### 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.

### **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

# Get ADOBE\* FLASH\* PLAYER

#### **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 <u>PDF format</u>. To view and print it you need Adobe Acrobat Reader software which you can



Please contact us if you have <u>questions</u>, <u>comments</u> or <u>problems</u>.

### **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.

Millennium Cataloging · Training Machine							
<u>File Edit View Go Tools</u>	Admin Reports Window Help						
Edit Functions	<u>S</u> et Initials <u>C</u> lear Initials						
	- <u>F</u> ree Records In Use						
Call No.	Login Manager						
	Passwords and Authorizations						
	Settings						
Edition Standard	Parameters						

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

🔽 Login Manager	🔽 Login Manager 🛛 🔹 💽					
A selected check bo customized manage		-	2000			
Login		ontrolled Op	Preferences			
System			V			
milacq		<b>~</b>		333		
miladmin		<b>~</b>				
milcat		<b>~</b>	<b>~</b>			
milcirc		<b>~</b>				
milerm						
milill						
milsched						
milser		~				
miltool		r	Ľ	-		
<u>C</u> reate Login	<u>E</u> dit Login	Delete Log	in Modify <u>G</u> ro	oups		
Manager-Contro	olled Options	Preference	es <u>Q</u> uit			

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: <u>Millennium Login Administration</u>.

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: <u>Login Administration</u>

#### 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. CREATING A LOGIN | Login Manager

OVERVIEW OF CUSTOMIZING OPTIONS | Login Manager

### 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 <u>copied</u> 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 <u>system options</u>, 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 <u>Setup</u> 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 <u>Colors</u> 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.

customized manager-controlled options or preferences.           Login         Manager-Controlled Op         Preferences						
milacq			L ۱۰			
miladmin			h			
milcat						
milcatfr		Ī				
milcirc						
milerm						
milill						
milsco						
milser						
miltool			-			

Preferences can be <u>copied</u> 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.

WORKING WITH LOGIN MANAGER | Login Manager

### WORKING WITH LOGIN MANAGER

- <u>Copying Manager-controlled options or Preferences</u>
- 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:

🔽 Login Manager							
A selected check bo customized manage		-	nces.				
Login	Manager-Co	ontrolled Op	Preferences				
System		2		-			
milacq		<b>~</b>		33			
miladmin		<b>~</b>	<b>~</b>				
milcat		<b>~</b>	Ľ				
milcirc		<b>L</b>					
milerm							
milill							
milsched							
milser		r	Ľ				
miltool		2		-			
<u>C</u> reate Login	<u>E</u> dit Login	Delete Log	in Modify <u>G</u> ro	ups			
Manager-Contro	olled Options	Preference	es <u>Q</u> uit				

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.

### **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 Managercontrolled options. You will see a dialog similar to this:

🔽 Login Manager				×
A selected check box in customized manager-co	-			ntions For milaco 🔀
Login	Manager-Co	ntro	- Cuptomizo C	priorito i or initiato q 🔽
System		N	Copy the Manag	er-Controlled Options
milacq		r	defined for:	
miladmin				
milcat		Ľ	System	
milcirc			milcat	
milerm				
milill				
milsched				
milser			Select	<u>C</u> ancel
miltool			I	
milwsp				
Create Login	Edit Login		Delete Login	Modify <u>G</u> roups
Manager-Control	led Options		Preferences	<u>Q</u> uit

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.

### 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:

V Login Man	ager		×				
	ck box indicates that the login uses						
customized manager-controlled options or preferences.							
Login	Manager-Controlled Op	Preferenc	es				
milcat	V		<b>_</b>				
milcatfr	V						
milcirc	Warning	×					
milerm							
milill	Delete the customized Pr	eferences 🖡					
milmedia	Delete the customized Pr for the milcirc login?	Ī					
milsco		ļi —	200				
milser	Yes No	j	100 A				
miltool		ļ					
mmcirc							
pmilacq							
pmiladm							
nmileat		-2	<b></b>				
<u>M</u> anager-	Controlled Options <u>P</u> refe	rences	<u>Q</u> uit				

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":

🔽 Login Man	ager				×	
A selected che customized ma			-	nces.		
Login Manager-Controlled Op Preferences						
System				Ī		
milacq miladmin	Error		<u> </u>	X		
milcat milcirc milerm	System options cannot be removed					
milill milsched		<u>O</u> K				
milser miltool	_					
<u>C</u> reate Log	in E	dit Login	Delete Log	in <b>M</b> e	odify <u>G</u> roups	
<u>M</u> anager-C	Controlled	Options	Preference	es	<u>Q</u> uit	

DELETING CUSTOMIZED MANAGER-CONTROLLED OPTIONS OR PREFERENCES | Login Manager

### 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 <u>Colors</u> 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.

#### **ACQUISITIONS - MANAGER CONTROLLED OPTIONS**

- Data Exchange
- Edit
- Holds •
- **Images** .
- . <u>Login</u>
- Modes •
- · Patron Display
- . Printing
- Setup .

