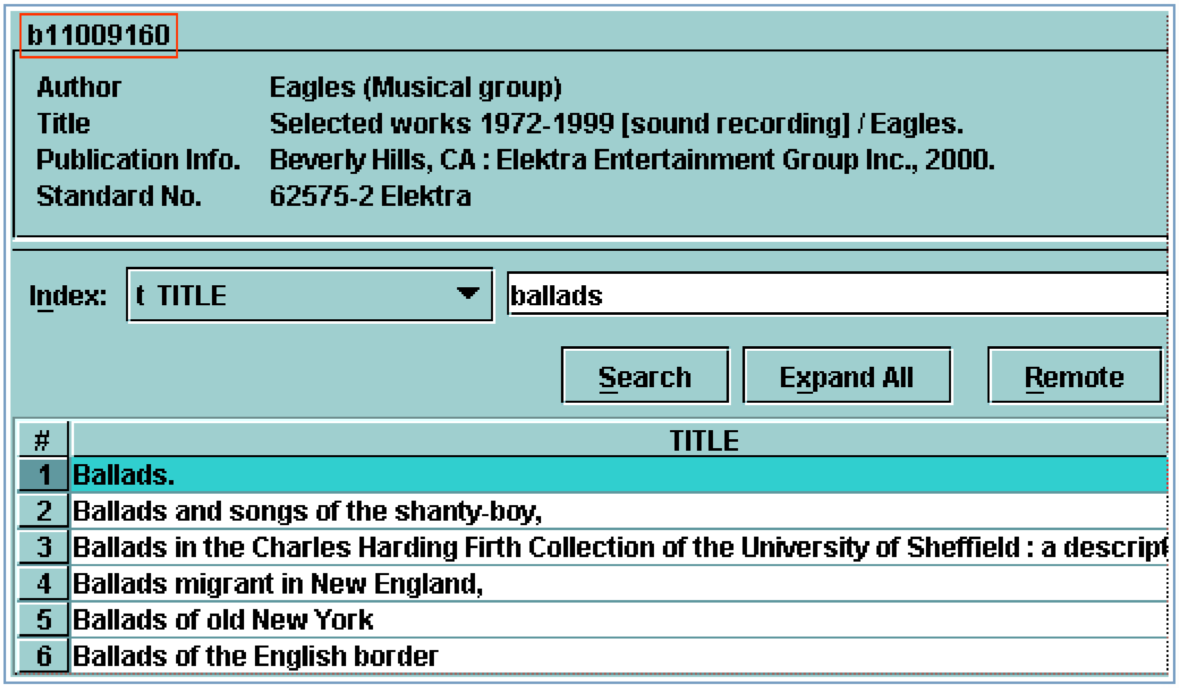
If **Show preview of posting printouts** is selected a series of popups will display, and you have to press **OK** to continue to the next step.



close window

SHOW RECORD NUMBER IN BRIEF RECORD DISPLAY

If this option is selected, the Millennium record number displays above the brief display of a record at the top of browse displays.



close window

TAKE ITEM LOCATION FROM CHECKIN RECORD

Select this option to automatically assign the location in the holdings/checkin record to an item created during check-in. Otherwise, the item's location will be the default location specified in the item record template.

TURN OFF VALIDITY CHECKING FOR BARCODES CIRC ILL

This option will only appear if you have barcode validity checking enabled.

If you select this option barcode validity checking is disabled when you check in or check out items using Millennium Interlibrary Loans or Circulation.

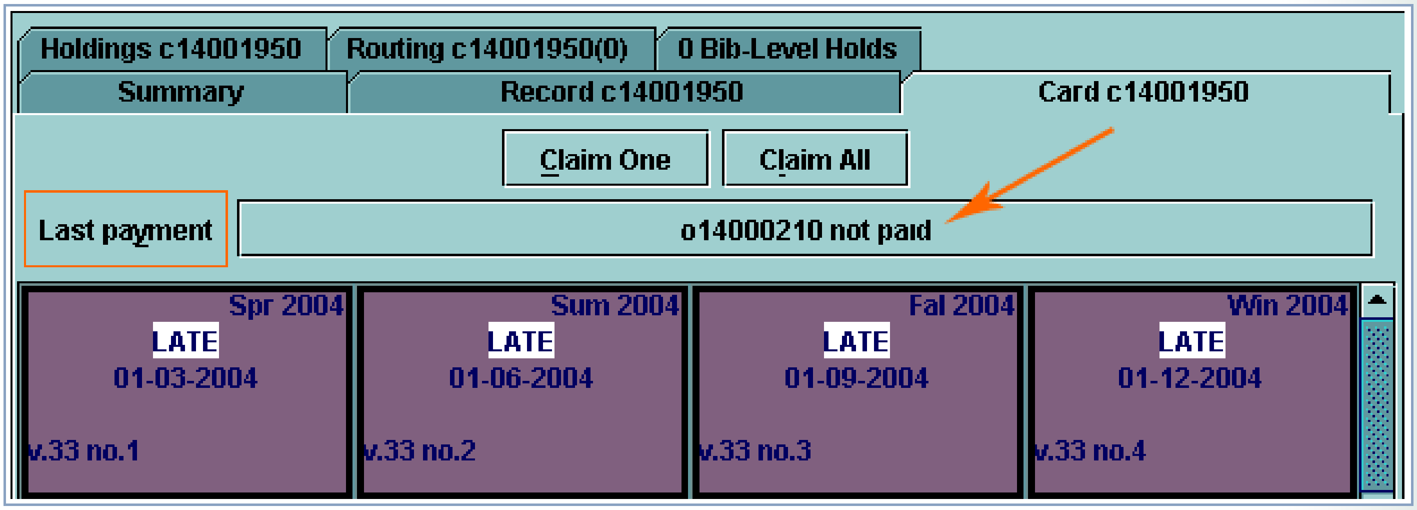
> Checking this option can help prevent conflicts when using non-standard barcode numbers to circulate non-local INN-REACH or ILL items (e.g. the supplier's barcode number).

close window

USE 1st ORDER RECORD WHEN CLAIMING

Select this option to automatically associate a claim with the first attached order record. If you do not select this option, order records are not automatically associated with claims.

When an order record is associated, the last PAID field in the order record is displayed on the **Card** tab in the **Claim** function so that you can verify that the vendor has received payment for the serial.
"Last payment" shows information from the PAID field in the order record, e.g. last paid amount and the payment date or a "not paid" note if no payments have been recorded. Clicking on the order record number/Last payment link brings up the order record.

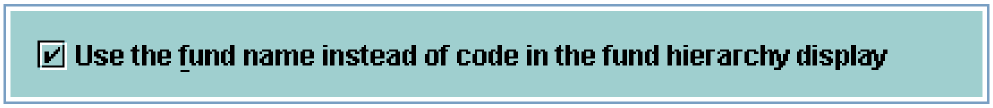


Regardless of this setting, the user can create or change the order record link manually by editing the Card Parameters.

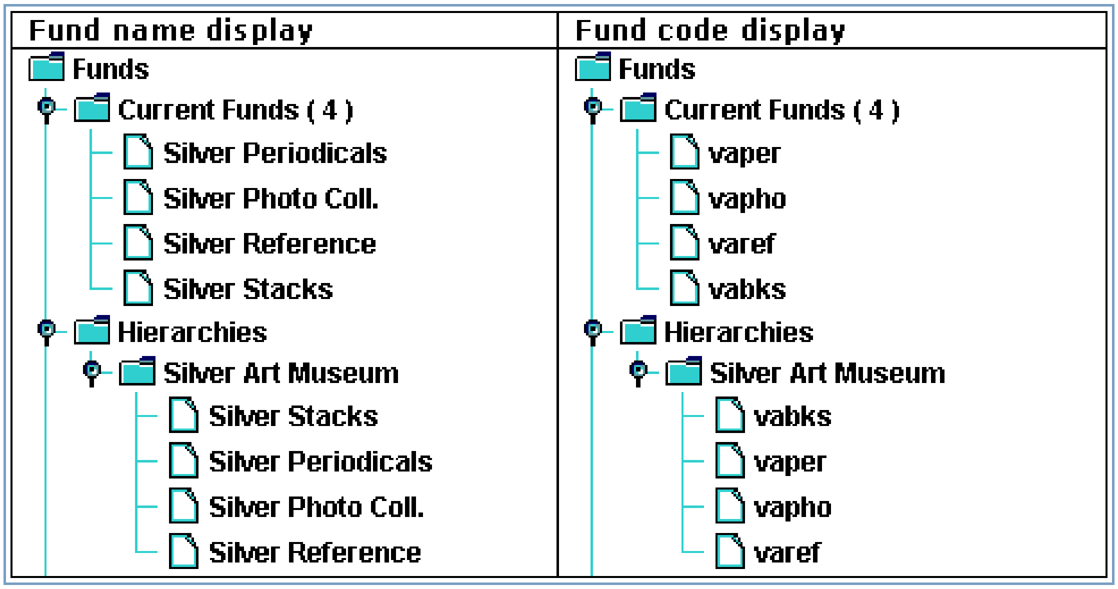
For additional information, refer to the Innovative Guide and Reference, Page # 100457: Modifying Order records While Claiming.

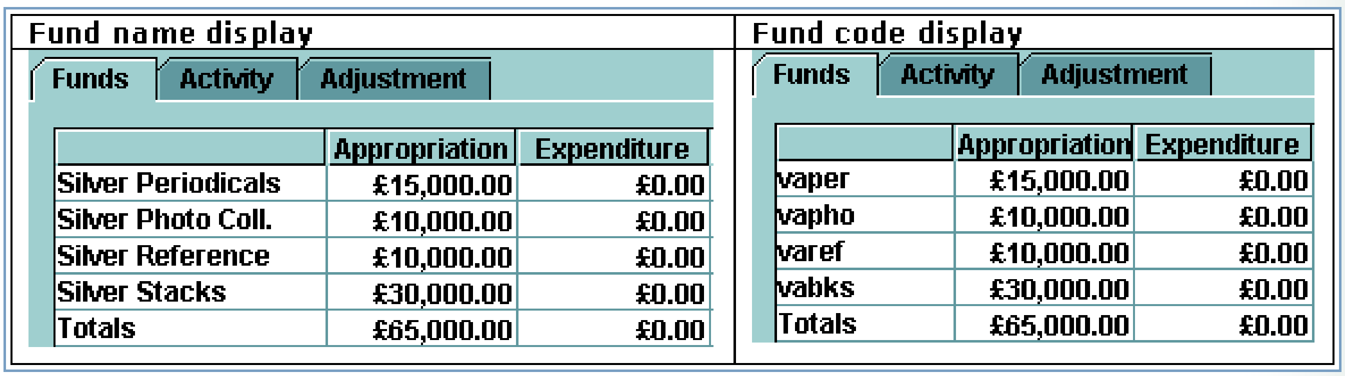
close window

USE THE FUND NAME INSTEAD OF CODE IN THE FUND HIERARCHY DISPLAY



This setting determines whether the fund name or the code displays on the tree of funds and in fund reports.





Fund name display

Funds | Activity | Adjustment

	Appropriation	Expenditure
Silver Periodicals	£15,000.00	£0.00
Silver Photo Coll.	£10,000.00	£0.00
Silver Reference	£10,000.00	£0.00
Silver Stacks	£30,000.00	£0.00
Totals	£65,000.00	£0.00

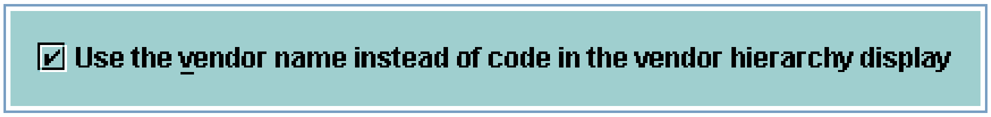
Fund code display

Funds | Activity | Adjustment

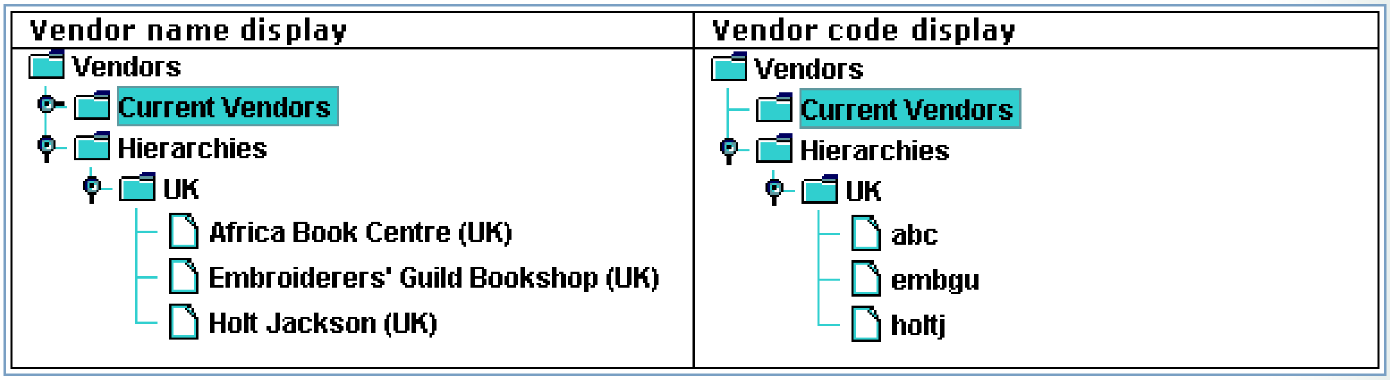
	Appropriation	Expenditure
vaper	£15,000.00	£0.00
vapho	£10,000.00	£0.00
varef	£10,000.00	£0.00
vabks	£30,000.00	£0.00
Totals	£65,000.00	£0.00

close window

USE THE VENDOR NAME INSTEAD OF CODE IN THE VENDOR HIERARCHY DISPLAY



This setting determines whether the vendor name or the vendor code displays in vendor hierarchies.



close window

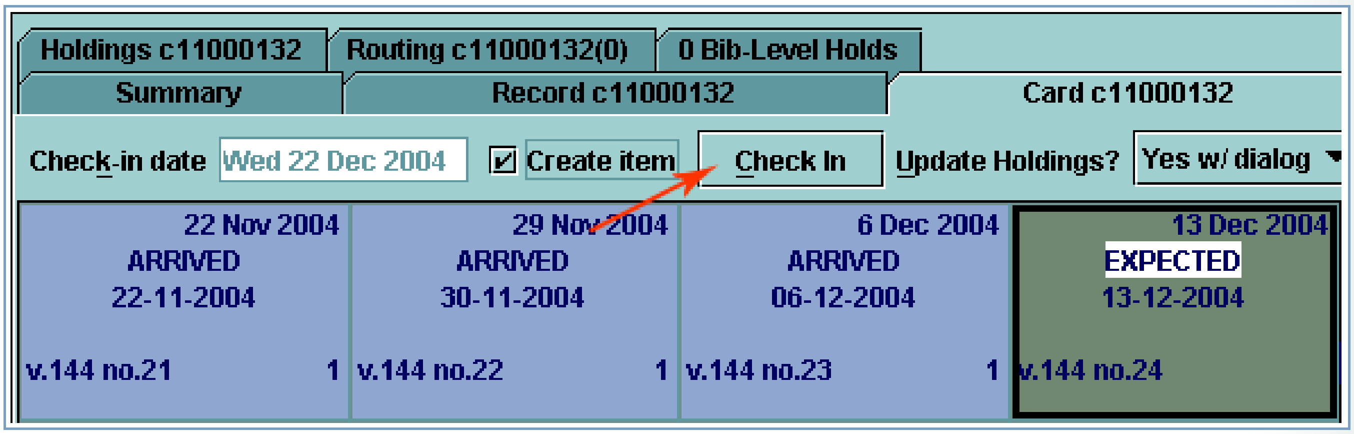
ALLOW ITEM CREATION

This setting determines whether the user can create item records for serial issues as part of the check-in procedure. With this setting enabled, the **Create item** checkbox will display on the **Card** tab.

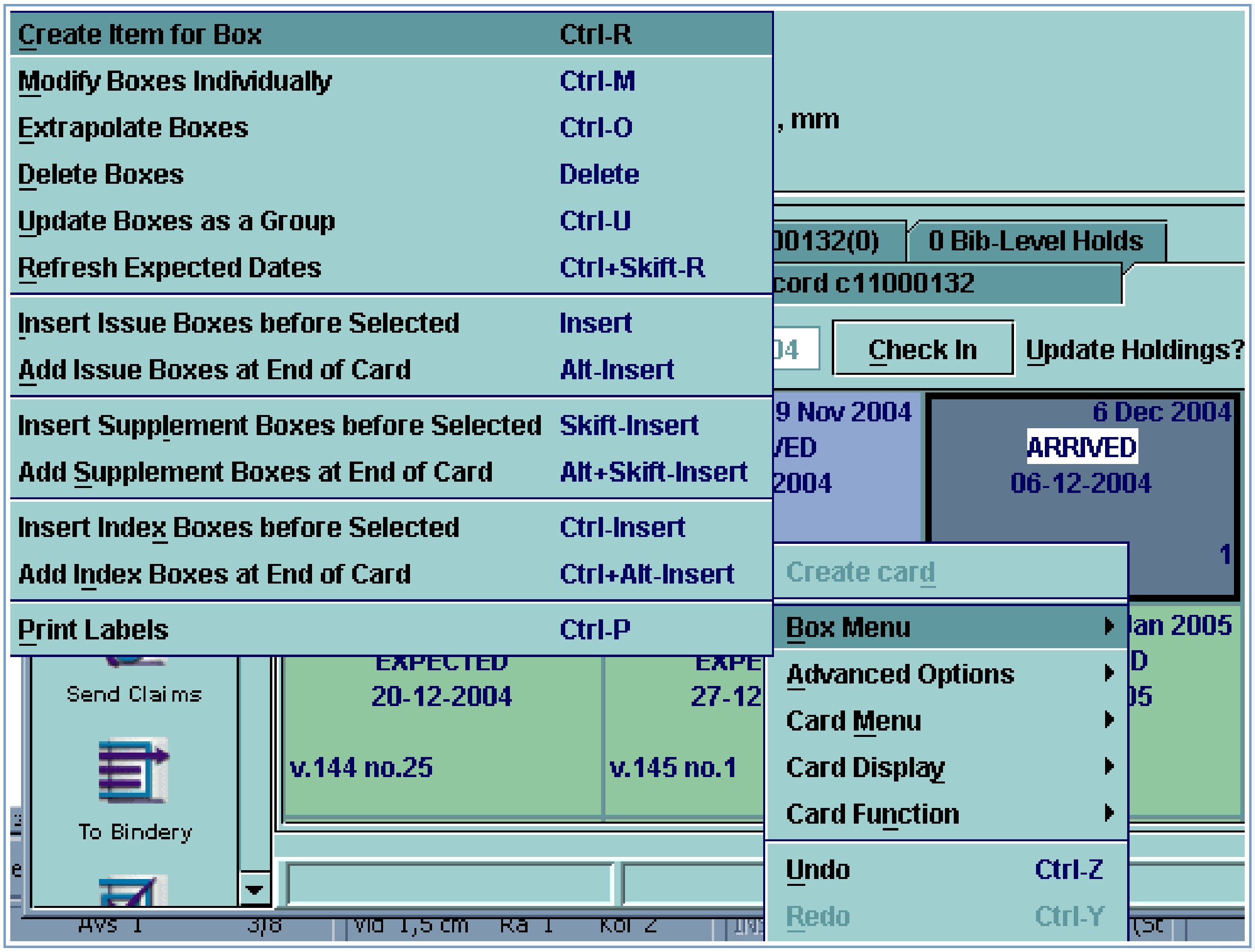
> For serials where an item should *always* be created as part of the check-in procedure, make sure the card parameter **Create item during check-in** is checked. The **Create item** checkbox will then be checked by default. Edit the card via **Tools » Card Menu » Edit Card.**

With **Allow item creation** disabled, the **Create item** checkbox will not display on the **Card** tab. Regardless of this setting, the user can create items after the issue has been checked in by using the **Create Item for Box** option on the **Box Menu**.

Example 1: When **Allow item creation** is enabled, clicking on the **Check In** button with the **Create item** box marked will check in the issue and automatically prompt the user for the item record data.



Example 2: When the **Allow item creation** setting is disabled, the **Create item** box does not display on the **Card** tab. If there is a need to create an item record, the user can optionally create the item for the issue after it has been checked in, by using the corresponding **Box Menu** option.



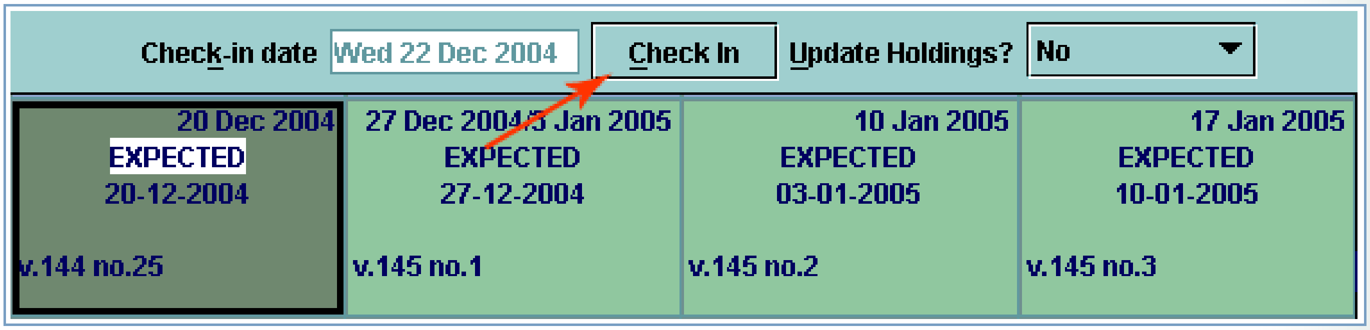
close window

ALWAYS SHOW CHECK IN DIALOG

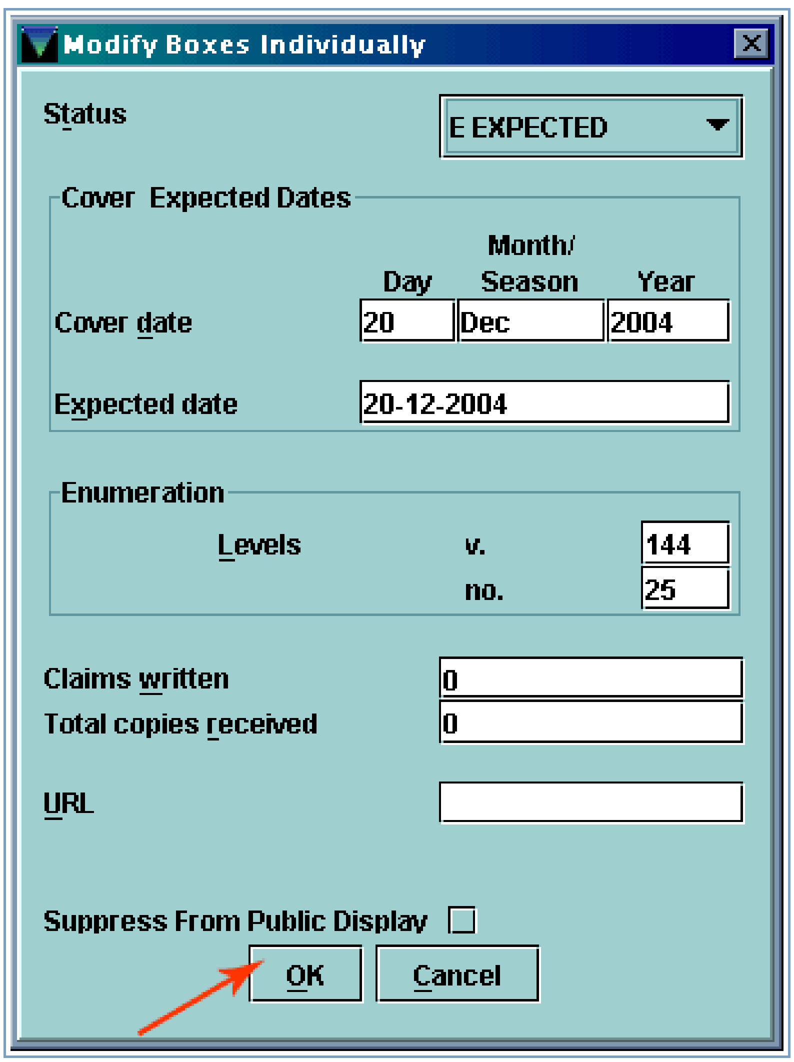
Select this option to always display the check-in dialog when checking in serials. This option is useful if issue enumeration and cover dates require frequent updating, or if issue level notes or URL's need to be inserted on a regular basis.

Example 1: **Always show check-in dialog** enabled:

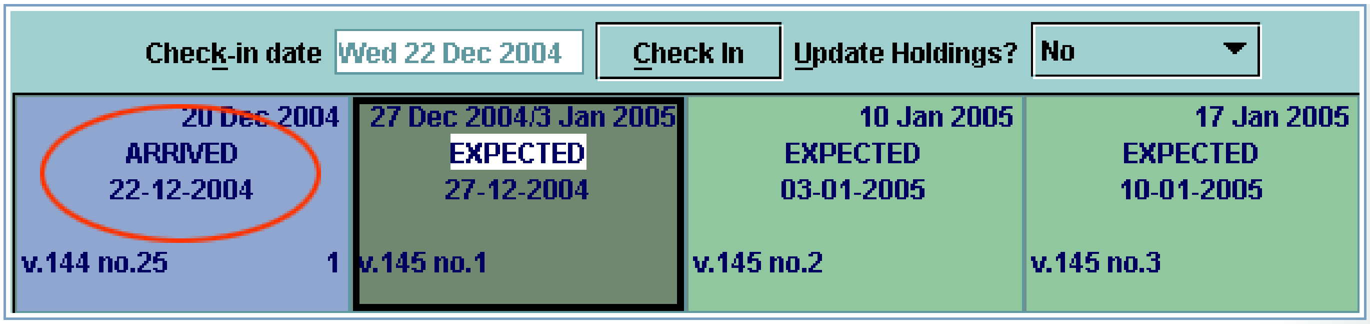
1. Click on **Check In** button:



2. Check-in dialog appears. Enter data in the fields as required and click **OK** to complete:

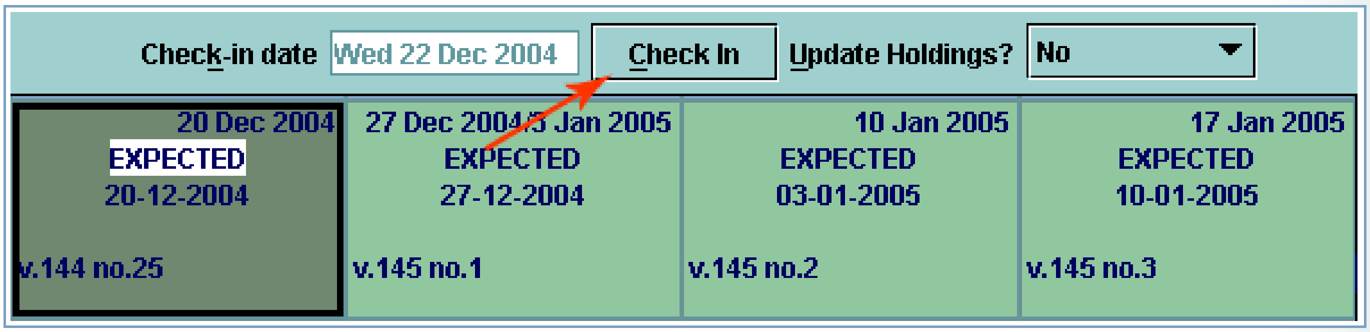


3. Box status is changed to ARRIVED:

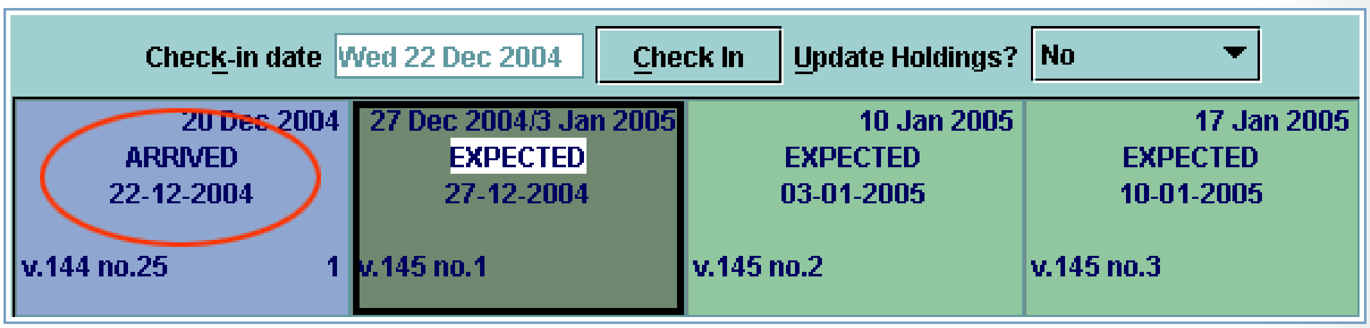


Example 2: **Always show check-in dialog** disabled:

1. Click on **Check In** button:



2. Box status is changed to ARRIVED without the dialog appearing:



Note 1: Regardless of this setting, the user can always call up the check-in dialog on demand, by double clicking on the issue box or by using the **Tools |Box Menu |Modify Boxes Individually** option.

Note 2: Regardless of this setting, the check-in dialog always displays if the issue box lacks a Cover date or Enumeration level values. This is a reminder for the user to add those values to the box.

close window

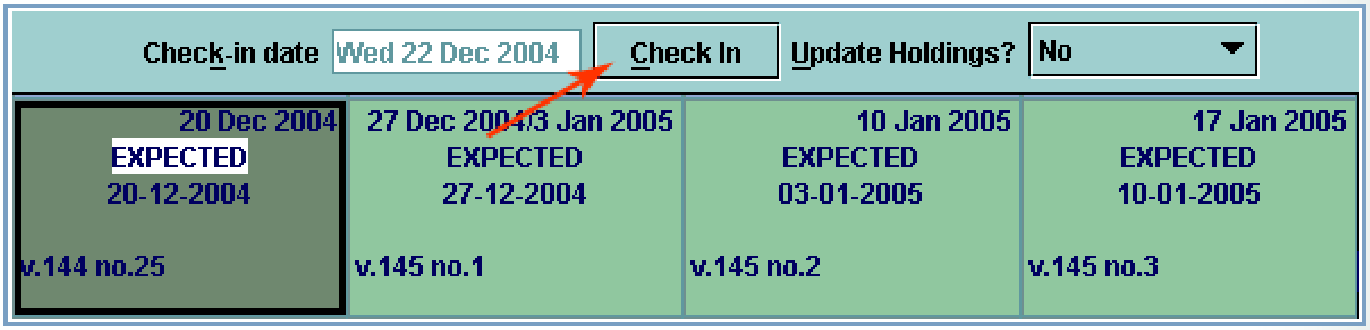
ALWAYS SHOW CHECK IN DIALOG DURING SISAC CHECKIN

If your library has the optional SISAC (previously known as SICI) barcode searching feature this option will display on the Setup tab. SISAC checkin means retrieving the bibliographic and attached holdings/checkin record by scanning the SISAC barcode printed on the journal.

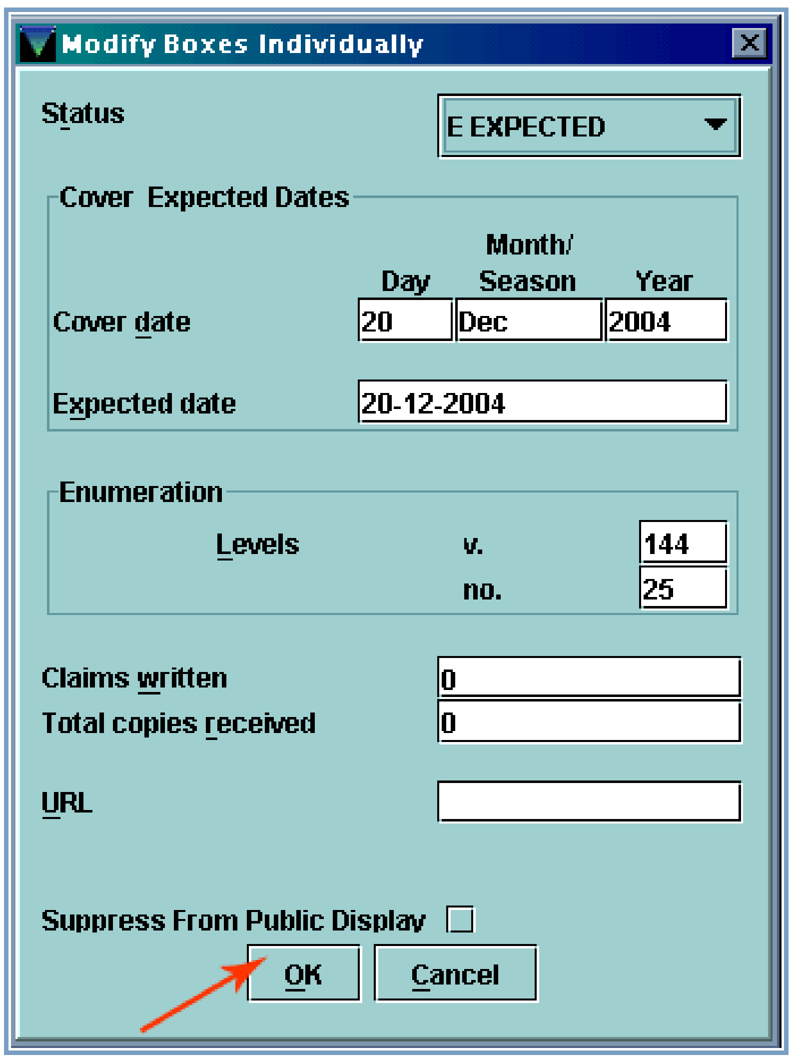
Select this option to always display the check-in dialog when performing SISAC check-in of serials.

Example 1: **Always show check-in dialog** enabled:

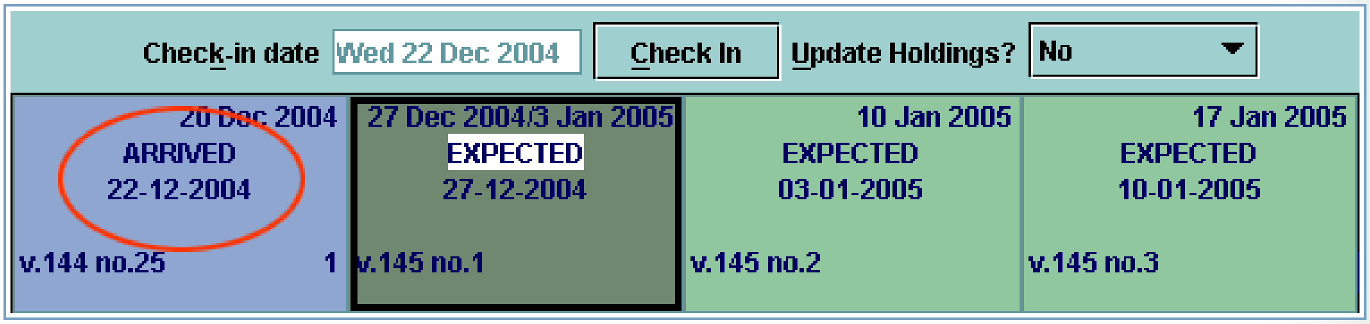
1. Click on **Check In** button:



2. Check-in dialog appears. Enter data in the fields as required and click **OK** to complete:

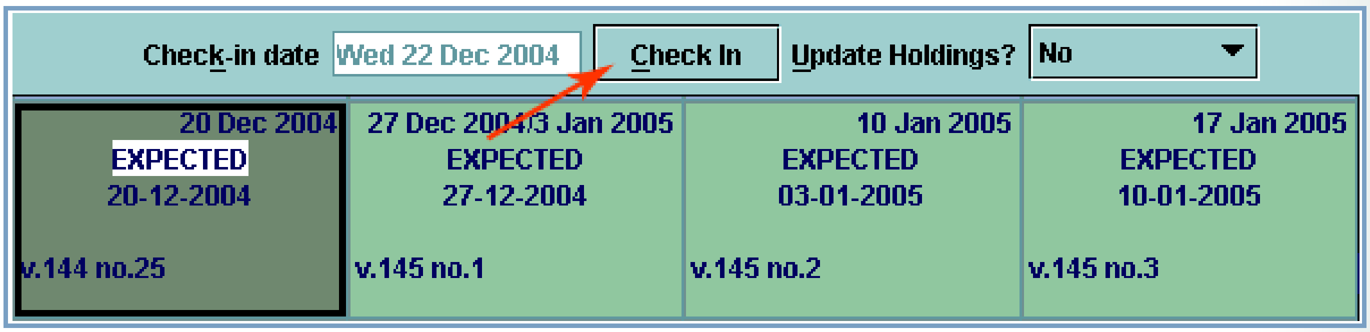


3. Box status is changed to ARRIVED:

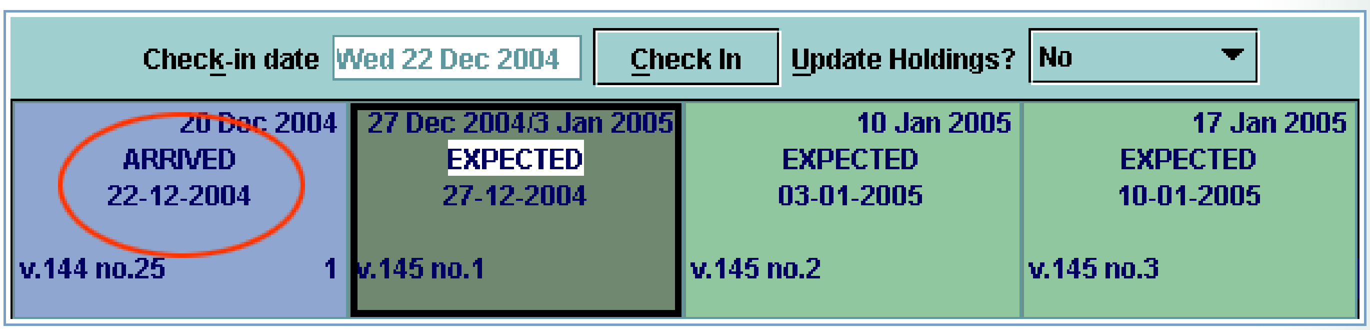


Example 2: **Always show check-in dialog** disabled:

1. Click on **Check In** button:



2. Box status is changed to ARRIVED without the dialog appearing:

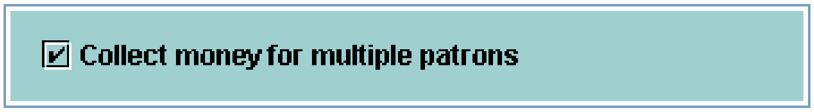


Note 1: Regardless of this setting, the user can always call up the check-in dialog on demand, by double clicking on the issue box or by using the **Tools |Box Menu |Modify Boxes Individually** option.

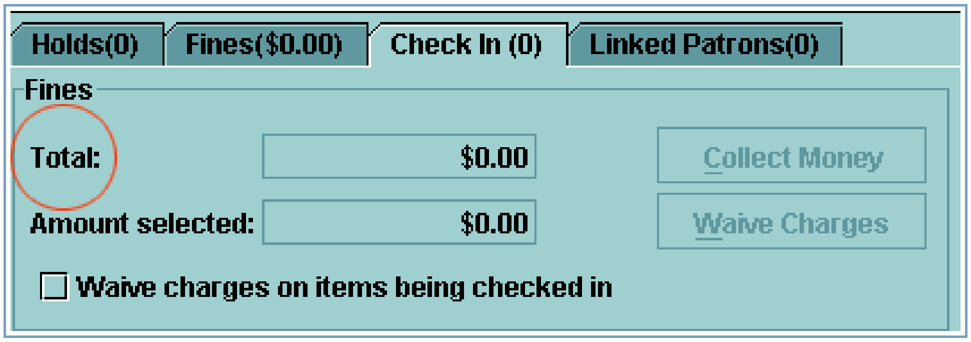
Note 2: Regardless of this setting, the check-in dialog always displays if the issue box lacks a Cover date or Enumeration level values. This is a reminder for the user to add those values to the box.

close window

COLLECT MONEY FOR MULTIPLE PATRONS



By default, when you check in an item for a patron in the **Check In** tab in **Circulation Desk** mode, Millennium clears the **Total** box of fines the previous patron accumulated. That is, the amount is set back to zero as soon as a new patron checks something in, even if you don't **Close** the current record.



If this option is selected, Millennium continues to display the fines accumulated by previous patrons. This allows you to collect fines for multiple patrons, e.g. for a family.

To clear the **Total** box before you scan an item, click on the **Close** button.


close window

DEFAULT "COPY EPRICE TO ITEM"

This option is used when receiving orders and creating items from the **Receive** tab in the **Orders** mode and in **Rapid Receive** mode, **Receive and Create Items** sub-mode. If this option is selected, the Estimated price (EPRICE) value from the order record is automatically copied to the PRICE field in the item record that is created in the process.

DEFAULT RECEIVE DATE TO TODAY'S DATE ACQ

This option allows you to automatically set the Receive date (RDATE) to today's date when you are receiving items in **Rapid Receive** mode, **Receive and Create Items** sub-mode. When this option is not checked, the default RDATE date is blank. In either case, you can key a new date manually when receiving.

For details about receiving orders, refer to the Innovative Guide and Reference, Page # 100629: Receiving Order Records and Creating Items

close window

ENABLE WEAK BINDING

This setting determines how the system searches for issues to bind in Binding mode.

With **Enable Weak Binding** unchecked, the binding method used by Millennium Serials searches for a *Unit of binding* in which all of the issues, supplements, and indexes have a Status of ARRIVED or PARTIAL. This is the default method.

If you have checked the **Enable Weak Binding** option, Millennium Serials employs a less stringent method of determining which issues, supplements, and indexes are bindable. The system searches for a *Unit of binding* in which at least one of the boxes has a Status of ARRIVED, PARTIAL, TO BIND, BIND PREP, or BOUND.

Regardless of this setting, the user can always override the pre-selected issues and manually select the issues to bind.

For additional information about how Millennium decides which issues are bindable, refer to the Innovative Guide and Reference, Page # 100443: Determining Which Issues to Bind

close window

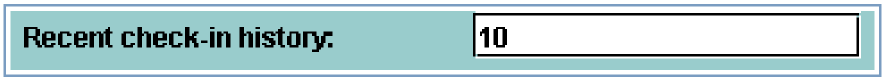
FOR CHECKIN BOUND, GET ITEM LOCATION FROM CHECKIN

Select this option to automatically assign the location code from the holdings/checkin record to an item created during check-in of bound issues. Otherwise, the item's default location will be the location specified in the item record template.

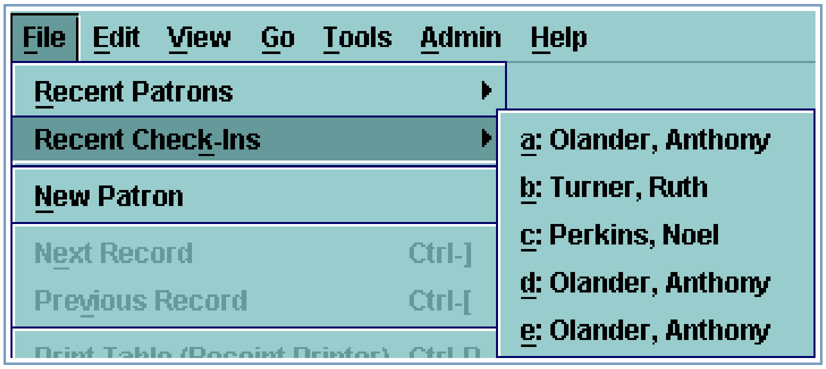
For additional information, refer to the Innovative Guide and Reference, Page # 100450: Checking in Bound Issues

close window

ADD SUPPLEMENTS AND INDEXES



The number entered in the box determines how many checked-in items (displayed as the names of the patrons who most recently checked in the items) the system remembers in menu **File » Recent Check-Ins** in **Circulation Desk** mode. The maximum number is 26.



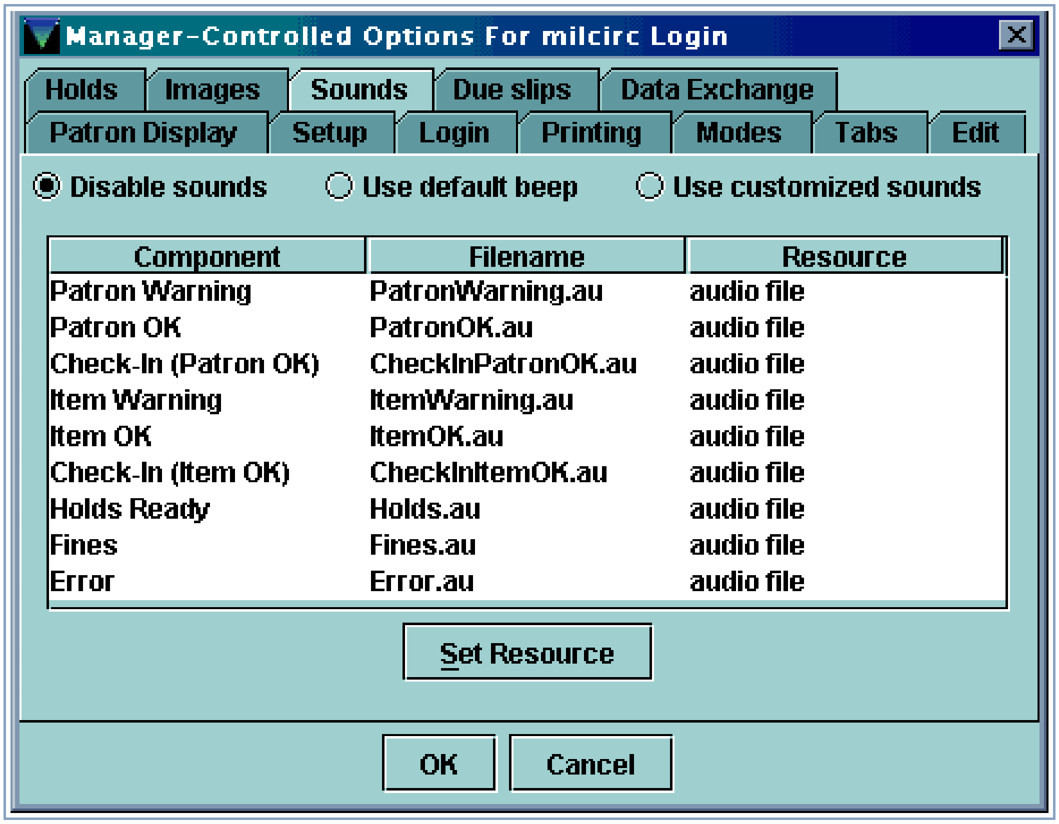
Entries display with most recent record at the bottom of the list. Each patron name is preceded by an underlined letter, which could be used as a keyboard shortcut to retrieve the record again. If a patron checks in several items within the number set, the name appears once for every checked in item.

NOTE: This option is available only in **Circulation Desk** mode, not in **Check-In** mode.

close window

SOUNDS

The **Sounds** tab has a list similar to the following:



Sound clips are used together with some functions, e.g. as a complement to patron or item warning messages.