#### **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**
- ٠ **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.

Manager-Controlled Options For milacq Login					
Patron Display Images Data Exchange					
Setup	Login	Printing	Edit	Holds	Modes

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.

Settings							×
Multiselection Gr	oups Macros	Search	Print Ter	nplates			
Record Display	Record Tem	plates 👘	Create Lists	Stati	stics	Windows	Funds
New Records	Rapid Update	Receive	Invoice	Import I	nvoice	Recomme	ndations

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.

#### ADMINISTRATION MANAGER CONTROLLED OPTIONS

- Data Exchange
- <u>Edit</u>
- 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.

Manager-Controlled Options For miladmin Login 🛛 🔀								
Images Data Exchange Web Master								
Setup	Login	Printing						

#### ADMINISTRATION SETTINGS

- <u>Create Lists</u>
- Invoice
- <u>Macros</u>
- Print Templates
- <u>Record Templates</u>
- <u>Statistics</u>
- 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.

Settings					
Record Templates	Create Lists	Statistics	Web Options	Macros	Print Templates

#### **CATALOGING - MANAGER CONTROLLED OPTIONS**

- Data Exchange
- <u>Edit</u>
- Holds
- Images
- Login
- Modes
- Printing
- <u>Setup</u>

#### **CATALOGING - SETTINGS**

- <u>Create Lists</u>
- Export Records
- Global Update
- Macros
- <u>New Records</u>
- <u>Print Templates</u>
  <u>Record Display</u>
- <u>Record Display</u>
  <u>Record Templates</u>
- <u>Reports</u>
- Search
- Session Statistics
- Statistics
- Windows
- <u>vviiluovvs</u>

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.

V Settings					
Reports Macros Export Records Search Print Templates					
Record Templates	Session Statistics	Create Lists	Statistics	Windows	
New Records Global Up		date	Record Dis	splay	

Millennium uses most of the <u>Database Maintencance options</u> 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

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.

Manager-Controlled Options For milcat Login							
Modes Images Data Exchange							
Setup	Setup Login		Edit	Holds			

#### **CIRCULATION - MANAGER CONTROLLED OPTIONS**

- Data Exchange
- Edit
- Holds
- Images
- Login
- Modes
- Patron Display
- Printing
- Setup
- Sounds
- <u>Tabs</u>

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.

Manager-Controlled Options For milcirc Login							
Holds Imag	Holds Images Sounds Due slips Data Exchange						
Patron Displa	y Setup	Login	Printing	Modes	Tabs	Edit	

#### **CIRCULATION - SETTINGS**

#### <u>Create Lists</u>

- <u>Macros</u>
- <u>New Records</u>
- On-the-fly Records
- Print Templates
- <u>Record Display</u>
- <u>Record Templates</u>
- <u>Search</u>
- <u>Statistics</u>
- 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.

Settings			
Create Lists Sta	tistics Windows	Macros Search	Print Templates
New Records	Record Display	Record Templates	On-the-fly Records

<u>Circulation options</u> 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 <u>Circulation Options That Can</u> <u>Be Options Grouped</u> on CSDirect.

### **ERM - MANAGER CONTROLLED OPTIONS**

- <u>Edit</u>
- 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.

Manager-Controlled Options For milerm Login	×
Setup Login Printing Edit Holds Modes Images	

#### **ERM - SETTINGS**

- <u>Create Lists</u>
- Global Update
- <u>Macros</u>
- <u>New Records</u>
- <u>Print Templates</u>
  <u>Record Display</u>
- <u>Record Templates</u>
- <u>Search</u>
- <u>Statistics</u>
- 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.

1	Settings							
ſ	Create Lists	Wind	ows	Macros	Sea	rch	Print Templates	
ł	New Record	ls	GI	obal Update	;		Record Display	Record Templates

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

#### **ILL MANAGER CONTROLLED OPTIONS**

- Data Exchange
- . **Departments**
- Due Slips •
- Edit •
- **Holds** .
- **Images**
- Login .
- Modes . •
- Patron Display Printing .
- <u>Setup</u>
- Sounds .

#### **ILL SETTINGS**

- Create Lists
- Macros •
- New Records
- **On-the-fly Records** .
- Print Templates
- **Record Display** •
- **Record Templates** . Search •
- **Statistics** •
- <u>Windows</u>

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.

Settings						×
Create Lists Sta	tistics W	indows Macros	Search	Print T	emplates	
New Records	Record E	)isplay Rec	ord Template	is	On-the-fly	Records

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

close window

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.

Manager-Controlled Options For milill Login						
Tabs Edit Hol	lds Images	Sounds Due	slips Data	Exchange		
TabsEditHolPatron Display	Setup Logir	Departments	s Printing	Modes		

### SERIALS MANAGER CONTROLLED OPTIONS

- <u>Edit</u>
- Holds
- Images
- Login
- Modes
- Printing
- Setup
- <u>Tabs</u>

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.