Disable sounds - select this option to turn off sounds altogether.

Use default beep - select this option if you want to use your workstation's own default sounds.

Use customized sounds - select this option to use the sound clips that are defined by the files in the list. If you use customized sounds, you can still disable a single sound type by selecting its name in the list, press **Set Resource** and choose (*none*) from the top of the list that appears.

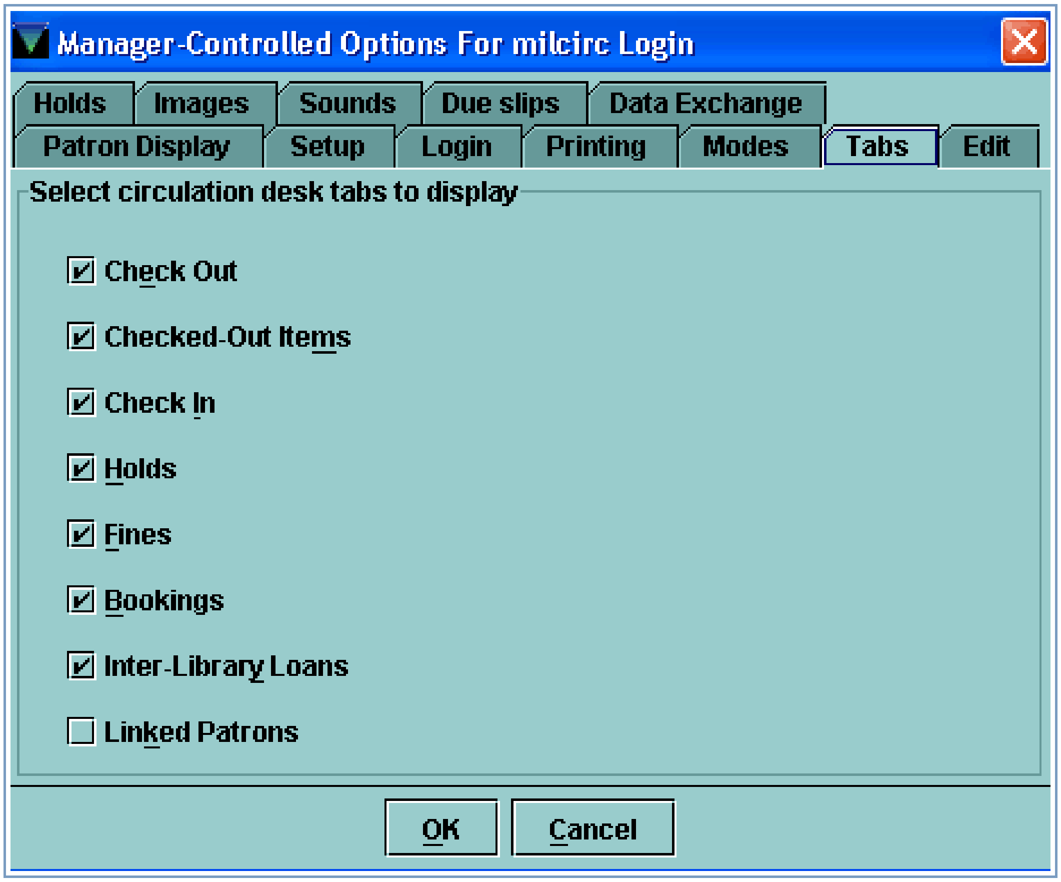
Set Resource can also be used to test sounds (use button **Play Sound**), change sound clips and **Import** new sound clips.

NOTE: Disable sounds or enabling **Use default beep** will take effect immediately. Enabling **Use customized sounds** or changing a sound clip do not take effect until you start a new session.

close window

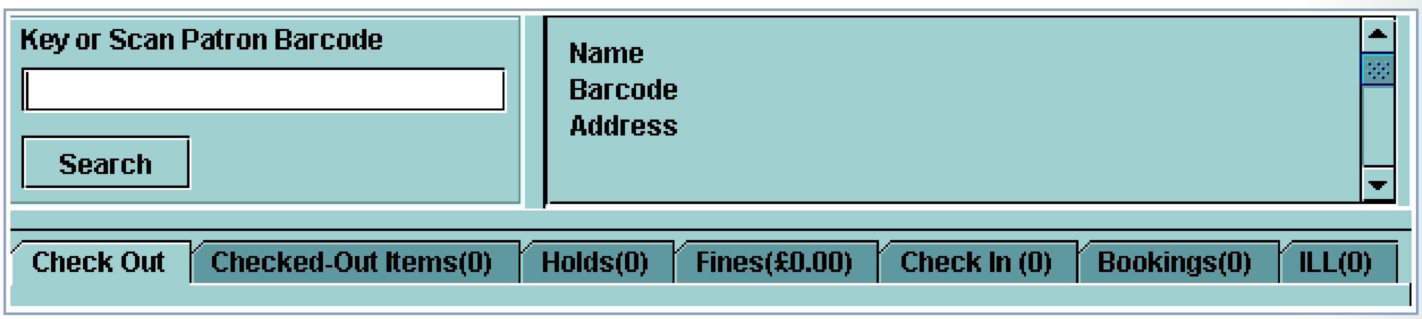
TABS

The **Tabs** tab has a list similar to the following. The example is from Millennium Circulation:

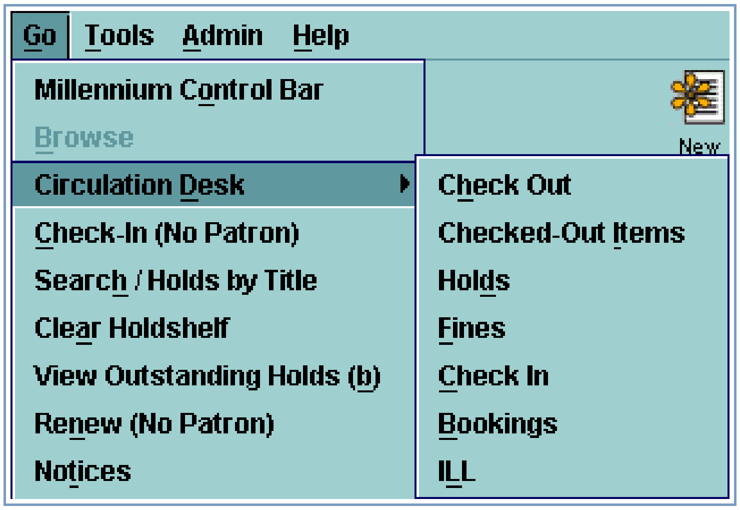


The content may vary depending on the products your library has acquired. For example, in the example above, the **Inter-Library Loans** tab is available only if your library has the **Inter-Library Loans** module.

In Millennium Circulation and Inter-Library Loans:
The checkboxes you select govern which tabs the login may access in **Circulation Desk** mode. The example above would trigger the following screen:



A tab can also be accessed from another mode, using the **Go » Circulation Desk** menu.



In Millennium Circulation and Inter-Library Loans the **Tabs** tab will not display if the **Circulation Desk** mode is disabled on the Modes tab.

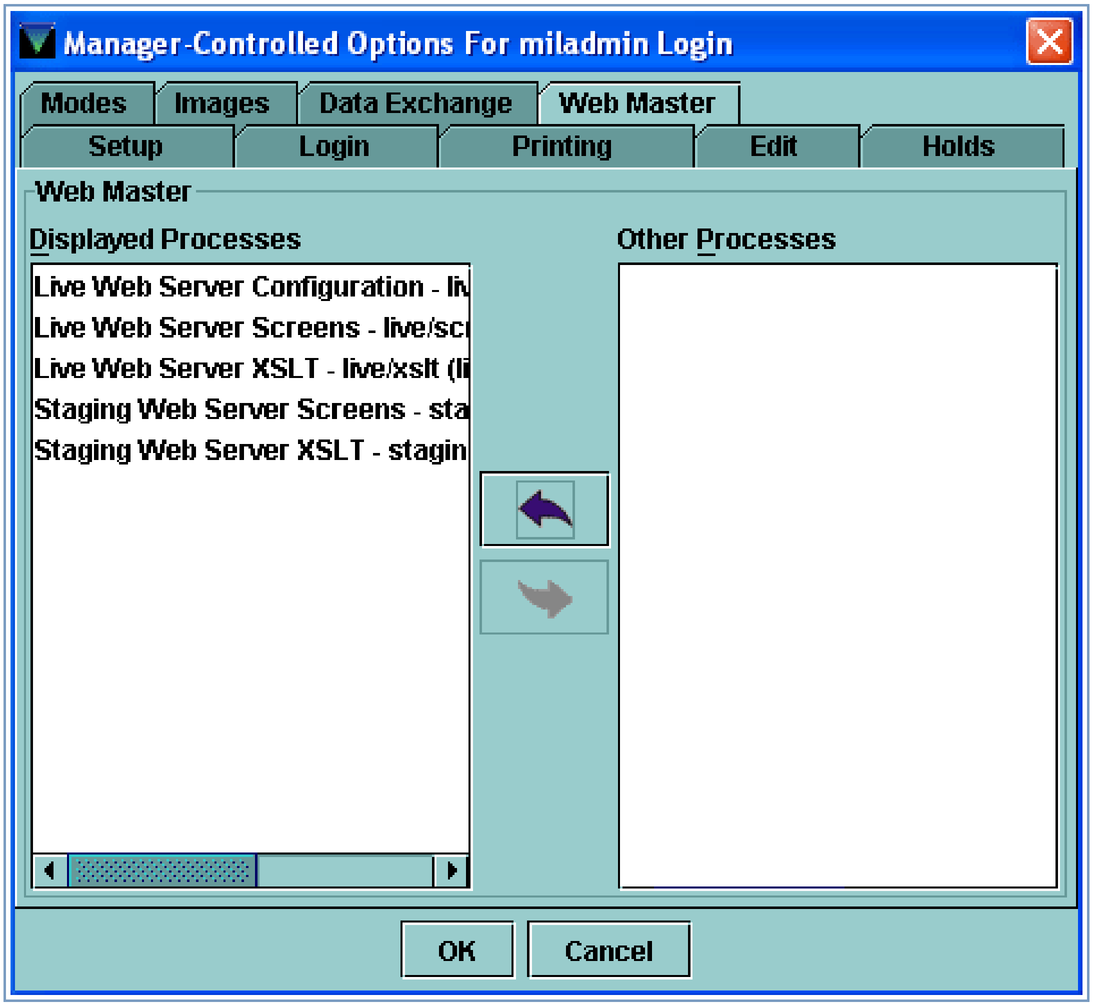
In Millennium Serials:
The checkboxes you select govern which tabs the login may access in the following modes: **Serials Check-in, Binding, Claiming, To Bindery** and **Check In Bound**. If all these modes are disabled on the **Modes** tab, the **Tabs** tab will not display.

NOTE: Changes do not take effect until you start a new session.

close window

WEB MASTER

The **Web Master** tab looks similar to the following:



The Web Master mode enables you to access the files that support your WebPAC.
This is where you define the import and export processes that are available in the **Web Master** mode.

Processes listed under *Displayed Processes* are available for users of this login in **Web Master** mode. To move a process, highlight it, then use left or right arrow to move it to the other list.

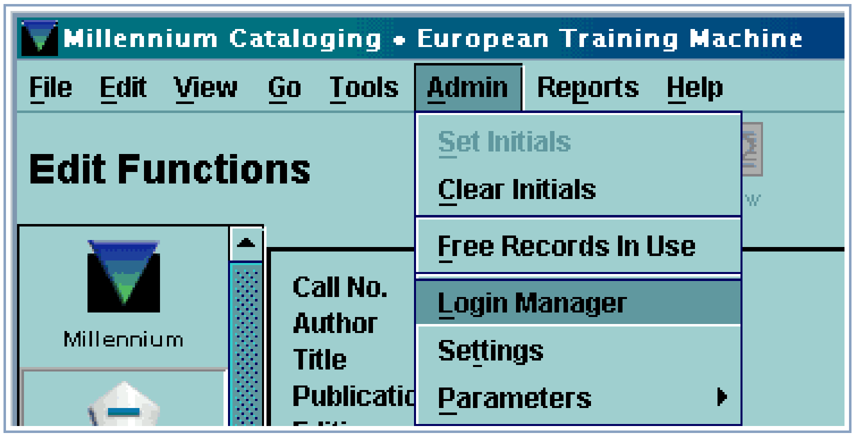
close window

INTRODUCTION TO PREFERENCES

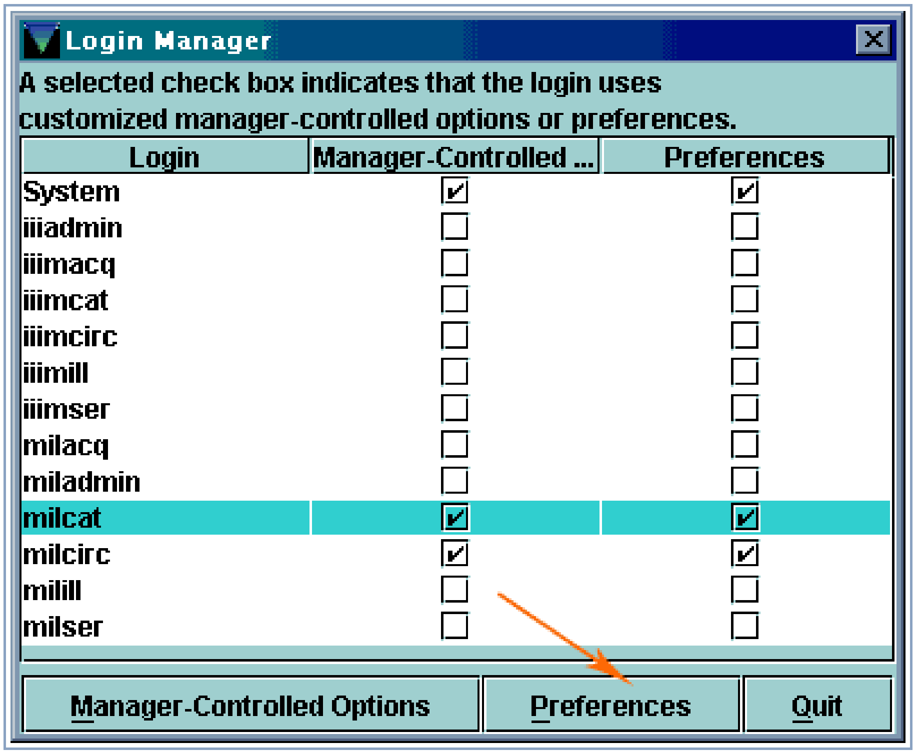
Preferences control the appearance of the module for a particular login, e.g. colors and fonts. Changes made to the Preferences will affect all users of the login.

Preferences are set from the Login Manager. To access the Login Manager, you must be authorized for function 187 (Login Manager). Alternatively, if the Login can edit preferences manager-controlled option is enabled for the login, Preferences can be set from menu option **Edit » Preferences**.

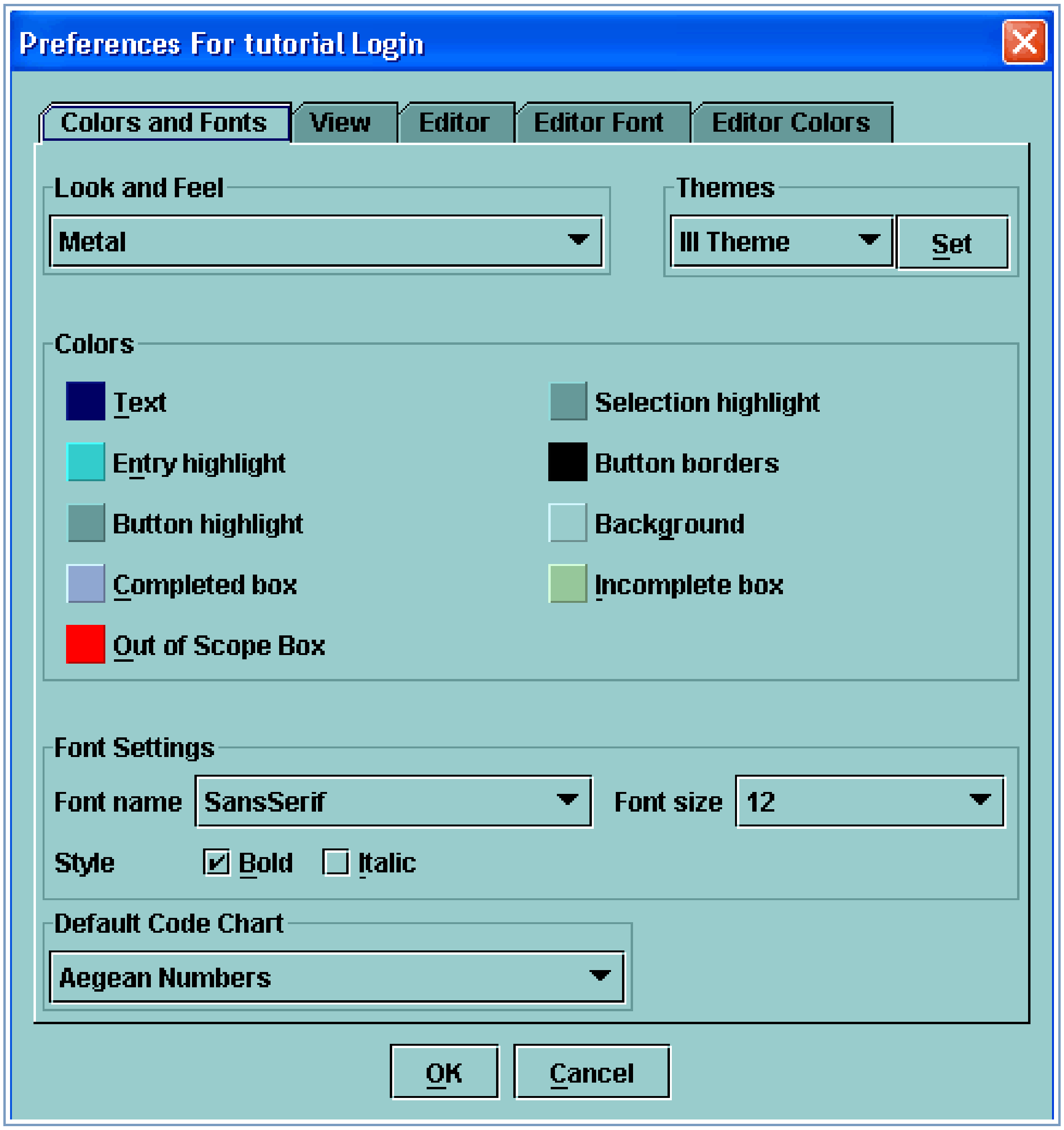
To open the Login Manager, choose **Admin » Login Manager** from within any Millennium module.



Select the login you want to customize, and press **Preferences** button.



The Preferences are divided into five tabs: Colors and Fonts, View, Editor, Editor font and Editor Colors:



Preferences work the same in all modules, and can be modified from the Login Manager for any login irrespective of what module you are logged in to. The only exception is in the Colors section, where the elements vary slightly between the modules.

NOTE: When you save Settings permanently, the changes will apply to ALL logins that do not have customized Preferences. Therefore it is recommended that you define a customized set of Preferences for all logins before you start making permanent changes to Settings.

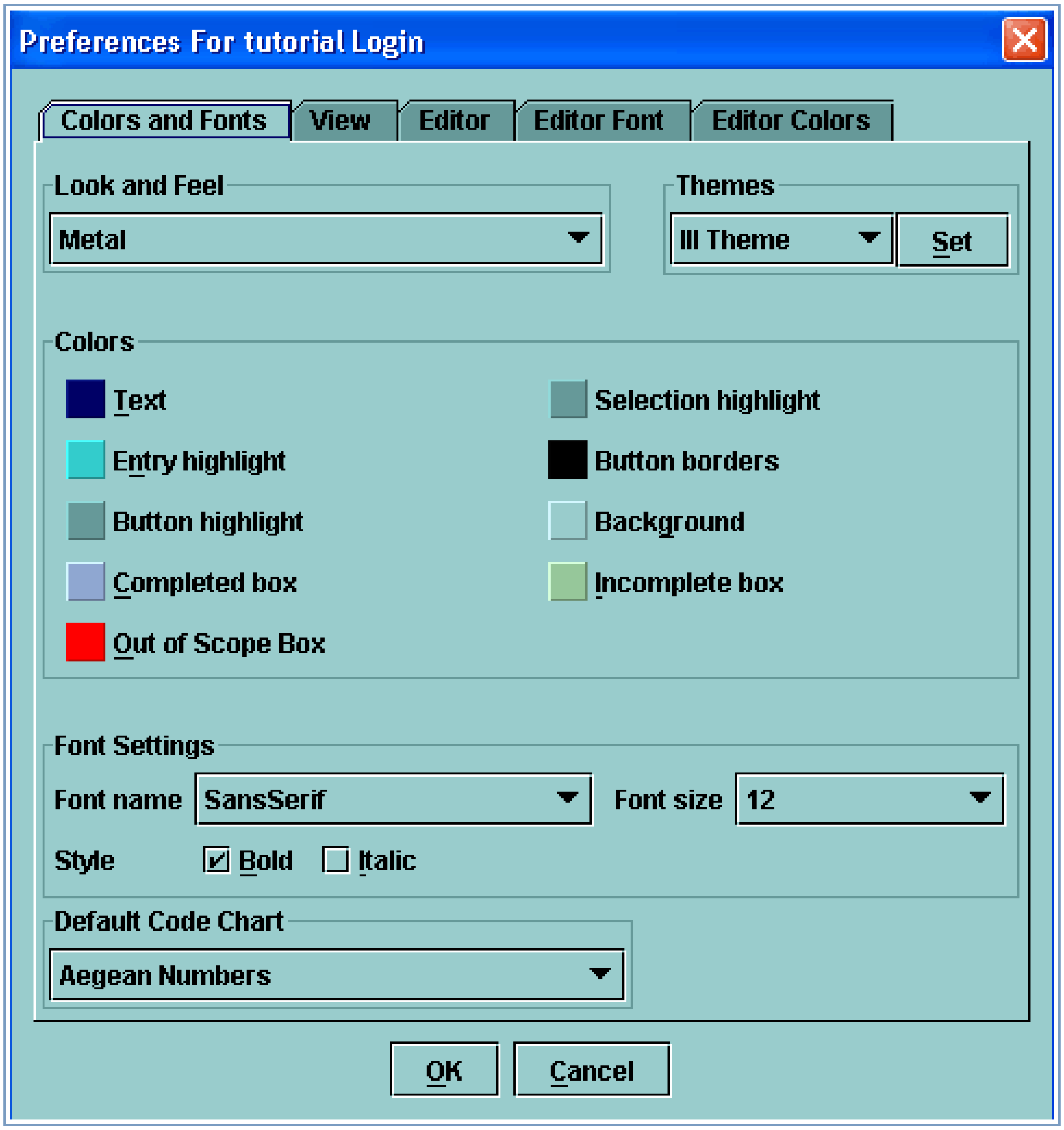
When a module is accessed from Millennium control bar, the original login's Preferences are used.

Refer to section Working with the Login Manager for instructions on how to edit or copy Preferences.

close window

COLORS AND FONTS

The **Colors and Fonts** tab looks similar to the following. The example is from Millennium Acquisitions:



Note that the elements in the Colors section vary slightly between the modules.

close window

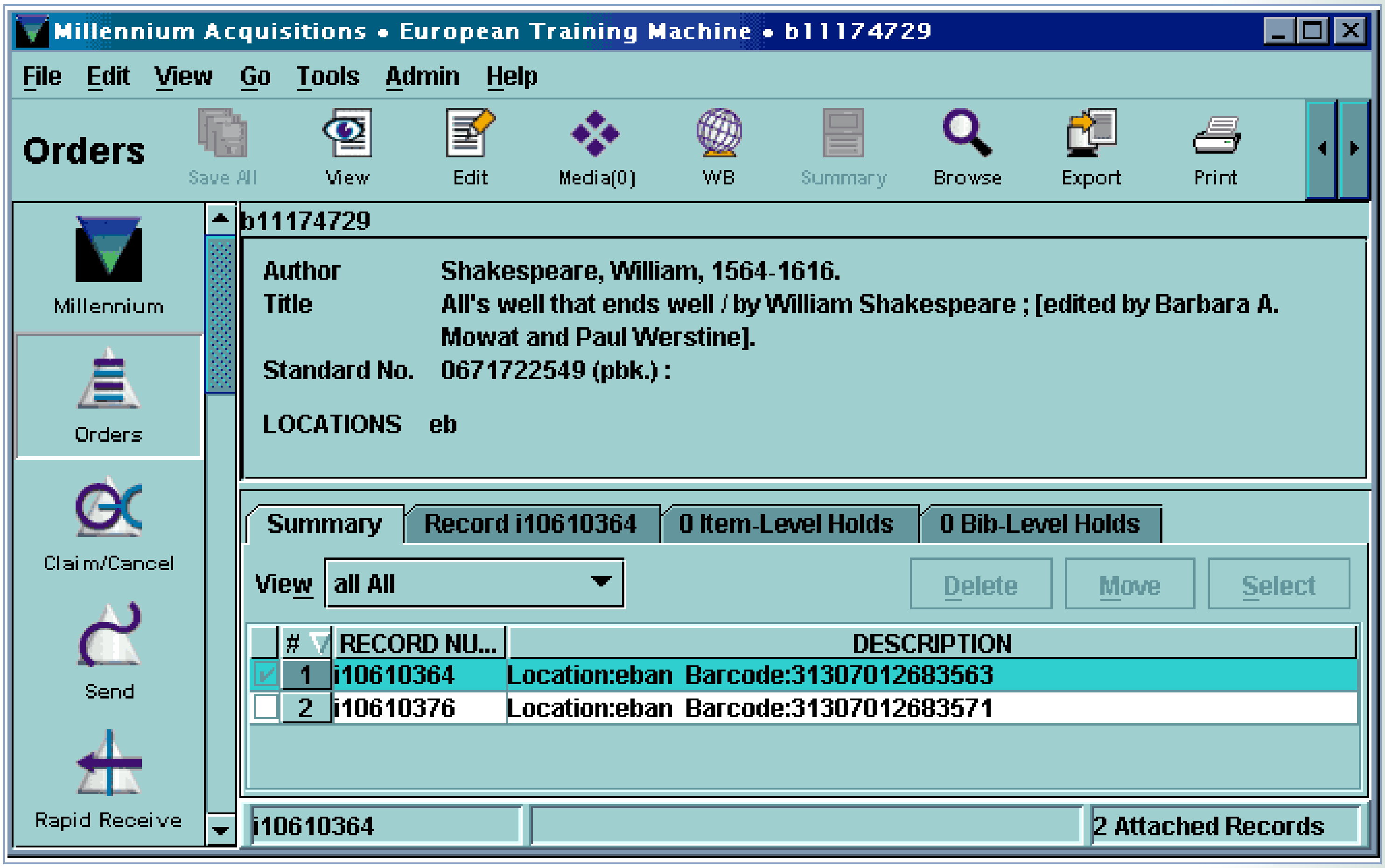
LOOK & FEEL

The look and feel setting controls the general appearance of components (e.g., buttons, drop-down lists, check boxes) in a Java® application. There are two types of "look and feel":

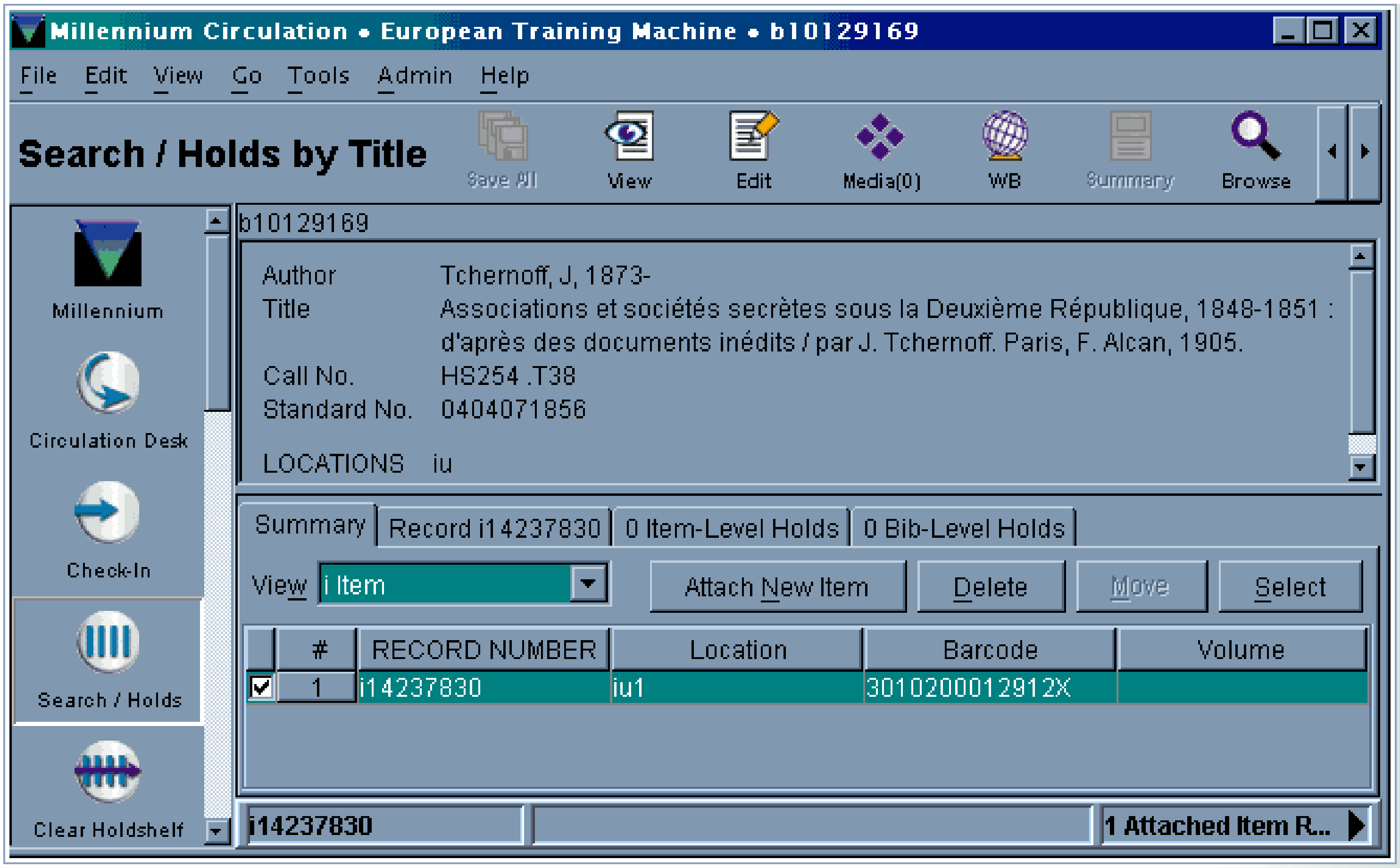
Metal - the standard Java® look and feel

Windows - corresponds to the appearance of Microsoft's Windows™ operating system

Example of the **Metal** look and feel, *Green* theme:



Example of the **Windows** look and feel:

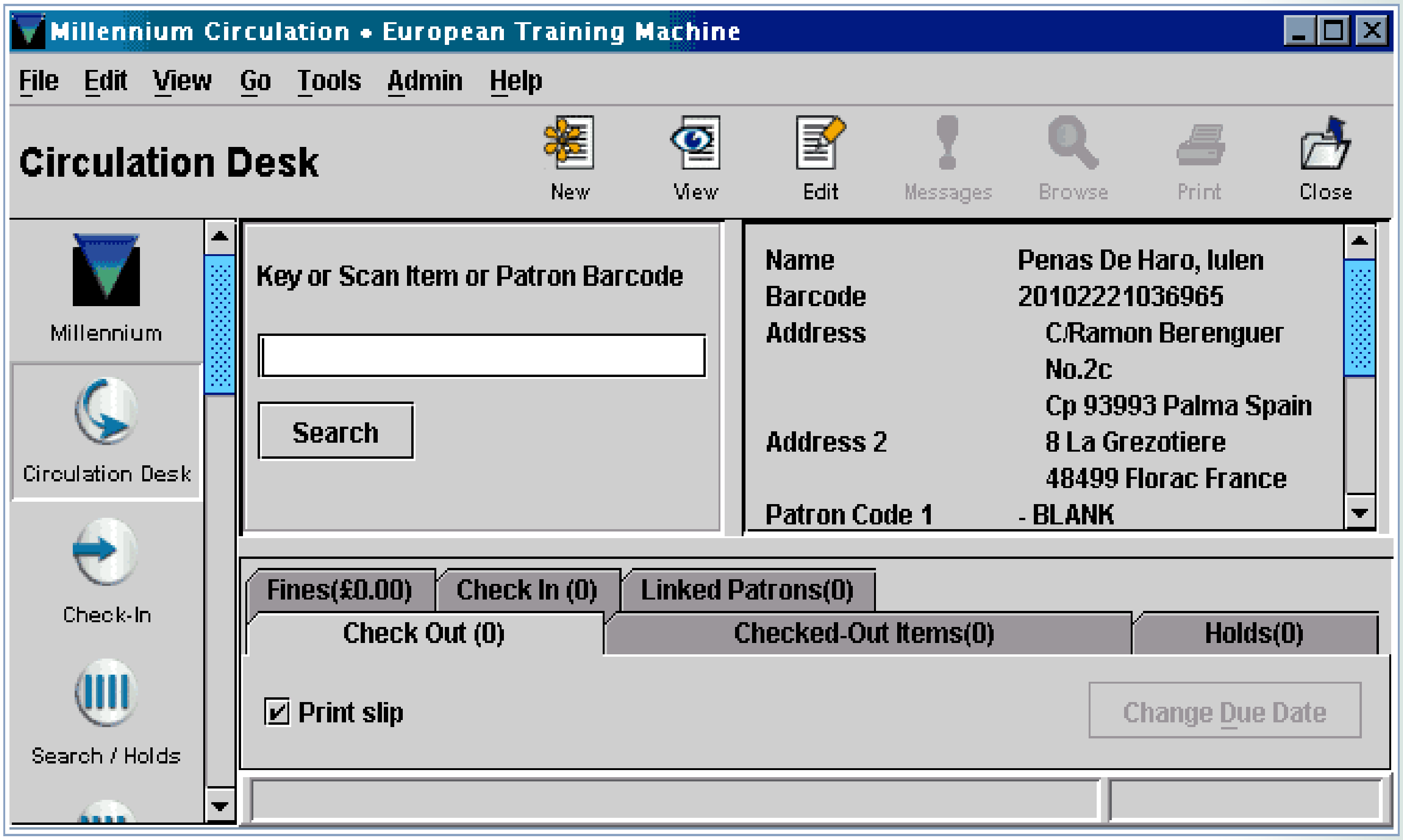


close window

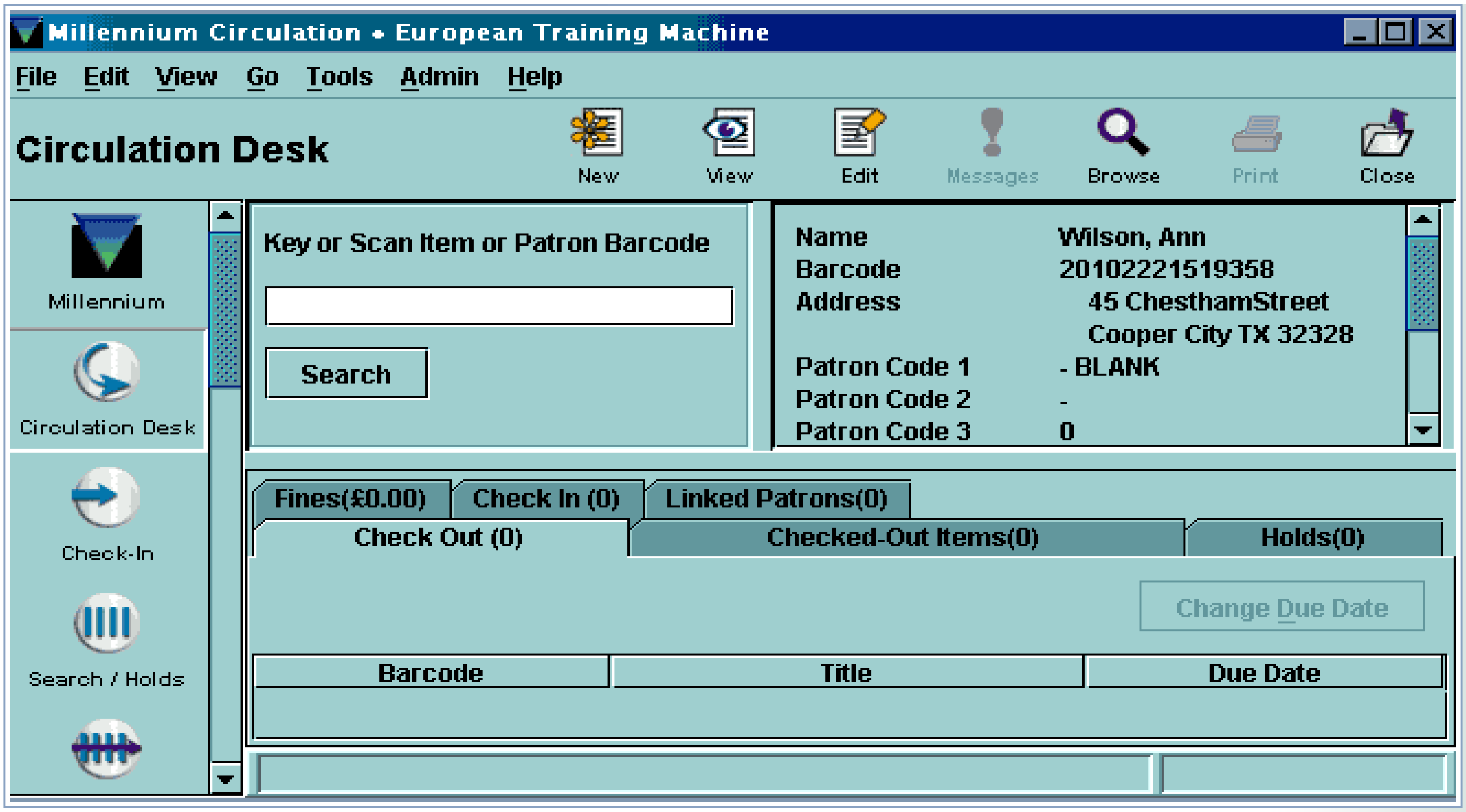
THEMES

Innovative has defined **Themes**, or collections of colors and fonts, which can be used with the **Metal** look and feel discussed in the previous step. If you select a theme, the theme's colors and fonts override any color and font choices you have made previously. The available themes are:

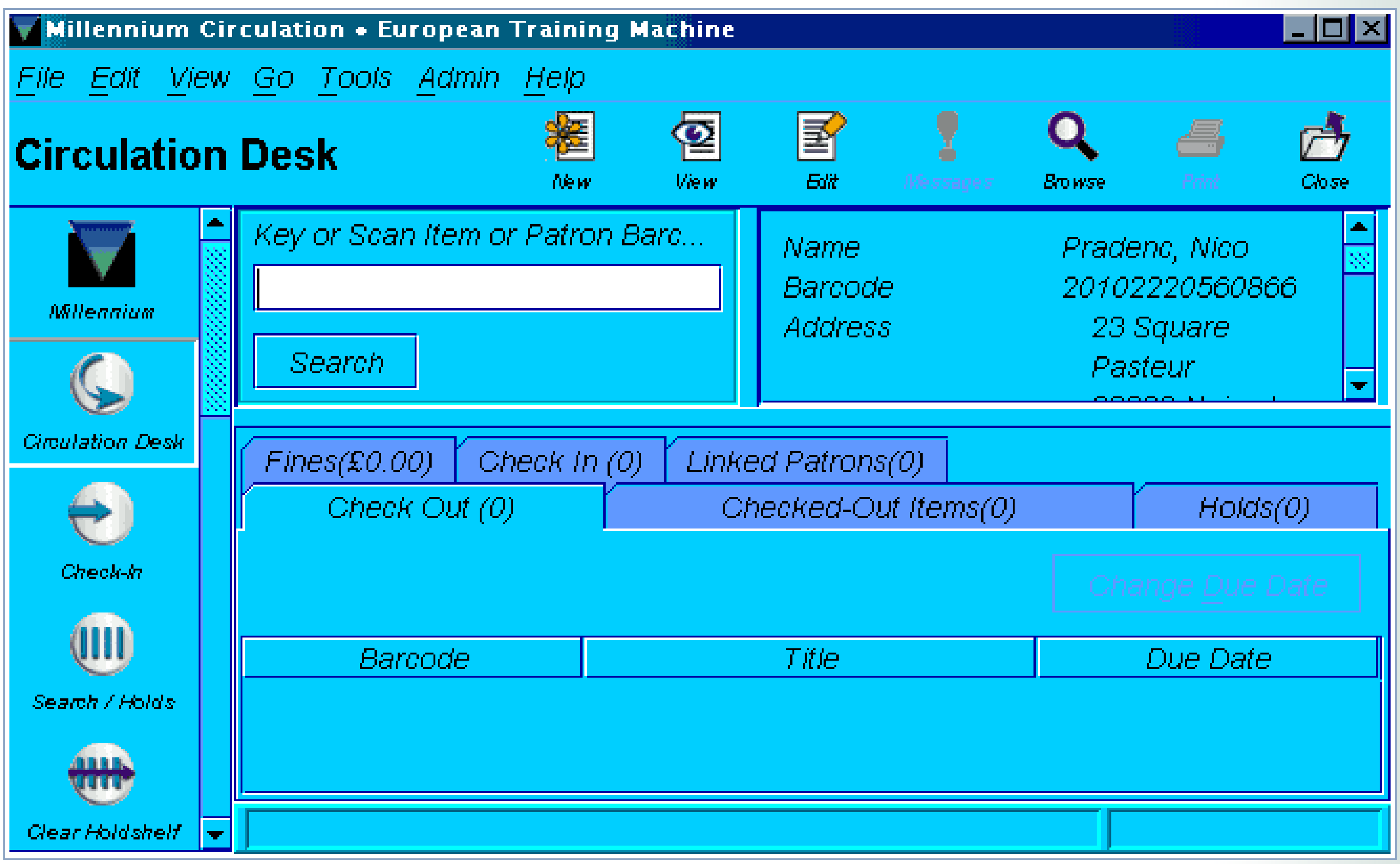
III Theme



Green Theme



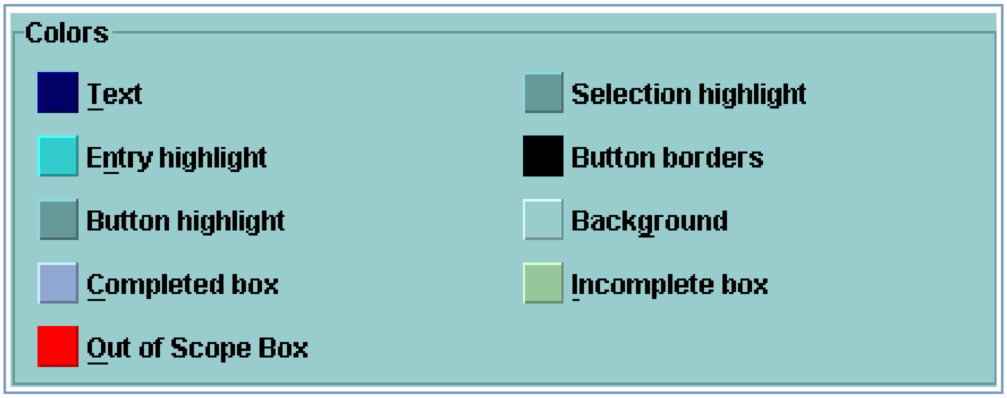
Blue Theme



To use a particular theme, select the theme from the drop-down list and choose **Set**. You need to restart the Millennium session to see the full effects of a theme change.

close window

COLORS



If you are using the **Metal** look and feel, you can define your own color scheme using the elements listed below. If you are using the **Windows** look and feel, the color scheme corresponds to the appearance of Microsoft's Windows™ operating system.

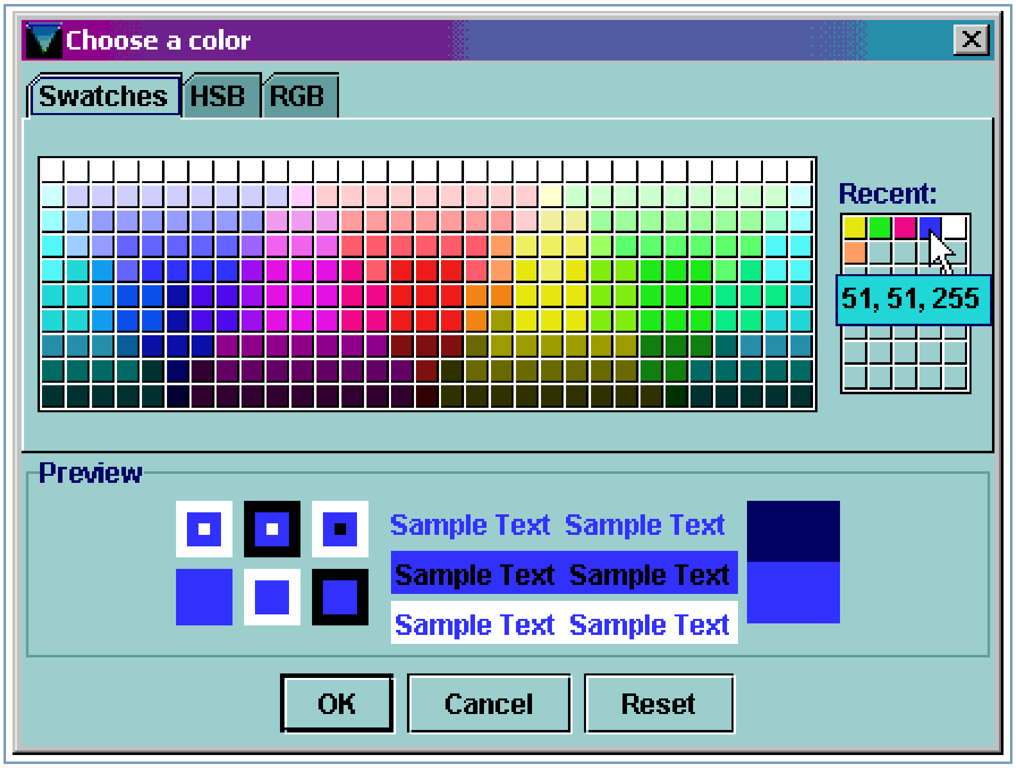
You can set colors for:

- **Text** - defines the color of text in windows and dialogs. ALL
- **Entry highlight** - defines the color of the currently selected entry in a browse display. ALL
- **Button highlight** - defines the color of a selected button. ALL
- **Selection highlight** - defines the color of the currently selected tab and the vertical scroll bar. ALL
- **Button borders** - defines the border color for buttons. ALL
- **Background** - defines the background color for the entire application. ALL
- **Tab Alert** - defines the alert color for patron record tabs, e.g. used to indicate that there is a hold awaiting pickup or an outstanding fine. CIRC ILL
- **Arrived box** - defines the color for a checkin card box with status "Arrived". CAT SER
- **To Bind / Bound box** - defines the color for a checkin card box with status "To Bindery" or "Bound". CAT SER
- **Late box** - defines the color for a checkin card box with status "Late". CAT SER
- **Completed box** - defines the color for a completed entry (i.e. an entry that includes location, fund and copies) in the Selection List display. ACQ
- **Incomplete box** - defines the color for an incomplete entry (i.e. an entry that does not include location, fund or copies) in the Selection List display. ACQ
- **Out of Scope box** - defines the color for a Selection List display entry in which the locations and funds are out of scope (i.e. non-editable) for the user. ACQ

To set a color, click on a colored square to open the *Choose a color* dialog. You can set the desired color using the **Swatches**, **HSB**, or **RGB** tab. Note that you only need to set the color in one of the tabs; choose whichever tab you prefer.