Manager-Controlled Options For milser Login						
Edit Holds Mode	es Tabs Images					
Setup	Login	Printing				

#### SERIALS SETTINGS

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

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.

V Settings				
Claiming Stati	stics Windows	Macros Searc	h Print Templates	
New Records	Rapid Update	Record Display	Record Templates	Create Lists

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

### 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.

Millennium Cat	aloging • Inte	ernal Training Machir	ie			
<u>File Edit View</u>	<u>G</u> o <u>T</u> ools	Admin Reports	Help			
Edit Functio	ons	<u>S</u> et Initials <u>C</u> lear Initials	View	Edit Media	WB Summary B	🔍 🚑 📩 Browse Print Close
	]	Free Records In Us	se			
Millennium	Call No. Author	Login Manager				
	Title Publicatio	Settings Parameters	•			
	Edition	_				
Cataloging	Standard	No.				
Quick Edit	Index: [t]	TITLE	•			
		Search Expan	nd All	Remote	INN-Vie <u>w</u>	Select
Global Update	#					# ENTRIES
1						
Rapid Update						
<del>0</del>						
Create Lists						
È						
Delete Items						
Headings Rpts	-					

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

customized manager-controlled options or preferences. Login Manager-Controlled Preferences							
Login		Preferences					
milacq	Ľ	ĭ ĭ					
miladmin	Ľ						
milcat	Ľ						
milcatfr	Ľ						
milcirc							
milerm	r V						
milill							
milmedia							
milsco	r V						
milser	Ľ						
miltool							
mmcirc							
pmilacq							

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

🔽 Manager-Controlled Options For milcatfr Login 🔀								
Modes	Images	Data Exchang	e					
Setup	Login	Printing	Edit	Holds				
🗌 Login	🗌 Login can edit preferences							
<mark>⊯</mark> <u>S</u> how	record num	ber in brief re	cord displa	y .				
R <u>e</u> cent :	Search histo	ry:	5					
<u>R</u> ecent I	Recent Record history: 5							
	0	K Cance	el					

Related options are grouped on tabs. Tabs and corresponding options vary between each module. You can customize the Managercontrolled 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 -

#### INTRODUCTION TO MANAGER CONTROLLED OPTIONS | Login Manager

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	САТ	CIRC	ERM	ILL	SER
Data Exchange	х	х	х	Х		х	
Departments						х	
Due Slips				Х		х	
Edit	х	х	х	Х	х	х	Х
Holds	х	х	х	х	х	х	Х
Images	Х	Х	Х	х	Х	Х	Х
Login	х	х	х	х	х	х	Х
Modes	х	х	х	х	х	х	Х
Patron Display	Х			х		Х	
Pickup Anywhere				Х			
Printing	х	х	х	х	х	х	Х
Setup	х	х	х	х	х	х	Х
Sounds				х		Х	
Tabs				Х		х	Х
Web Master		Х					

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.

Some Manager-controlled options override corresponding <u>system options</u>, 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 <u>Working with the Login Manager</u> for instructions on how to edit or copy Manager-controlled options.

INTRODUCTION TO MANAGER CONTROLLED OPTIONS | Login Manager

### 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.

### DEPARTMENTS

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

Manager-Controlled Options For milill Login 🛛 🛛 🔀								
Tabs         Edit         Holds         Images         Sounds         Macros         Due slips								
Patron Display	Setup	Login	Depart	iments	Printing	Modes		
Current selection: All Departments								
Departments				Campuses	S			
Main ILL Departme	ent			main				
Other								
All Seject								
		<u>о</u> к	<u>C</u> ance	el 🛛				

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 <u>Setting Up ILL</u>. 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.

#### DEPARTMENTS/CAMPUSES

Manager-Controlled Options For tutorial Login							
Tabs Edit Holds Images S	ounds Due slips Data Exchange						
Patron Display Setup Login	Departments Printing Modes						
Current selection: Emeryville PL							
Departments	Campuses						
Training Library	eb						
Emeryville PL	ep						
Innovative University							
Millennium Schools							
Other							
Silver Art Museum							
	All Select						
ОК	Cancel						

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.

### DUE SLIPS

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

Manager-Controlled Options For milcirc Login							
Holds Images So	unds D	ue slips 🛛 Dat	a Excha	ange			
Patron Display Set	up Log	in Printing	Mod	es Tabs	Edit		
Messages							
Message to print on due slip:							
Line 1							
Line 2							
Due Slip Layout							
<u>U</u> se Defaults	Reset To	Previous Settin	gs	Print Test	Slip		
Field	1	Slip Order		Width			
Title	1	Slip Order	25	YYIUUI			
Author							
Call No.							
Barcode	2		25				
Due Date	3		25				
Volume							
Location			_				
Copy No. Total (incl. spaces)			79				
Total (incl. spaces)			19				
	ок	Cancel	]				

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

### 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.

# Tue 10 Feb 2004 01:35PM Item(s) checked out to Olson, John
TITLE BARCODE DUE DATE
Are you somebody? : the 02250145238 17-02-04
Welcome to Summertown Library!
Phone no: 052-3456722

PATRON INFORMATION ON DUE SLIP | Login Manager

### PATRON INFORMATION ON DUE SLIP



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.

# Tue 10 Feb 2004 01:45PM Item(s) checked out to p1002526.

 TITLE
 BARCODE
 DUE DATE

 Are you somebody? : the I 02250145238
 17-02-04

Welcome to Summertown Library! Phone no: 052-3456722

## DUE SLIP LAYOUT

-Due Slip Layout						
Use Defaults         Reset To Previous Settings         Print Test Slip						
Field	Slip Order	Width				
Title	1	25				
Author						
Call No.						
Barcode	2	25				
Due Date	3	25				
Volume						
Location						
Copy No.						
Total (incl. spaces)		79				
		·				

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.

### EDIT

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

	Manager-Conti	olled Opti	ons For	milcat Logi	n	×		
Ē	dit Holds II	nages S	ounds	Due slips	Data Exch	ange		
	Patron Display	Setup	Login	Printing	Modes	Tabs		
L <sub>E</sub>	clit							
	🗹 Use wizard to	create new	records					
	Fixed-Length Fig	eld Display N	lode —					
	○ Show codes only							
	O Show descri	ptions only						
	Show both codes and descriptions							
		ок		ancel				

Millennium Acquisitions and Administration look slightly different.

Millennium Acquisitions:

Manager-Controlled Options For milacq Login									
	Patron Dis	splay	Images	Data E	xchange				
ſ	Setup	Logii	n Pri	nting	Edit	Holds	Modes		
	Use wizard to create new records								
	Fixed-Length Field Display Mode								
	○ Show codes only								
	O Show descriptions only								
	Show both codes and descriptions								
	Selection	n List Di	splay Mod	le					
	Line								
	О Вох								
			0	ĸ	Cancel				

Millennium Serials:

dit Holds Mode Setup	es   Tabs   Images Login	Printing
_		
Use wizard to crea	ate new records	
isplay which box not	e on checkin card:	O Staff note
		Public note
Fixed-Length Field Di	splay Mode	
O Show codes only		
O Show description	is only	
Show both codes	-	
Show both codes	and descriptions	
	OK Cancel	

USE WIZARD TO CREATE NEW RECORDS | Login Manager

### USE WIZARD TO CREATE NEW RECORDS

☑ 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.

Lar	nguago	e	eng B	English	CAT DATE	
Ski	Skip Characters		0		BIB LVL	m MONOGRAPH
Loc	Location north North Library		Material Type	a LANG MATERIA		
Cop	Copies		0			
i	020			🔽 Edit Data		×
С	090					
a	100	1		BIB LVL <u>m</u> MOI	NOGRAPH	
t	245					
р	260			Next <u>C</u> a	ancel New Reco	rd Creation
г	300					
n	500					
d	650	0				
d	650	0				

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

New PATRON	Last Updated: 10-15-2002	Created: 10-15	-2002 Revisions
EXP DATE	-	BIRTH DATE	
RESIDES	a ALBANY	HOME LIBR	north North Libi
PCODE2	s FULL/STUDENT	PMESSAGE	- NO MESSAGE
PCODE3	0 Undeclared/unknown	MBLOCK	- NO BLOCK
P TYPE	0 Undergraduate	CL RTRND	0
тот снкоит	0	MONEY OWED	\$0.00
TOT RENWAL	0	FIRM	
CUR CHKOUT	0	BLK UNTIL	
PATRN NAME			
ADDRESS	Street		
	City/State/Zip		
ADDRESS2			
	-		
TELEPHONE			

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

### FIXED-LENGTH FIELD DISPLAY MODE

Fixed-Length Field Display Mode	
○ Show codes only	
○ Show descriptions only	
Show both codes and descriptions	

This option governs the display of the <u>fixed-length fields</u>.

#### 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	а				

#### 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.
# SELECTION LIST DISPLAY MODE

Selec	tion List Display Mode	
🖲 Lir	ne	
ОВо	x	

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:

Summary         Record o1100003x         Selection List o1100003x         Payments o1100003x         0 Bib-Level Holds					
Add Add G	Add     Add Group     Delete     Edit Box     Limit Location:     ALL		nit Location: ALL 🔻		
# Location	Fund	Copies Total Price			
🗹 1 ebaf	eafic	1	£12.00		
🔲 2 epaf	eafic	4	£48.00		
3 ebres	ebanf	2	£24.00		

Selection List Display in **Box** mode:

Summary Red	ord o1100003x	Selection List o11	00003x Payme	ents o1100003x	0 Bib-Level Holds
Ad	d Add <u>G</u> roup	Delete	Edit Bo <u>x</u>	Limit Loc	ation: ALL 🔻
Loc: ebaf Fund: eafic Copies: 1 Total Price: £12.0	Loc: epaf Fund: eafic Copies: 4 Total Price: £48.0	Loc: ebres Fund: ebanf Copies: 2 Total Price: £24.0			

### ADD SUPPLEMENTS AND INDEXES

Display which box note on checkin card:	⊖ Staff note	
	Public note	

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

Modify Boxes Individually					
Status		[	E EXPEC	TED	•
Cover	Expected Dates				
		Day	Monti Sease		ar
Cover	date		Win	2005	
Expect	ted date	01-12-	2005		
_ Enume	eration				
	Levels		v.	14	
			no.	4	
Claims	—		)		
Total co	pies <u>r</u> eceived	ļ	)		
URL					
Public <u>N</u>	-		018-25 m	issing	
<u>S</u> taff No	ite	I	eplacem	nent orde	red
Suppre	ss From Public D	isplay			
	<u>о</u> к	<u>C</u> a	ncel		

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

Public Note displaying:

 Sum 2005

 ARRIVED

 14-06-2005
 \*

 p.18-25 missing

 v.14 no.2
 1

Staff Note displaying:

Sum 2005 ARRIVED 14-06-2005 \* replacement ordered v.14 no.2 1

**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: <u>Overview of Checkin Card</u> <u>Fields</u>.

# HOLDS

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

Modes Im Setup	ages Data Login	Exchange Printing	Edit	Holds
Holds	Login	Frinding	Luit	TIOIGS
riolus				
I <u>⊿</u> Allow bib	level <u>h</u> olds or	n bibs with only 1 a	ittached item	1
	1			
ala wolik 🔄	ievel nolas o <u>r</u>	<u>n</u> bibs with no item	s and no ord	ers
Show Hol	ld Alert during	receiving		
		receiving		
	h	\$		
Limit pick	kup locations 1	to those in the Hol	d Pickup Loo	ations table.
Default Not W	Vanted After D	)ate: <mark>0</mark>		days
		<u>O</u> K <u>C</u> ancel		
e default matches you	r circulation po	licy. Do not make ex	ceptions for a	ny logins unl
n.	en culation po	nog. Do not make c/		ing logins, unit

ALLOW BIB LEVEL HOLDS ON BIBS WITH ONLY 1 ATTACHED ITEM | Login Manager

# ALLOW BIB LEVEL HOLDS ON BIBS WITH ONLY 1 ATTACHED ITEM

Allow bib level holds on bibs with only 1 attached item

If this option is selected, staff are allowed to place a <u>title-level</u> 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 <u>ITEM-level</u> 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 <u>patron placed</u> holds in the WebPAC are governed by the "Hold Level" section of Web Server option <u>REQUEST</u>.

ALLOW BIB LEVEL HOLDS ON BIBS WITH NO ITEMS AND NO ORDERS | Login Manager

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

Allow bib level holds on bibs with no items and no orders

If this option is selected, staff are allowed to place a <u>title-level</u> 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 <u>patron</u> from placing title-level holds on a bibliographic record with no attached item or order records, when requesting from the WebPAC, set the <u>BIBREQUEST</u> Web Server option to "false".

### SHOW HOLD ALERT DURING RECEIVING

Show Hold Alert during receiving

If this option is selected, the system provides a message to alert staff of any <u>title-level</u> 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

Record o10001426	Receive o10001426		Payments o1000	1426 1 8	1 Bib-Level Hold	
	🗌 Q <u>u</u> eue	P.O.	Vie <u>w</u> Finances			
6 Last Updated: 20	0-01-2004	Create	d: 20-01-2004	Revision	s: 3	
p PURCHASE	E PRICE	EUR0.00	)	RLOC	a ACQUISITIC	
200 🛛 Biblioteca di 🛛 💟	Hold Alert			LOC	a ACQUISITIC	
				TATUS	0 ON ORDER	
	🚺 There is	s 1 hold o	n this title	LOC		
1			-	<b>FENDOR</b>	none	
		<u>o</u> ĸ		ANG	eng English	
L					us United St	
	RDATE	20-01-2	004	VOLUMES	0	

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: <u>Receiving Acquisitions</u>

# LIMIT PICKUP LOCATIONS TO THOSE IN THE HOLD PICKUP LOCATIONS TABLE

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 <u>Hold Pickup Locations table</u> 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 <u>Branch (location) codes table</u>, i.e. all your location codes are listed.

DEFAULT NOT WANTED AFTER DATE | Login Manager

### DEFAULT NOT WANTED AFTER DATE

Default Not Wanted After Date:0

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.

days

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.