TO SET THE COLOR USING THE SWATCHES TAB:

1. Click on a color square from the palette. The system adds your color to the **Recent** list of colors and shows you a preview of the color in the bottom portion of the dialog:

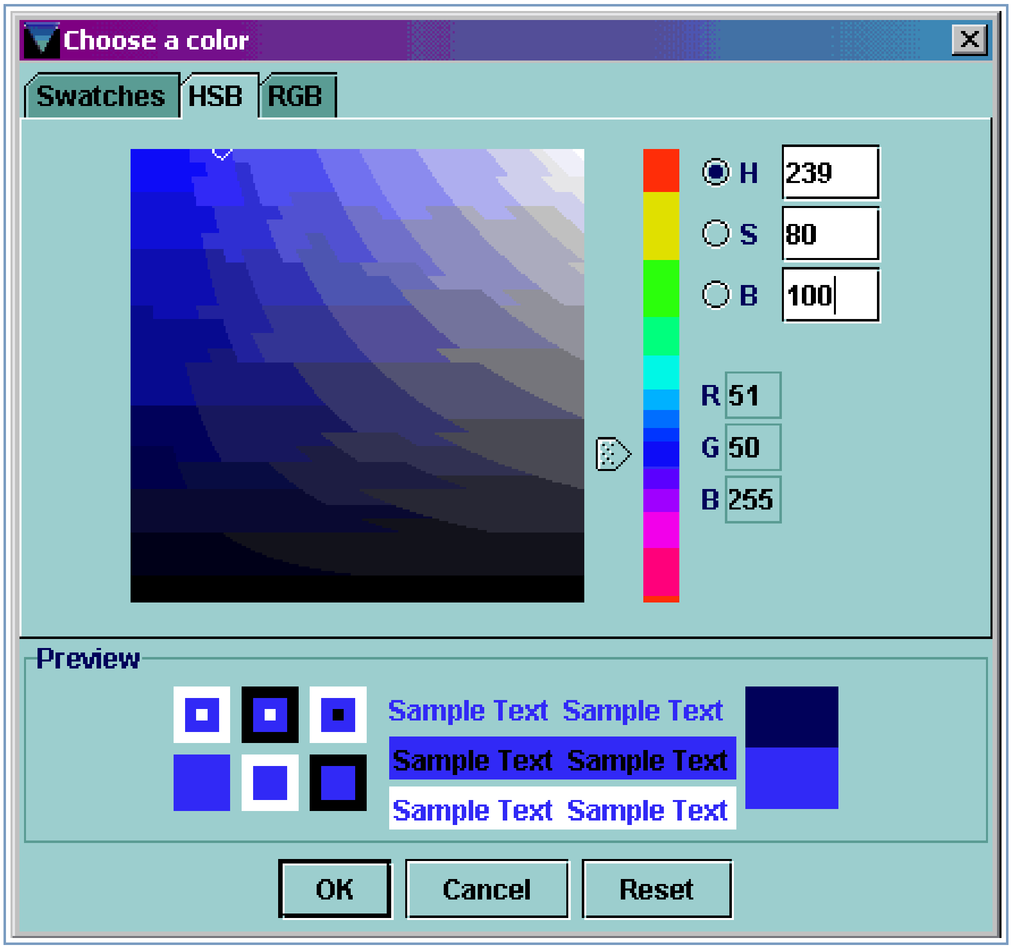


The **Recent**list of colors contains a history of the colors you have selected while the *Choose a color*dialog is open. Once you close the *Choose a color*dialog, the list is erased.

2. Choose **OK** to set the color. You can also choose **Reset** to view your original color or **Cancel** to exit.

TO SET THE COLOR USING THE HSB (hue-saturation-brightness scheme) TAB:

1. Choose a color in one of three ways:
   - Select a hue by dragging the slider up or down the color bar; in the example below, the slider points to blue. Then choose an exact color by moving the "selection circle" within the color picker.
   - Select the **H** radio button and then move the slider up or down the color bar to choose a hue. Next, select the **S** radio button and then move the slider up or down the color bar to choose a saturation value. Finally, select the **B** radio button and then move the slider up or down the color bar to choose a brightness value.
   - Enter numeric values for hue, saturation, and brightness in the **H**, **S**, and **B** text boxes.

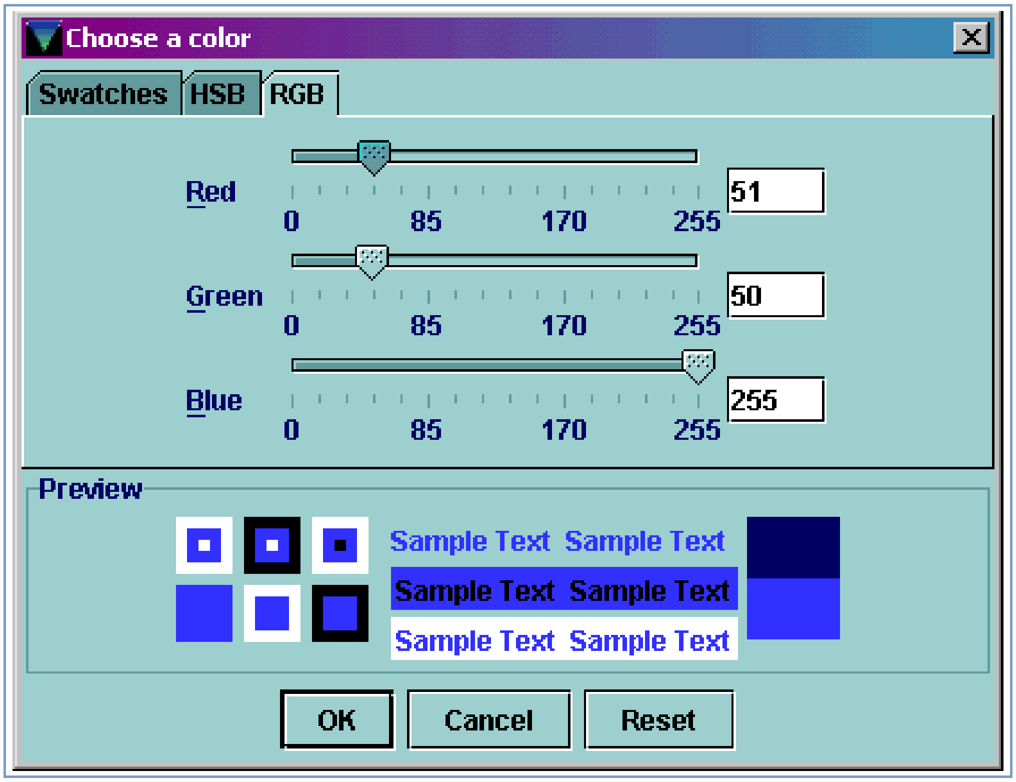


Note that as you choose a color, the system adjusts the RGB values and displays a preview of the color in the bottom portion of the dialog.

2. Choose **OK** to set the color. You can also choose **Reset** to view your original color or **Cancel** to exit the dialog without changing the color.

TO SET THE COLOR USING THE RGB (red-green-blue scheme) TAB:

1. Choose a color in one of two ways:
   - Drag the sliders for **Red**, **Green**, and **Blue** to set the value for each, or
   - Enter numeric values in the **Red**, **Green**, and **Blue** text boxes.



Note that the system displays a preview of the color in the bottom portion of the dialog.

2. Choose **OK** to set the color. You can also choose **Reset** to view your original color or **Cancel** to exit the dialog without changing the color.

close window

FONT SETTINGS

If you are using the **Metal** look and feel, you can define the font used to display text. You can set the font type, size, and style (i.e. bold and/or italic). Note that the **Windows** look and feel uses the font parameters from your Windows[TM] setup.

> To run Millennium applications, your monitor must have a minimum resolution of 800 x 600. With this setting, you should not set a font size larger than **16 point bold**. Note that higher resolution monitors can accommodate larger font sizes.

close window

DEFAULT CODE CHART

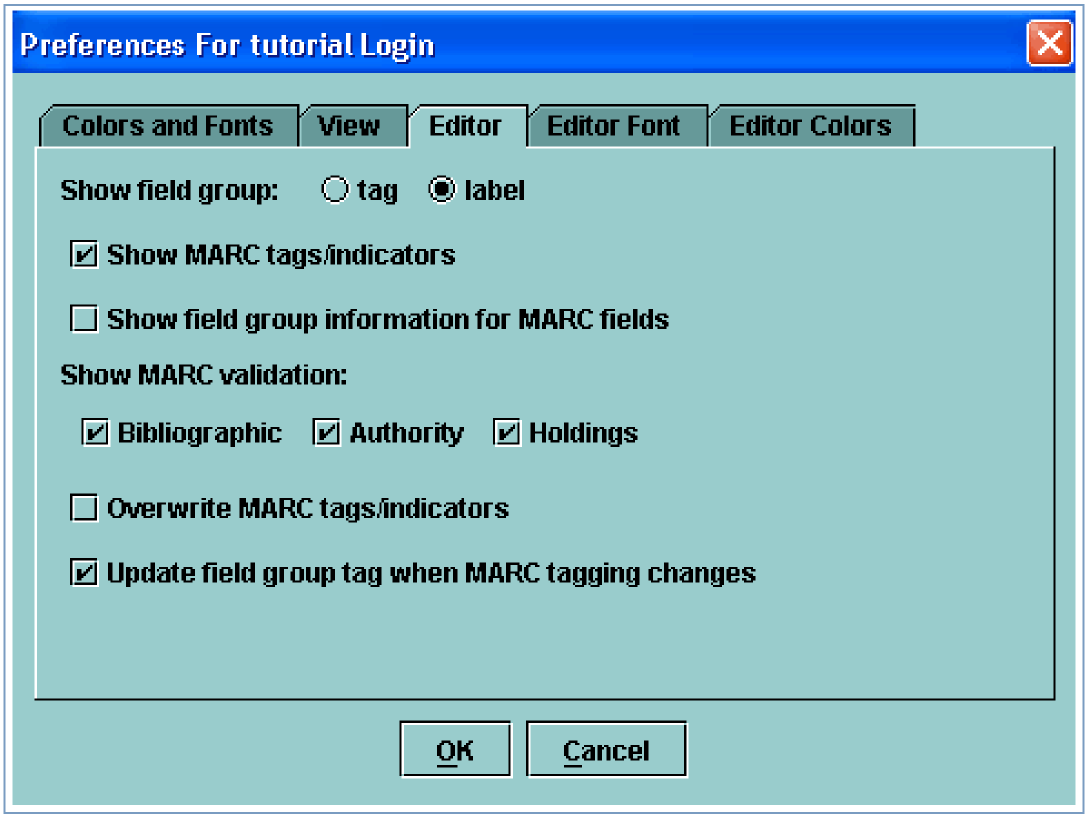
This setting determines which default code chart to use in the Character Map function in the editor. Note that the code chart can also be changed interactively by the user via the **Tools » Character Map** option.

Refer to the Innovative Guide and Reference, Page # 105473: Character Map for information about inserting UNICODE characters into records via the code charts.

close window

EDITOR

The **Editor** tab offers the following settings for the record editor:

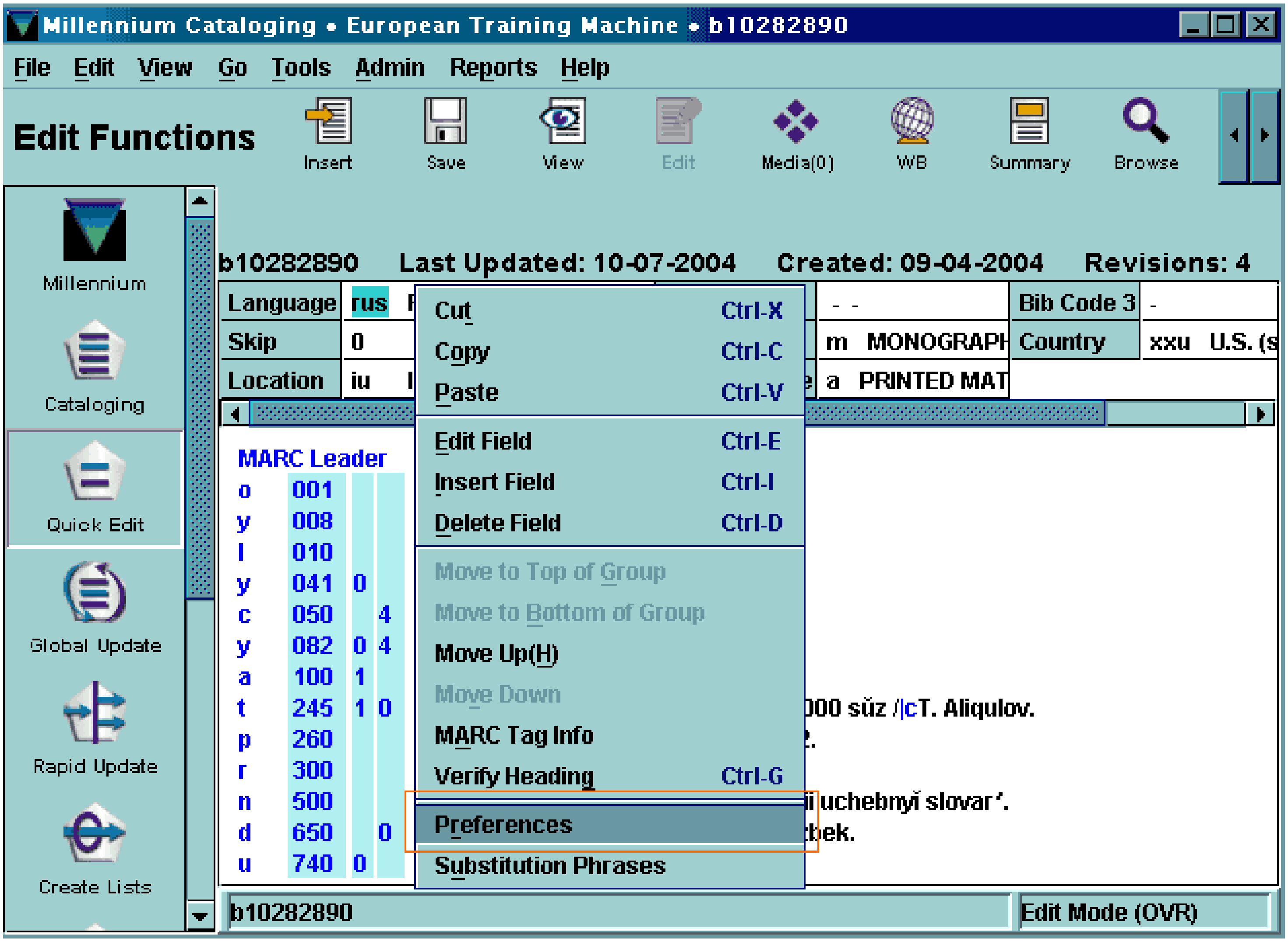


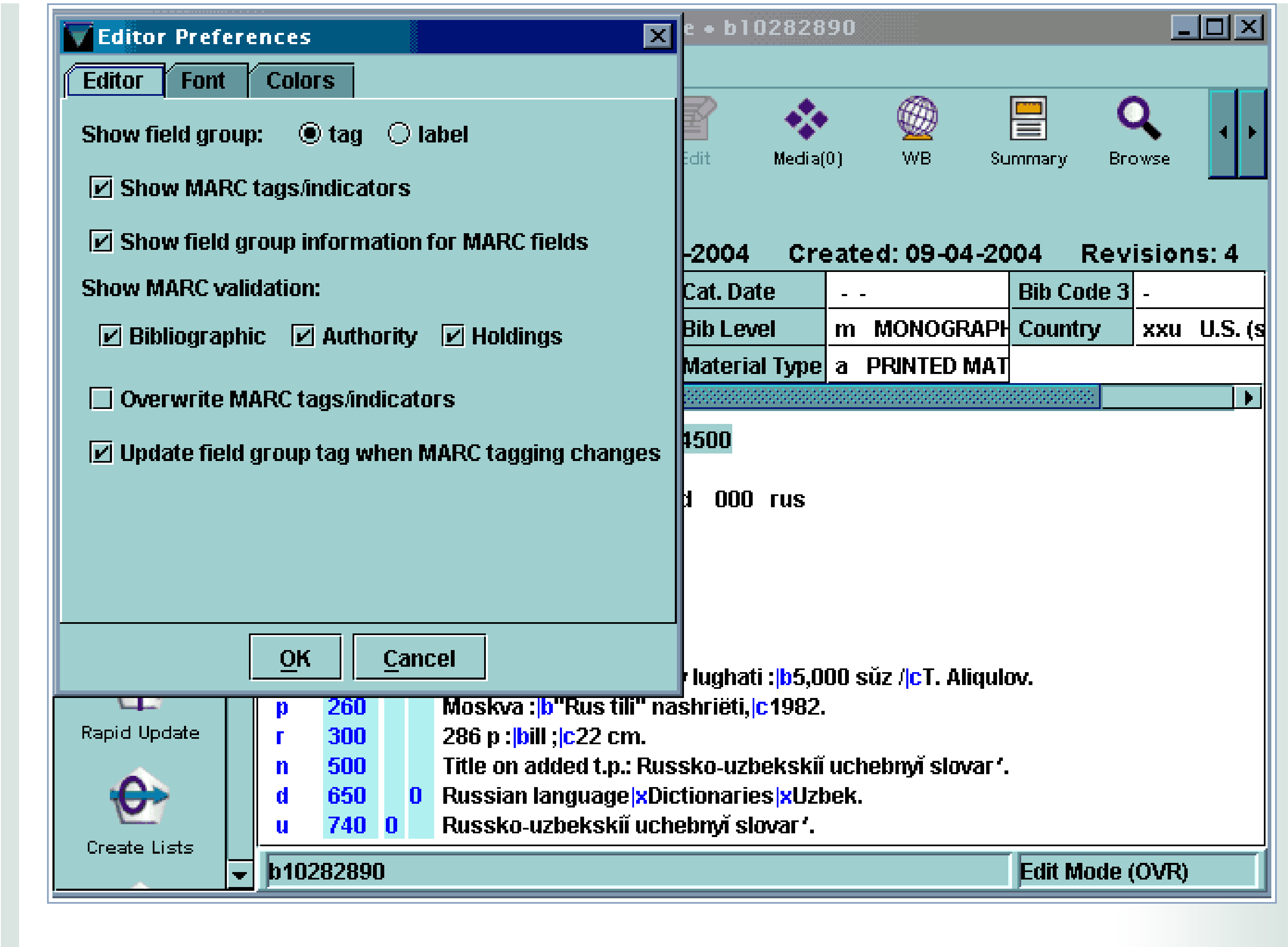
Using the options on the Editor tab you can customize the appearance and behavior of the Millennium editor. The following settings are available:

- Display of MARC tags and field group tags or labels
- MARC validation for bibliographic, authority and checkin records
- Insert or overwrite mode for MARC tags and indicators
- Automatic update of field group tag when MARC tag changes

In addition to making permanent changes to the Editor Preferences for a login (as discussed in the Introduction), a user can also make temporary changes which only apply to the current session. This method requires no authorization and will only affect the workstation where the change was made.

To access the Editor Preferences this way, right click from within a record in edit mode and select **Preferences** from the menu.


Millennium Cataloging • European Training Machine • b10282890
File Edit View Go Tools Admin Reports Help
Edit Functions
Insert
Save
View
Edit
Media(0)
WB
Summary
Browse
Millennium
Cataloging
Quick Edit
Global Update
Rapid Update
Create Lists
b10282890 Last Updated: 10-07-2004 Created: 09-04-2004 Revisions: 4
Language rus
Skip 0
Location iu
Bib Code 3 -
m MONOGRAPH
Country xxu U.S. (s
a PRINTED MAT
MARC Leader
Cut Ctrl-X
Copy Ctrl-C
Paste Ctrl-V
Edit Field Ctrl-E
Insert Field Ctrl-I
Delete Field Ctrl-D
Move to Top of Group
Move to Bottom of Group
Move Up(H)
Move Down
MARC Tag Info
Verify Heading Ctrl-G
Preferences
Substitution Phrases
b10282890
Edit Mode (OVR)



close window

SHOW FIELD GROUP AND MARC TAGS

The following options are available:

Show field group
Choose whether to have the editor display field group **tags** (e.g. "a" for author fields) or field group **labels** (e.g. "AUTHOR"). This applies to non-MARC fields and, if the box **Show field group information for MARC fields** is checked, for MARC fields as well.

Show MARC tags/indicators
Check this option to make the editor display MARC tags and indicators when editing MARC records.

Show field group information for MARC fields
Check this option to make the editor display field group information for MARC fields.

TAGS & LABELS

You can vary the display of MARC and non-MARC variable length fields:	FLASH version
MARC tags and indicators in variable length fields, with or without field group labels	
non-MARC fields by tag or label	

close window

SHOW MARC VALIDATION

Check this option to perform validation on all MARC fields when a bibliographic, authority, or holdings/checkin record is being created or edited. The box is checked by default. When the box is un-checked, validation is turned off for all open MARC records. When the box is checked again, validation is turned on for all open MARC records and all subsequent MARC records are validated when opened.

Refer to the Innovative Guide and Reference, Page # 105692: Validating MARC Tag Information for information about validating MARC tag information in the Millennium Editor.

OVERWRITE MARC TAGS/INDICATORS

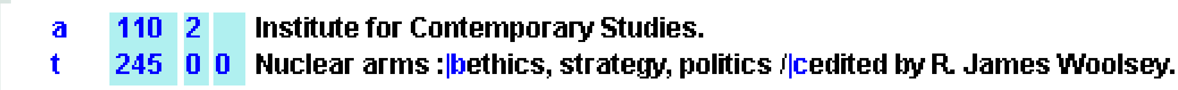
Check this option to choose to overwrite, rather than insert, existing MARC tags and indicators when editing a MARC record. When this box is checked, placing the cursor in the MARC tag, Indicator 1 or Indicator 2 positions in a record causes the editor to be in OVERWRITE mode. When the cursor moves to the main data portion of a MARC field, the editor switches to INSERT mode.

close window

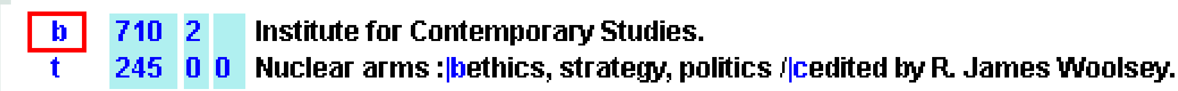
UPDATE FIELD GROUP TAG WHEN MARC TAGGING CHANGES

If this option is selected, the field group tag will automatically be corrected when you exit a MARC field whose MARC tag and/or indicators have been updated.

Example: change MARC tag 110 (field group tag 'a') to 710 (field group tag 'b').
Before the change:



After the change - the field group tag is updated as soon as you exit the field (record not saved at this stage):

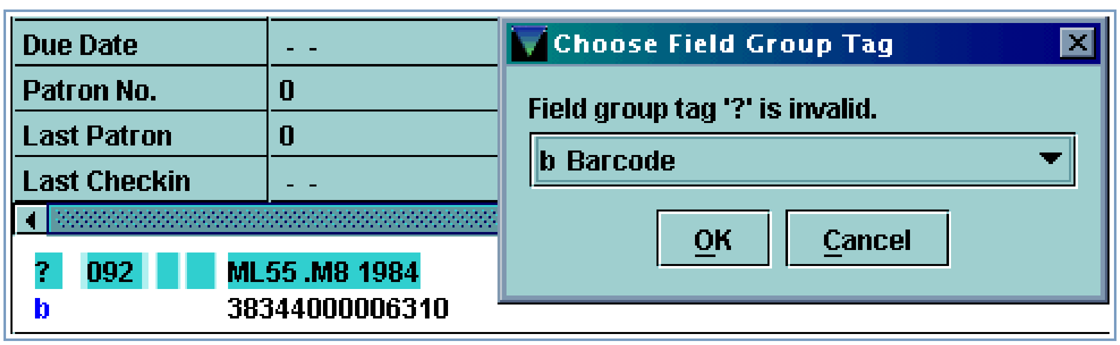


The editor uses the appropriate m2btab.fse.* load table to find the association between field group tags and MARC tags/indicators for bibliographic, item and holdings/checkin records (the asterisk represents a possible extension, such as m2btab.fse.uni for UNIMARC bibliographic records, or m2btab.fse.i for item records). Some systems do not have a m2btab.fse.* table, in which case m2btab.b.* will be used instead.

The load table used for authority records is primarily m2btab.anam.* or m2btab.asub.*, depending on authority type (the asterisk represents a possible extension, such as m2btab.anam.chi for Chinese MARC). On some systems, m2btab.a.* is used instead.

Load tables can be viewed via character based system menus:
M > MANAGEMENT information
  I > INFORMATION about the system
    C > CODES used
      M > MARC load tables
        [select appropriate table depending on record type and MARC type]

If the MARC tag is not defined in the load table, and no field group can be found, a question mark - '?' - is placed as the field group tag, and when you save the record you will be asked to select a tag:



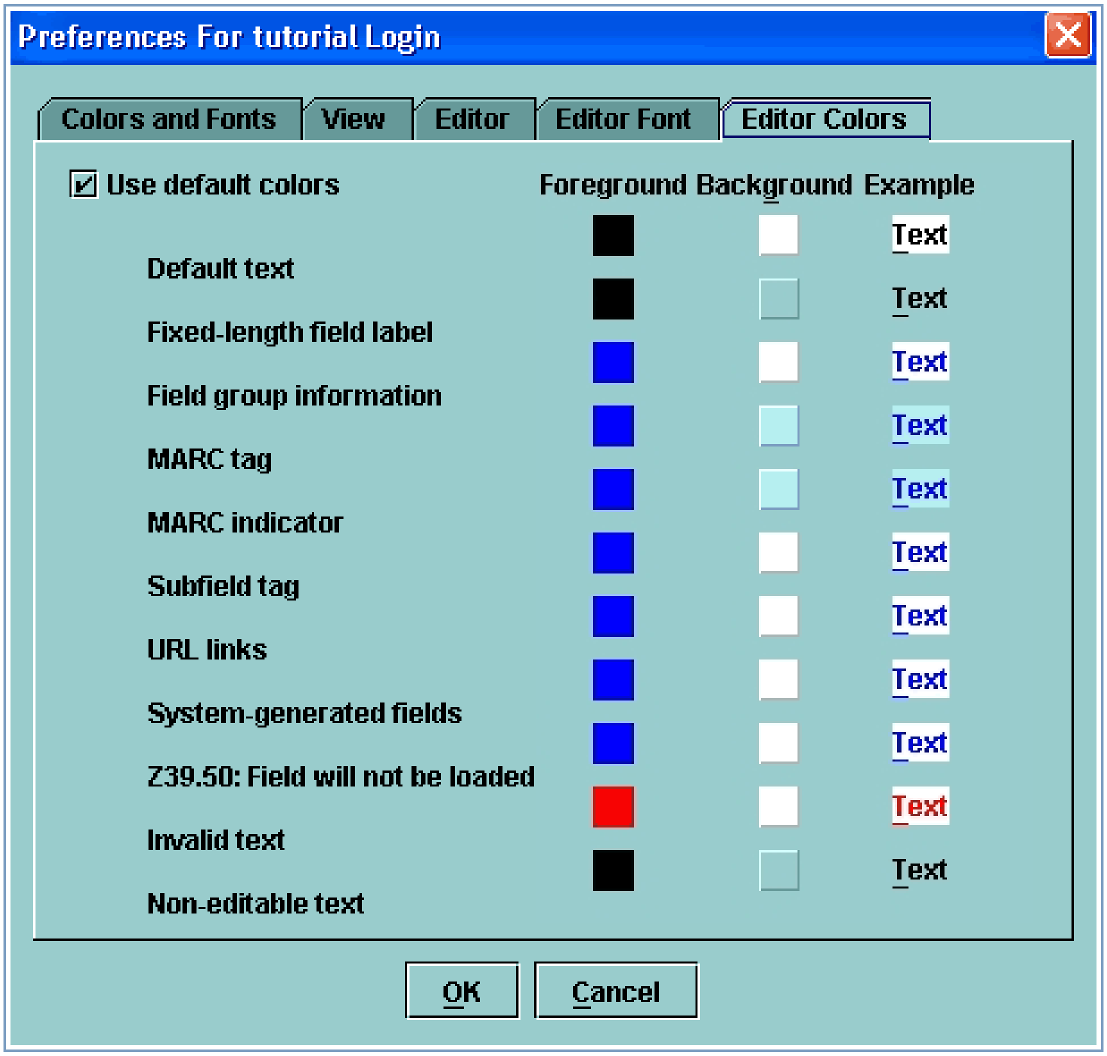
The update of field group tags will happen whether or not you choose to show the field group information

Contact Innovative to add missing MARC tags to existing load tables.

close window

EDIT COLORS

The **Editor Colors** tab contains the following options:



When you first enter the **Editor Colors** tab, **Use default colors** will be selected. To specify a different combination of foreground and background colors, uncheck the default option. For each type of text element you will see in the editor, e.g., **Default text, MARC tag**, etc., select the corresponding **Foreground** color square. Then choose a color from either the Swatches, the HSB, or the RGB tab. Then select the corresponding **Background** color square and choose the desired color.

You can specify colors for different elements of a record:	FLASH version
Default text	
Fixed length field labels	
Field group information (tags or labels) for variable length fields	
MARC tags	

MARC indicator

Subfield tag

URL links

System-generated fields

Z39.50: Field will not be loaded

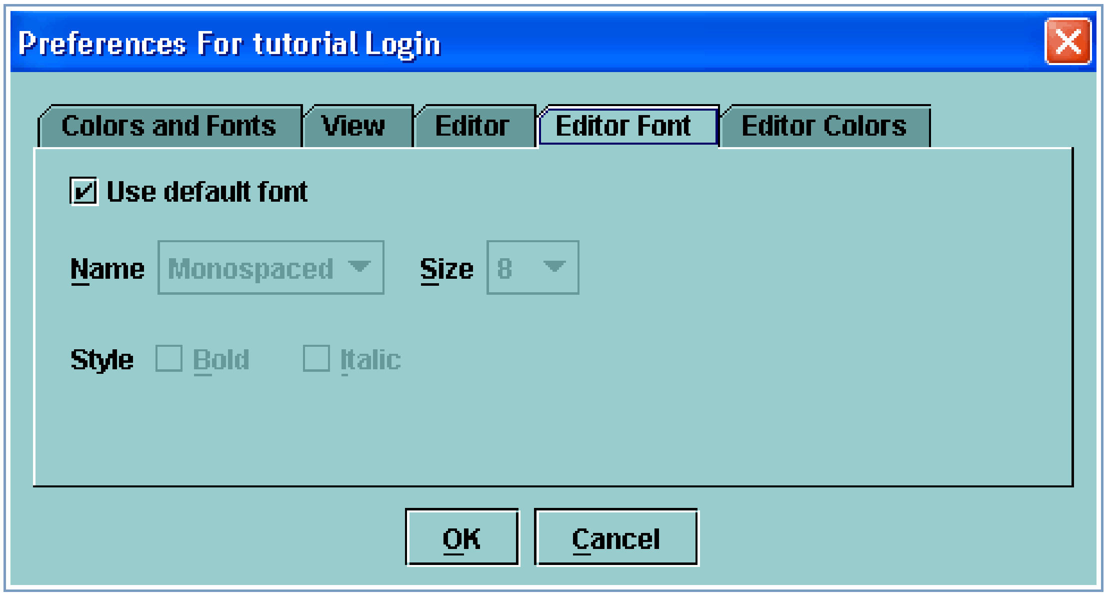
Invalid text (such as incorrect field group tags, blank fixed fields)

Non-editable text (in fixed fields)

close window

EDITOR FONT

The **Editor Font** tab contains the following options:



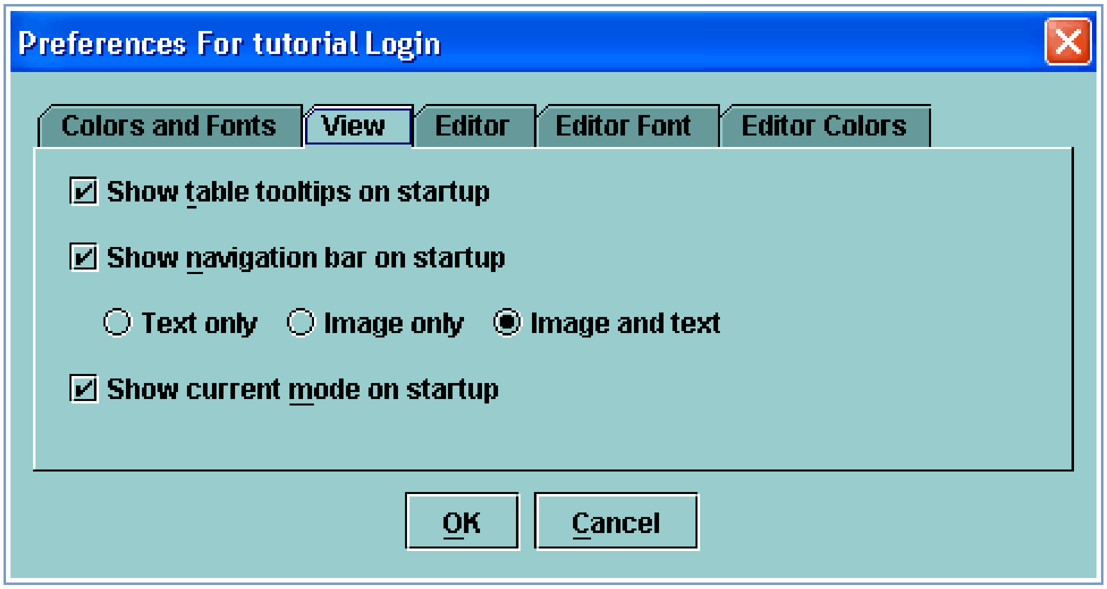
When you first enter this tab, **Use default font** will be selected. The default font used depends on what Look and Feel and Theme settings you have selected for the login. To specify a different combination of font face, size, and style for all text displayed in the record editor, uncheck the default option. Then, select the desired **Name** and **Size** from the drop-down lists and check **Bold** and/or **Italic** if desired.

Change the font size and type for the record editor as shown below:	FLASH version
Default text	

close window

VIEW

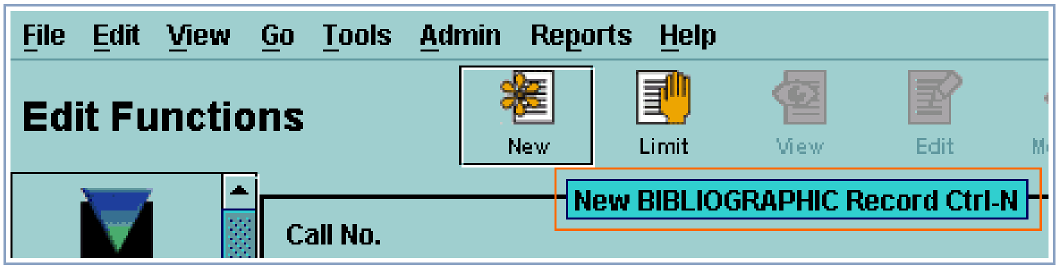
The **View** tab contains the following options:



close window

SHOW TABLE TOOLTIPS ON STARTUP

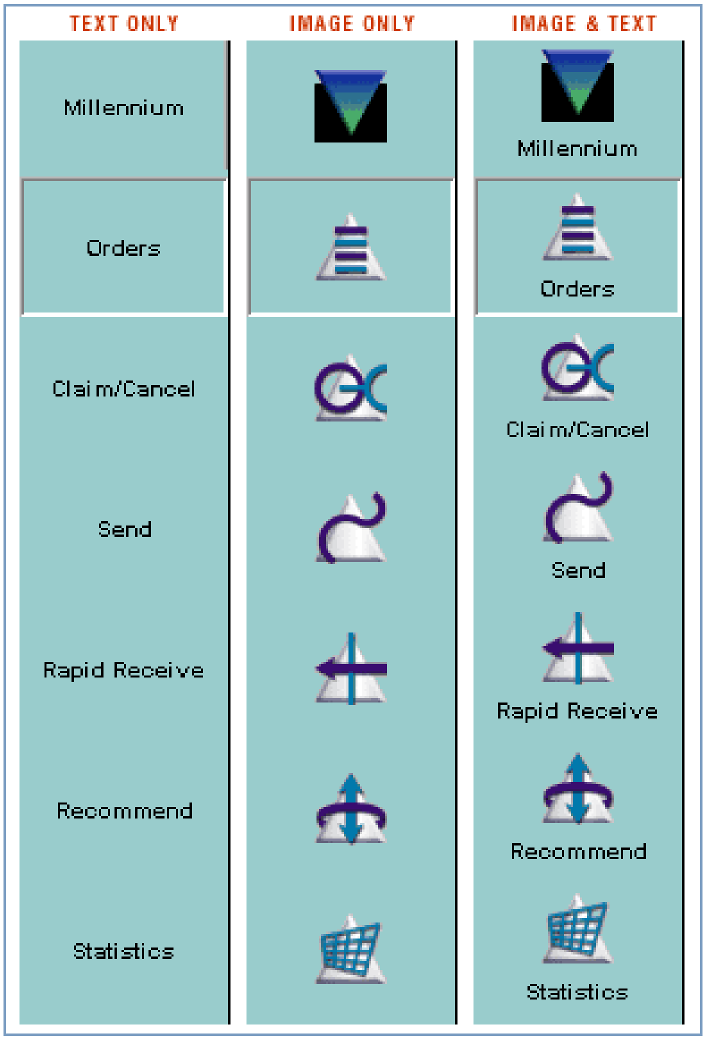
This setting determines whether tooltips are displayed by default for the login. Tooltips are displayed when you move the mouse over a button or icon.



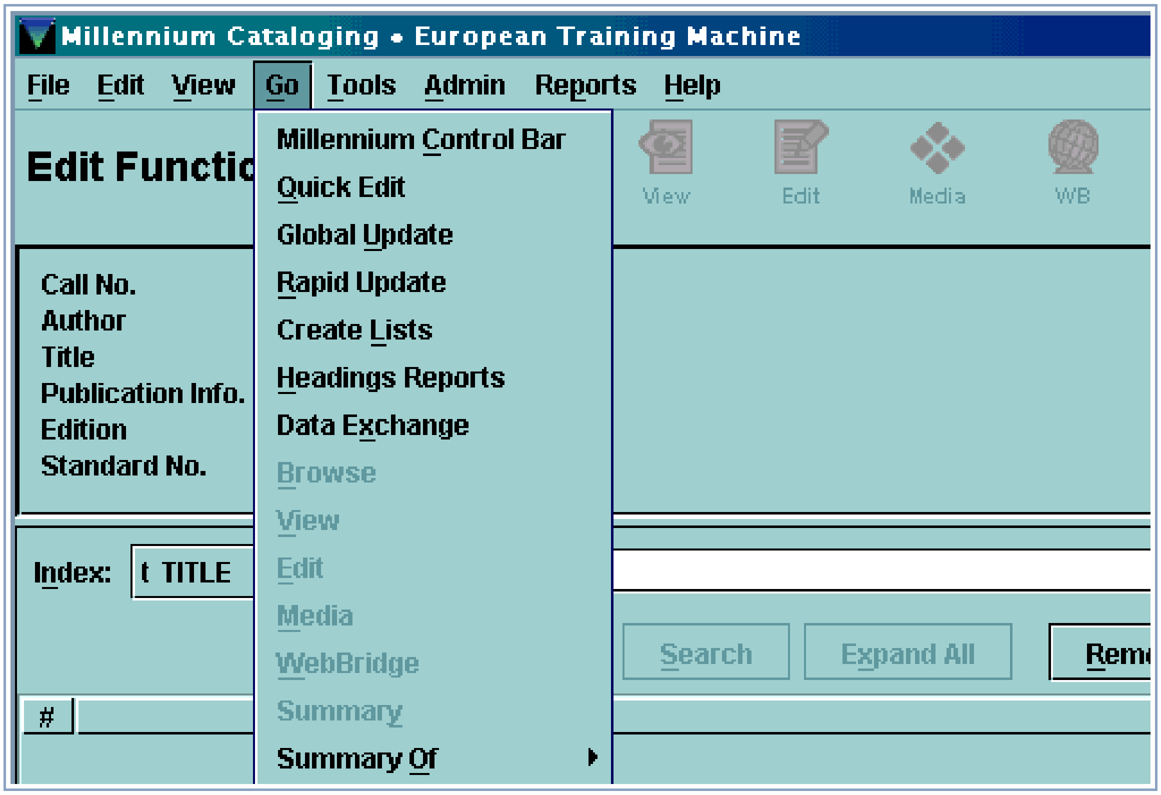
close window

SHOW NAVIGATION BAR ON STARTUP

This option determines whether the navigation bar (the vertical strip of modes that displays along the left side of the main window) displays. You can also choose whether to display the navigation bar as **Text only**, **Image only** or **Image and Text**.



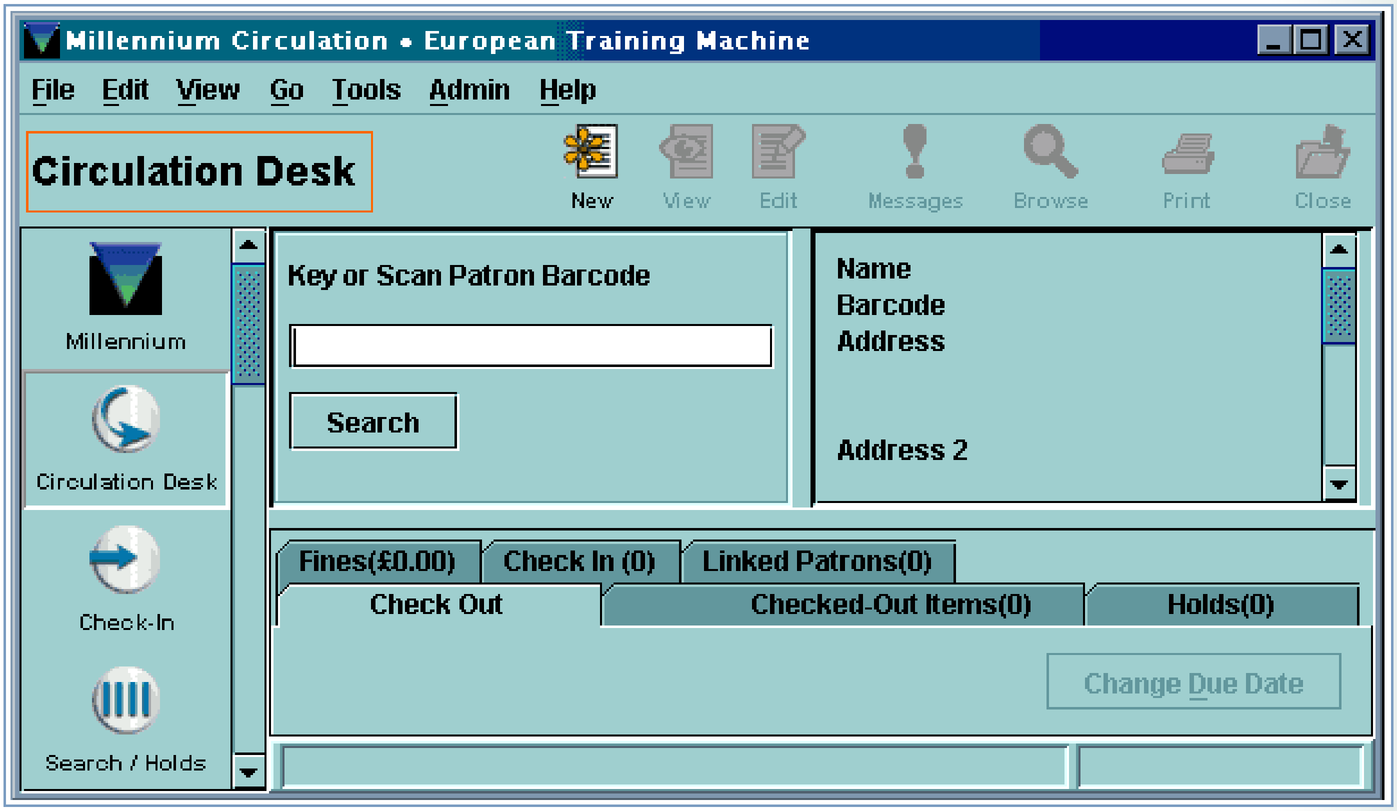
When the **Show Navigation bar on startup** setting is unchecked, the navigation bar will not display at startup. The user can then access the other modes from the **Go** menu.



close window

SHOW CURRENT MODE ON STARTUP

This setting determines whether the current mode displays in the top left corner of the screen.

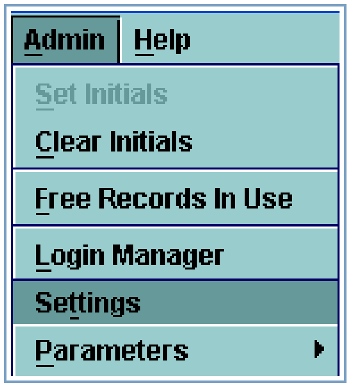


close window

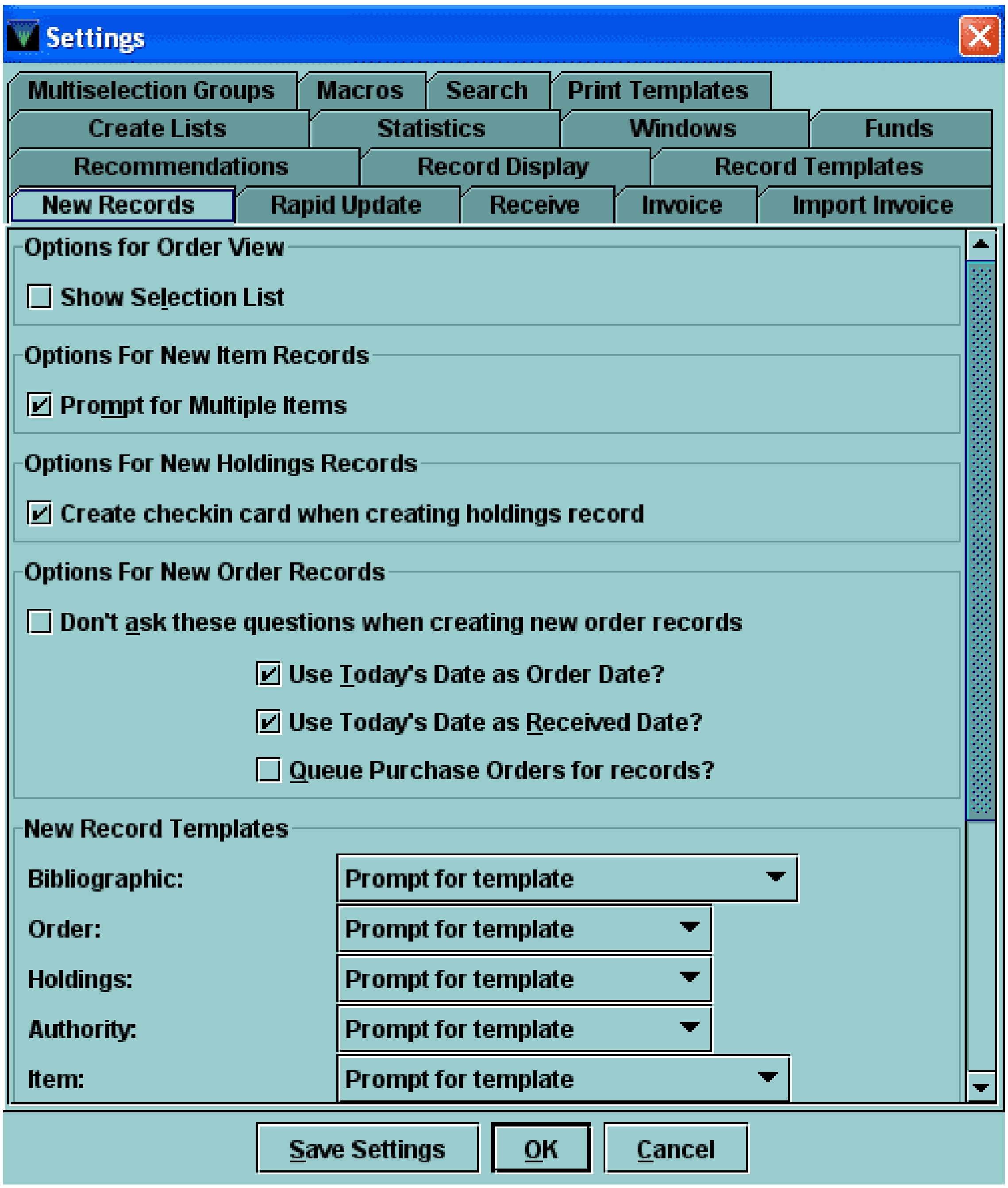
INTRODUCTION TO SETTINGS

Settings control the behavior of various functions in the Millennium applications, such as the templates, record displays and statistics.

To open the Settings window, choose menu **Admin » Settings** from within any Millennium application:



A screen similar to the following will appear. (This example is from Millennium Acquisitions):



Related options are grouped on tabs. Tabs vary between each module, as shown in this table:

TABS	MODULE						
	ACQ	ADM	CAT	CIRC	ERM	ILL	SER
Claiming							X
Create Lists	X	X	X	X	X	X	X
Export Records			X				
Funds	X						
Global Update			X		X		
Import Invoice	X						
Invoice	X						
Macros	X	X	X	X	X	X	X
Multiselection Groups	X						
New Records	X		X	X	X	X	X
On-the-fly Records				X		X	
Print Templates	X	X	X	X	X	X	X
Rapid Update	X						
Receive	X						
Recommendations	X						
Record Display	X		X	X	X	X	X
Reports			X				
Search	X		X	X	X	X	X
Session Statistics			X				
Statistics	X	X	X	X	X	X	X
Templates	X	X	X	X	X	X	X
Web Options		X					
Windows	X		X	X	X	X	X

You can only change Settings for the login you are currently using (with the exception of logins with undefined **Preferences**, see the

Note below). Settings can be modified at any time during a session and the changes will take effect immediately. Settings can be changed for the *current session* only or *permanently* as the default for the login. A change for the current session will only affect the workstation where the change was made. Changing the Settings permanently will affect other users of the same login, but not until they start a new session.

In some cases, changing a setting requires authorization for the function controlled by the setting. For example, to be able to modify the **Invoice** Settings, the user needs to be authorized for function 78 (Process Invoices). The specific authorization number required to change a setting is listed in the corresponding tutorial section.

To change your settings for the *current session* only:

1. Choose **Admin » Settings** to open the Settings window.
2. Choose the tab that contains the setting option.
3. Choose a new value for the setting option.
4. Choose **OK**.

To save changed Settings *permanently* (i.e. for the current and subsequent sessions), you must additionally be authorized for function 176 (Save Settings - Millennium). The **Save Settings** button is greyed out for unauthorized users.

To change the default settings *permanently* for the login:

1. Choose **Admin » Settings** to open the Settings window.
2. Choose the tab that contains the setting option.
3. Choose a new value for the setting option.
4. Choose **Save Settings**.
5. Choose **OK**.

NOTE: When you save Settings *permanently* for a login, the change applies to any login that does not have a set of customized **Preferences**. Therefore it is recommended to customize the Preferences for the logins before you start saving Settings permanently.

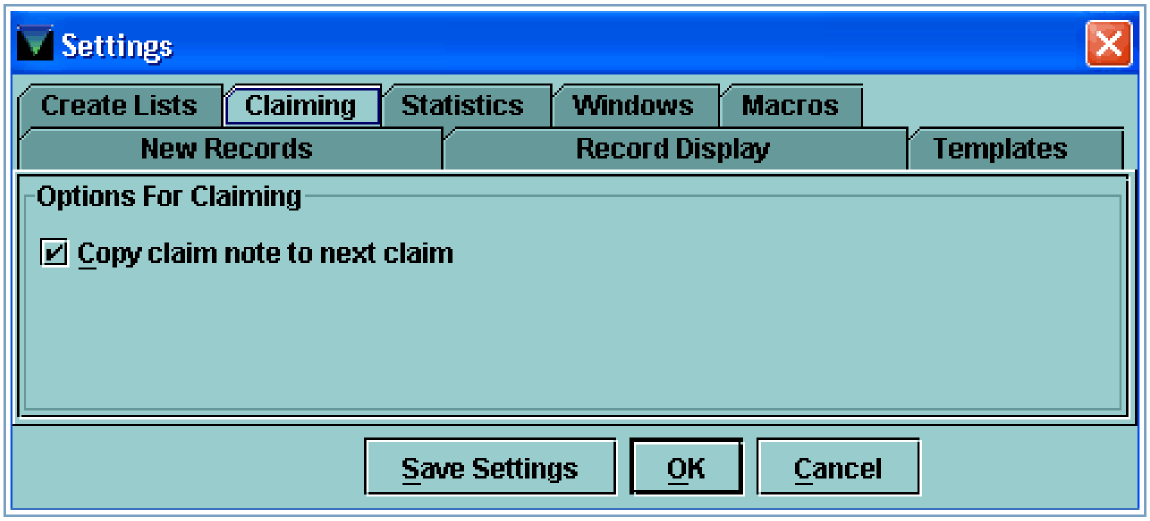
When a module is accessed from the Millennium control bar, the original login's Settings are used. However, the following settings can have a unique default value in each Millennium application, even though the applications are launched from a single login through the Millennium control bar:

- Macros
- New Records
- On-the-fly Records
- Preferred Templates (Record Templates)

close window

CLAIMING

The **Claiming** tab contains options for claiming in Millennium Serials. The following setting is available:



close window

COPY CLAIM NOTE TO NEXT CLAIM

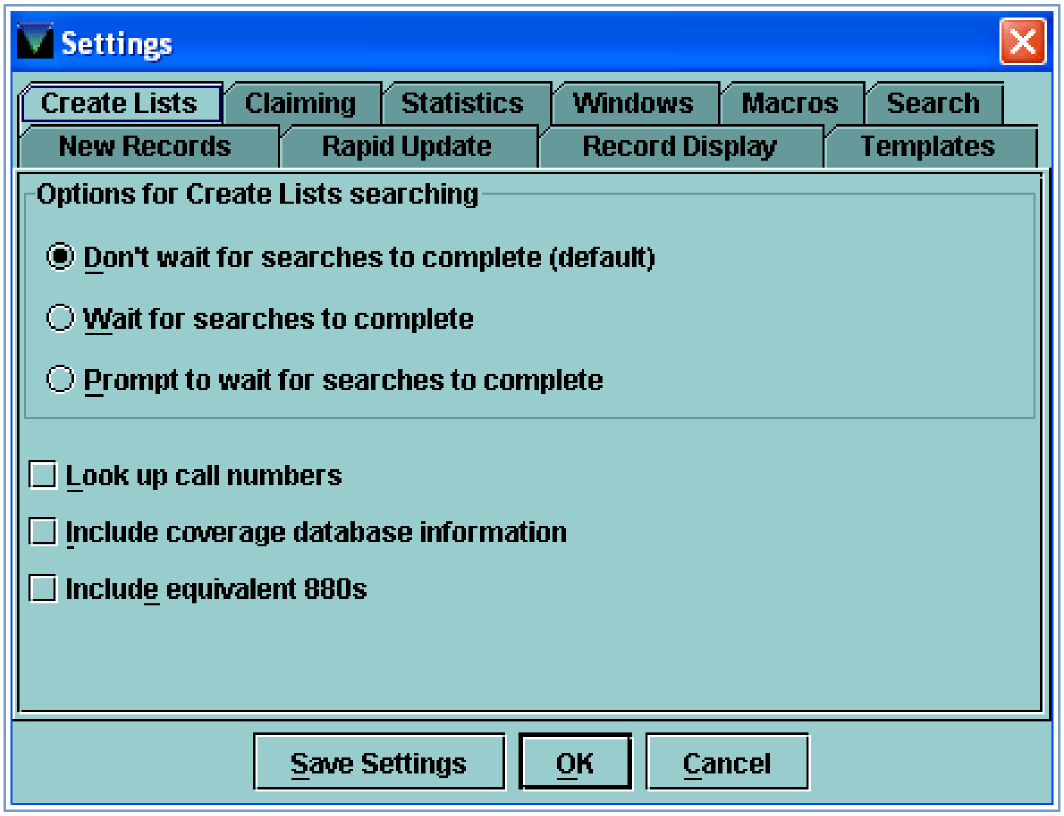
To specify that the most recently entered claim note automatically appear in the **Note** text box of the Claim dialog in Millennium Serials, select the check box. If selected, the most recent note will be used by default during the whole claiming session. To specify that the **Note** text box should be blank by default for each claim, clear the check box.

For additional information, refer to the Innovative Guide and Reference, Page # 100454: Claiming Late Issues

close window

CREATE LISTS

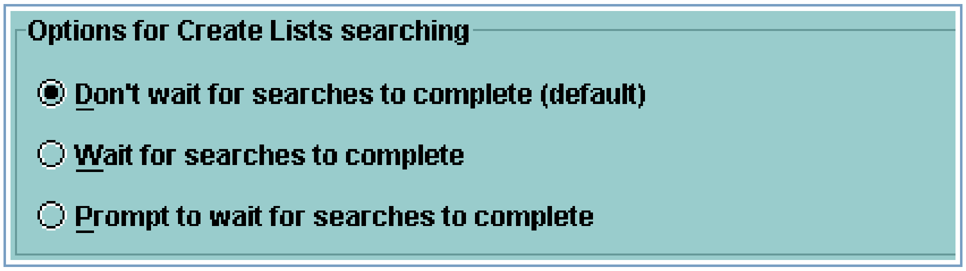
The **Create Lists** tab contains options that affect searching in [Create Lists] mode. The following options are available:



Create Lists mode has a shortcut to Settings on the toolbar:

[close window]

OPTIONS FOR CREATE LISTS SEARCHING



Don't wait for searches to complete (default)
This method requires an additional user license, i.e. while the Create Lists search is running your session uses two user licenses. You can do other work in the application while the search is running, without waiting for the search to complete. If you start yet another search in Create Lists, a third license will be required, etc.

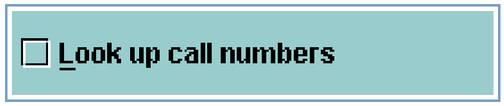
Should there be no available license in your Login Group you will get an error message when you try to launch the search: "*Sorry, currently there are no user licenses available to launch a search process. Would you like to save the search criteria?*". If you answer "Yes" you can save the search criteria and try to start the search at a later time. If you answer "No" the search criteria are discarded.

Wait for searches to complete
A progress bar displays and you cannot do other work in the application while the search is running. This method requires no additional user license.

Prompt to wait for searches to complete
The system will attempt to use an additional license, so that you can do other work in the application while the search is running. If there are no additional user licenses in your Login Group available for the search, you are prompted to run the search as **Wait for searches to complete**.

close window

LOOK UP CALL NUMBERS



This option allows you to expand the call number search when you search for the call number in item or holdings/checkin records. If an item/holdings record has a call number, that call number is used in the search. If the item/holdings record has no call number, the search is expanded to look for a call number in the bibliographic record. If neither the item/holdings record nor the bibliographic record has a call number, the item or holdings/checkin record is not included in the results. When you enable this option, you can also use the call number field as above when you perform subsequent actions, such as **Sort** and **List**, on the review file.

close window

INCLUDE COVERAGE DATABASE INFORMATION

If your library has acquired Electronic Resource Management, you can use the coverage database field information when creating review files. This option enables the ability to include field data from the coverage database in your criteria when using Create Lists.

For additional information, refer to the Innovative Guide and Reference, Page # 105981: Maintaining Coverage Data for Resources

close window

INCLUDE EQUIVALENT 880s

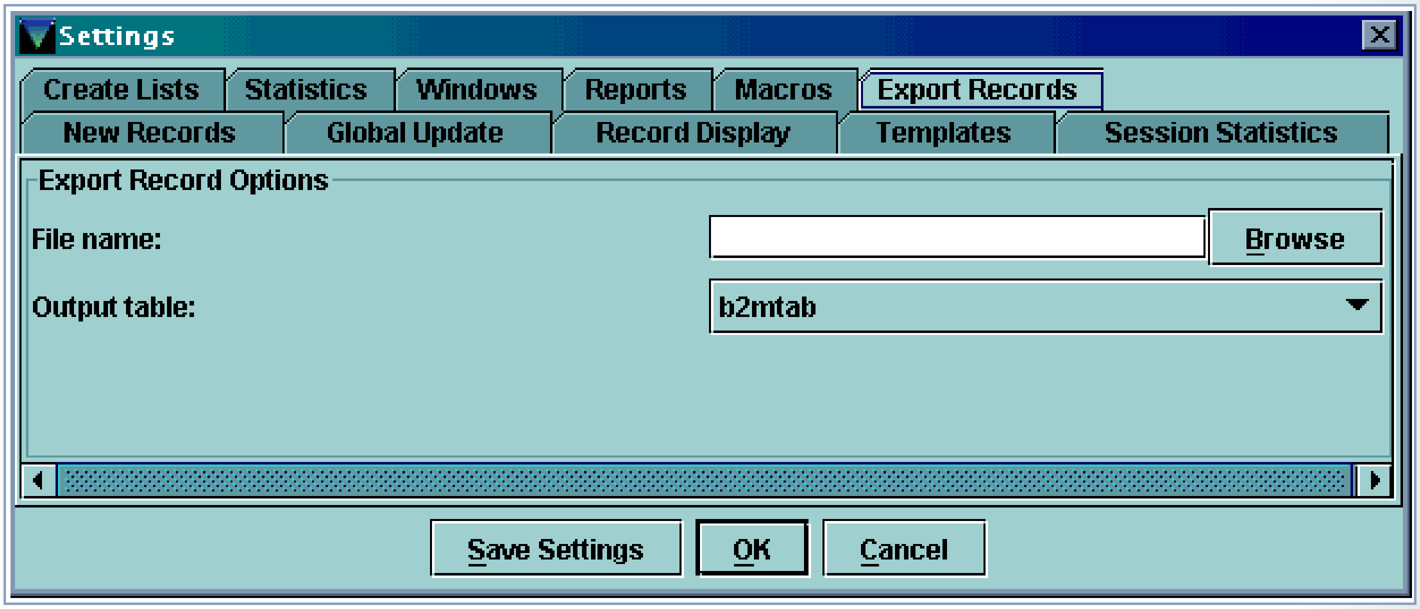
If your library uses 880 fields to store romanized and vernacular characters in your database, select this option to include both main fields and equivalent 880 fields in searches.

When you enable this option, it also applies when you perform subsequent actions, such as sort, list and export, on the review file.

close window

EXPORT RECORDS

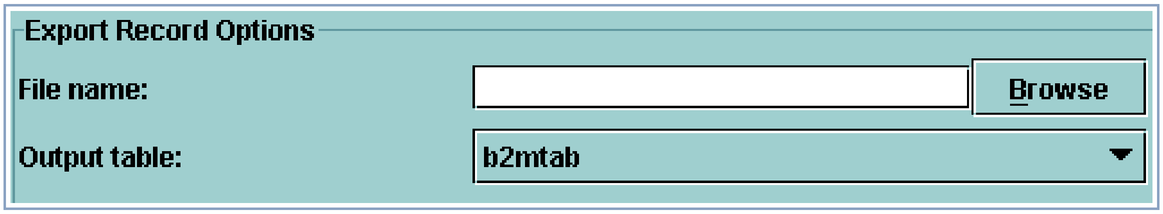
The **Export Records** tab contains default settings for exporting individual bibliographic or authority records from Millennium Cataloging. Note that these parameters can also be set interactively by the user during the export. The following options are available:



NOTE: The record export function is available from all Millennium modules.

close window

EXPORT RECORD OPTIONS



File name
Enter a file name, including the directory and path, to specify an output file for exporting. Alternatively, you can specify a file by choosing **Browse** and selecting an existing file.

Output table
Choose the output load table that defines the mapping of Innovative fixed-length and variable-length fields to MARC fields and subfields when the MARC record is exported.

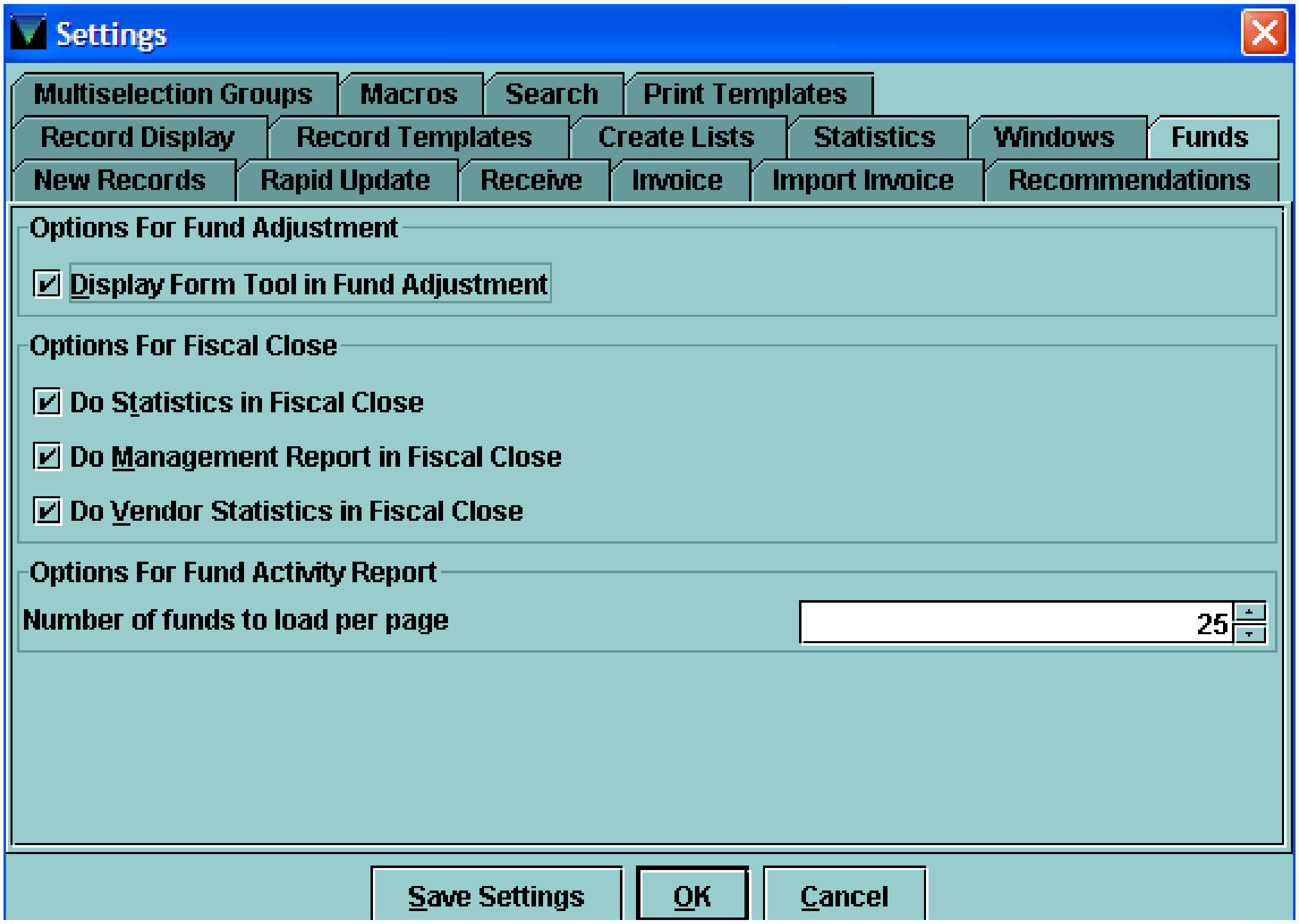
For additional information, refer to the Innovative Guide and Reference, Page # 106001: Exporting an Individual MARC record.

close window

FUNDS

NOTE: To view/change this tab the user needs to be authorized for function 085 (Fund file maintenance).

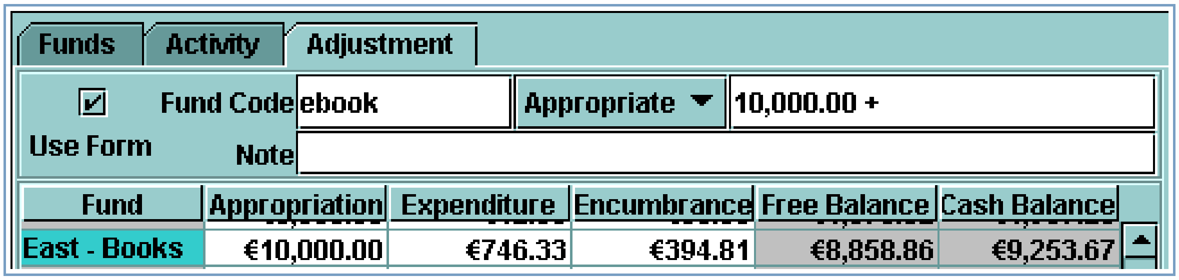
The **Funds** tab contains options for [Fund adjustment]() and for [Fiscal Closing]() in Millennium Acquisitions. The following options are available:



[close window]()

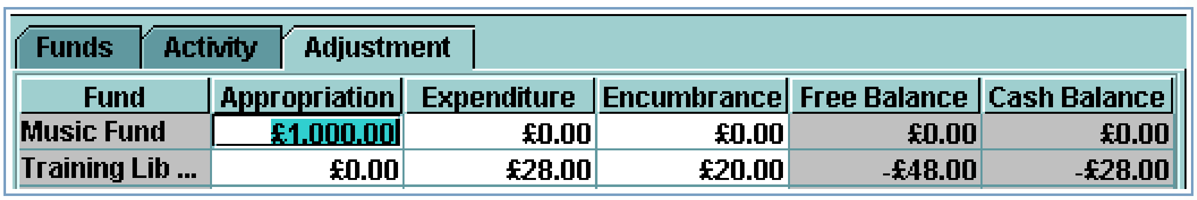
OPTIONS FOR FUND ADJUSTMENT

Display Form Tool in Fund Adjustment
Select this option to enable the **Form Tool** when you edit a fund table. If this option is selected, the form tool appears at the top of the table on the **Adjustment** tab in **Funds** mode.

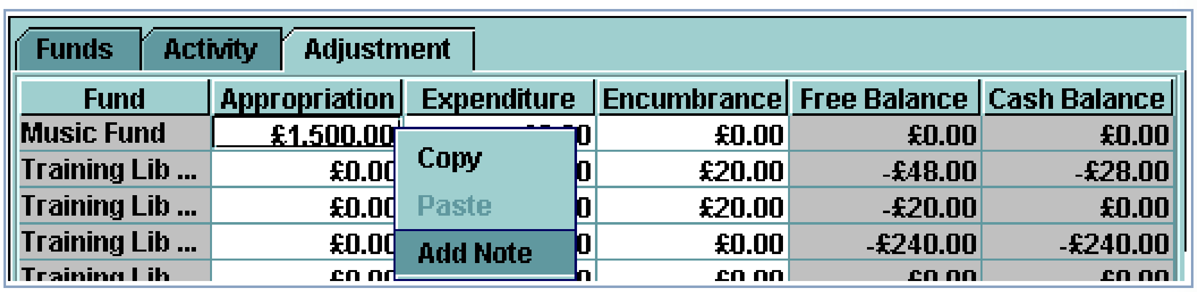


For information on how to use the **Form Tool**, refer to the Innovative Guide and Reference, Page # 105489: [Using the Form Tool for Editing]

If **Display Form Tool in Fund Adjustment** is unchecked, you have to click directly on the Appropriation, Expenditure or Encumbrance fields in the fund table to make your adjustments:

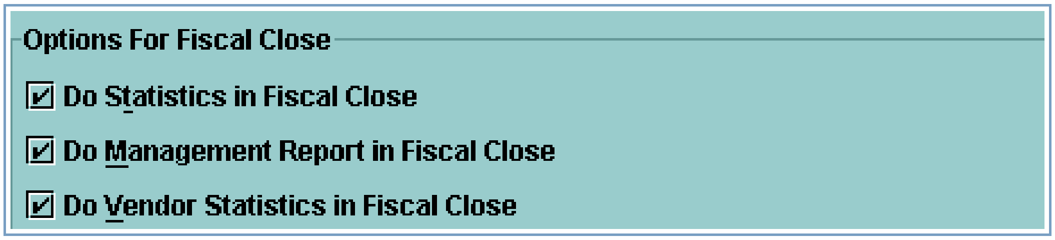


To add a note, right click and select **Add Note** after making the adjustment:



[close window]

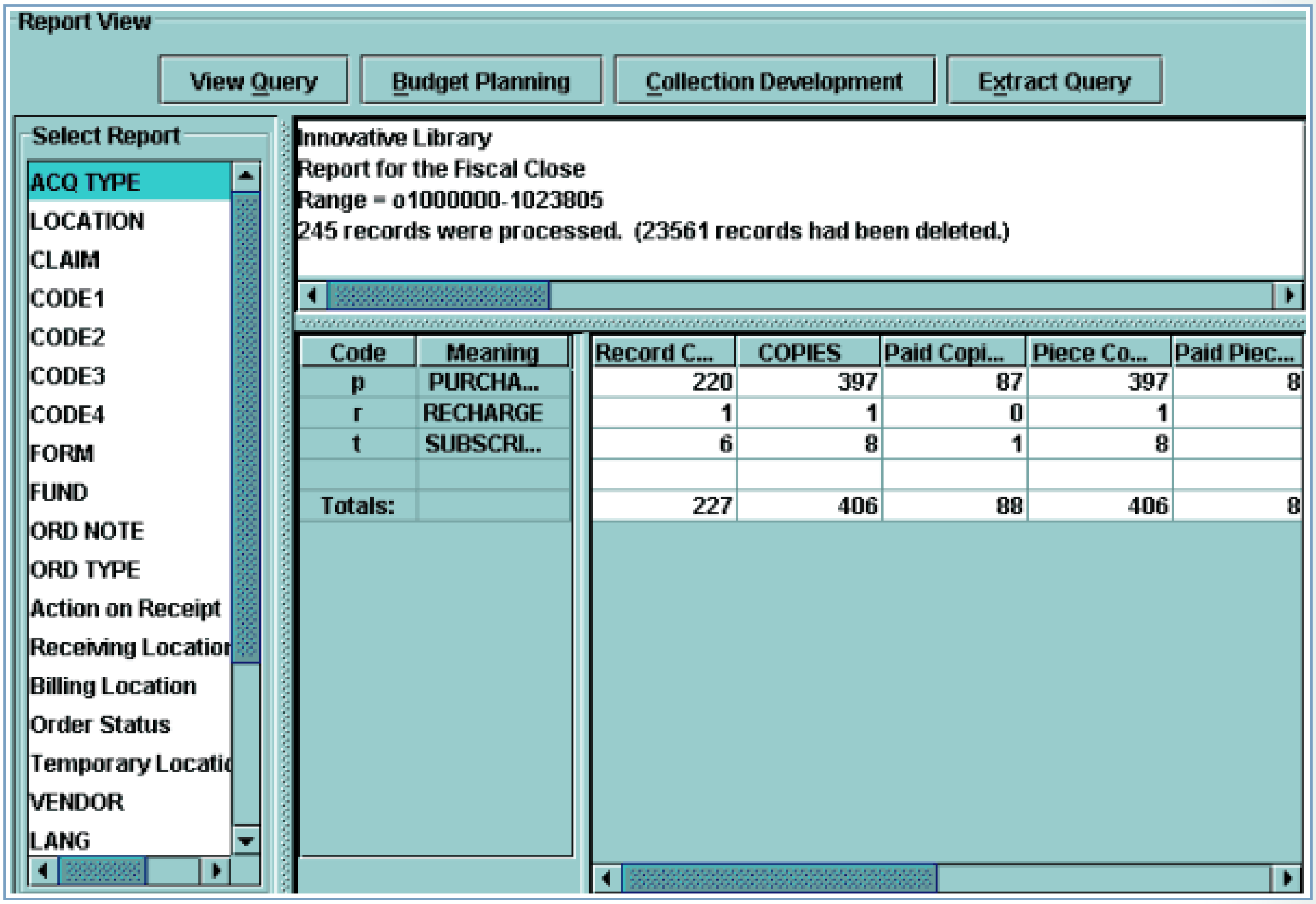
OPTIONS FOR FISCAL CLOSE



These options allow the user to create various types of statistical reports as an integrated part of the Fiscal Close procedure. Note that in creating these reports during Fiscal Close, you do not need to switch modes.

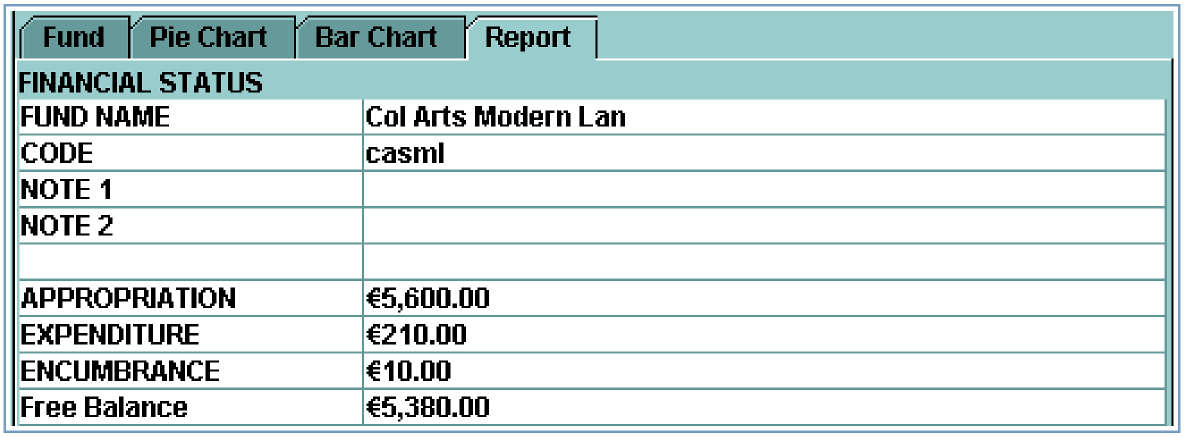
Do Statistics in Fiscal Close
Select this check box if you want to run a statistical report as part of the fiscal close procedure.

Example of a statistical report on order records:



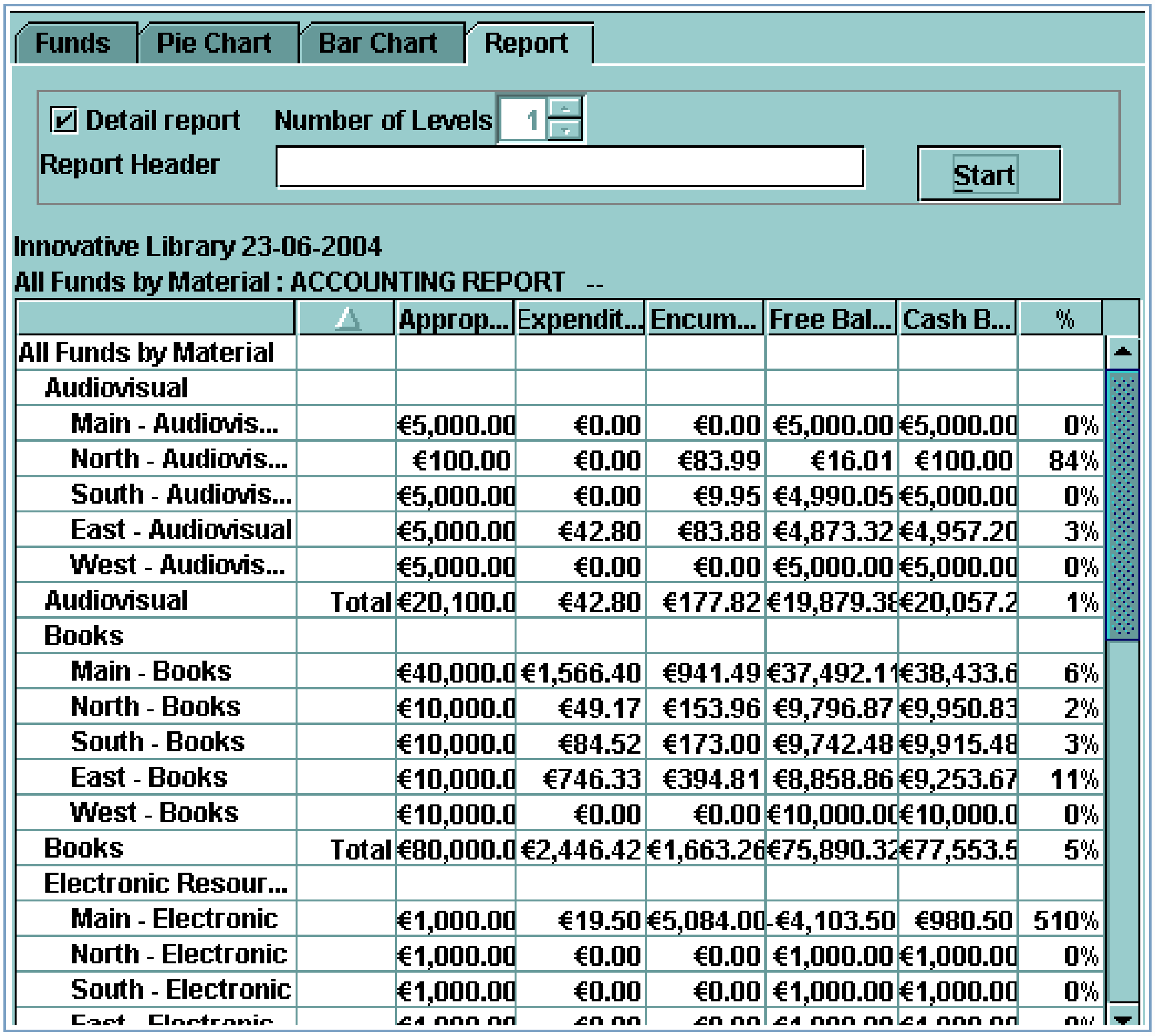
Do Management Report in Fiscal Close
Select this check box to be able to run a management report during the fiscal close procedure.

Example 1: Management report on a single fund:



FUND NAME	Col Arts Modern Lan
CODE	casml
NOTE 1	
NOTE 2	
APPROPRIATION	€5,600.00
EXPENDITURE	€210.00
ENCUMBRANCE	€10.00
Free Balance	€5,380.00

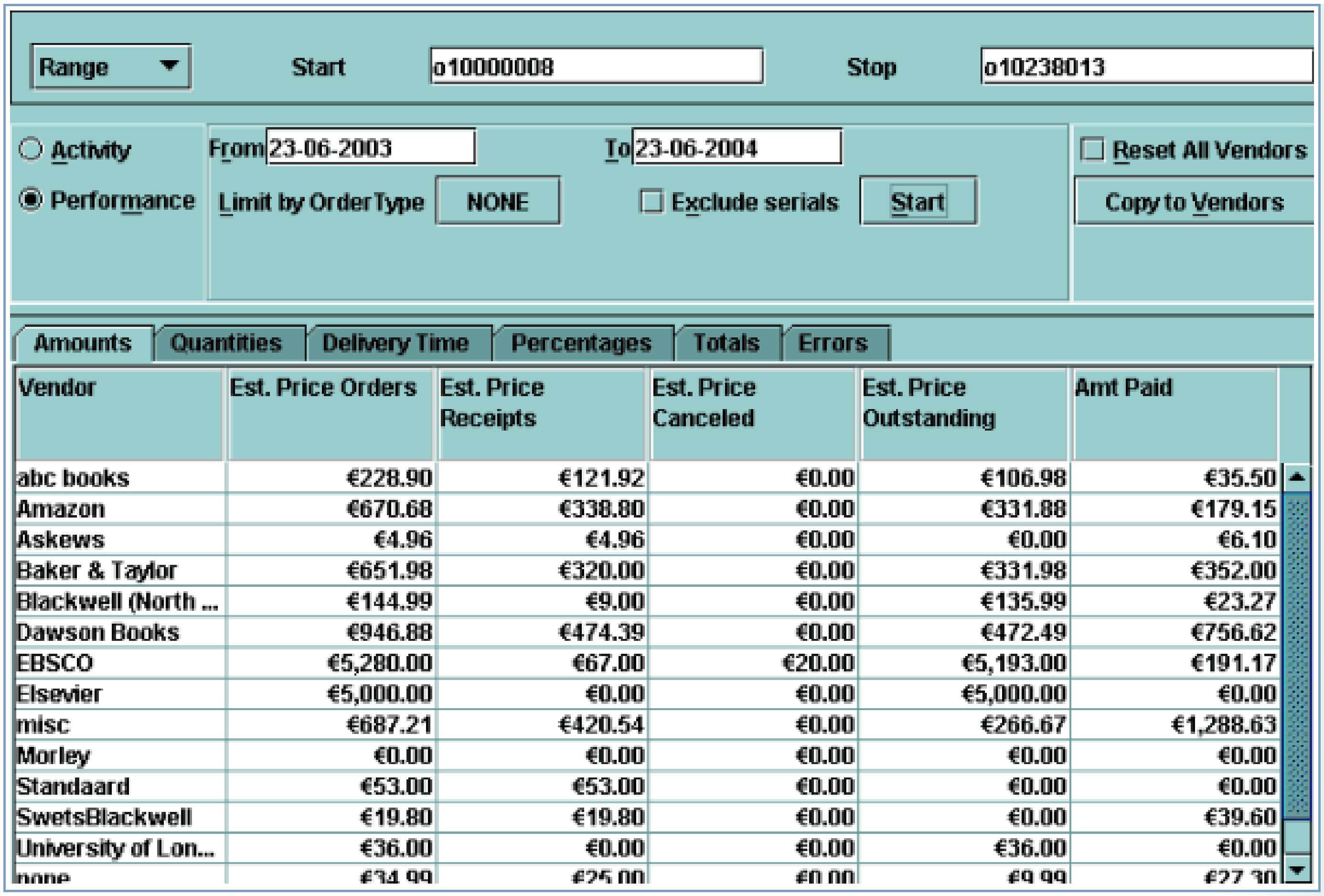
Example 2: Management report on a group of funds:



		Approp...	Expendit...	Encum...	Free Bal...	Cash B...	%
All Funds by Material							
Audiovisual							
Main - Audiovis...		€5,000.00	€0.00	€0.00	€5,000.00	€5,000.00	0%
North - Audiovis...		€100.00	€0.00	€83.99	€16.01	€100.00	84%
South - Audiovis...		€5,000.00	€0.00	€9.95	€4,990.05	€5,000.00	0%
East - Audiovisual		€5,000.00	€42.80	€83.88	€4,873.32	€4,957.20	3%
West - Audiovis...		€5,000.00	€0.00	€0.00	€5,000.00	€5,000.00	0%
Audiovisual	Total	€20,100.0	€42.80	€177.82	€19,879.38	€20,057.2	1%
Books							
Main - Books		€40,000.0	€1,566.40	€941.49	€37,492.11	€38,433.6	6%
North - Books		€10,000.0	€49.17	€153.96	€9,796.87	€9,950.83	2%
South - Books		€10,000.0	€84.52	€173.00	€9,742.48	€9,915.48	3%
East - Books		€10,000.0	€746.33	€394.81	€8,858.86	€9,253.67	11%
West - Books		€10,000.0	€0.00	€0.00	€10,000.00	€10,000.0	0%
Books	Total	€80,000.0	€2,446.42	€1,663.26	€75,890.32	€77,553.5	5%
Electronic Resour...							
Main - Electronic		€1,000.00	€19.50	€5,084.00	-€4,103.50	€980.50	510%
North - Electronic		€1,000.00	€0.00	€0.00	€1,000.00	€1,000.00	0%
South - Electronic		€1,000.00	€0.00	€0.00	€1,000.00	€1,000.00	0%
East - Electronic		€1,000.00	€0.00	€0.00	€1,000.00	€1,000.00	0%

Do Vendor Statistics in Fiscal Close
Select this check box to be able to run a vendor statistics report during the fiscal close procedure.

Example of a vendor statistics report:



Vendor	Est. Price Orders	Est. Price Receipts	Est. Price Canceled	Est. Price Outstanding	Amt Paid
abc books	€228.90	€121.92	€0.00	€106.98	€35.50
Amazon	€670.68	€338.80	€0.00	€331.88	€179.15
Askews	€4.96	€4.96	€0.00	€0.00	€6.10
Baker & Taylor	€651.98	€320.00	€0.00	€331.98	€352.00
Blackwell (North ...	€144.99	€9.00	€0.00	€135.99	€23.27
Dawson Books	€946.88	€474.39	€0.00	€472.49	€756.62
EBSCO	€5,280.00	€67.00	€20.00	€5,193.00	€191.17
Elsevier	€5,000.00	€0.00	€0.00	€5,000.00	€0.00
misc	€687.21	€420.54	€0.00	€266.67	€1,288.63
Morley	€0.00	€0.00	€0.00	€0.00	€0.00
Standaard	€53.00	€53.00	€0.00	€0.00	€0.00
SwetsBlackwell	€19.80	€19.80	€0.00	€0.00	€39.60
University of Lon...	€36.00	€0.00	€0.00	€36.00	€0.00
none	€34.99	€25.00	€0.00	€9.99	€27.30

For additional information, refer to the Innovative Guide and Reference, Page # 106027: Creating Statistical Reports in Fiscal Close

close window

OPTIONS FOR FUND ACTIVITY REPORT

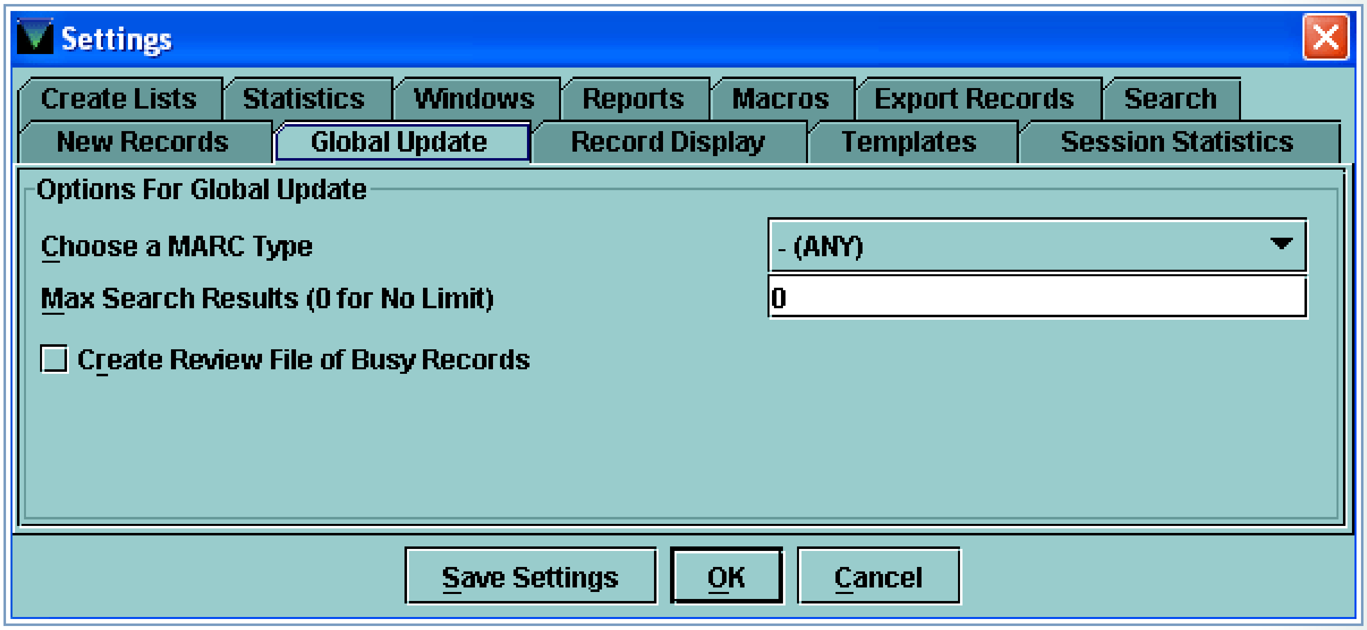
This option allows the user to control the number of funds to display on each page of the Fund Activity Report. For libraries with a large number of funds, this setting can be used as a way to reduce the response time when running the Fund Activity Report. For additional information, refer to the Innovative Guide and Reference, Page # 105490: Generating the Fund Activity Report.

PRINTER FRIENDLY PAGE

close window

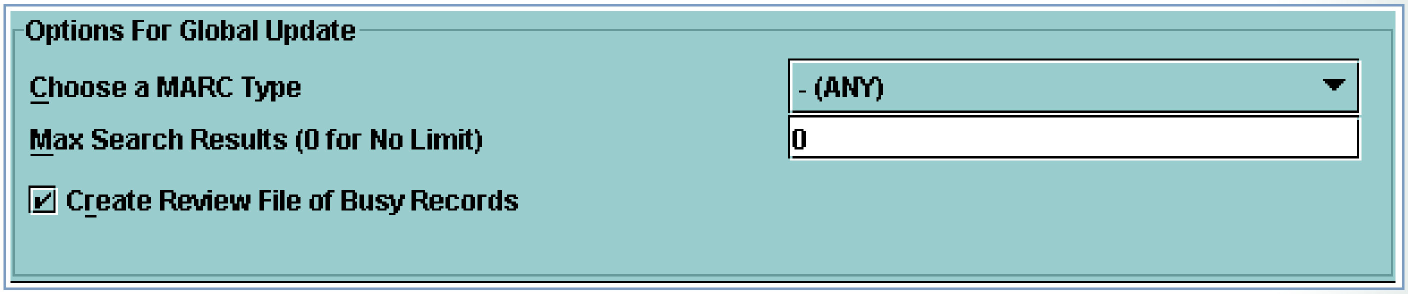
GLOBAL UPDATE

The **Global Update** tab contains the following options for the Global Update mode in Millennium Cataloging and ERM:



close window

OPTIONS FOR GLOBAL UPDATE

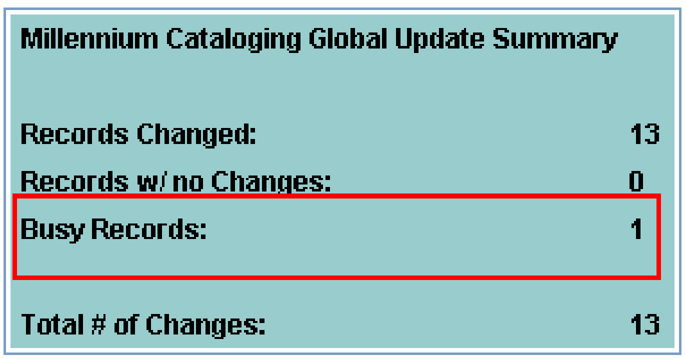


Choose a MARC Type
Specifies the type of bibliographic records that can be updated in **Global Update** mode. Choose the MARC type that applies to your system or (ANY).