## IMAGES

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

Manager-Controlled	Options For milacq Lo	gin	X
Patron Display Imag	es Data Exchange		
Setup Login	Printing Edit	Holds	Modes
Component	Filename	Resou	ILCO
Orders	acqorders.gif		
Claiming	acqclaiming.gif	TO TO	
Send	acqsend.gif	~	
Send Claims	sersendclaims.gif	ď	
Send Orders	acqsendorders.gif	2	
Rapid Receive	acqrapidreceive.gif	<del>1</del>	
Rapid Update	acqrapidupdate.gif	15	
Receive	acqrapidupdate.gif	作生についた。 「「」」、 「」、 「」、 「」、 「」、 「」、 「」、 「	
Invoice	acqinvoice.gif	<u></u>	
Funds	acqfunds.gif	<u>s</u>	
Vendors	acqvendors.gif	$\underline{o}$	
Up	acquponelevel.gif	4	
Suggestions	acqsuggestions.gif	8	
Selectors Selection List	acqselectors.gif acqaddorder.gif	₩.	
Acq Create Lists	acqcreatelists.gif	*	
Acq Statistics	acqstatistics.gif	<b>#</b> #	
Vendor Statistics	acqvendorstats.gif	1	
Change Eprice	acqestpricemgr.gif	£3	
Foreign Exchange	acqforexmgr.gif	~	
Fiscal Close	acqfiscalclose.gif	<b>D</b> n	
Import Invoices	acqimportinvoices.gif	<b>2</b>	
Data Exchange	acqdataexchange.gif	<u>, 1</u>	
Contacts	acqcontacts.gif		
Default Book Jacket	(none)		
	Set Resource		
	<u>O</u> K <u>C</u> ancel		

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):

IMAGES | Login Manager

b10521537			
Call No.	PG3458.Z47 1986		
Author	Zernask, Heino, 1912-1985.	1000	
Title	El otro jardín : vida y obra de Antón Chéjov / Heino Zernask.	100	
Publication Info.	[Buenos Aires] : Editorial Universitaria de Buenos Aires, c1986.	100	
Standard No.	9502302656	199	
		100	



100

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: <u>Defining the Images that</u> <u>Display in the Navigation Bar</u>.

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

# IMAGES

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

Modes Images [	Data Exchange	Ī	
Setup Login	Printing	Edit	Holds
🗹 Clear initials on key	yboard timeout		
Exit application on	keyboard timeo	ut	
Prompt for initials on startup			
○ <u>A</u> ssociate initials a	nd password wi	ith login	
Initials to associate w	ith login		
	OK Can	icel	

# 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: <u>Setting</u> <u>Keyboard Timeout Periods</u> for details.

### **EXIT APPLICATION ON KEYBOARD TIMEOUT**

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 <u>Clear initials on keyboard timeout</u> 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.

PROMPT FOR INITIALS ON STARTUP | Login Manager

## 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:

Millennium Ci	rculation • European Training Machine	
<u>File E</u> dit <u>V</u> iew	<u>G</u> o <u>T</u> ools <u>A</u> dmin <u>H</u> elp	
Circulation	Desk 🖉 🦉 🗗 🚺	Browse Print
Millennium	Key or Scan Patron Barcode     Name       Barcode     Address	
Circulation Desk	Check Out Checked-Out Items(0) Holds(0) Fines(£0.00) Che	ck In (0) Linked Pat
Check-In	Print slip	Change <u>D</u> ue
	Password:	
Search / Holds	OK Cancel	
Clear Holdshelf		

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 <u>Associate initials and password with login</u> option.

ASSOCIATE INITIALS AND PASSWORD WITH LOGIN/INITIALS TO ASSOCIATE WITH LOGIN | Login Manager

### 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

Initials to associate with login
----------------------------------

Millennium Circulation and Inter-Library Loans logins do not have an **Associate initials and password with login** checkbox. For these modules you associate initials 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.

# MODES

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

Manager-Controlled Options For milcirc Login					
Holds Images Sounds Due slips Data Exchange					
Patron Display Setup Login Printing Modes Tabs Edit					
Select modes to display					
Circulation Desk	✓ Create Lists				
Check-In (No Patron) (x)	✓ Statistics				
Search / Holds by Title	🗌 Data Exchange (j)				
☑ Clear Holdshelf	✓ Homebound Report (f)				
View Outstanding Holds (b)	Merge Duplicate Patron Records (g)				
Transfer Paged Items (8)	☑ Bookings Maintenance (2)				
Renew (No Patron)	☑ Bookings Events (3)				
✓ Notices					
OK Cancel					

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 <u>Tabs</u> 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.

# 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:

Patron Display Images Data Exchange					
Setup	Login	Printing	Edit	Holds	Modes
Patron Record Display					
Brief display					
O Brief display w/address					
○ Full display					

#### PATRON DISPLAY | Login Manager

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.