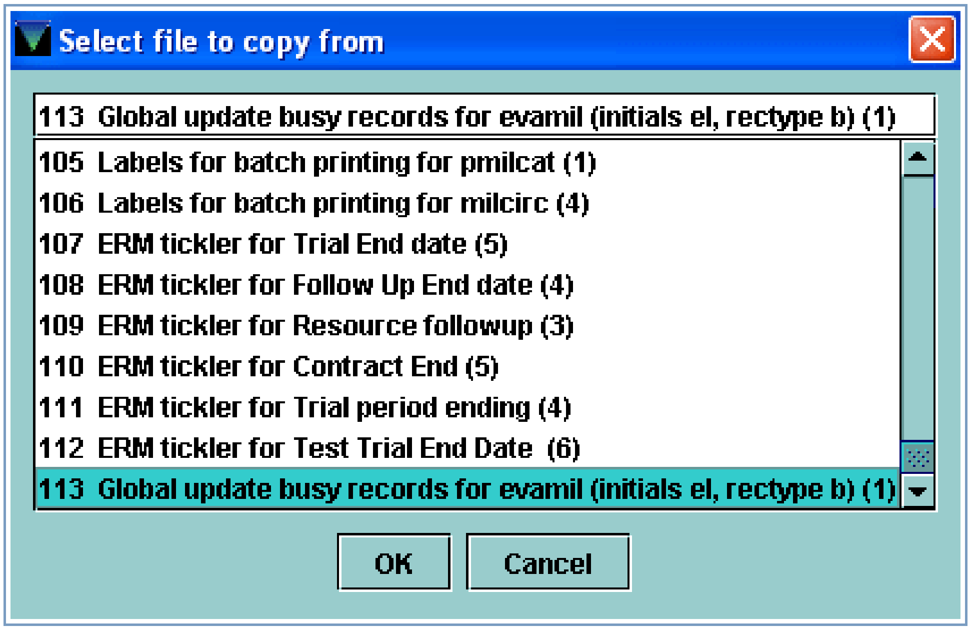
Max Search Results (0 for No Limit)
Specifies the maximum number of records that will be retrieved in a search within the **Global Update** mode. The default value is **0**, which indicates that no limit is imposed.

> Note that this setting controls what is returned in the search, not what is updated. Setting this to 0=No limit still allows you to select a subset of records for processing in **Global Update**.

Create Review File of Busy Records
When performing updates in **Global Update** mode, records that are busied by other processes will not be updated. The system will report the number of busy records after processing the updates:



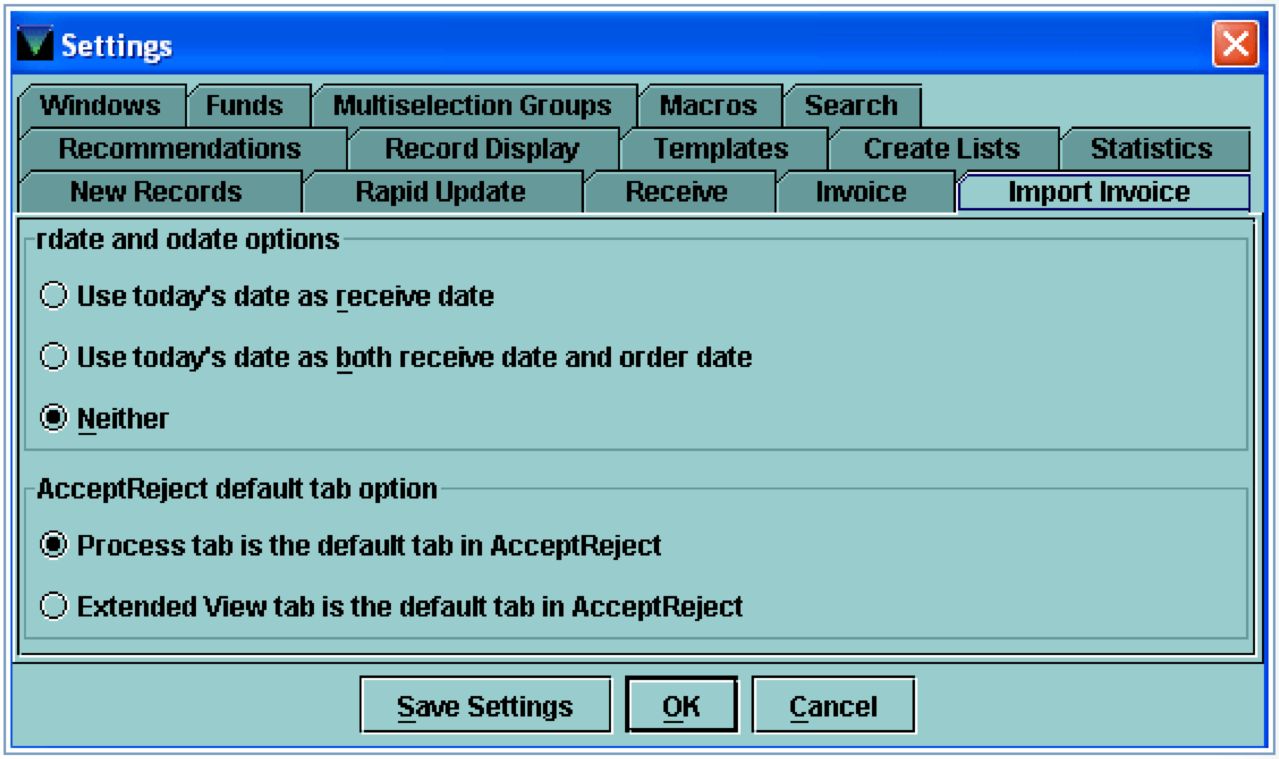
Select this option to create a review file of the busy records. Use the Copy function in **Create Lists** mode to find the review file. It appears among other system generated files at the end of the list.



close window

IMPORT INVOICE

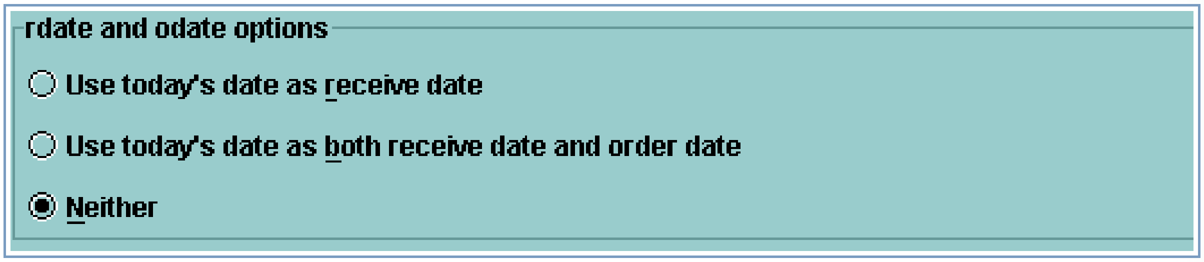
The **Import Invoice** tab contains options for processing invoices electronically in Millennium Acquisitions Import Invoices mode.



NOTE: Electronic invoice processing requires the Extended approval plan interface (Product Code 409) and/or Electronic serials invoicing (Product Code 410).

close window

OPTIONS FOR IMPORT INVOICE



Use today's date as receive date
Select this option to use the date that the invoice is processed as the receive date in the order record.

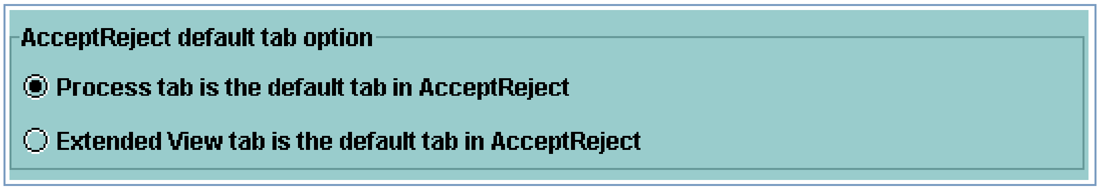
Use today's date as both receive date and order date
Select this option to use the date that the invoice is processed as the order date as well as the receive date.

Neither
Do not update the Receive or Order date fields when processing invoices electronically.

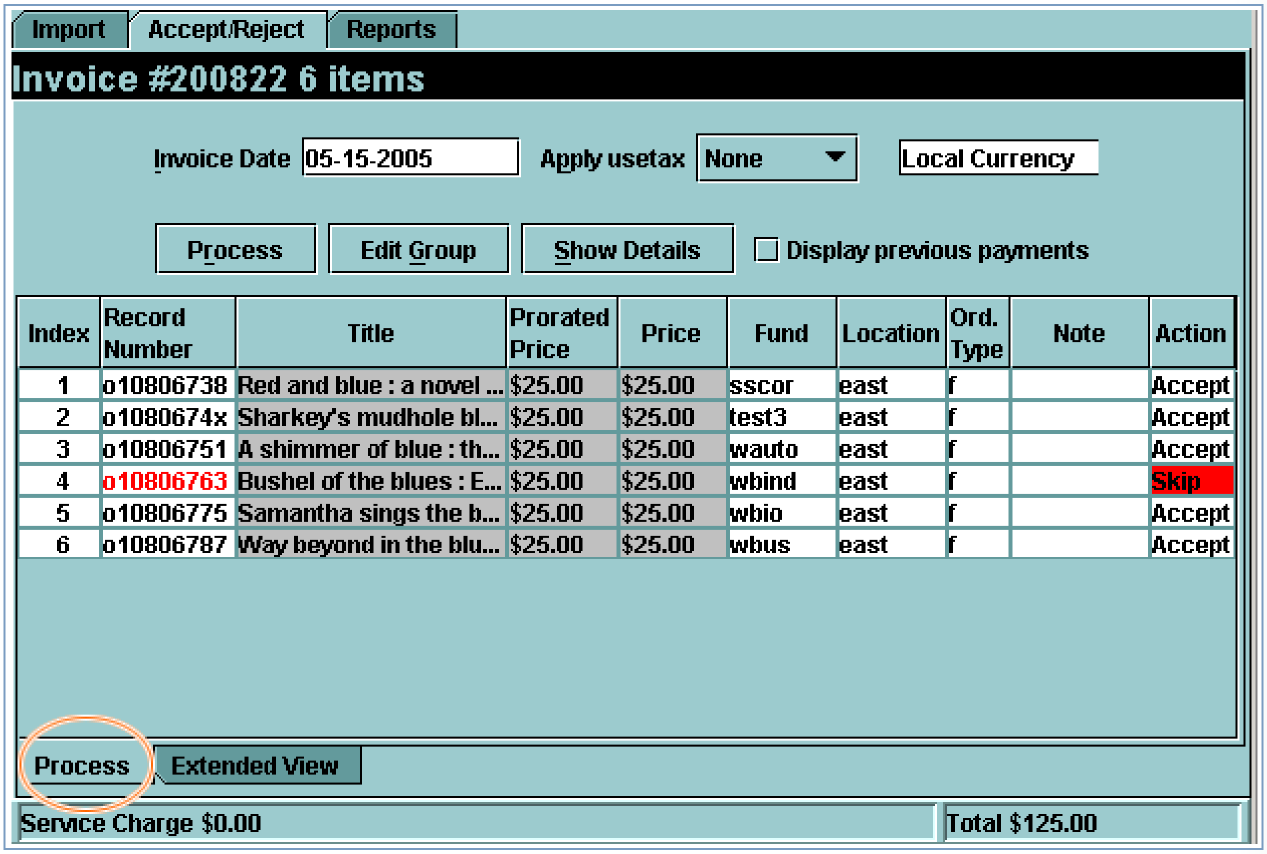
For additional information, refer to the Innovative Guide and Reference, Page # 106113: Loading Records in a Shipment

close window

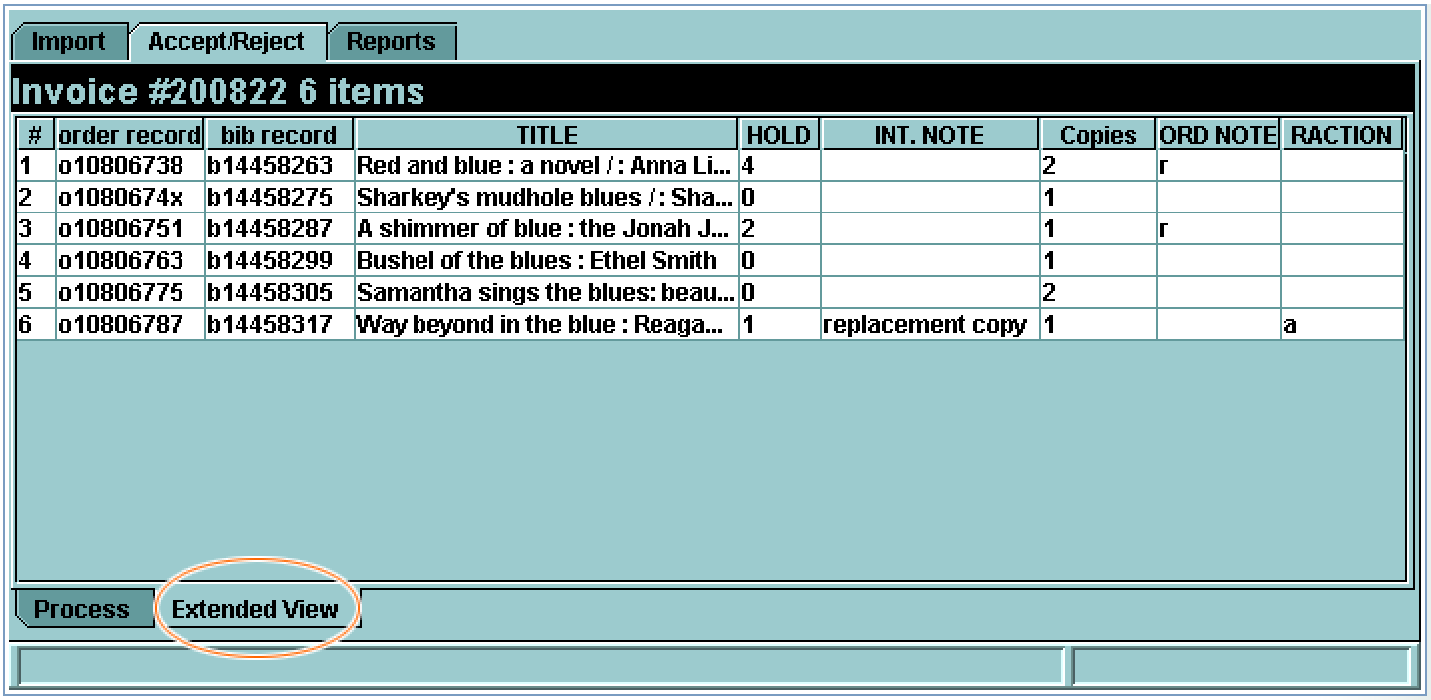
ACCEPT/REJECT DEFAULT TAB OPTION



Process tab is the default tab in Accept / Reject
Select this option if you want to set the *Process* tab as the default display when you select an invoice in the **Accept / Reject** tab.



Extended View tab is the default tab in AcceptReject
Select this option if you want to set the **Extended View** tab as the default display when you select an invoice in the *Accept/Reject* tab.



#	order record	bib record	TITLE	HOLD	INT. NOTE	Copies	ORD NOTE	RACTION
1	o10806738	b14458263	Red and blue : a novel / : Anna Li...	4		2	r	
2	o1080674x	b14458275	Sharkey's mudhole blues / : Sha...	0		1		
3	o10806751	b14458287	A shimmer of blue : the Jonah J...	2		1	r	
4	o10806763	b14458299	Bushel of the blues : Ethel Smith	0		1		
5	o10806775	b14458305	Samantha sings the blues: beau...	0		2		
6	o10806787	b14458317	Way beyond in the blue : Reaga...	1	replacement copy	1		a

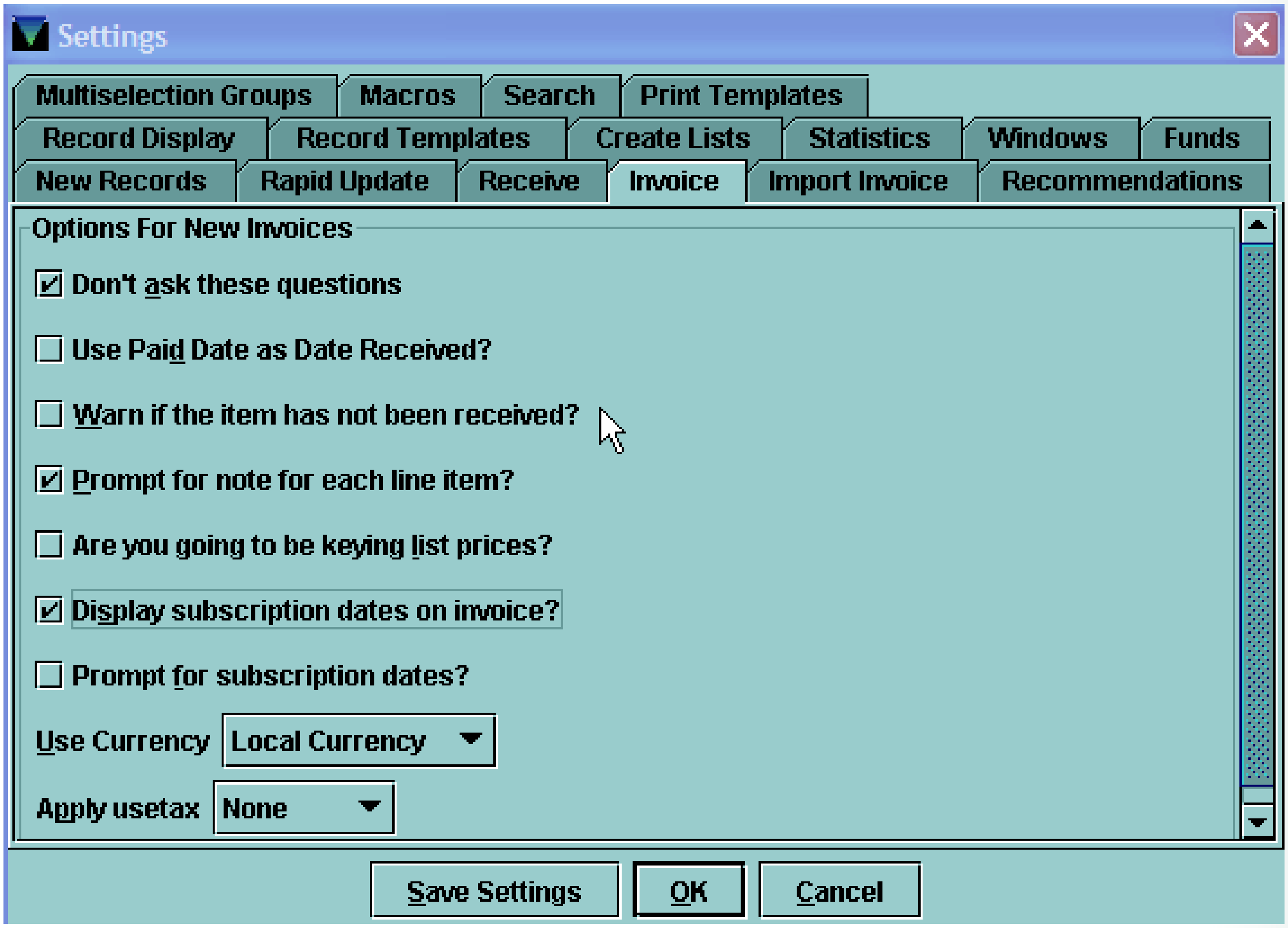
For additional information, refer to the Innovative Guide and Reference, Page # 106021: Accepting and Rejecting Records in a Shipment, and Page # 106425: Using the Extended View in the Accept/Reject Tab.

close window

INVOICE

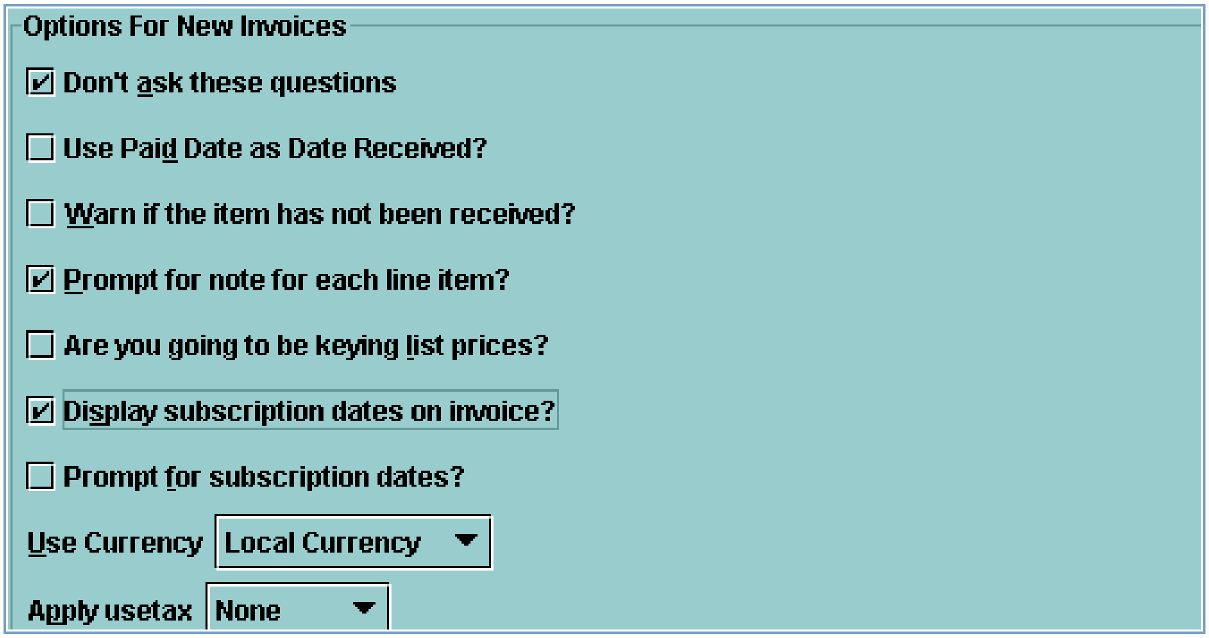
NOTE: To view/change this tab the user needs to be authorized for function 78 (Process invoices).

The **Invoice** tab contains options for creating new invoices in Millennium Acquisitions Invoice mode.



close window

OPTIONS FOR NEW INVOICE



Don't ask these questions
If this check box is *not* selected, a dialog containing the Invoice options listed below will display the first time you enter **Invoice** mode during a session. Select this check box to choose default Invoice options and prevent the dialog from displaying automatically.

Use Paid Date as Date Received?
This option is offered if your Acquisition Option **Combine receiving and invoice entry** is set to "Yes."

If this check box is *not* selected, the system does not change the order record's RDATE (e.g. when receiving and invoice processing are done at different times, for partial receipts, or when processing invoices for prepaid orders).

Warn if the item has not been received?
This option is only offered if you uncheck the **Use Paid Date as Date Received?** setting above.
If this check box is selected, the system warns you when you process an invoice for a record that has not been received. If this check box is *not* selected, the warning is suppressed (e.g. when processing an invoice for a pre-paid order).

Prompt for note for each line item?
If this check box is selected, the system prompts you to add a note as you key the line item. If this check box is *not* selected, you can add a note to the line item, but are not automatically prompted to do so.

Are you going to be keying list prices?
This option is offered if your Acquisition Option **Key both list price and net price on invoice** is set to "Yes."

If this check box is selected, the system allows you to key a list price and a net price (in the Paid column) for each order record. If this check box is *not* selected, the system allows you to key a net price for each order record.

Display subscription dates on invoice?
If this check box is selected, the system automatically displays the *Sub From* and *Sub To* columns during invoicing for entering subscription dates. Note that if this option is not selected, the **Prompt for subscription dates** option below is not available.

Prompt for subscription dates?
This option is offered if you select the option **Display subscription dates** on invoice above. If this check box is selected, the system uses a popup box to remind users to enter subscription dates during the invoicing process.

Use foreign currency amounts?
This option is offered if your Acquisition Option **Library uses foreign currencies** is set to "Yes".

If this check box is selected, the system allows you to toggle between foreign and local currency using the **Tools** menu. When you start the invoice processing, you are prompted to choose a foreign currency. The currencies and rates displayed are from your Foreign Currency Table. If this check box is *not* selected, currency will be keyed in local currency and cannot be converted to foreign currency.

Apply usetax
This option is offered if your Acquisition Option **Library subject to use tax** is set to "Yes" or "Yes (specify rate)". The value entered here will be the default when processing invoices.

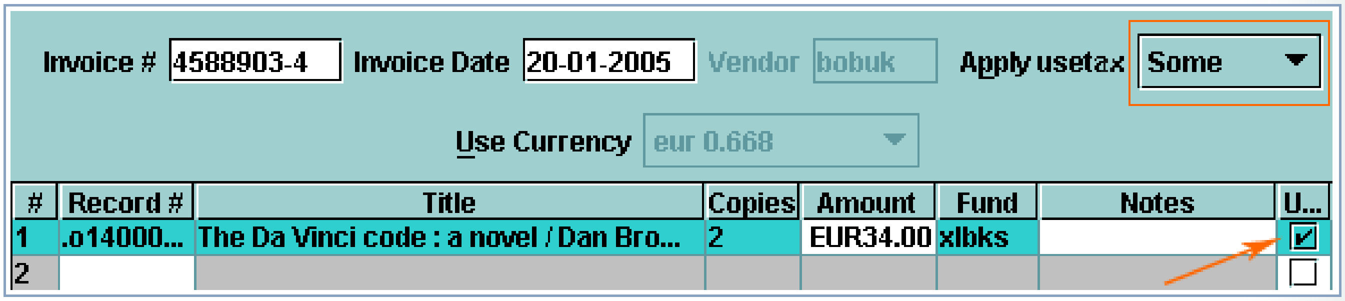
> You can change the default use tax setting on the actual invoice form by choosing an alternate option in the **Apply usetax** pull-down menu.

The following options are available:

None - no use tax is charged for the invoice

All - the use tax rate is applied to all line items on the invoice

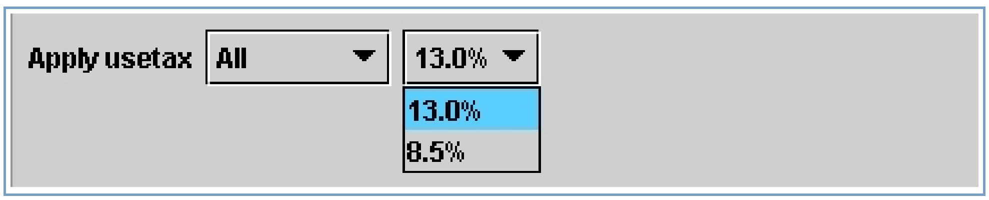
Some - for each line item on the invoice, check the Usetax check box to indicate that use tax should be charged for that item



As Coded - the system checks for a coded field in the order record. If the field is coded with the value for use tax, the line item is charged for use tax. Contact Innovative to set up order record encoding.

For additional information, refer to the Innovative Guide and Reference, Page # 100642: Entering Invoices with Use Tax

Rate
This option is offered if your Acquisition Option **Library subject to use tax** is set to "Yes (specify rate)", and **Apply usetax** is set to "All," "Some," or "As Coded".



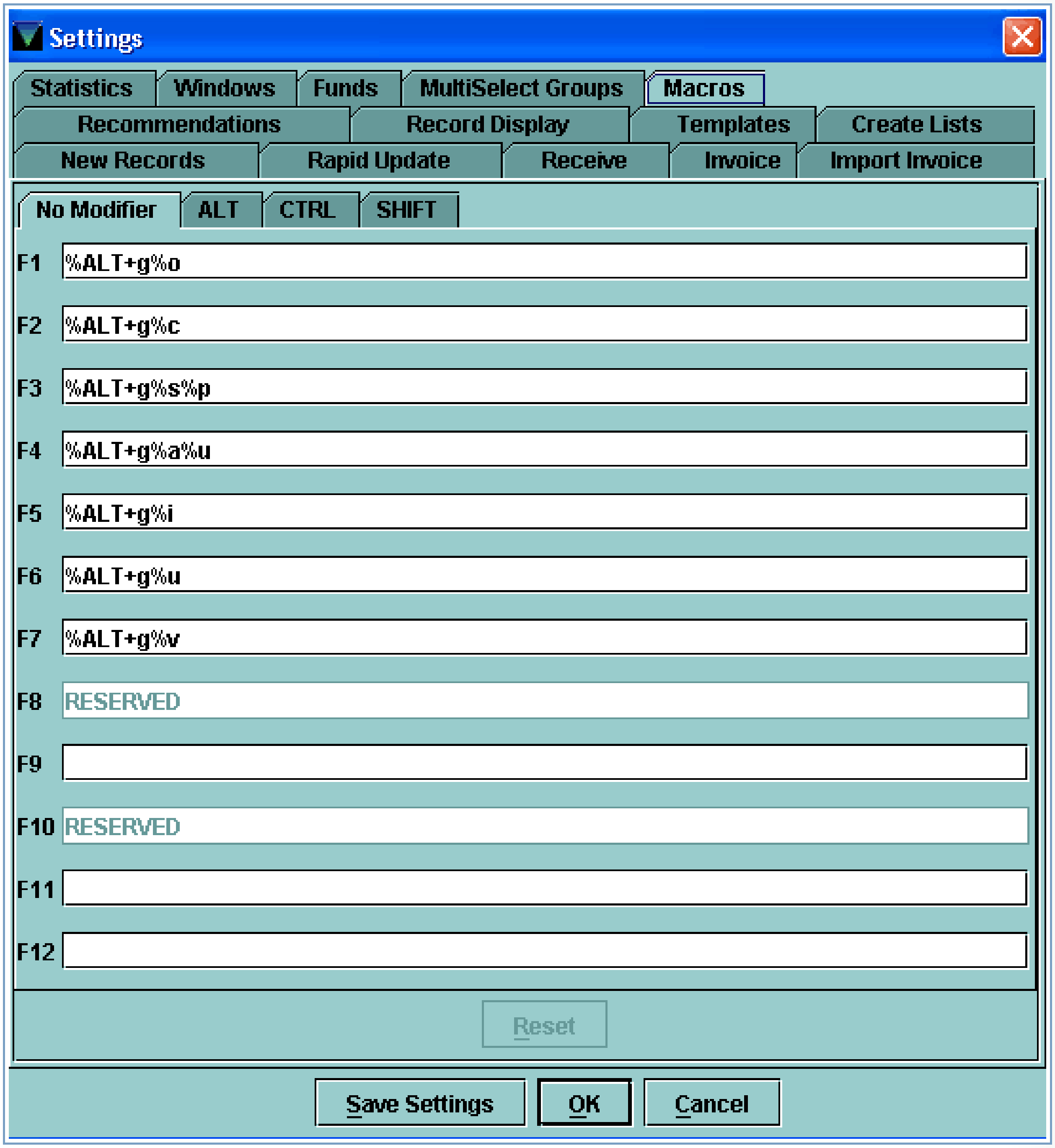
You cannot use more than one usetax rate on a single invoice.

Use tax rates are entered by the library. For further information, refer to the Innovative Guide and Reference, Page # 105535: Maintaining Use Tax Rates

close window

OPTIONS FOR NEW INVOICE

The **Macros** tab allows you to customize the keyboard function keys. The system offers the ability to customize function keys F1 through F12, and also these function keys in combination with Alt, Ctrl, and Shift, e.g. Alt+F1, Ctrl+F1, Shift+F1, etc.



You can create macros for frequently used text strings, diacritic characters that are not available on your keyboard, as well as for keyboard shortcuts to various functions in the Millennium modules.
Note that the system designates a particular function key as "RESERVED" if it is unavailable for customization.

If you have customized your function keys by using macros, you press the function key or function key combination to activate the macro.

The sample screen above represents the default setup for Millennium Acquisitions. In this example, function key F1 has a value meaning "Change the current mode to Orders". The macro uses the keyboard commands offered by underlined characters: %ALT+g%o → Alt-G to open the **Go** menu, then 'o' to get to **Orders** mode.

Using F1 will take you to **Orders** mode from wherever you are in Millennium Acquisitions.

If desired, you can change the defaults and edit the function keys to perform other actions.

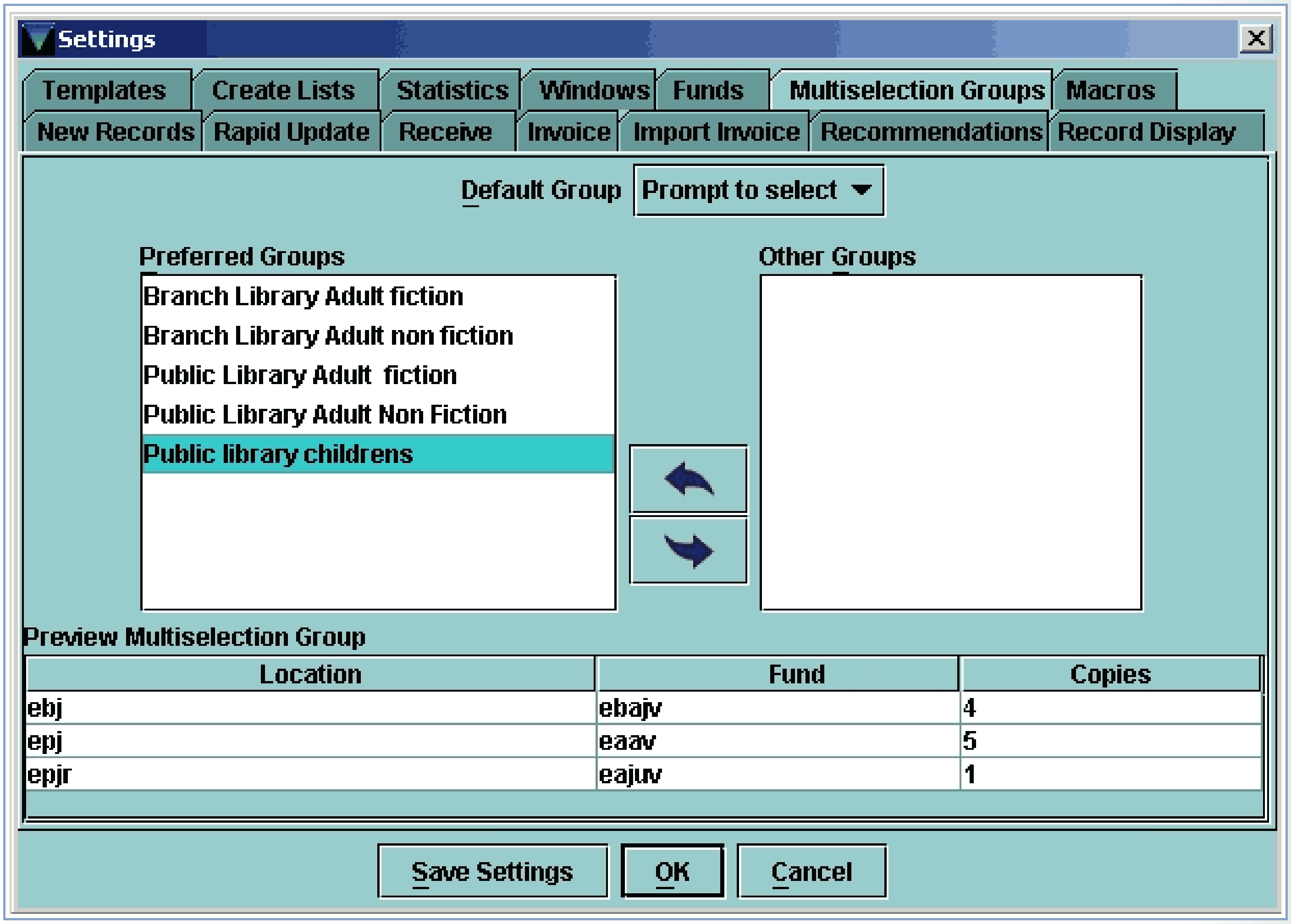
For a complete list of predefined values in all modules, refer to the Innovative Guide and Reference, Page # 100743: Function Keys

For detailed information about customizing function keys, refer to the Innovative Guide and Reference, Page # 105847: Macros Settings

close window

MULTISELECTION GROUPS

The **Multiselection Groups** feature allows you to associate combinations of location codes, fund codes, and number of copies with a login. A screen similar to the following appears:



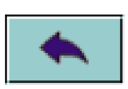
During order record creation, you can use Multiselection Groups as a quick method to order copies for multiple locations.

The first step is to create Multiselection Groups in Millennium Acquisitions as part of the Acquisitions parameters. The Multiselection Groups are created in **Admin| Parameters| Acquisitions| Multiselection Groups**

For additional information about creating Multiselection Groups, refer to the Innovative Guide and Reference, Page # 105932: Maintaining Multiselection Groups

You can then use the Multiselection Groups tab in Settings to specify which groups display for each login. Users can access Multiselection Groups available to them when creating/editing order records in both the **Orders** and **Selection Lists** modes.

Add to or remove from your list of **Preferred Groups** by doing the following:

Add to your list		Select the group in the **Other Groups** list and click the left arrow.
Remove from your list		Select the group in the **Preferred Groups** list and click the right arrow.

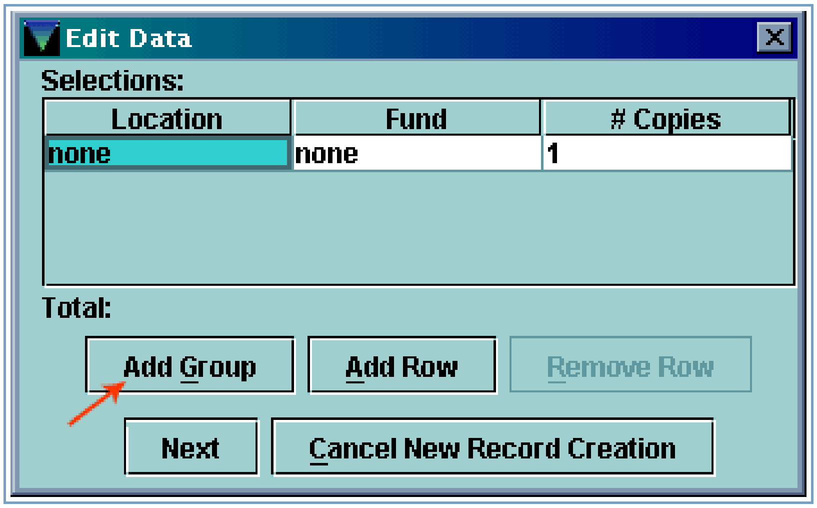
- To move multiple groups at the same time, select the groups by holding down the Ctrl key and clicking on the names. Then choose the appropriate arrow button.
- When you click on a Multiselection Group, you will see the combination of locations, funds, and numbers of copies associated with that group in the **Preview Multiselection Group** table.

From the **Default Group** drop-down menu, select how the **Preferred Groups** will be offered when you use the Multiselection Group feature to add copies:

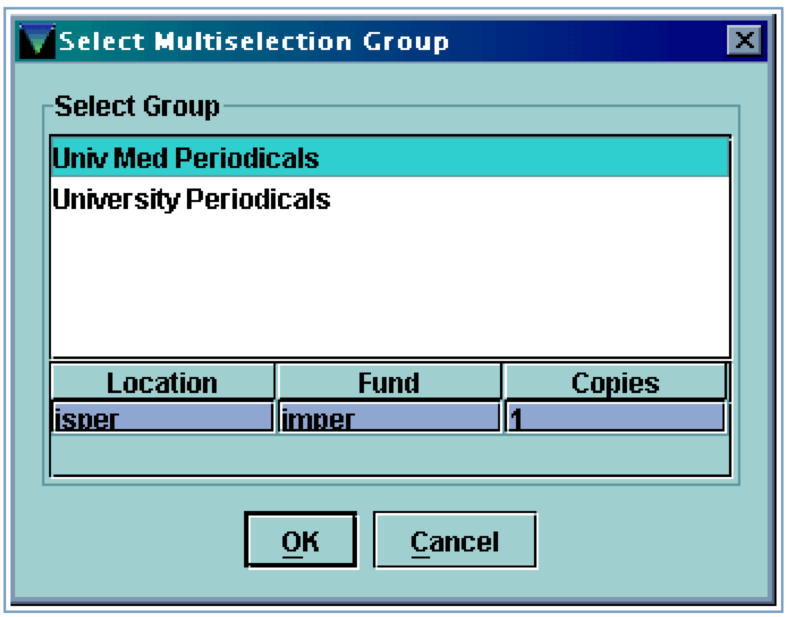
- **Always prompt**: You will always be prompted by a dialog to select a Multiselection Group from the **Preferred Group** list when you add copies to an order.
- **Prompt to select**: You will be prompted by a dialog to select a Multiselection Group from the **Preferred Group** list the first time that you add copies to an order. Afterwards, the Multiselection Group you chose will automatically be used as the default group for the remainder of the session. When starting a new session, you will be prompted again to choose a default group.
- **[name of group]**: Choose a Multiselection Group from the drop-down menu. The Multiselection Group you choose will be the default selection, and you will not be prompted by a dialog to select a group when you add copies to an order.

When you edit location, fund, and copy information, Millennium displays the Edit Data dialog. By choosing the **Add Group** button, Millennium will either automatically populate the table with the combinations of locations, funds, and number of copies defined for that Multiselection Group; or, depending upon the settings for your login, prompt you to choose a Multiselection Group.

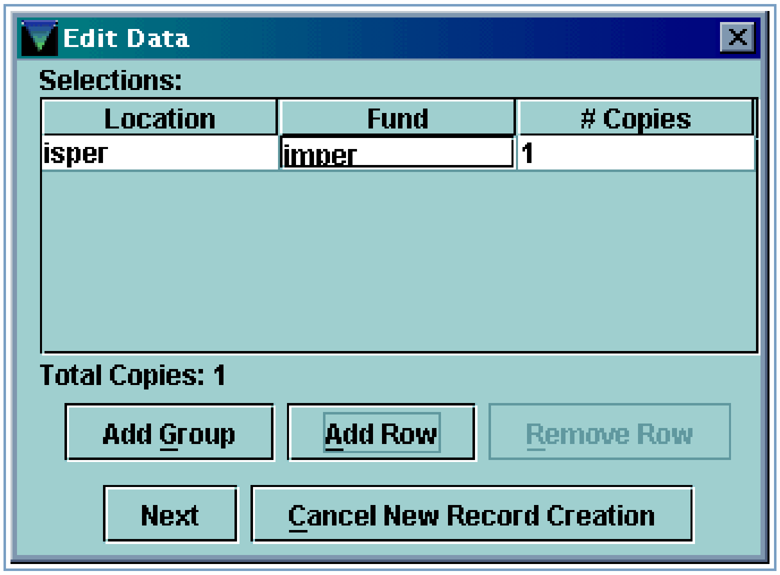
Edit Data dialog:



Example 1: If **Default Group** is set to **Prompt to select** or **Always prompt**, you will be prompted to choose from the groups in the **Preferred Groups** list:



Example 2: If **Default Group** has a Multiselection Group predefined, the system automatically populates the Location, Fund and # Copies fields with the appropriate values:

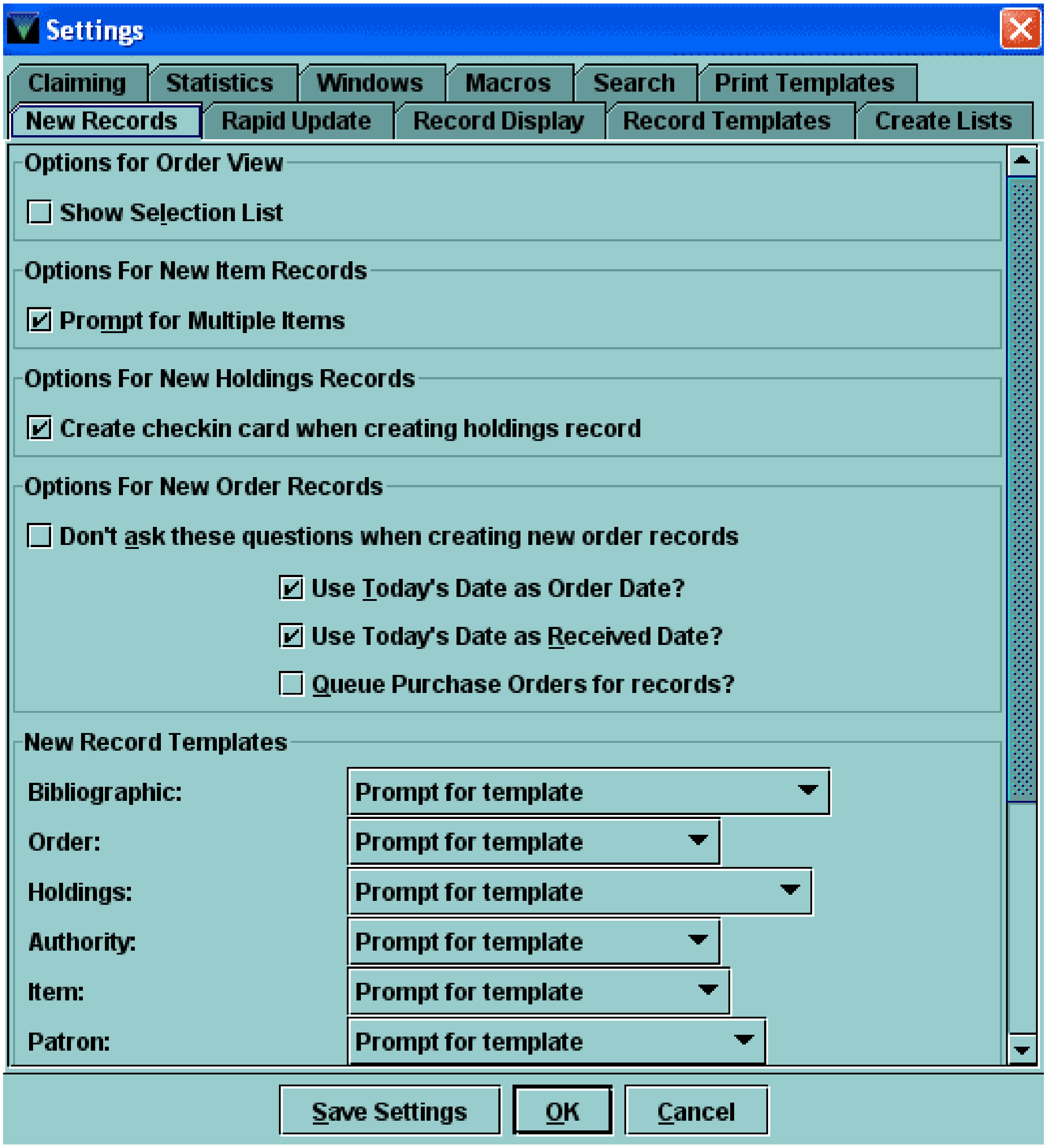


close window

NEW RECORDS

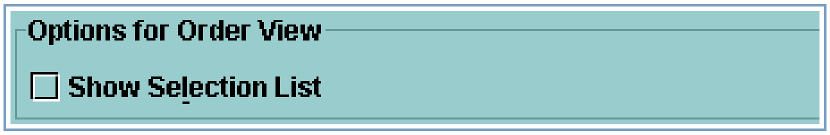
The **New Records** tab provides the following options for creating new records in Millennium:

NOTE: To view/change this tab the user needs to be authorized for function 073 (Key New Records - ACQ). ACQ

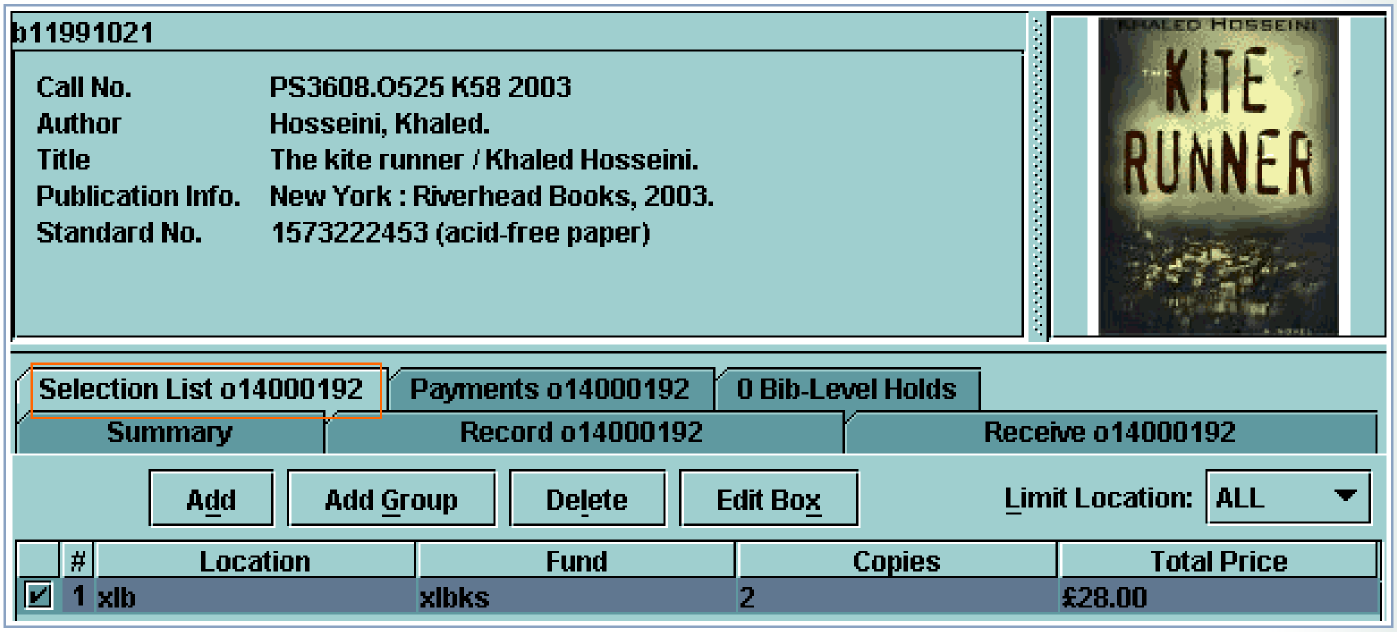


close window

OPTIONS FOR ORDER VIEW



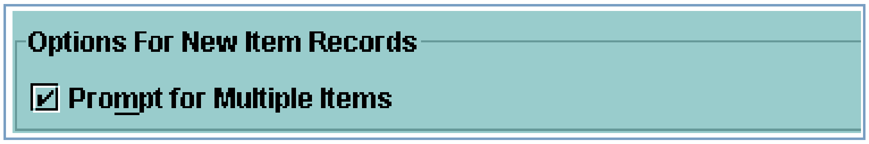
Show Selection List
Select this check box to specify whether the **Selection List** tab will display for order records in **Orders** Mode.



For additional information, refer to the Innovative Guide and Reference, Page # 100800: Using Selection Lists

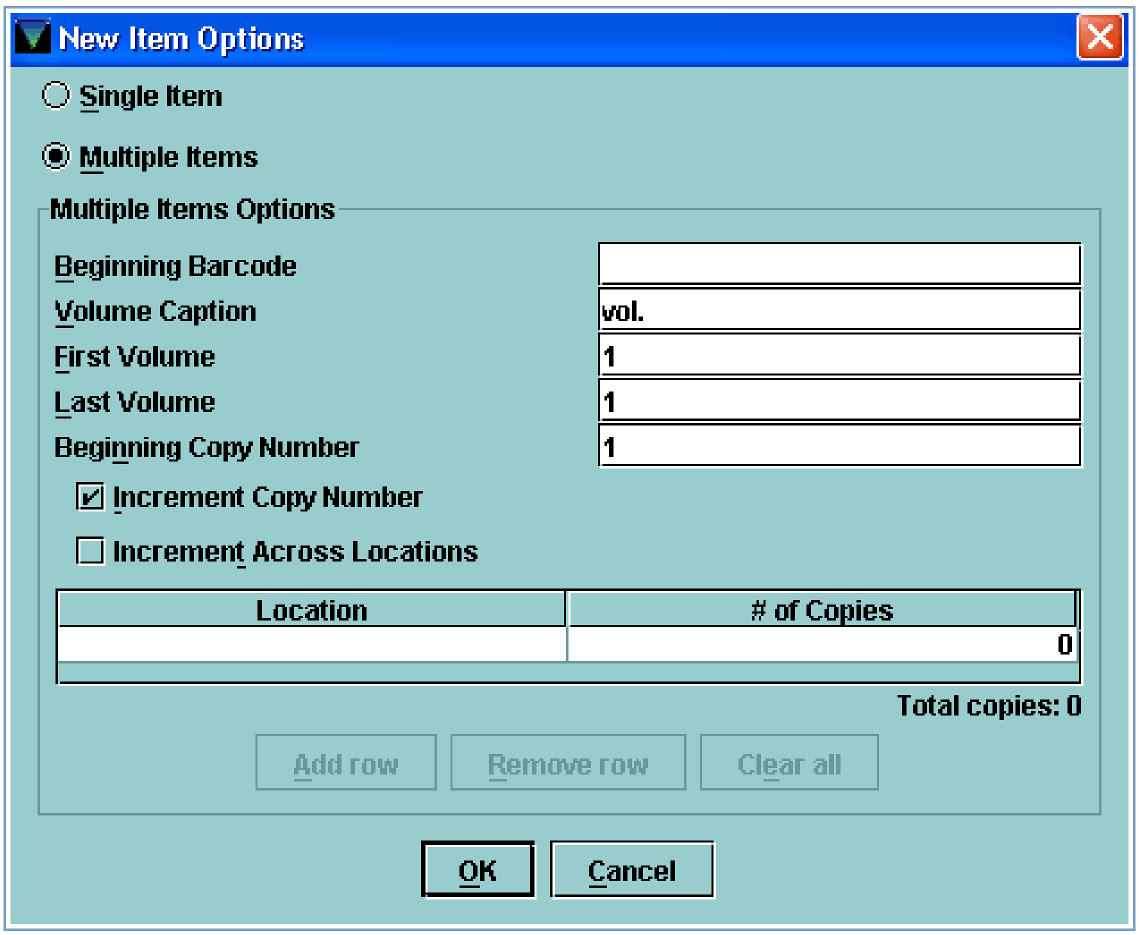
close window

OPTIONS FOR NEW ITEM RECORDS



Prompt for Multiple Items
Select this check box to specify that a prompt for multiple items will display during creation of new item records.

If this option is selected the **New Item Options** dialog box will appear when you start creating items, e.g by clicking on **Attach New Item** on the item summary:



For further information about creating multiple item records, refer to the Innovative Guide and Reference, Page # 104019: [Creating Item Records in Millennium Cataloging]

If this check box is *not* selected, a single item will be created by default.

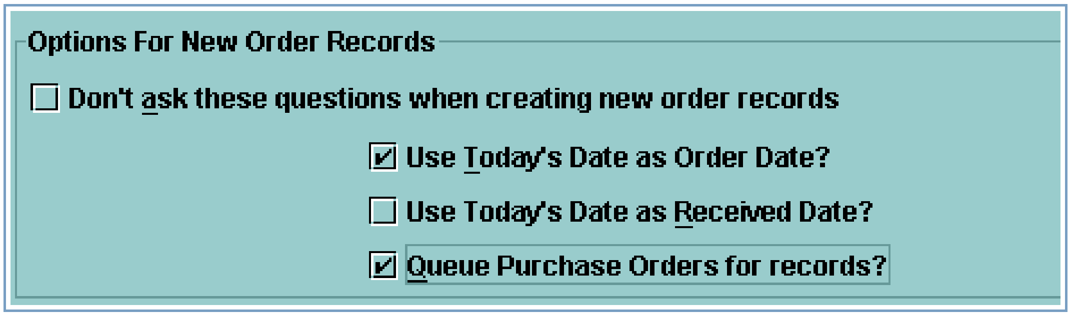
close window

OPTIONS FOR NEW HOLDINGS RECORDS

Create checkin card when creating holdings record
Select this check box to specify that a checkin card should be created when a new holdings/checkin record is created.
If this check box is *not* selected, the system will not automatically prompt the user to create the card. The user can then create the checkin card on demand by using the **Create Card** button on the **Card** tab.

close window

OPTIONS FOR NEW ORDER RECORDS



Don't ask these questions when creating new order records
If this check box is *not* selected, a dialog box containing the options listed below will display the first time you attach a new order record in **Orders**, **Invoice** or **Rapid Receive** mode during a session. Select this check box to choose default options and prevent the dialog from displaying automatically.

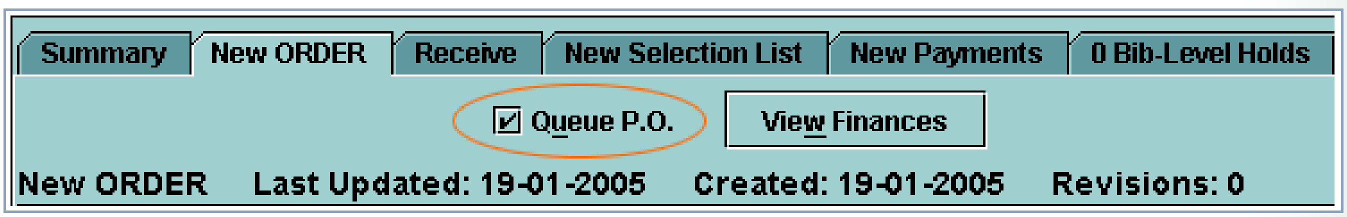
Use Today's Date as Order Date?
If this check box is selected, today's date will be used as the order date. If the check box is *not* selected, you are expected to enter the order date manually in the ODATE (Order date) field when keying the order record.

Use Today's Date as Received Date?
If this check box is selected, today's date will be input as the received date in the order record's RDATE (Received date) field when keying new order records.

This option is useful if you want to create order records retroactively for items already received.

If this check box is *not* selected, the RDATE field will remain blank when keying new order records.

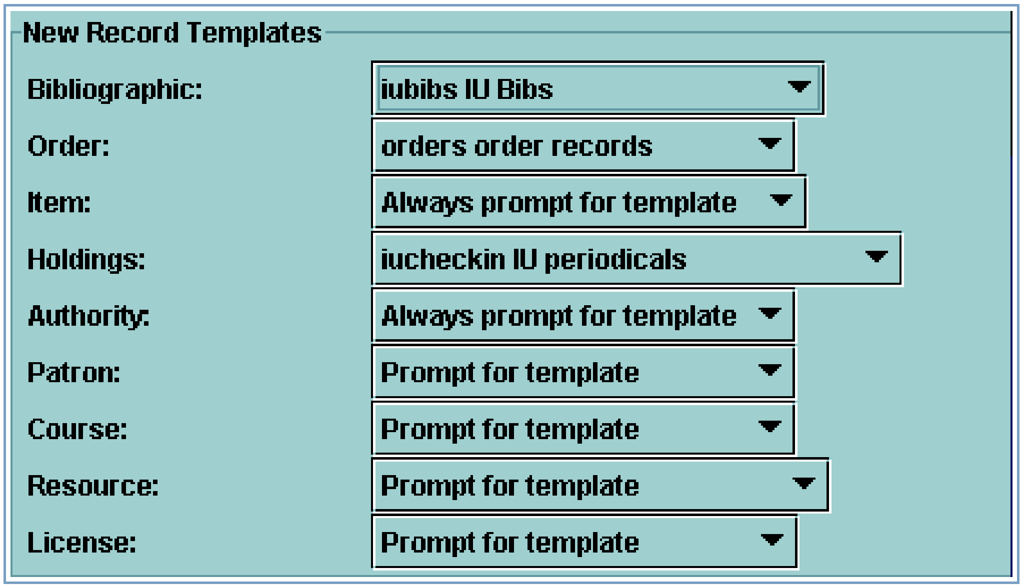
Queue Purchase Orders for records?
If this check box is selected, purchase orders will be queued for printing or electronic transmission when new order records are created. Regardless of this setting, the user can check/uncheck the "Queue P.O" setting on demand when creating order records.



When the **Queue Purchase Orders for records** setting is selected, the Queue P.O. option will be checked by default when keying order records and purchase orders will be queued for printing or electronic transmission unless you uncheck the box.

close window

NEW RECORD TEMPLATES



You can specify default templates for creating the following record types:

- authority
- bibliographic
- checkin
- contact
- course
- item
- license
- order
- patron
- program
- resource
- section
- vendor

To choose a template at the time of record creation, set the template option as **Always prompt for template** or **Prompt for Template**.

> When you select **Prompt for Template**, the system will prompt you for a template the first time you create a record during the session. For subsequent records, the system will remember the most recent template used during record creation. If you want to be prompted each time a new record is created, select the **Always prompt for template** option.

If you have selected a list of Preferred Templates, only those templates will display in the list for each record type.

For information about adding new templates to the system, refer to the Innovative Guide and Reference, Page # 105825: Managing Templates for New Records

close window

RECORDS TO ATTACH TO NEW BIBLIOGRAPHIC RECORDS

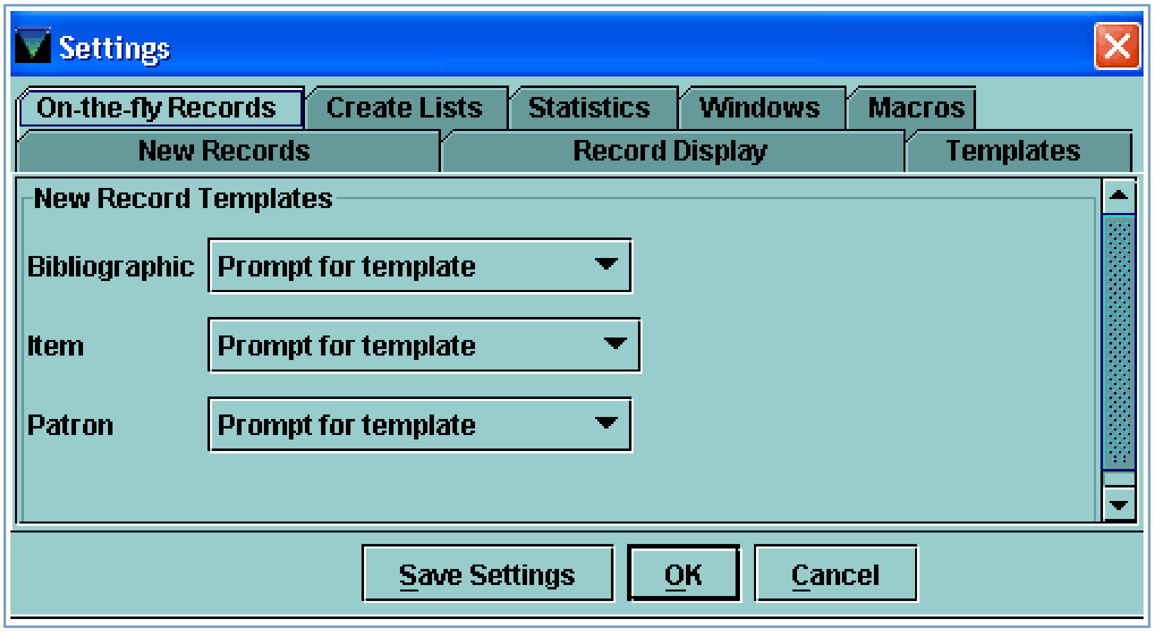
Choose the record types to be automatically attached to new bibliographic records. This setting allows you to create the bibliographic record and its attached record(s) in one step. After finishing keying a new bibliographic record, you will be prompted automatically for the record type(s) selected here.

> If you do not create the attached record (i.e. you click on "Cancel New Record Creation") when automatically prompted, your bibliographic record will not be saved. If you regularly create groups of bibliographic records without attached records, you should uncheck the box for item, order, and checkin, as desired.

close window

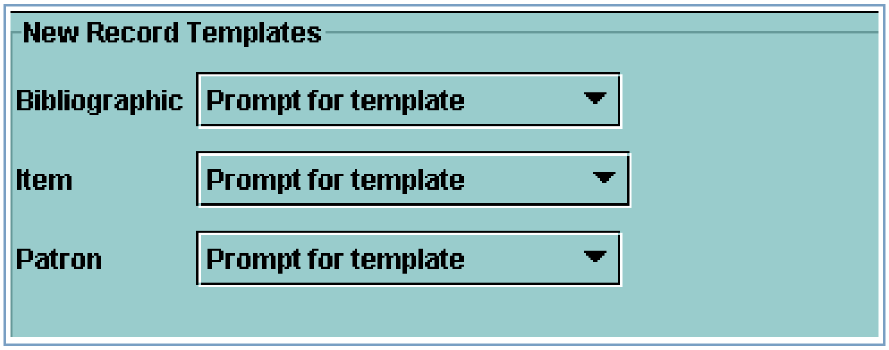
ON-THE-FLY RECORDS

The **On-the-fly Records** tab contains the following options for On-the-fly records in Millennium Circulation and Interlibrary Loans:



close window

NEW RECORD TEMPLATES



You can specify default templates for creating the following record types:

- bibliographic
- item
- patron

If you want to choose a template at the time of record creation, set the template option as **Always prompt for template** or **Prompt for template**.

> When you select **Prompt for template**, the system will prompt you for a template the first time you create a record during the session. For subsequent records, the system will remember the most recent template used during record creation. If you want to be prompted each time a new record is created, select the **Always prompt for template** option.

If you have selected a list of Preferred Templates, only those templates will display in the list for each record type.

NOTE: The settings on this tab override the following Circulation Options:
Item-on-fly : Defaults for on-the-fly Bib records
Item-on-fly : Defaults for on-the-fly Item records
Patron-on-fly : Defaults for on-the-fly Patron records

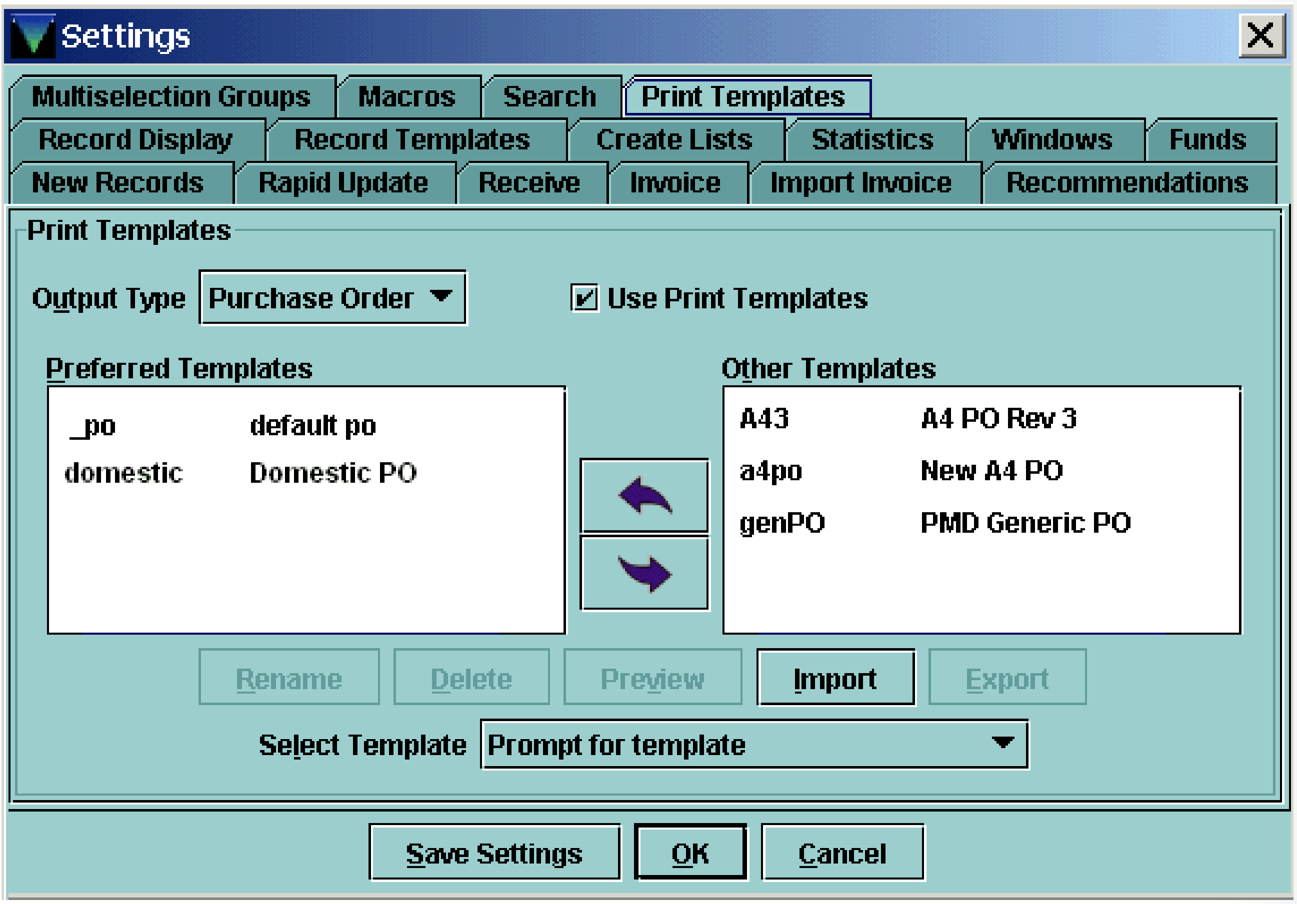
close window

PRINT TEMPLATES

The Print Template feature allows for more flexible and customizable output of specific print jobs. Print Templates also provide enhanced support for printing diacritics and an option to save your print job to disk in PDF format.

With the appropriate editing software (e.g., iReport), you can specify the data that appears on these forms as well as control font selection, layout, and incorporation of graphic images into these forms, which can be printed to a printer or exported to disk.

The Print Template tab contains different output options depending on the module. This example is from Millennium Acquisitions:



Currently, Millennium supports Print Templates for the following output types:

- Purchase Orders
- Monographic Spine Labels
- Hold Slips
- ArticleReach Paging Slips
- Routing Slips
- Transit Slips

Output Types Vary by Module

Only the types of templates that are appropriate to the module will display in the **Print templates** tab when accessed for that login:

Module	Templates that display
Acquisitions	Purchase order Routing slip Spine label

Administration	All output types
ArticleReach	ArticleReach paging slip
Cataloging	Routing slip Spine label
Circulation	Hold slip INN-Reach transit slip - INN-Reach libraries only Spine label Transit slip
ERM	Routing slip
ILL	Hold slip INN-Reach transit slip - INN-Reach libraries only Spine label Transit slip
Serials	Routing slip Spine label

Enabling Print Templates

The first step is to enable Print Templates in D > Database maintenance options in the character-based system:

```
40 > Enable Print Templates..................................YES
```

After enabling in the system option mentioned above, Print Templates can be implemented on a login by login, output by output basis. For example, one user may check the "**Use Print Templates**" box for output type "Spine labels" only. Print Template administration is managed very much like it is for Record Templates. The template concept allows the library to give users printing choices that are appropriate for their work.

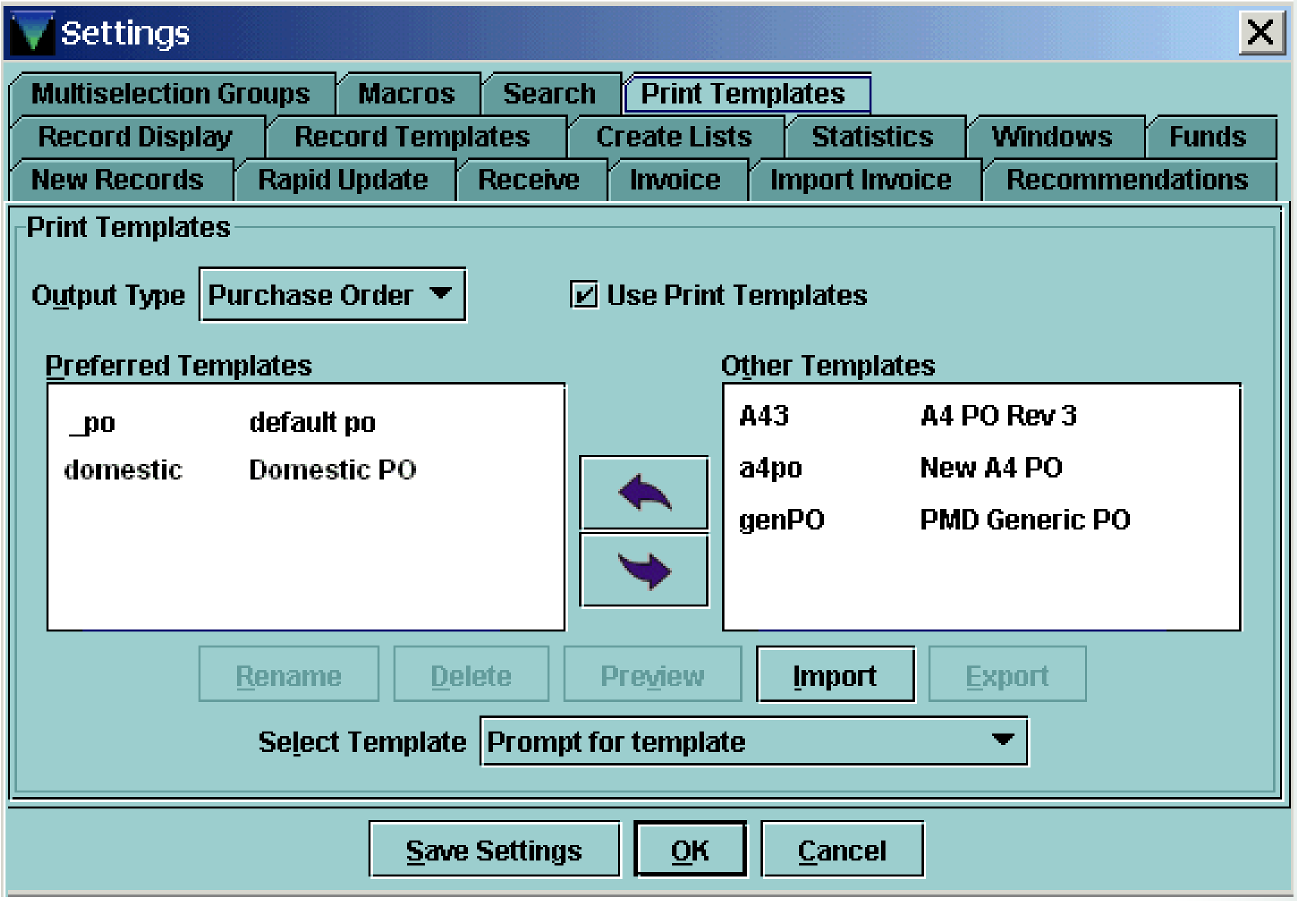
For information about printing in Millennium using Print Templates, refer to the Innovative Guide and Reference, Page # 107521: Printing With Print Templates

close window

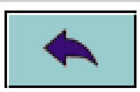
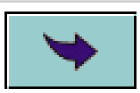
PREFERRED/OTHER TEMPLATES

Follow the steps below for maintaining a list of Preferred Print Templates for your login

1. Choose the Print Templates tab from Admin | Settings.



2. Choose the Output type (e.g., Purchase Orders, Monographic Labels, etc.) from the Output Type drop-down.
3. Make certain that the Use Print Templates box is checked.
4. Add to or remove from your list of Preferred Templates for the selected output type by doing the following:

Add to your list		Select the template in the Other Templates list and click the left arrow.
Remove from your list		Select the template in the Preferred Templates list and click the right arrow.

5. To move multiple templates at the same time, select the templates by holding down the Ctrl key and clicking the templates' names. Then choose the appropriate arrow button.
6. When you have finished managing templates, choose OK to save the settings for the current session only. To save your preferred templates lists for the current and subsequent sessions, choose Save Settings, then choose OK.

Selecting a Default Template for the Login

The user's default template is selected from those in the Preferred Templates list with the **Select Template** drop-down; you can select a specific template for the login or one of the following options:

Prompt for Template

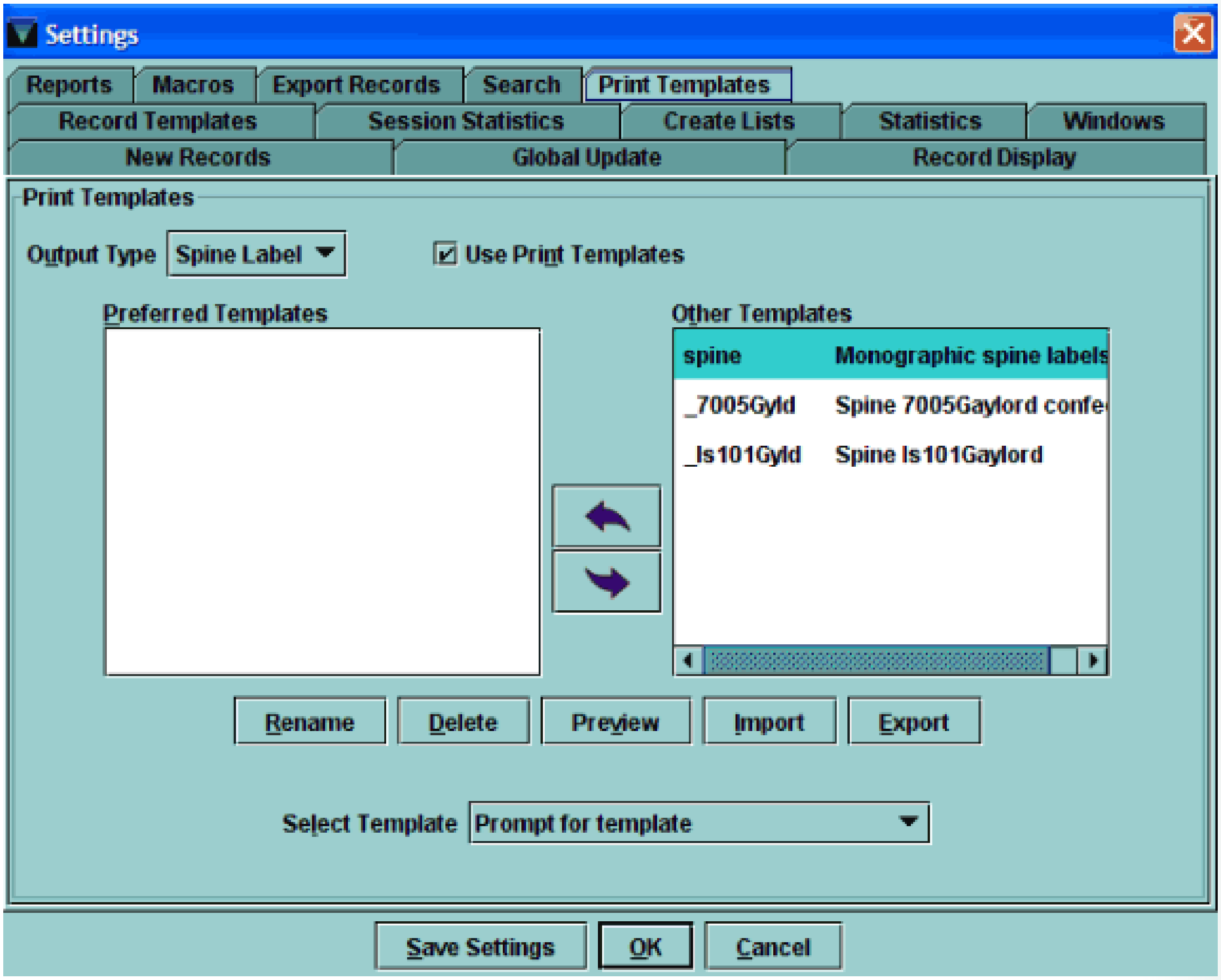
The user is asked to choose a template the first time he or she prints. This template is used for the rest of the Millennium session.

Always Prompt for Template

The user is asked to choose a template every time he or she prints.

close window

TEMPLATE MAINTENANCE



To maintain Print Templates, the following authorizations are required:

- 282|Preview print templates
- 283|Update print templates tab
- 284|Import/export print templates
- 285|Delete print templates

To customize a template, a user would export an existing template from the Millennium server to their PC. This will allow the user to start with a template that already has the appropriate data library defined and available for dragging and dropping. Once the template has been modified using iReport, the new template may be imported back into Millennium.

Exporting Print Templates

To export a template, highlight it in the list and click the **Export** button. A folder selection pop-up window will open; find and highlight the folder where you want to save the template. Click the **Choose a directory button** to close the pop-up window and export the template to the folder path displaying in the "File Name" input box.

Note that it is not possible to choose a file name for the template files, only a folder. Exported files will have the names with which they were imported.

Editing Print Templates

Print Templates may be customized for local needs using a third party freeware product called iReport from JasperSoft Corp. (Some limited customization is also possible using a text editor such as Notepad). For information about customizing Print Templates using iReports, refer to the Print Templates Wiki.

Importing Print Templates

After editing and saving the template in the third party application, click the **Import** button. In the file selection pop-up window, find and highlight the template file to import, as well as any associated graphics files. Click **Open**.

You will be prompted for a Name and Description for your templates. "Name" is the short label (max. 10 characters); "Description" can be a longer descriptive text (max. 25 characters). When importing a print template, you cannot use a name that is already in use by an existing template. In order to reuse a name, you must rename or delete the existing template.

Previewing Print Templates

You can view a template by selecting the template from the Preferred Templates or Other Templates list and then clicking Preview. The template displays in a separate window.

NOTE: Be careful to import the image file at the same time if your template uses one (e.g. the library logotype embedded in the template). Multiple files can be selected by using the Shift or Control keys while clicking on the file names. Errors like "Failed to create preview" or "The document was rendered but could not be printed." will occur if your template contains references to a graphic, but the graphic file was not imported with the template file.

Renaming Print Templates

You can rename a template by selecting the template from the Preferred Templates or Other Templates list and then clicking **Rename**. You are then prompted to enter a name of up to 10 characters and a description of up to 25 characters for the template. Both name and description can contain standard alphanumeric characters only and cannot contain the underscore character.

Deleting Print Templates

You can delete a template by selecting the template from the Preferred Templates or Other Templates list and then clicking **Delete**.

NOTE: Deleting a Print Template will only remove it from Millennium, not from the folder where it is currently stored on your PC or network.

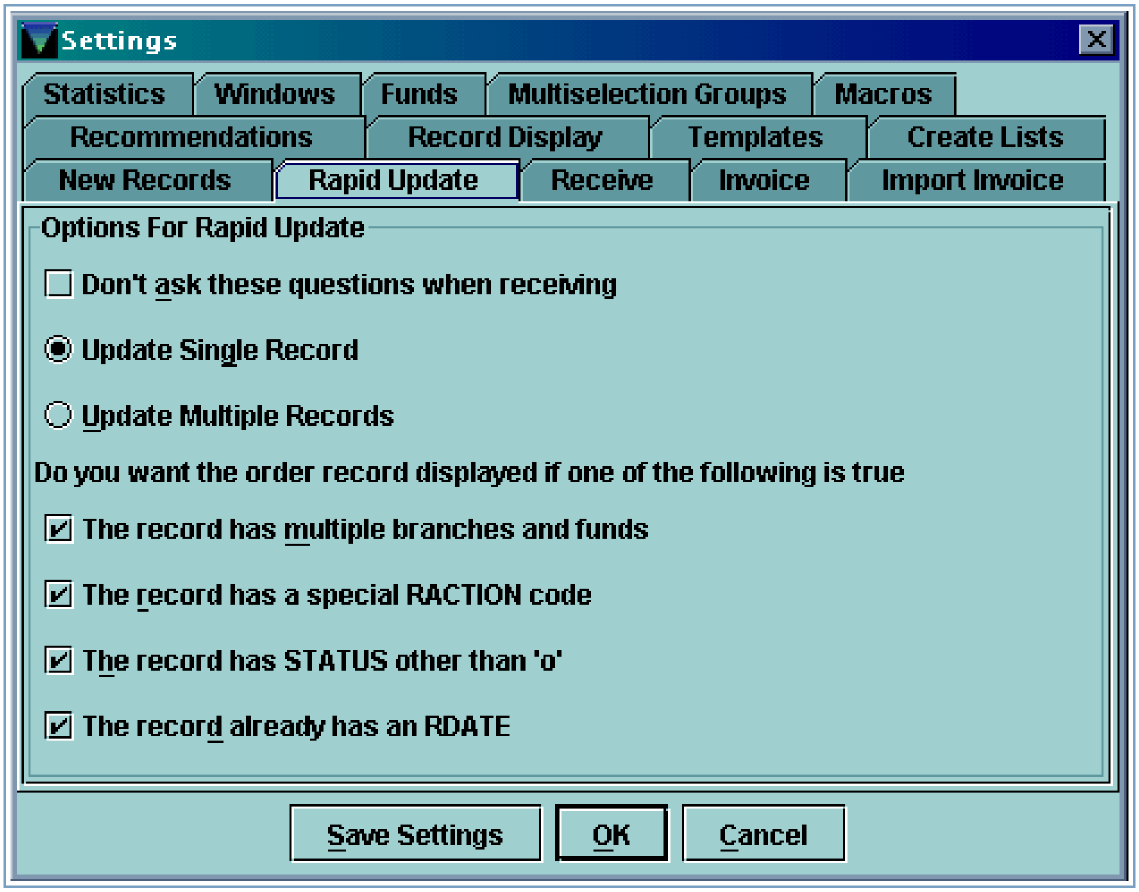
NOTE ABOUT DEFAULT TEMPLATES: The Print Templates feature comes with a set of default templates. These are identified by a leading underscore character in the template's name (e.g., "_7005gyld" in the list shown above). The default templates are intended to serve as a solid foundation for further customization by individual libraries. These source templates can be exported but not renamed or deleted by the user. For additional information, refer to the Innovative Guide and Reference, Page # 107687: Creating Customized Print Templates and the Print Templates Wiki.

close window

RAPID UPDATE

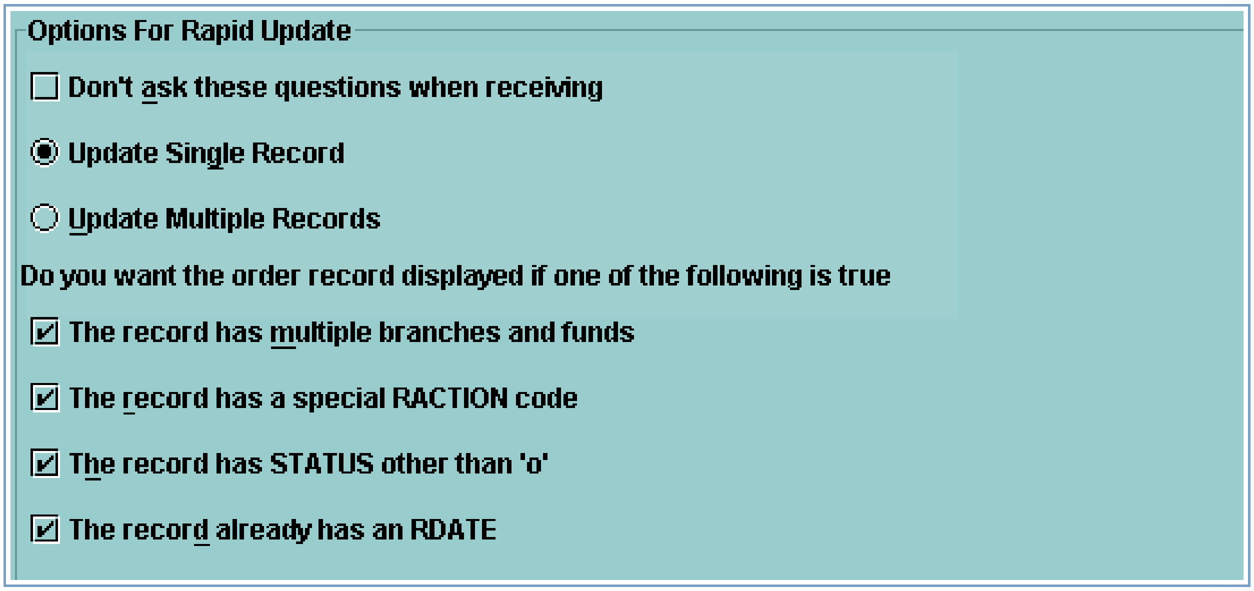
NOTE: To view/change this tab the user needs to be authorized for function 76 (Rapid updating).

The **Rapid Update** tab contains the following options for the Millennium Acquisitions Rapid Update mode:



close window

OPTIONS FOR RAPID UPDATE



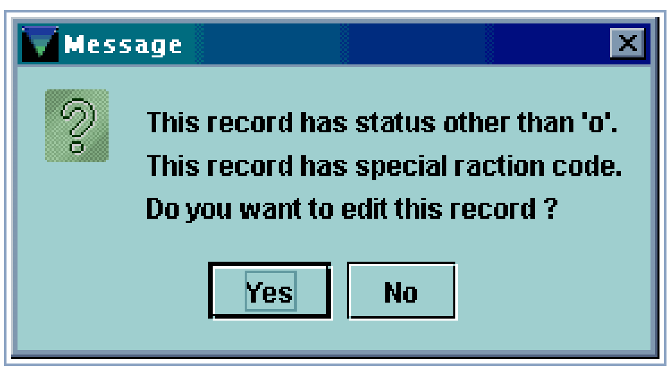
Don't ask these questions when receiving
If this check box is *not* selected, a dialog containing the Rapid Update options listed below will display the first time you change to the **Rapid Receive - Rapid Update** submode during a session.

Select this check box to choose default Rapid Update options and prevent the dialog from displaying automatically.

Update Single Record
Select this option to update a single record. You must choose either this option or the **Update Multiple Records** option.

Update Multiple Records
Select this option to update multiple records from a review file, range, or index. You must choose either this option or the **Update Single Record** option.

Do you want the order record displayed if one of the following is true
Select one or more of the check boxes listed below to specify the conditions under which you want the order record to display when using **Rapid Update**, Single Record mode. Millennium will prompt you to display each record that meets the selected criteria before updating it.



The record has multiple branches and funds

The record has a special RACTION **code**.

The records has STATUS **other than 'o'**

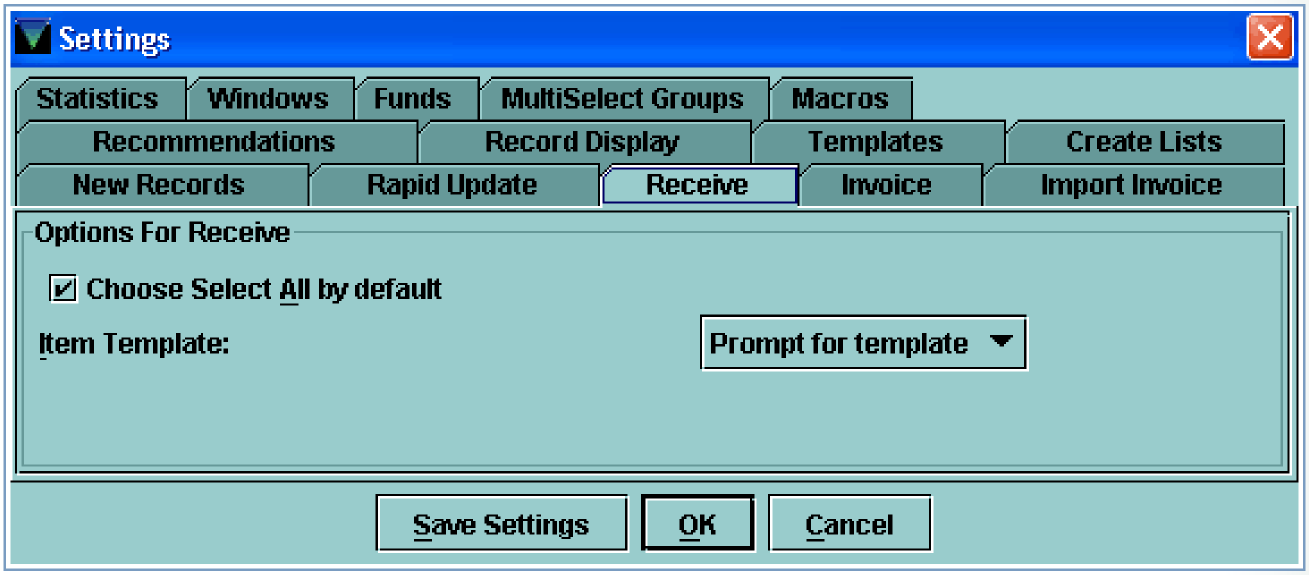
The record already has an RDATE

close window

RECEIVE

NOTE: To view/change this tab the user needs to be authorized for function 127 (Receive/add item).

The **Receive** tab contains the following options for the Millennium Acquisitions Rapid Receive mode:

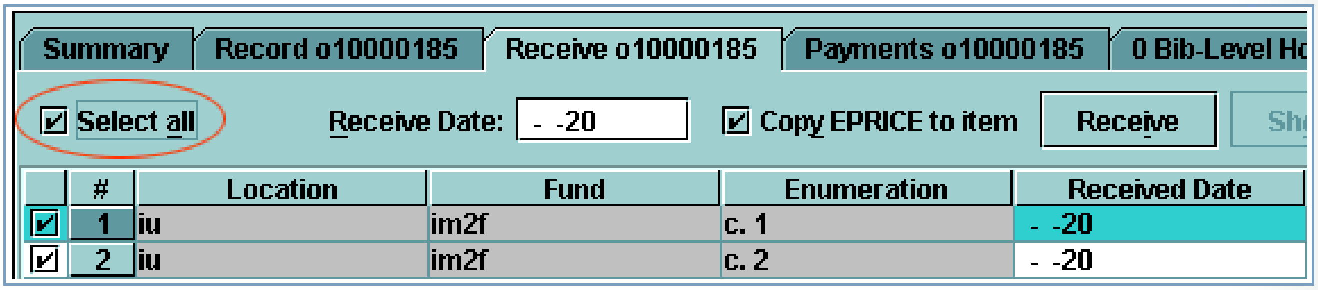


close window

OPTIONS FOR RECEIVE

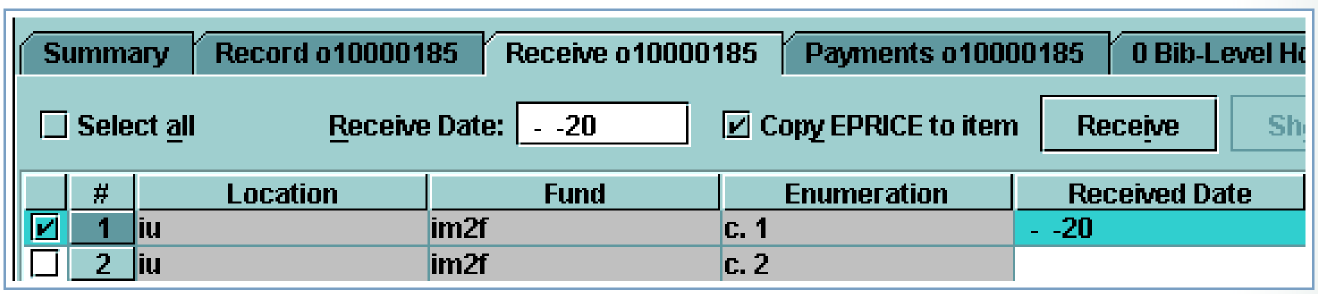
Choose Select All by default
If this box is selected, all ordered copies will be selected automatically when accessing the **Receive** tab in either **Orders** mode or in **Receive and Create Items** mode. Regardless of this setting, you can select or deselect copies as desired during the receiving process.