Circulation I	Desk	New ·	View Edit Mess
Millennium Circulation Desk	Key or Scan Item or Patron Barcode	Name Barcode Note Patron Type Patron Code 4 Claims Returned Expiration Date	Peavoy, Ulrika 20102221035686 Check address! 10 Faculty 0 0 31-12-2004

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

 $BRIEF\ DISPLAY \mid Login\ Manager$ 

### 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

### BRIEF DISPLAY W/ADDRESS

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.

Name	Olander, Anthony
Barcode	20102220510309
Address	15 Selkirk Mansions
	Whitechapel London
Note	Umbrella to pick up at circdesk
Patron Type	8 Undergrad student
Patron Code 4	0
Claims Returned	0
Expiration Date	31-12-2004

### **CUSTOM DISPLAY**



When this option is selected, you can create a customized list of <u>fixed- and variable-length fields</u> 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.

# FULL DISPLAY

# 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		

### SHOW PATRON PHOTO

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.

PATRN NAME P TYPE PCODE4 CL RTRND	Shakespeare, William O Regular O Code O O	Pol	
EXP DATE	31-12-2005		

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

PATRN NAME P TYPE	Shakespeare, William O Regular	10
PCODE4 CL RTRND	0 Code 0 0	IN.
EXP DATE	31-12-2005	
		11/1

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

### **PICKUP ANYWHERE**

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

Manager-Controlled Options For andy166 Login 🛛 🛛 🗙					
Tabs Edit Patron Display	Holds Images Setup Login	Sounds Macros Pickup Anywhere	Due slips Printing	Modes	
Pickup Anywhere INN-Reach Pickup Location to associate with login					
<u>O</u> K <u>C</u> ancel					

**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

## PRINTING

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

Ì	🔽 Manager-Controlled Options For tutorial Login 🛛 🛛 🗙					
	Patron Display Images Data Exchange					
	Setup Login Printing Edit Holds Modes					
	☑ Allow label printing					
	Printing Defaults					
	O Last used on workstation for login					
	◉ <u>U</u> se login defaults					
	Login <u>D</u> efaults					
	<u>O</u> K <u>C</u> ancel					

**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: <u>Millennium Login Administration</u> 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).

🔽 Select Standard Printer 🛛 🛛 🔀	
2	Current Printer: Local Printer
0	Select Standard Printer
	(none)
	Local Printer
	Send to email address
	System Printer A
	OK Cancel

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 <u>printing categories</u> 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.

PRINTING | Login Manager

### 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.

Check-In Date		Fines
Tue 18 Jan 2005 <u>B</u> ackdate		Total:
		Amount selected:
Print receipt		🗌 Waive charges

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.

## ALLOW LABEL PRINTING

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:

Chec	<u>k</u> -in date Th	urs 16 Dec 2004	Print routing 🗌 Cro	eate item <u>C</u> heck In	Update Holdings?	
Yes w/ dialog 💌						
	2003		200	4 2005	2006	
ARRIV	'ED	ARRIVED	EXPECTED	EXPECTED	EXPECTED	
07-12-2	2003	15-01-2004	01-10-2004	01-10-2005	01-10-2006	
		Index 2000-2003				
v.16	1	1	v.17	v.18	v.19	

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:

Check-in date Thurs 16 Dec 2004 Print labels/routing Create item Check In Update Holdings? Yes w/ dialog 💌						
2003 ARRIVED 07-12-2003 v.16 1	I ARRIVED 15-01-2004 Index 2000-2003 1	2004 EXPECTED 01-10-2004 v.17	2005 EXPECTED 01-10-2005 v.18	2006 EXPECTED 01-10-2006 v.19		

file:///C/PROJECTS/TUTORIAL%20LoginManager%202008%20-%20UPDATES/print\_options12\_2.html (1 of 2) [10/27/2008 11:05:33 AM]

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

PRINTING DEFAULTS	
	Printing Defaults
	○ Last used on workstation for login
	◉ <u>U</u> se login defaults
	Login <u>D</u> efaults

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

## LAST USED ON WORKSTATION FOR LOGIN

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 <u>Printing category</u> 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 <u>local printer</u>, 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.

V Print (Label Printer)							
General Page Setup Appearance Format							
Print Service	Print Service						
Name: HP LaserJet 4P 🔹							
Status: Accepting jobs							
Print Range	Copies						
III 🖲	Number of copies: 1						
O Pages 1 to 1	Collate						
<u>O</u> K <u>C</u> ancel							

• 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.

VPrint (Label Printer)								
General Page Setup Appearance Format								
Media								
Size: Letter								
Orientation Margins								
Oprimi Portrait	left (mm) right (mm)							
O Landscape	25.4 25.4							
O Reverse Portrait								
O Reverse Landscape	top (mm) bottom (mm)							
	25.4 25.4							
<u>O</u> K <u>C</u> ancel								

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

Print (Label Printer)								
General	Page Setup	Appeara	nce	Forn	nat			
Job Attributes								
Name: Java Printing								
User name	User name: richardm							
-Color Anno	aranco		Sides					
-Color Appe	arance		siues					
Monoc	hrome		$\bigcirc 0$	ne-sid	ed			
O Color			Οτι	umble				
			O Di	uplex				
<u>O</u> K <u>C</u> ancel								

• 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.