Example 1: **Choose Select all by default** is enabled:



Click on **Receive** if all copies are received at the same time. If not, uncheck **Select all** and select the copies that should be received.

Example 2: **Choose Select all by default** is *not* enabled:



Only the first copy in the list is selected. Click on **Receive** to receive that copy, or change selection as desired.

Item Template
Select an item template from the drop-down list to use when receiving orders via the **Receive** tab or in **Rapid Receive - Receive and Create Items** submode. You can also choose to **Prompt for template**. If you have selected a list of Preferred Templates for item records, only those templates will display in the list.

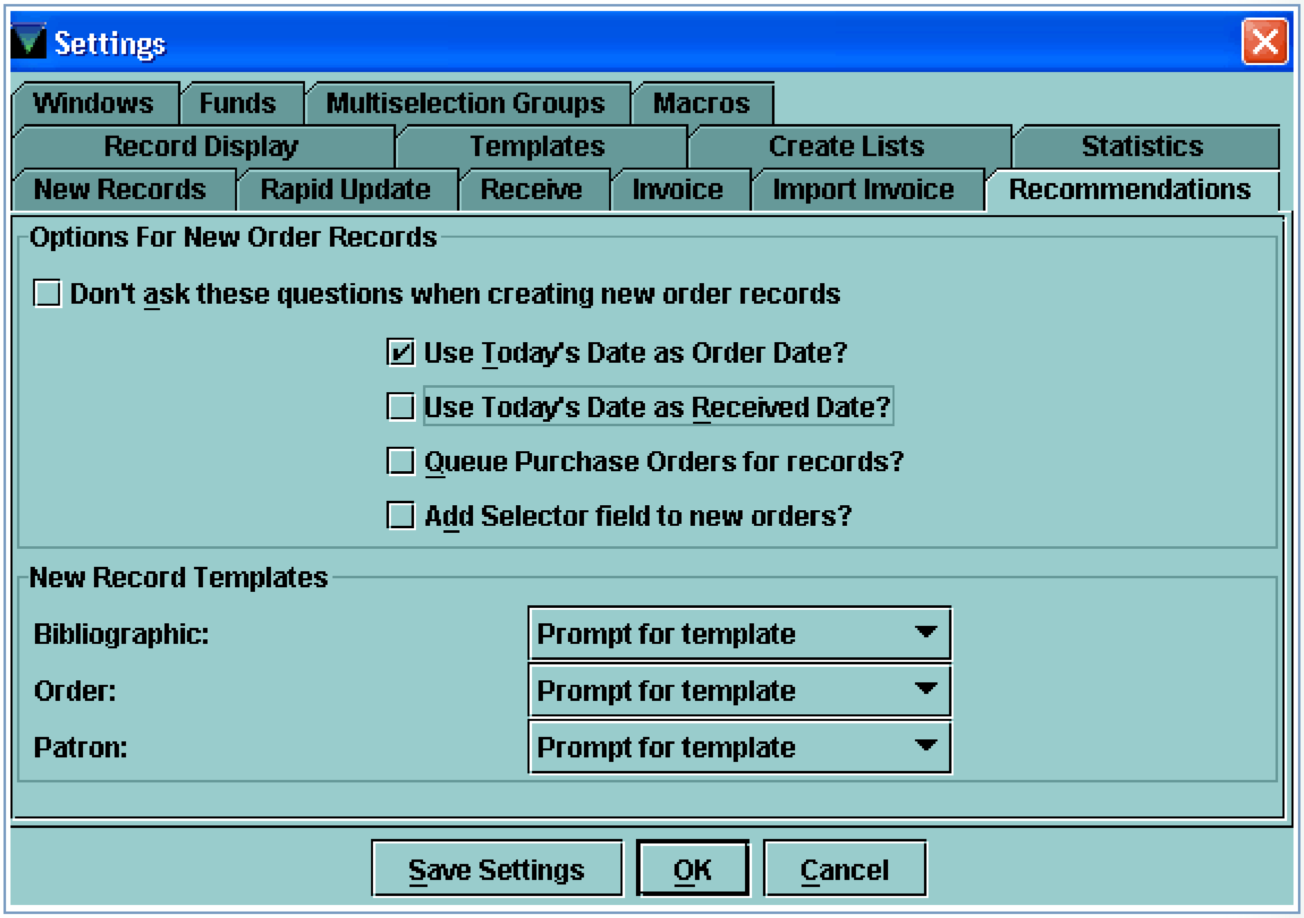
> If you select **Prompt for template**, the system will prompt you for a template the first time you create a record during the session. For subsequent records, the system will remember the most recent template used during record creation. If you want to use a different template for the next record, go to **Admin|Settings|Receive** and select another template or **Prompt for Template**.

close window

RECOMMENDATIONS

NOTE: To view/change this tab the user needs to be authorized for function 190 (Process patron recommendations).

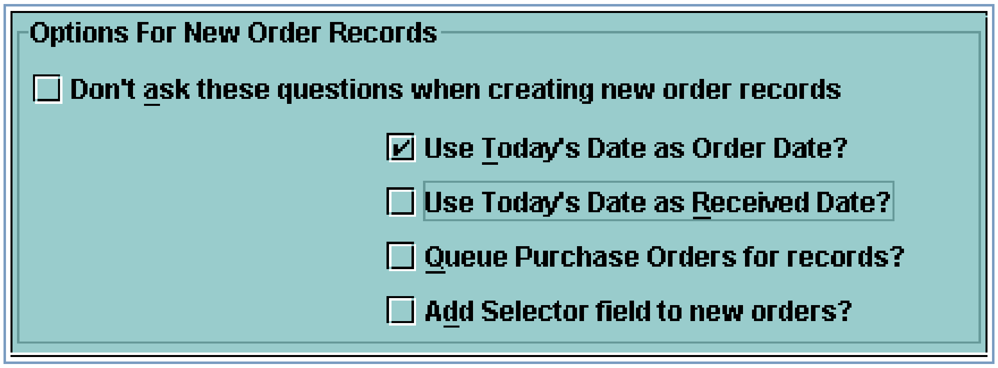
The **Recommendations** tab contains the following options for the Millennium Acquisitions [Recommend] mode:



The **Recommendations** tab is divided into two sections. The top part of the tab refers to settings for new order records created during the **Approve and Acquire** process in **Recommend** mode. The bottom part of the tab sets the default templates for new records created from within **Recommend** mode.

close window

OPTIONS FOR NEW ORDER RECORDS



Don't ask these questions when creating new order records
If this check box is *not* selected, a dialog box containing the options listed below will display the first time you create a new order record in **Recommend** mode. Select this check box to choose default options and prevent the dialog box from displaying automatically.

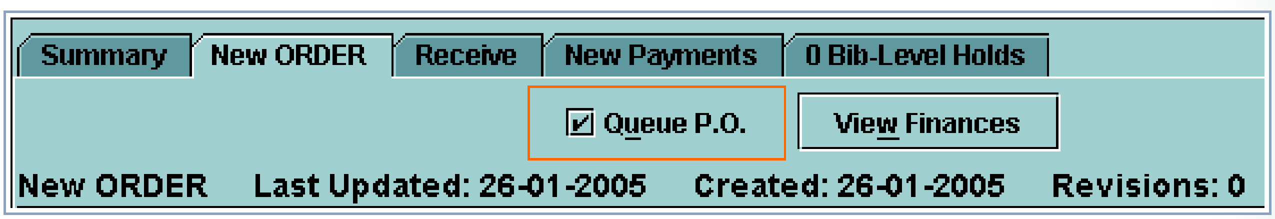
Use Today's Date as Order Date?
If this check box is selected, today's date will be used as the order date. If the check box is *not* selected, you are expected to enter the order date manually in the ODATE (Order date) field when keying the order record in **Recommend** mode.

Use Today's Date as Received Date?
If this check box is selected, today's date will be input as the received date in the order record's RDATE (Receive date) field when keying new order records in **Recommend** mode.

> This option is useful only when you want to create order records retroactively for items already received.

If the check box is *not* selected, the RDATE field will remain blank when keying new order records in **Recommend** mode.

Queue Purchase Orders for records?
If this check box is selected, purchase orders will be queued for printing or electronic transmission when new order records are created. Regardless of this setting, the user can check/uncheck the "Queue P.O" setting on demand when creating order records in **Recommend** mode.

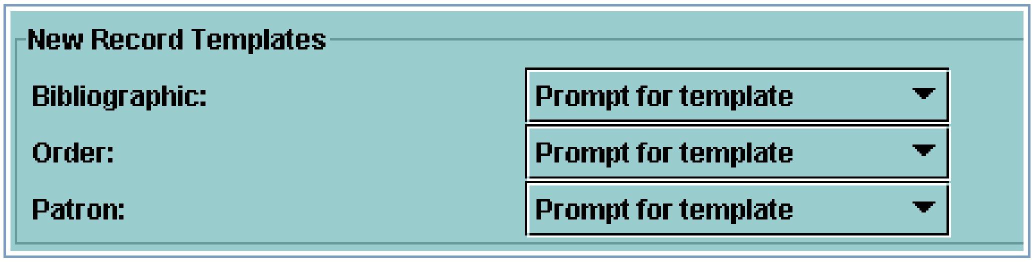


When the **Queue Purchase Orders for records** setting is selected, the "Queue P.O" option will be checked by default when keying order records and purchase orders will be queued for printing or electronic transmission unless you uncheck the box.

Add Selector field to new orders?
When this option is set, the system adds a variable-length field SELECTOR, containing the name of the selector from the patron record, to each order record you create in **Recommend** mode. If your library does not have the Selector Tag set up, this option is unavailable.

close window

NEW RECORD TEMPLATES



You can specify default templates for creating the following record types in **Recommend** mode:

- bibliographic (applies to the Approve and Acquire function)
- order (applies to the Approve and Acquire function)
- patron (applies to the Selectors submode)

If you want to choose a template at the time of record creation, set the template option to **Always prompt for template** or **Prompt for template**.

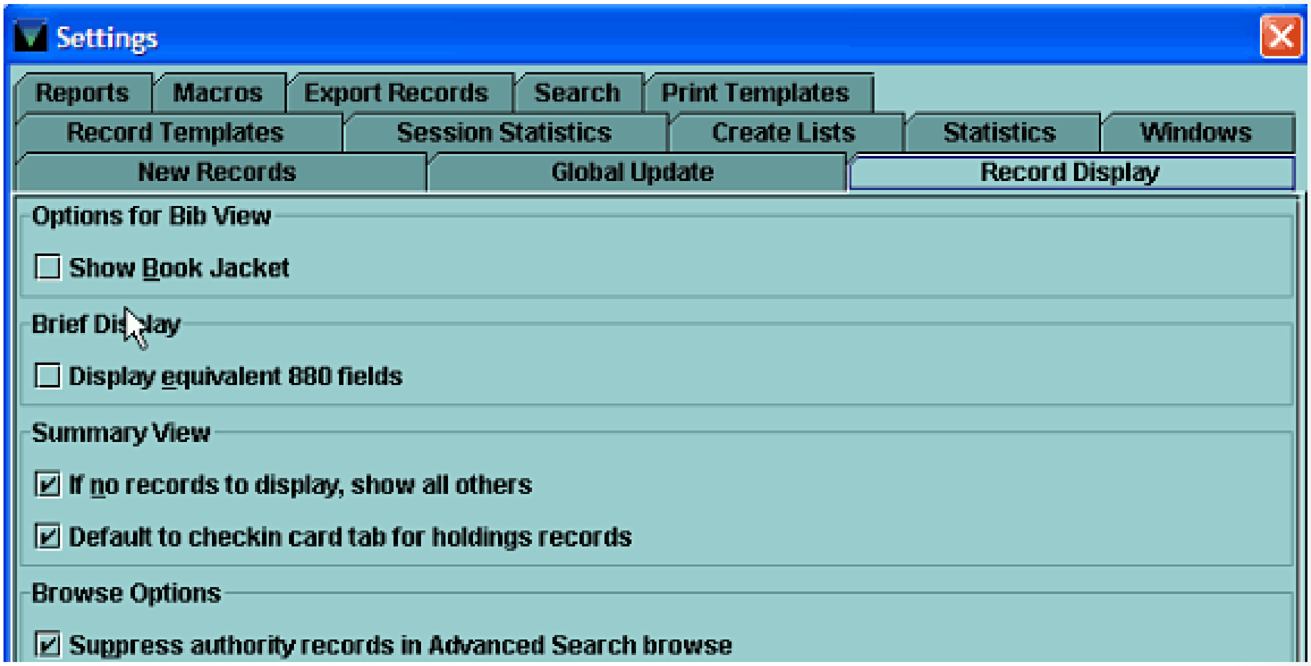
> When you select **Prompt for template**, the system will prompt you for a template the first time you create a record during the session. For subsequent records, the system will remember the most recent template used during record creation. If you want to be prompted each time a new record is created, select the **Always prompt for template** option.

If you use this option and have selected a list of Preferred Templates, only those templates will display in the list for each record type.

close window

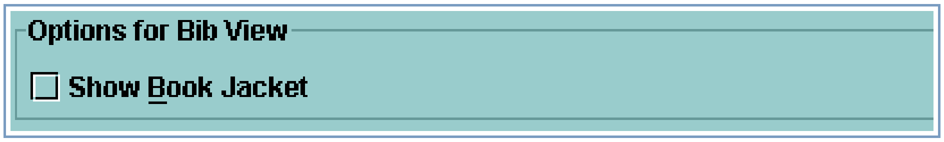
RECORD DISPLAY

The **Record Display** tab contains options affecting the brief record display of bibliographic records.

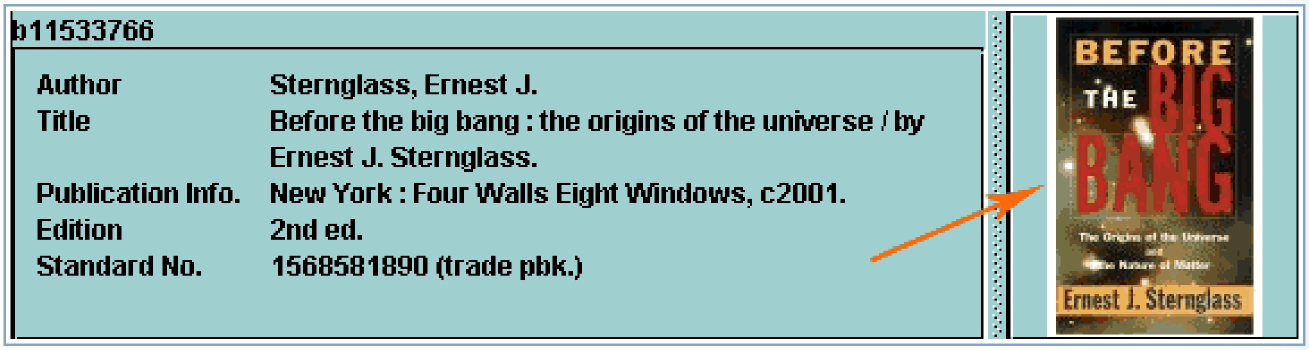


close window

OPTIONS FOR BIB VIEW



Show Book Jacket
This option specifies whether the book jacket image appears on record displays.

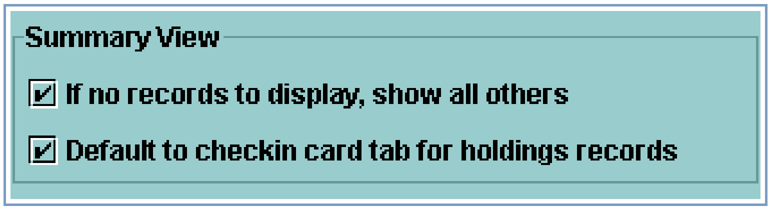


For information about setting up the Book jacket feature, refer to the Innovative Guide and Reference, Page # 100808: [Maintaining the Web Links File]

If your library has acquired the WebBridge product, resources for book jacket display in staff modules are defined in WebBridge management instead. Refer to the Innovative Guide and Reference, Page # 106463: [Displaying Book Jackets and Cover Art in Millennium]

close window

SUMMARY VIEW



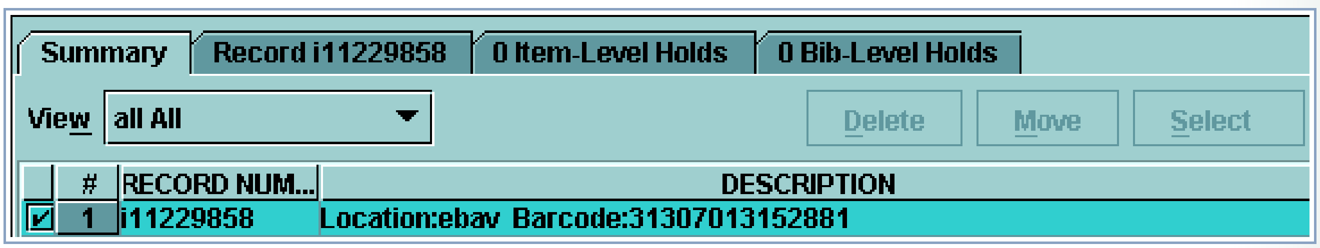
If no records to display, show all others
Each Millennium application has a default record type that displays in the record summary tab below the brief bibliographic window when records are retrieved in a search (or, in the case of Electronic Resource Management, below the resource record).
This option specifies what is displayed in the record summary when none of the attached records is of the default type (e.g. the default type is item records and the bibliographic record has no attached item records):

- If this option is checked, a summary list of "all records" is displayed.
- If this option is not checked, an empty summary list is displayed.

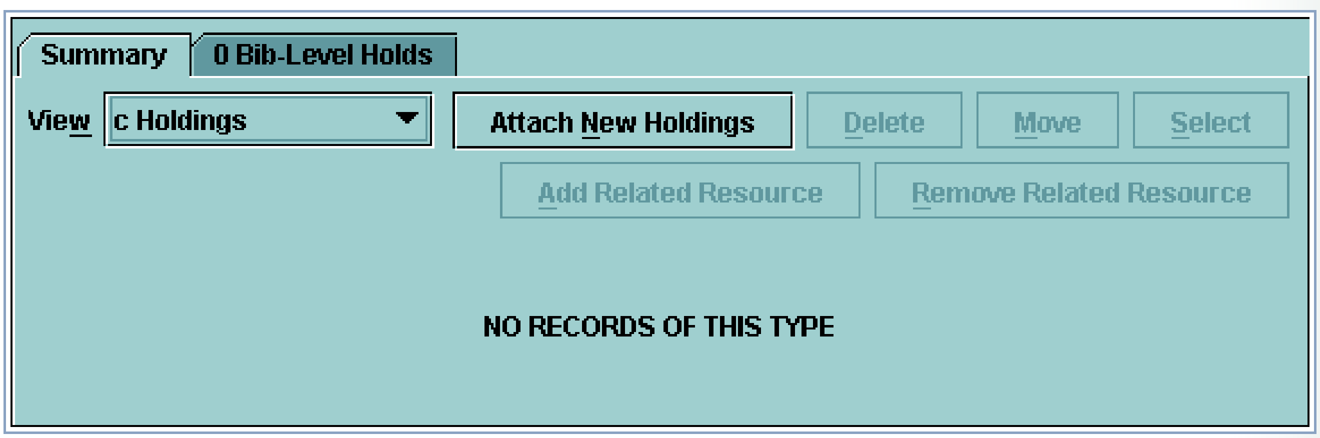
> The **If no records to display, show all others** setting can also be accessed interactively by the user and changed for the current session by using **View » Record View Properties**.

For example, in Millennium Serials, the checkin/holdings record is the default record type for the summary display. If you retrieve a bibliographic record which has an item but no checkin/holdings record attached, the summary display will appear as follows:

a) **If no records to display, show all** is *checked*:



b) **If no records to display, show all** is *unchecked*:



The default record type for each module is as follows:

Application	Mode	Default record type
Millennium Acquisitions	Orders, Claim/Cancel, Rapid Receive, Selection List, Invoice	Order
Millennium Administration	Has no search mode	not applicable
Millennium Cataloging	Quick Edit, Delete Items	Item

Millennium Circulation	Search/Holds	Holds/Bookings (which is a special display of item records)
Millennium Electronic Resource Management	Quick Edit	Licence
Millennium Inter-Library Loan	Has no search mode	not applicable
Millennium Serials	Serials Check-in, To Bindery, Check In Bound	Checkin/Holdings

The default record type can be changed for the current session, by using menu **View » Record View Properties**. You can also change the record type view on a record by record basis by using the **View** drop-down list on the **Summary** tab. Only the options for record types that you are authorized to access will display.

Default to checkin card tab for holdings/checkin records
Specifies that the checkin **Card** tab automatically displays when a checkin/holdings record is selected from the Summary view. If no checkin card currently exists, the **Card** tab displays the **Create Card** option.

If this option is *not* selected, the **Record** tab displays when a checkin/holdings record is selected from the Summary view.

close window

BROWSE OPTIONS

Suppress Authority Records in Advanced Search Browse
This option specifies whether authority records appear in a browse list when using Advanced keyword searching in Millennium staff modules.

NOTE: This setting is only available for libraries that are using the option to include authority records in the Keyword Index.

close window

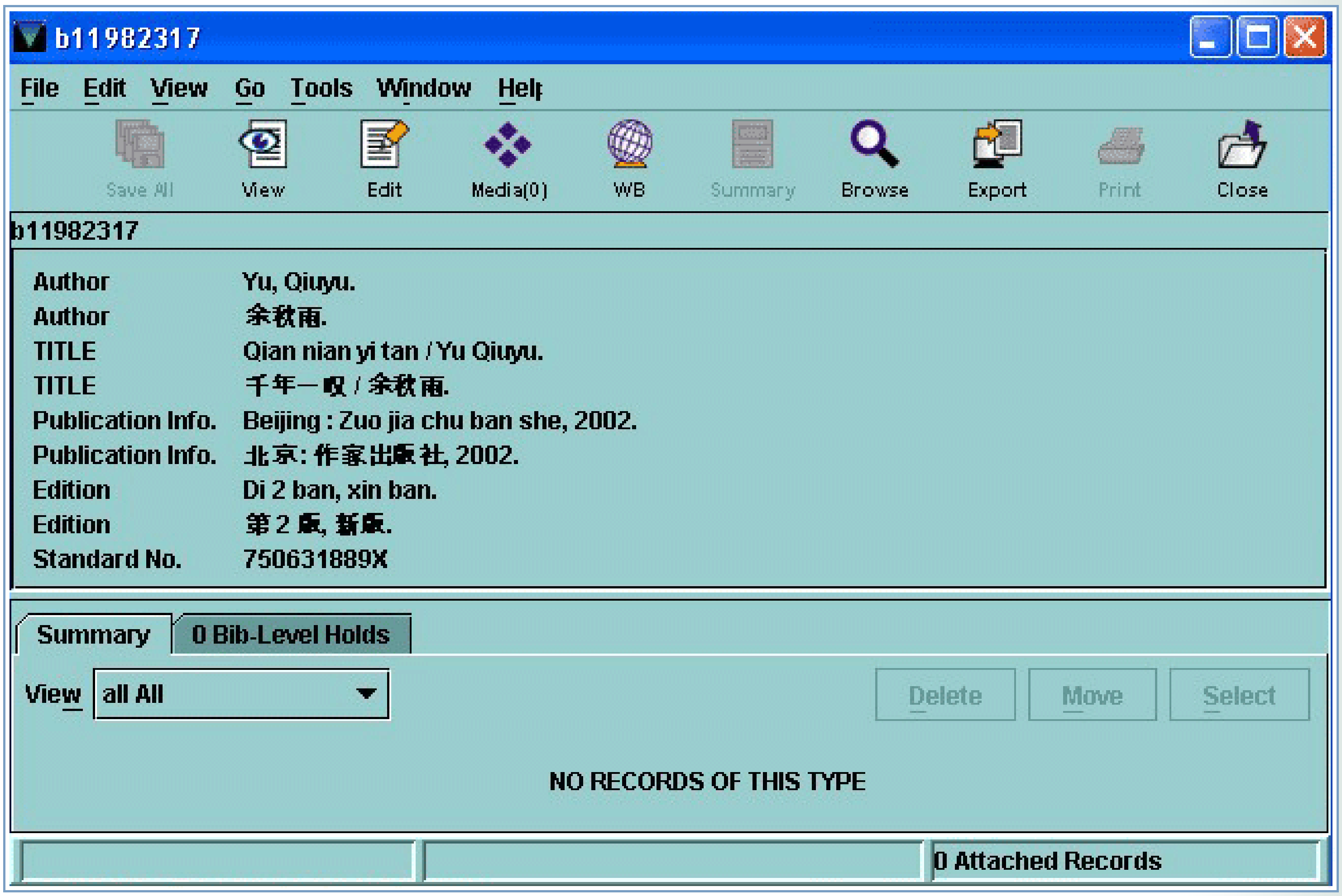
BRIEF DISPLAY

Display equivalent 880 fields

If your library uses 880 fields to store romanized and vernacular characters in your database, select this option to include both main fields and equivalent 880 fields for any field that is set up to display in the brief record display area for authority and bibliographic records.
The system will follow the subfield |6, if one exists, to the equivalent 880 field and display both fields.

Brief displays are seen above search browses and above the summary of attached records when viewing a single title. The brief display is customizable and can vary by module. Contact Innovative to change the displays on your system.

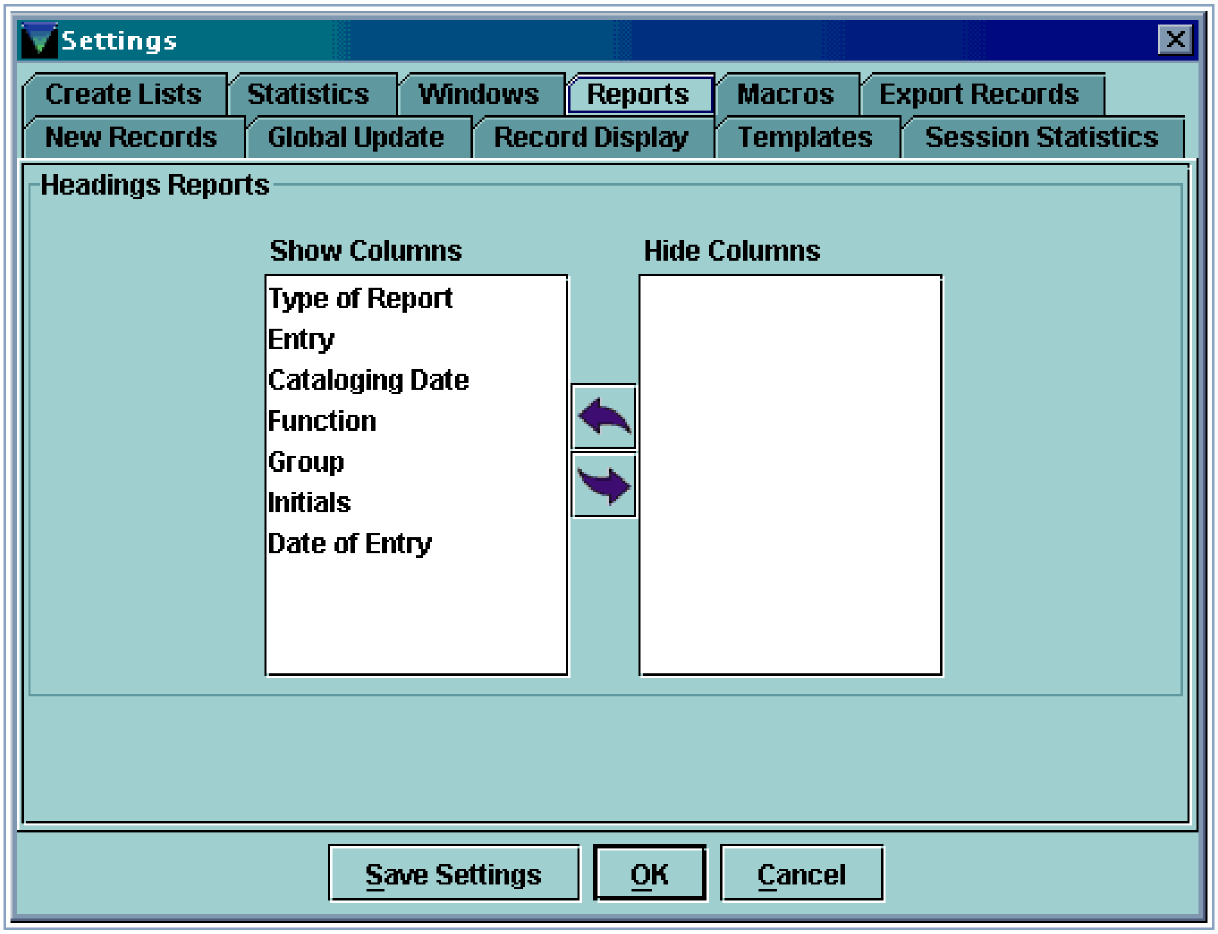
Example of a brief display on a browse screen:



close window

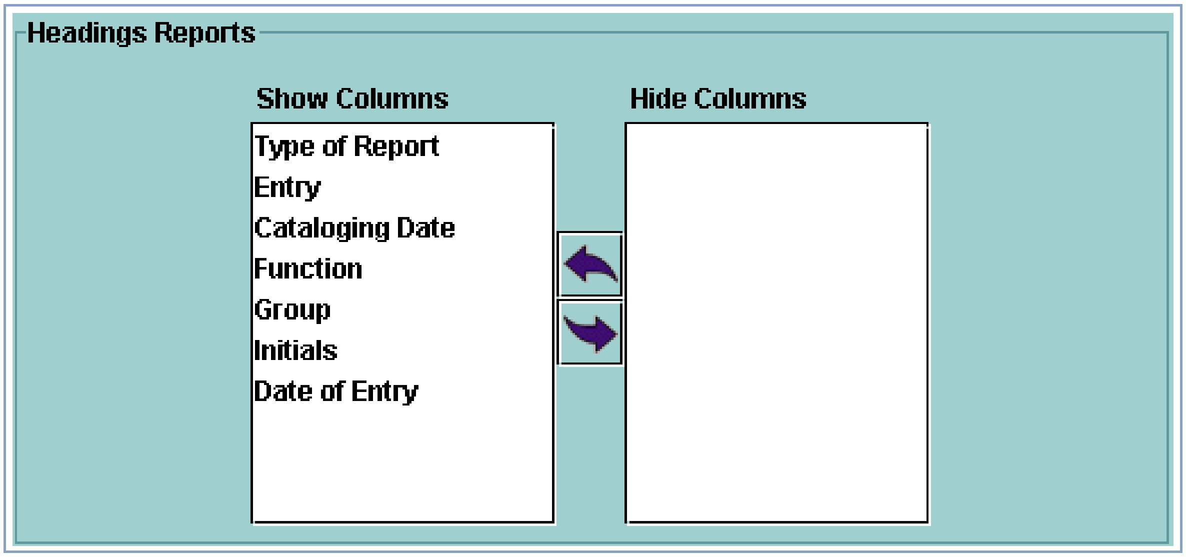
REPORTS

The **Reports** tab includes options for customizing the Headings report in Millennium Cataloging Headings Reports mode.



close window

HEADINGS REPORTS



This setting allows you to customize the Headings Reports by adding or removing columns. The following columns are available:

Type of Report - Type of headings report entry, e.g. "Headings used for the first time", "Invalid headings"

Entry - The field data and record number for an entry in the headings report

Cataloging Date - Date the record in the headings report was catalogued (CAT DATE).

Function - System function through which the heading was entered, for example "mcat" for editing MARC records in Millennium Cataloging. For additional information, refer to the Innovative Guide and Reference, Page # 105951: Function Codes

Group - If your library has Statistical groups set up for user's login, this column displays the statistics group by which the heading was changed. For additional information, refer to the Innovative Guide and Reference, Page # 106047: Statistical Group Table

Initials - User initials of the operator who made the change.

Date of Entry - Date and time the heading was changed.

Add or remove columns from your headings reports by doing the following:

Show Columns		Select the column in the list of **Hide Columns** and click the left arrow.
Hide Columns		Select the column in the list of **Show Columns** and click the right arrow.

To move multiple columns at the same time, select the columns by holding down the Ctrl key and clicking the column names. Then choose the appropriate arrow button.

Headings report with all columns shown:

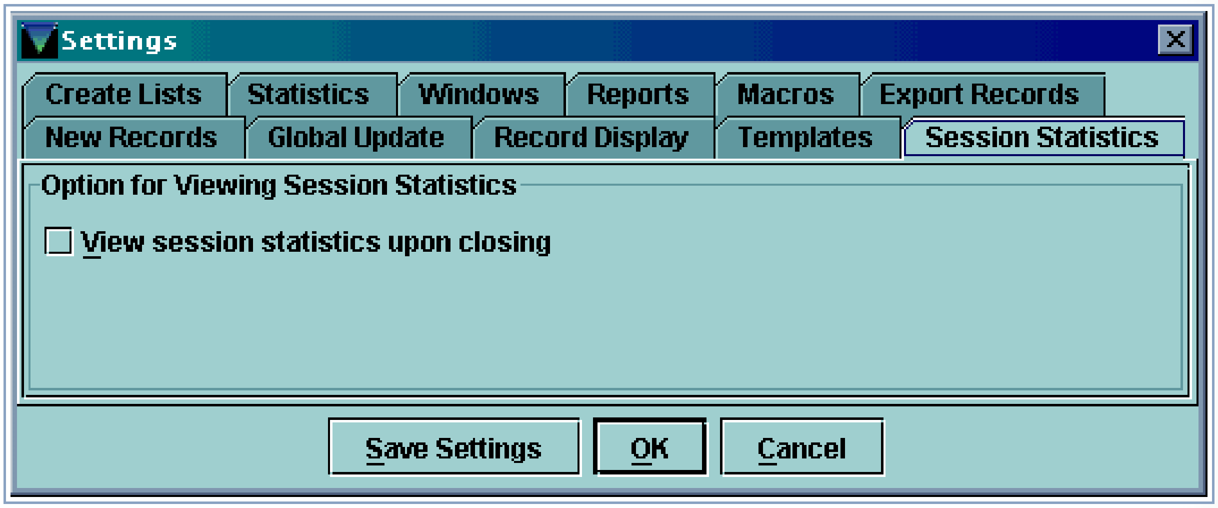
#		Type	Entry	Cat Date	Functi...	Group	Init	Entry Date
1	☐	Headings used for the first time	**Field:** a100 |aBrown, Dan **Indexed as AUTHOR**: *brown dan* **Preceded by "b"**: *brown dale 1956* **Followed by "b"**: *brown dan 1964* **From:** b12286461 Brown, Dan Devils qnd Angels		mc	0	aa	2004-maj-27 15:23:03
2	☐	Headings used for the first time	**Field:** a1001 |aBrown, Dan,|d1964- **Indexed as AUTHOR**: *brown dan 1964* **Preceded by "b"**: *brown dan* **Followed by "b"**: *brown david 1929* **From:** b1228645x Brown, Dan, 1964- The Da Vinci code : a novel / Dan Brown.	2004-maj-27	z3	0	aa	2004-maj-27 15:06:50
3	☐	Headings used for the first time	**Field:** a100 |aBrusselmans, H **Indexed as AUTHOR**: *brusselmans h* **Preceded by "b"**: *brussel james a james arnold 1905* **Followed by "b"**: *brusselmans herman* **From:** b12286503 Brusselmans, H Ik Ben Rijk En Beroemd En Ik Heb Nekpijn		mc	0	w	2004-maj-28 12:45:00
		Headings used for the first time	**Field:** v97001|tEthics and administrative practices in long term care |c Annabelle L. Kleppick|fKleppick, Annabelle L.		mc	0	aa	2004-mar-19 17:40:33

56 Entries

close window

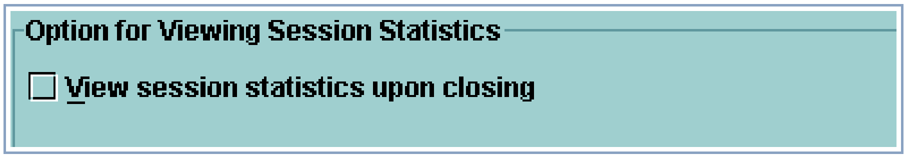
SESSION STATISTICS

The **Session Statistics** tab contains the following option for displaying Session Statistics in Millennium Cataloging:



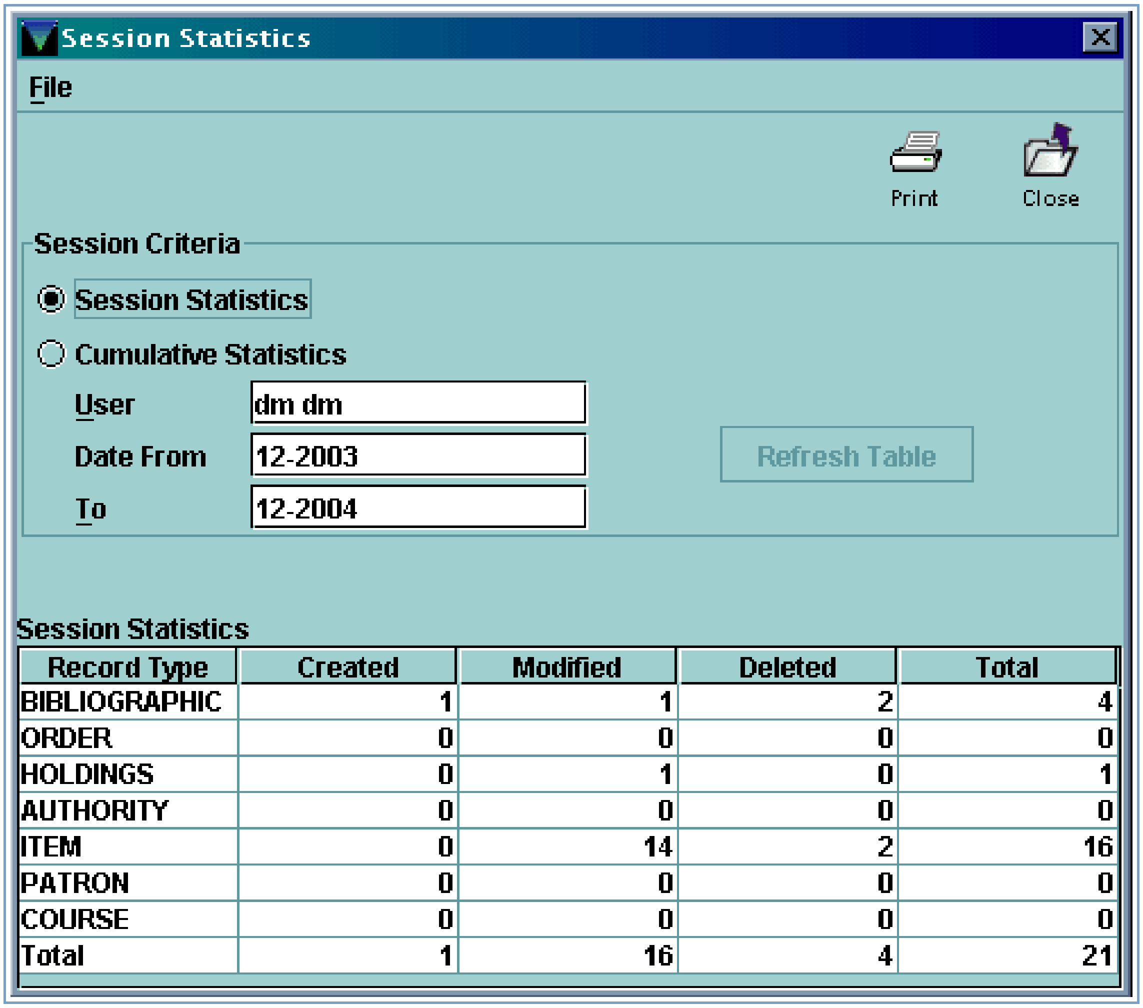
close window

OPTION FOR VIEWING SESSION STATISTICS



View session statistics upon closing
Select this check box if you want a report of session statistics to display automatically each time you exit Millennium Cataloging.

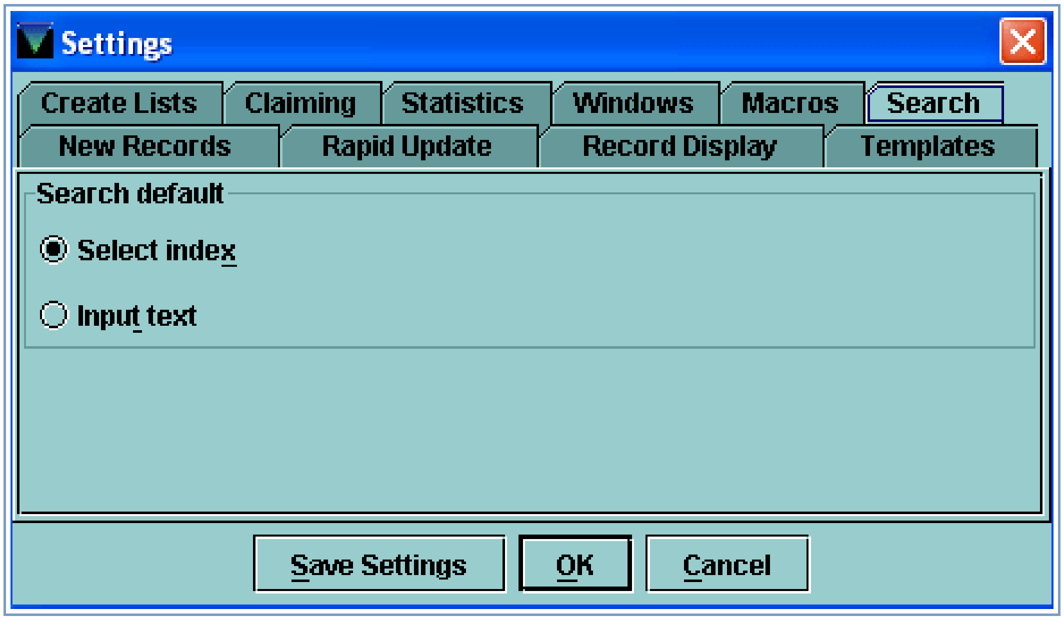
After you exit, e.g. by using **File|Exit**, then answering "Yes" to question *Exit Millennium Cataloging?*, the statistics screen will appear:



close window

SEARCH

The **Search** tab allows you to customize search options.

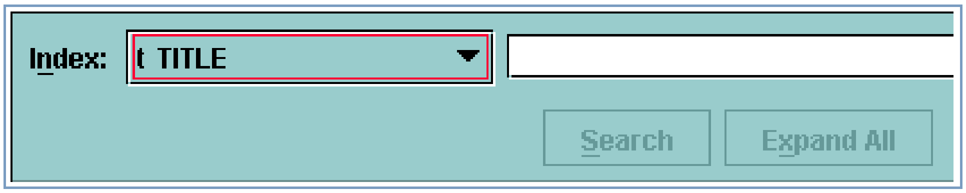


close window

SEARCH DEFAULT

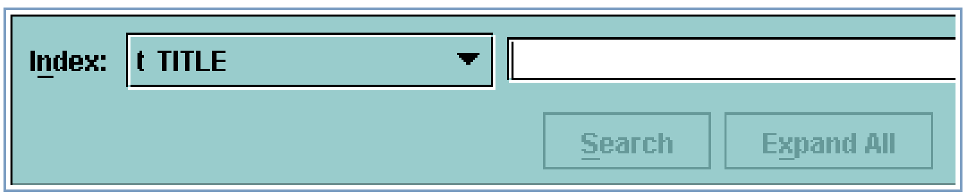
This option allows you to select where the cursor focus is initially in the search panel.

Select index
If this option is selected, the cursor is initially on the **Index** drop-down menu when you switch to a search mode:



To change index without using the mouse, use the *down* arrow to open the drop-down menu and select an index. You can also key the index tag, e.g. **'a'** for the author index. The index will change and the focus moves to the input box.To move to the input box without changing index, hit the **<TAB>** key.

Input text
If this option is selected, the cursor is initially on the **input text box** when you switch to a search mode:



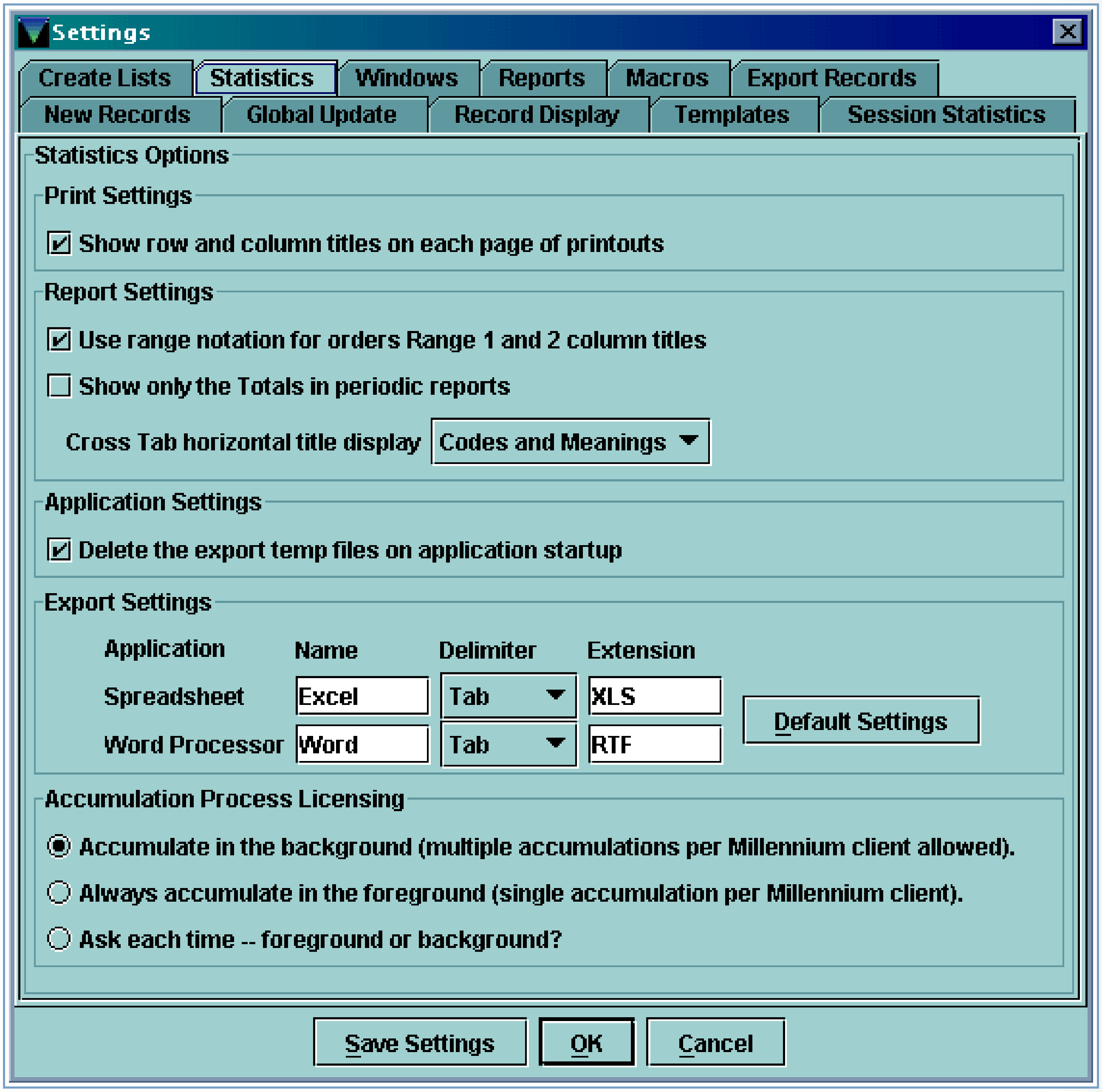
To move to the **Index** drop-down without using the mouse, press **<SHIFT><TAB>**.

Innovative can change the order of the indexes on your system. The order can vary by module. Use the Service Commitment on CSDirect to request a change.

close window

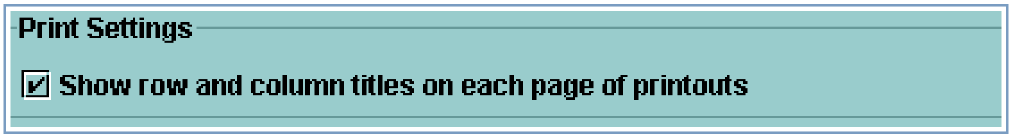
STATISTICS

The **Statistics** tab contains the following options for the Statistics mode.



close window

PRINT SETTINGS

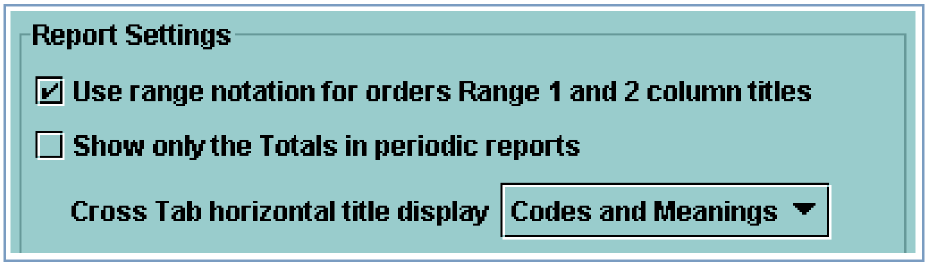


When the **Show row and column titles on each page of printouts** option is selected, the row and column titles will print on every page of printed reports.

If this option is *not* selected, row and column titles will print only on the first page of printed reports.

close window

REPORT SETTINGS



Use range notation for orders Range 1 and 2 column titles
If this option is checked, the name of each range appears in the title of columns that report on a date range.

For example, a particular column title might be "**$ in 2002**" when this option is selected and "**$ in Period 2**" when it is not selected:

"Use range notation" selected:

Code	Meaning	Number of Volumes	# in 2001	$in 2001	# in 2002	$in 2002	Est. Price(E*C)
g	GIFT	21	20	366.87	24	1,319.50	1,355.61
p	PURCHASE	285	214	17,886.21	233	24,002.10	29,133.33
Totals:		306	234	18,253.08	257	25,321.60	30,488.94

"Use range notation" *not* selected:

Code	Meaning	Number of Volumes	# Pay Per 1	$ Period 1	# Pay Per 2	$ Period 2	Est. Price(E*C)
g	GIFT	21	20	366.87	24	1,319.50	1,355.61
p	PURCHASE	285	214	17,886.21	233	24,002.10	29,133.33
Totals:		306	234	18,253.08	257	25,321.60	30,488.94

Show only the Totals in periodic reports
If this option is checked, periodic reports display only the composite totals in fields for each range rather than subtotals.

"Show only the Totals" selected:

Time	Record Count	Price	No. of Renewals	No. O'due n...	Total Chec...	Year-to-Date ...
Jun-2004	1	£0.00	0	1	1	1
Jul-2004	4	£0.00	3	3	6	6
Aug-2004	4	£25.95	0	0	14	6
Sep-2004	6	£22.95	0	1	20	9
Oct-2004	1	£19.99	0	0	7	1

"Show only the Totals" *not* selected:

Time	Cod...	...	Record Count	Price	No. of Renewals	No. O'due notices	Total Checkouts
Jul-2004	0	...	3	£0.00	0	2	4
Jul-2004	251	...	1	£0.00	3	1	2
Totals:			4	£0.00	3	3	6
Aug-2004	0	...	4	£25.95	0	0	14
Totals:			4	£25.95	0	0	14

Cross Tab horizontal title display
This option specifies whether the field code (e.g. location code **main**), field meaning (e.g. **Main Library**), or both display in cross tab reports.

Sample cross tab report with codes displayed

Code	Meaning	0	3	9	14	15
epper	EPL Periodi...	0	0	1	0	0
epref	EPL Refere...	6	2902	0	0	0
is	Innovative ...	1	0	0	0	0
is1	IU Medical ...	8468	0	0	0	0
iu1	IU 1st Floor	48111	0	0	0	0

Sample cross tab report with meanings displayed

Code	Meaning	Books	Books, Reference	Periodicals, Bound	Video
epper	EPL Periodi...	0	0	1	0
epref	EPL Referen...	6	2902	0	0
is	Innovative U...	1	0	0	0
is1	IU Medical 1...	8468	0	0	0
iu1	IU 1st Floor	48111	0	0	0

Sample cross tab report with both codes and meanings displayed

Code	Meaning	0 Books	3 Books, Reference	9 Periodicals,...	14 Video
epper	EPL Periodi...	0	0	1	0
epref	EPL Refere...	6	2902	0	0
is	Innovative U...	1	0	0	0
is1	IU Medical 1...	8468	0	0	0
iu1	IU 1st Floor	48111	0	0	0

close window

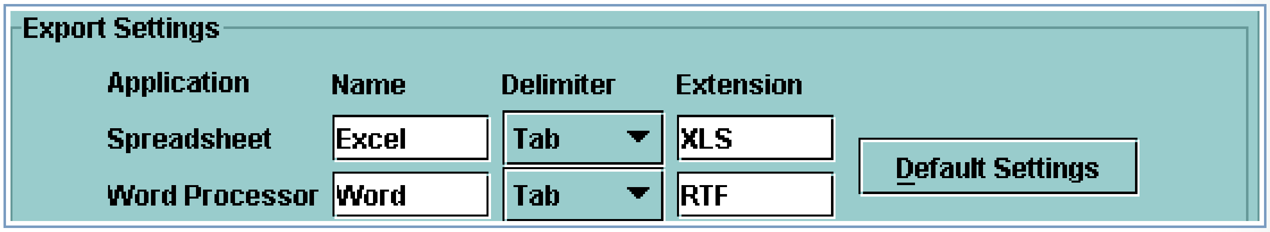
APPLICATION SETTINGS

Delete the export temp files on application startup
When exporting query results to a spreadsheet or word processor, Millennium Statistics creates a temporary file in the C:\Temp directory on the client PC, which is then opened by the spreadsheet or word processor application. If this box is checked, these temporary files are deleted whenever Millennium Statistics is started.

> If you choose this option, you must use the spreadsheet or word processing program's Save As option to preserve the exported reports. Otherwise, the exported file(s) will be deleted the next time Millennium Statistics is launched on the client workstation.

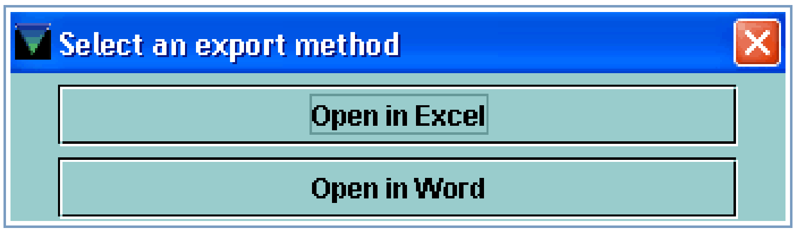
close window

EXPORT SETTINGS



These settings specify which application to launch when exporting reports and the format in which the reports are exported. The three parameters for both spreadsheet and word processor exporting are:

Name
Specifies the program name that appears in the *Select an export method* dialog box.



The defaults are **Excel** for the spreadsheet and **Word** for the word processor.

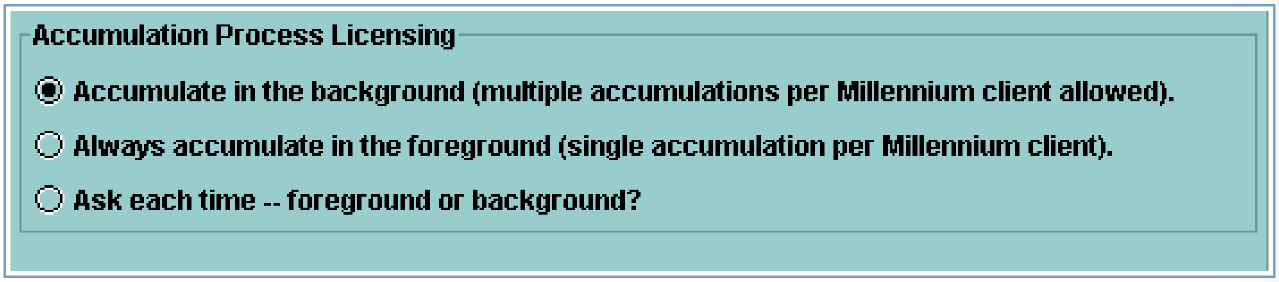
Delimiter
Specifies the character that separates the data elements in each row in the reports. The default is the ASCII <TAB> character. The other options are <COMMA> and <SPACE>.

Extension
Specifies the filename extension appended to the temporary export file created when reports are exported to the spreadsheet or word processor. On some PC operating systems (most notably, Microsoft Windows), applications use the filename extension to associate files with the application that opens and edits them. The defaults are **XLS** for the spreadsheet and **RTF** for the word processor.

If you have made changes to export settings and later want to restore system defaults, press **Default Settings**.

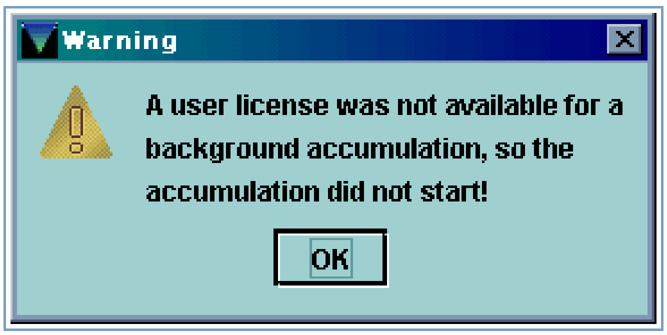
close window

ACCUMULATION PROCESS LICENSING

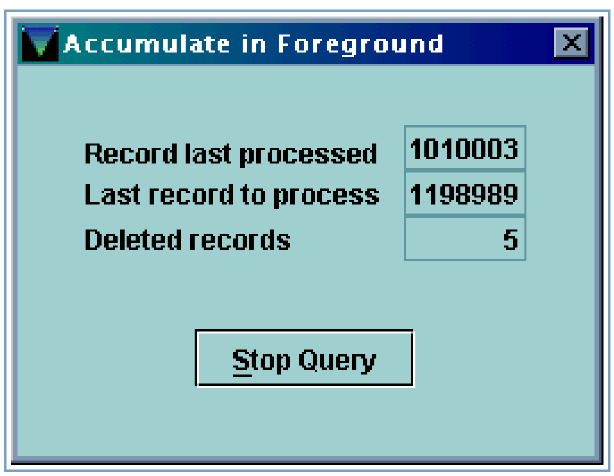


When a report query is run, the Millennium server machine acquires a user license for the process. The user license is released after the data has been accumulated. This setting determines if the data accumulation process should occupy an *extra* license or not. The three choices are:

Accumulate in the background
If this option is chosen, the user can start more than one data accumulation process, or do other work in the application while the process is running. This method requires an additional user license, i.e. while the process is running your session uses two user licenses. If you start another data accumulation process, a third license will be required, etc.
Should there be no available license in your Login Group you will get an error message when you start the query:



Always accumulate in the foreground
If this option is chosen, the user can start only one data accumulation process, and cannot do other work in the application while the process is running. This method requires no additional user license. While the query is running a progress report displays:



Ask each time
If this option is chosen, each time the user starts a data accumulation process, Millennium Statistics asks if the process should run in the background (which allows multiple processes). If you answer "Yes", and there is no license available in your Login Group, you will get an error message when you start the query. If so, you can start the process again, and choose to run in the foreground (which allows one process only) by answering "No" to the question.

close window

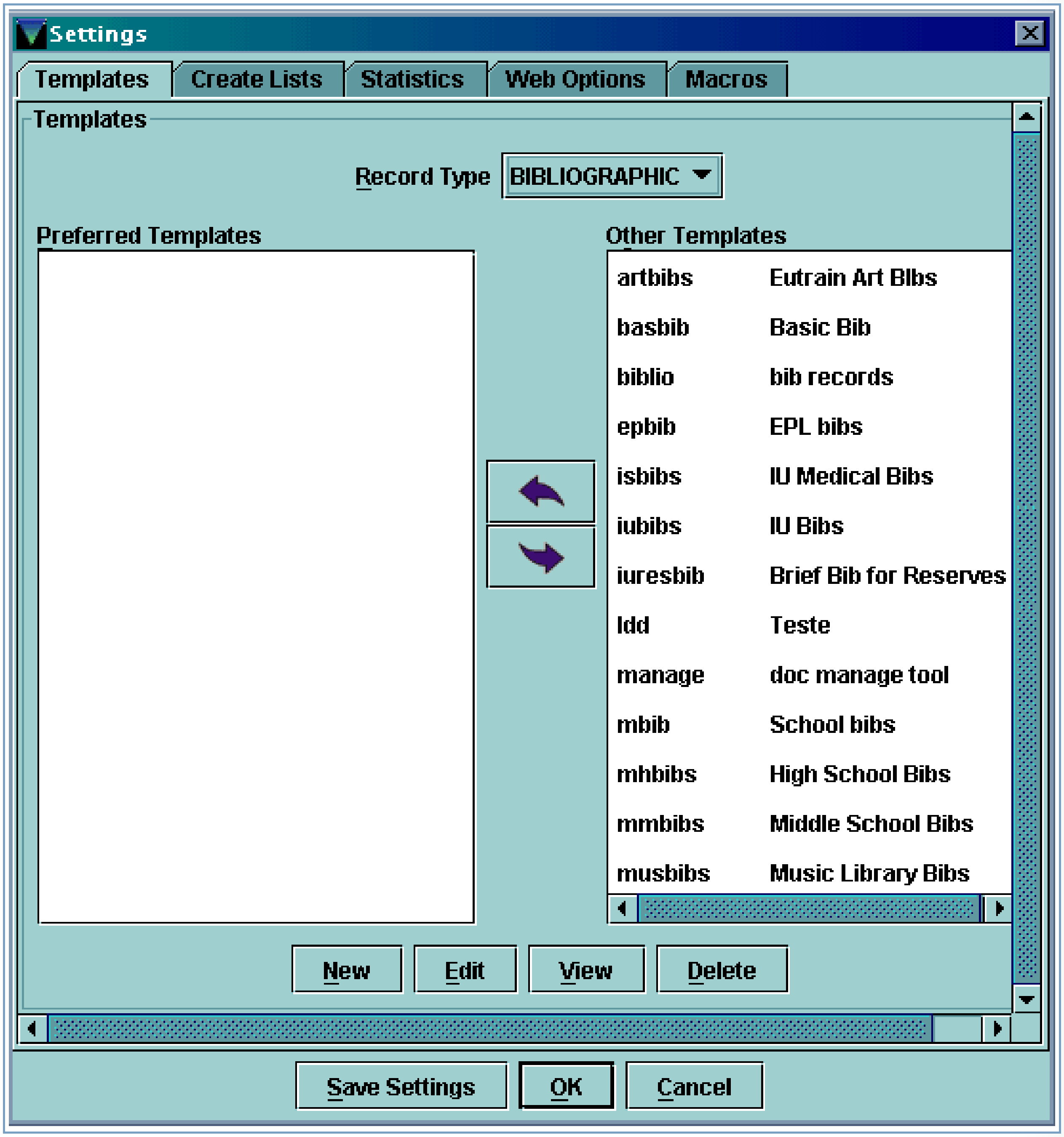
RECORD TEMPLATES

In the **Record Templates** tab, you can create, edit, and delete templates. You can also build a login based set of preferred templates for each record type.

All templates created in Millennium are stored centrally and accessible to logins as defined in the **Record Templates** tab.

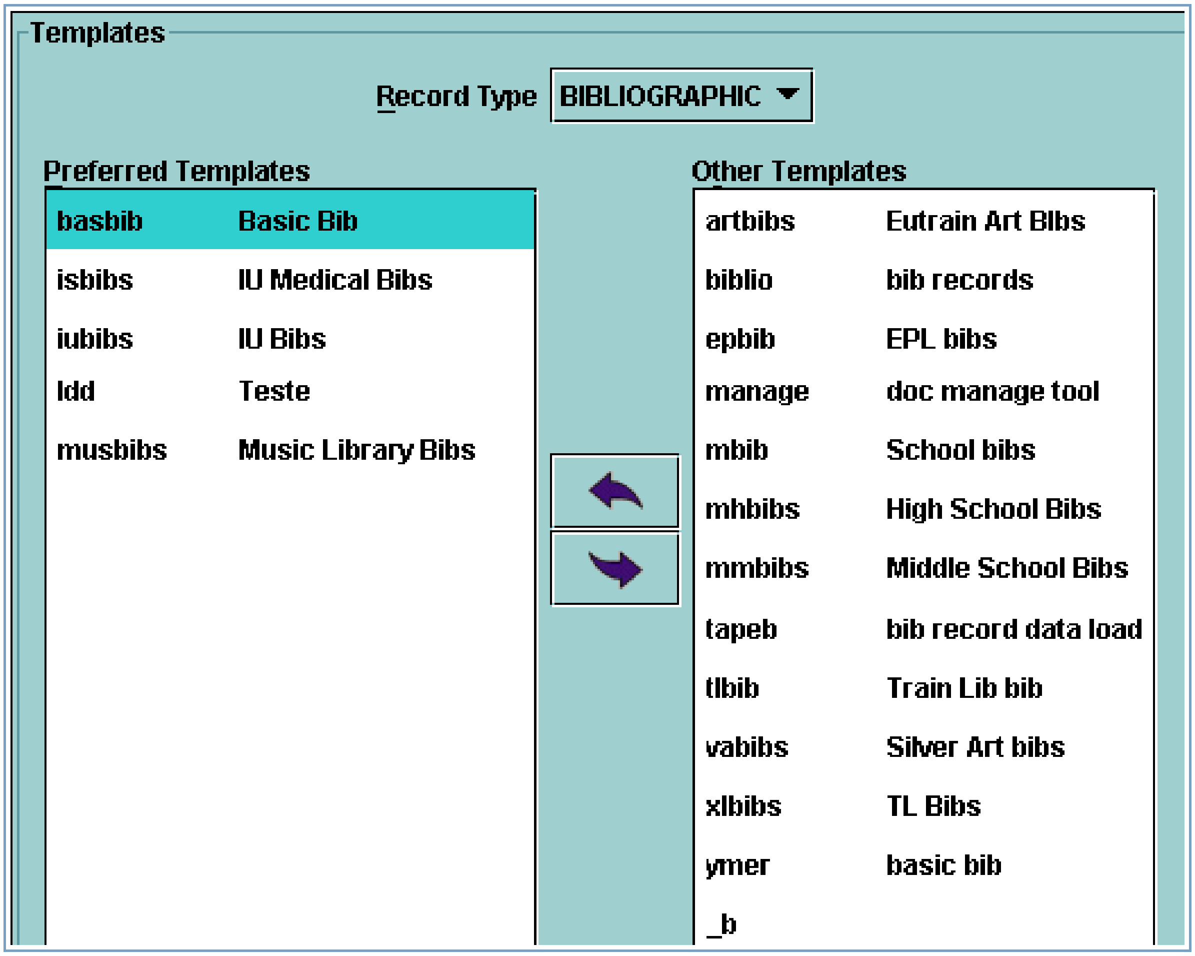
While the number of templates you can create is unlimited, your Preferred Templates list is limited to a total of 150 preferred templates for all record types per login.

The following options are available:



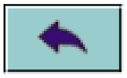
close window

PREFERRED/OTHER TEMPLATES



Follow the steps below for creating or maintaining a list of **Preferred Templates**:

1. In the Templates window, choose a record type from the **Record Type** drop-down menu.
2. You can view a template by double-clicking the template name in the **Preferred Templates** or **Other Templates** list, or by selecting the template and then clicking **View**. The template displays in a record template window. If you are authorized to edit templates, the template displays in editable form. If you are not authorized to edit templates, the template displays in read-only form.
3. Add to or remove from your list of **Preferred Templates** by doing the following:

Add to your list		Select the template in the **Other Templates** list and click the left arrow.
Remove from your list		Select the template in the **Preferred Templates** list and click the right arrow.

4. To move multiple templates at the same time, select the templates by holding down the Ctrl key and clicking the templates' names. Then choose the appropriate arrow button.

On the **Admin » Settings » New Records** tab only the templates from your list of **Preferred Templates** will display for each record type. If you set the value to **Prompt for template** or **Always prompt for template** Millennium displays your list of **Preferred Templates** from which you can choose a template when you create a new record.

close window

PREFERRED/OTHER TEMPLATES

NOTE: To maintain templates, you must be authorized for function 275 (Create templates) and/or 276 (Update templates) and/or 277 (Delete templates).

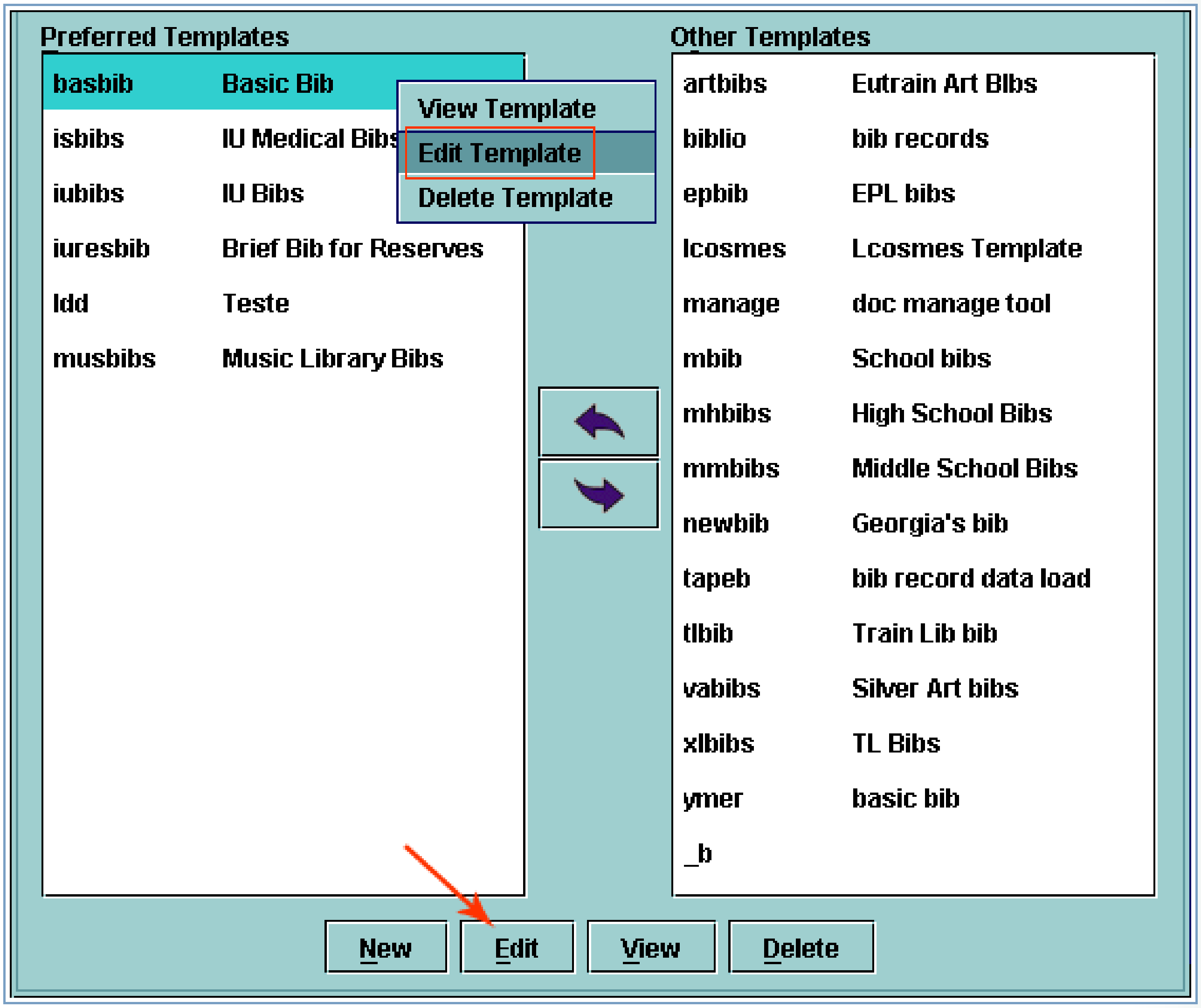
The steps for creating templates are similar to those used in creating records in Millennium - you can use many of the same features when creating templates as when creating records.

You can create new record templates for all Millennium record types. When you create a template, it is added to the list of **Other Templates**. All users have access to the template.

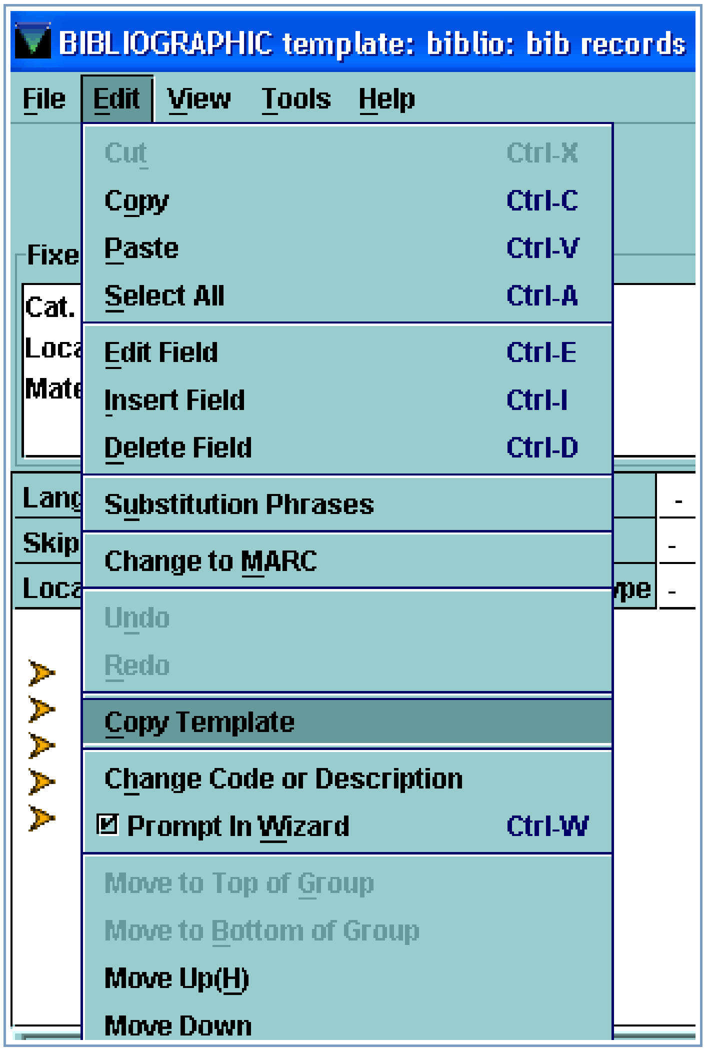
To create a new record template in Settings, use any of the following methods:

- Click on the **New** button in the Templates window. For additional information, refer to the Innovative Guide and Reference, Page # 105676: Creating Record Templates
- **Copy** an existing template by using the following steps:

1. Select a template and click on **Edit** button, or right click and choose **Edit Template**:



2. Select **Edit|Copy Template**



For additional information, refer to the Innovative Guide and Reference, Page # 105676:Copying a Template

It is also possible to **save an existing record** as a template using the record editor. For additional information, refer to the Innovative Guide and Reference, Page # 105679: Saving a Record as a Template

To modify a template, highlight one of the existing entries in the **Preferred** or **Other Templates** columns and click on the **Edit** button, or right click and choose **Edit Template**. For additional information, refer to the Innovative Guide and Reference, Page # 105676: Editing Record Templates

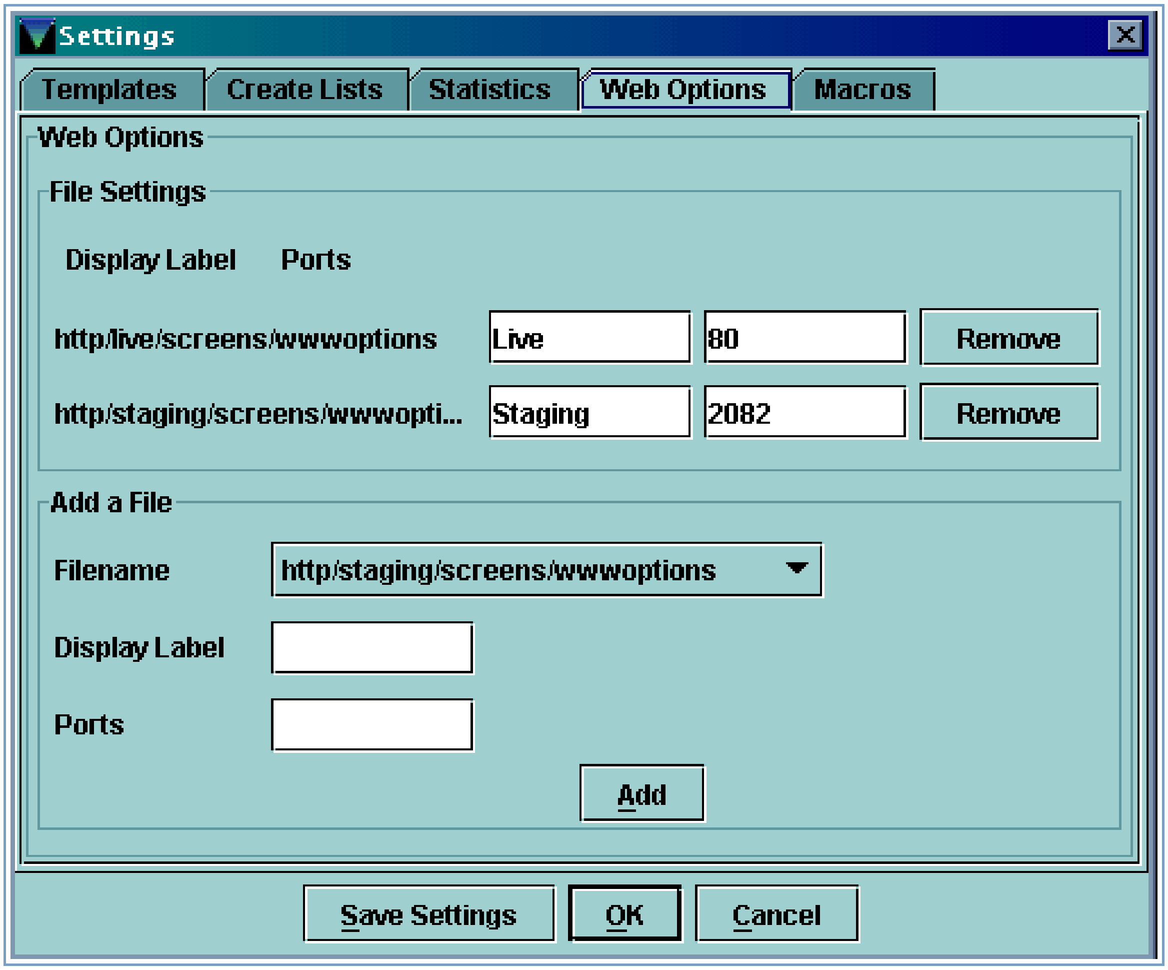
To remove a template, highlight one of the existing entries in the **Preferred** or **Other Templates** columns and click on the **Delete** button, or right click and choose **Delete Template**. For additional information, refer to the Innovative Guide and Reference, Page # 105677 Deleting Record Templates

To display a template, highlight one of the existing entries in the **Preferred** or **Other Templates** columns and click on the **View** button, or right click and choose **View Template**.

close window

WEB OPTIONS

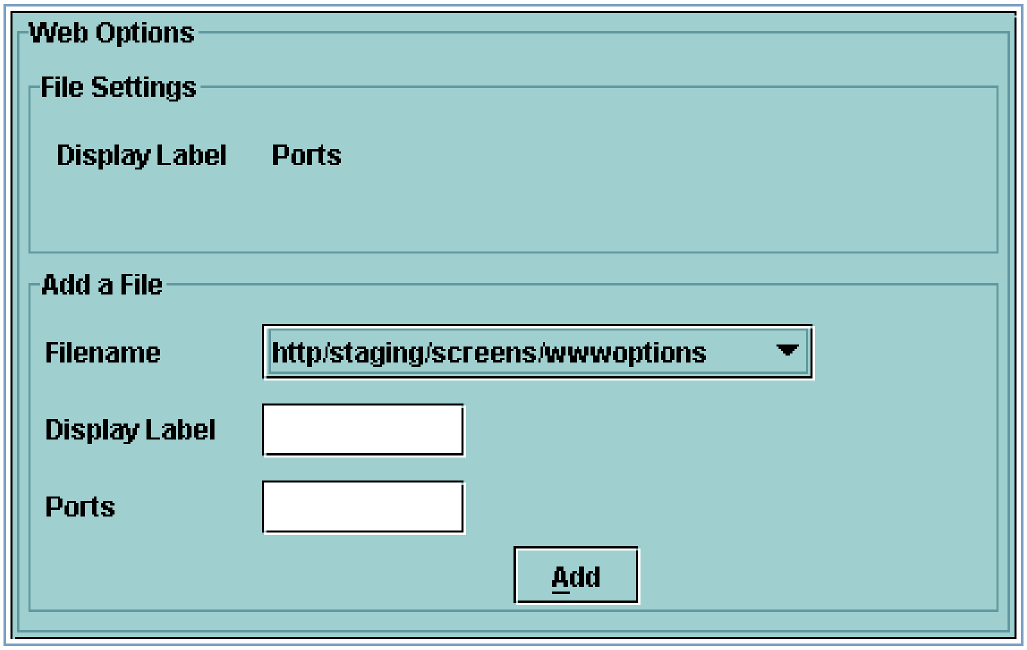
The **Web Options** tab allows you to determine the WebPAC options files that can be accessed in Web Options mode in Millennium Administration.



close window

FILE SETTINGS/ADD A FILE

Files listed under File Settings can be accessed in **Web Options** mode. There are no defaults:

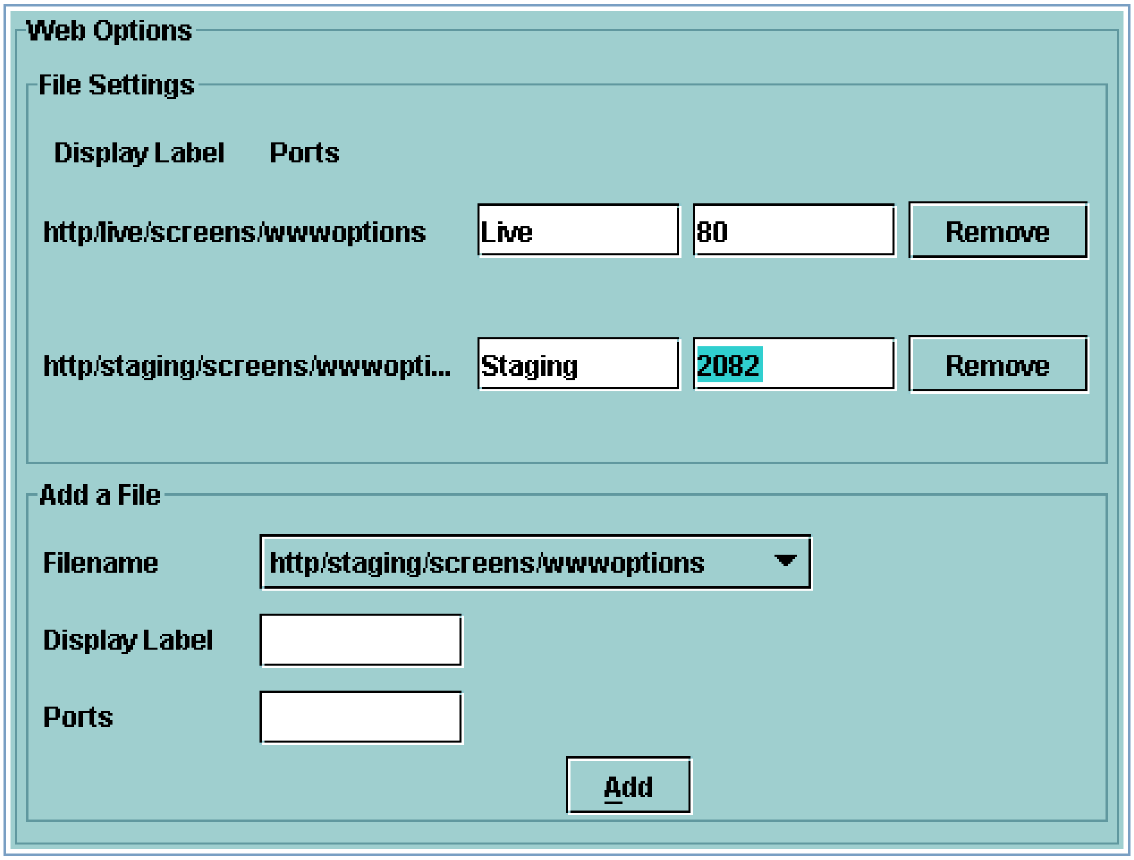


To add a WebPAC Options file to File Settings, complete the following steps:

1. Select a Filename from the drop-down list under Add a File. The drop-down list is a list of available files in your live and staging directories.
2. Enter a Display Label for the file (e.g. "Staging").
3. Enter the port(s) for the WebPAC(s) currently using the selected file. By default, the staging file is assigned port 2082 and the live file is assigned port 80.
4. Click **Add**.
5. After you save the change by clicking on **Save Settings** and/or **OK**, the file(s) will appear in **Web Options** mode, in Select a File list.

To edit display name or port, select an existing file under File Settings:

- Change the display label as needed.
- Update the port for the WebPAC using this WebPAC options file, if the port has been changed.



Changing or setting the port(s) does not change the WebPAC behavior. Changing or setting the port(s) only dictates which ports are restarted after you click **Restart** while the selected WebPAC Options file is open in **Web Options** mode.

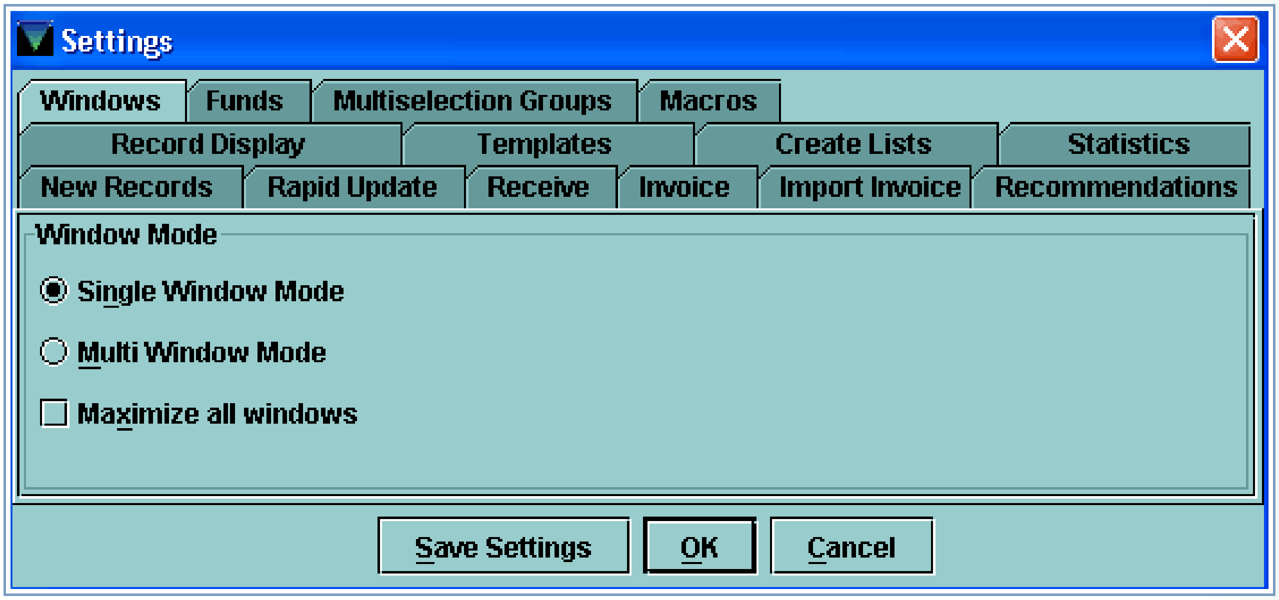
To remove an existing file from the list of accessible files, click on **Remove**.

For additional information, refer to the Innovative Guide and Reference, Page # 106807: Updating Web Options

close window

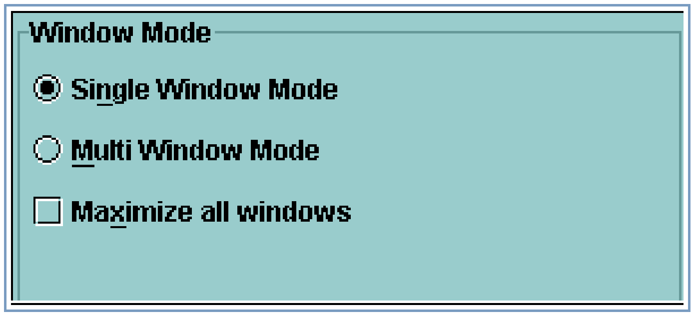
WINDOWS

The **Windows** tab contains options that specify whether Millennium runs in a single window, or in Multiple Windows mode.



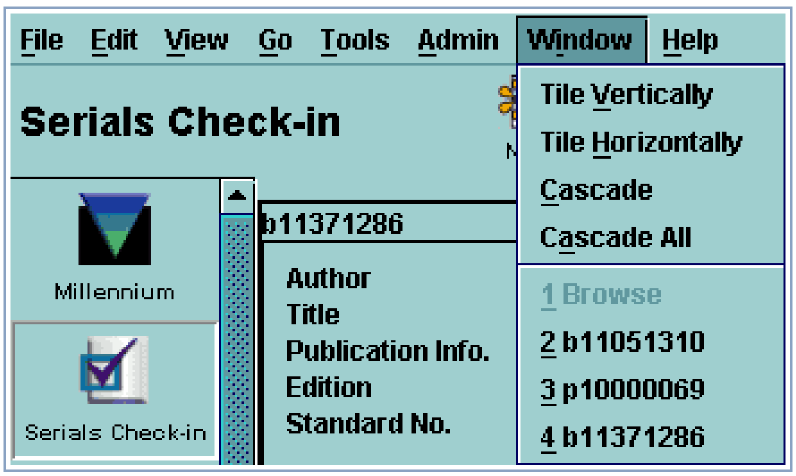
close window

WINDOW MODE



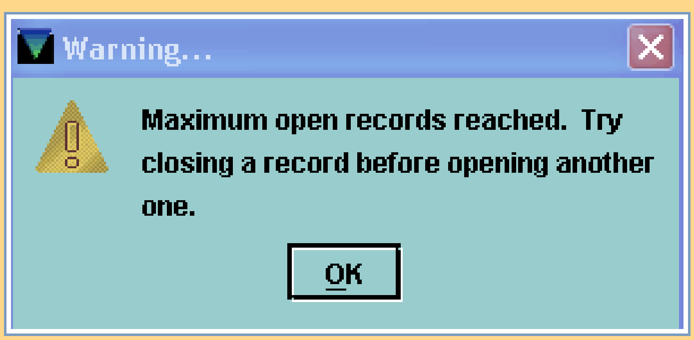
Single Window Mode
If this option is selected, Millennium runs all functions and displays all records in a single window, and each function or record is replaced in the window by the next function or record. For example, if you select a record from a browse list, the open record will replace the browse list in the window.

Multi Window Mode
If this option is selected, Millennium opens each new record in a new window. For example, if you select a record from a browse list, the record will open in a separate window, leaving the browse list open in a window behind it. A maximum of five windows plus a browse window can be open at one time. All open windows can be seen and accessed from the **Window** menu that will appear on the menu bar when this option is checked.



Maximize all windows
If this check box is selected, windows are maximized when they open (i.e. the newly-opened window fills the computer screen).

A maximum of five windows plus a browse window can be open at one time. When you open a 6th record an error message displays:



close window

GLOSSARY

Field group tag A one-letter code identifying similar fields for grouping and labelling purposes. All variable-length fields (MARC and non-MARC) are associated with a field group tag. Multiple MARC tags can share the same field group tag. For example:

a   100   1   Adams, Ansel,|d1902-   (MARC field for author)
a   110   1   South Africa.|bParliament.   (MARC field for author)
a   Adams, Ansel   (non-MARC field for author)
b   30001016825723   (non-MARC field for barcode)

Fixed length field Data fields that are of a specified fixed length, e.g. dates, codes, statistical information. The data display in a grid in a Millennium record. In most, though not all, cases, valid codes are pre-entered in tables on the system. Refer to the Innovative Guide and Reference, Page # 105775: Fixed-length Fields

Item-level Hold A staff member or patron places a hold on an item record (for example, a specific copy of a book or a specific volume of a set). An item-level hold is satisfied when that specific item is returned to the library system.

Load table An interface profile - a set of parameters defining which fields will be loaded from a source and how they will be mapped when stored within a record. See the Innovative Guide and Reference at Page # 101491: MARC Record Load Table

Title-level Hold A staff member or patron places a hold on the first available copy of a title. A title-level hold may be satisfied when any item associated with the specified bibliographic record is returned to the library system.

Variable length field A record field of up to 10,000 characters in length.
For example: MARC and non-MARC fields in bibliographic, patron, item, checkin, order, course records. Refer to the Innovative Guide and Reference, Page # 105783: Variable-Length Fields

close window