VPrint (L	abel Printer)				×
General	Page Setup	Appea	rance	Format	
Format —					
🖲 Graphi	ic				
⊖ <u>T</u> ext					
O Text (r	narrow)				
Text Printi	ng		Graph	ic Printing	
Character	s per line:	80	Font s	size (6-24):	8
Lines per	page:	60	Chara	acter margin:	0
Lines to ej	ject:	2			
🗌 Print f	orm feed				
				<u>o</u> ĸ	<u>C</u> ancel

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 <u>Use login defaults</u> 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.

# USE LOGIN DEFAULTS



When you select **Use login defaults**, the selection of physical printer or **local** printer settings discussed in the <u>previous step</u>, 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.
#### **PRINTING CATEGORIES**

🛛 Login Defaults 🛛 🛛 🔀						
Receipt Printer						
Select local printer on startup						
Enable direct text printing						
Form Printer						
Select local printer on startup						
Enable direct text printing     Enable direct text printing						
only 40 columns wide						
Number of lines to eject after printing 2						
<u></u> <u>o</u> k						

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.

PRINTING CATEGORIES | Login Manager

Sele	ct Standard Printer 🛛 🗙					
2	Current Printer: (none)					
	Select Standard Printer					
	(none)					
	Local Printer					
	Send to email address					
	<u>O</u> K Cancel					

**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 <u>Print Templates</u> tab in Settings.

# SELECT LOCAL PRINTER ON STARTUP

Select local printer on startup

If this option is selected, the default printer for the <u>printing category</u> 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:

Print (S	tandard Printer)	×					
General	Page Setup Appea	rance Format					
Print Servi	ce						
Name: H	Name: HP LaserJet 2100 Series PCL 6						
Status: No	ot accepting jobs						
Print Rang	e	Copies					
IIA 🖲		Number of copies: 1					
O Pages	1 to 1	Collate					
<u>P</u> rint <u>C</u> ancel							

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.

ENABLE DIRECT TEXT PRINTING | Login Manager **ENABLE DIRECT TEXT PRINTING** 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 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

Printer for direct text printing is only 40 columns wide Number of lines to eject after printing 2

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.* 

# SETUP

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

Manager-Controlled Options For milcat Login							
	<u> </u>	kchange	/				
Setup	Login	Printing	Edit	Holds			
<ul> <li>☑ Login can edit preferences</li> <li>☑ Show record number in brief record display</li> <li>Recent Search history: 5</li> </ul>							
Recent Record history: 5							
<u>O</u> K <u>C</u> ancel							

Other modules have many specific options, like Millennium Serials:

🔽 Manager-Controlled Options For milser Login 🛛 🛛 🔀						
Edit Holds	Modes	Tabs	Images			
Setup		Login		Prir	nting	
🗌 Login can e	dit prefere	nces				
Show reco	rd number i	n brief re	cord dis	play		
🗌 Always sho	w check-in	dialog				
🗌 Alway <u>s</u> sho	w check-in	dialog du	Iring SIS	AC checkin.		
🗹 Allow item	creation					
🗹 Take item l	ocation fro	m checki	n record			
🗌 For checkir	n bound, get	t item loc	ation fro	m checkin		
Prompt to generate claims during check-in						
Add supplements and indexes						
🗌 Enable Weak Binding						
Show Popup for Print Pull Slip						
Show 'Claim All' button in Claiming mode						
✓ Use 1st order record when claiming						
Recent Searc	h history:		5			
Recent Record	d histone		5			

file:///Cl/PROJECTS/TUTORIAL%20LoginManager%202008%20-%20UPDATES/print\_options13.html (1 of 2) [10/27/2008 11:05:35 AM]



## ADD MESSAGE AT CHECKOUT

#### 🗌 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.

Key or Scan Item or Patron Baro	code	Name Barcode Address Patron Type Patron Code 4 Claims Returned Expiration Date	Penas De Ha 20102221030 C/Ramon E Cp 93993 F 16 9-12 stude 0 0 12-30-2004	6965 Berenguer Palma Spa	
Check Out (1) Checked-Out	ltems(0)	Holds(0) Fine	s(\$0.00) Ch	eck in (0)	Linked Patrons(0)
✓ Print slip		· · · ·	Add <u>M</u> es	sage	Change <u>D</u> ue Date
Barcode	Title	1-0	D == 00.01	Due Date	
3010200015802X Novelas ejemplares / Miguel de Cervante Dec 23 2004					JU4

Add Message To Item 🔀
2
Message
Damage to section 1 noted July 7 - repair on retu
OK Cancel

For further information about this function, refer to the Innovative Guide and Reference, Page # 105953: <u>Adding Messages at</u> <u>Checkout</u>.

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

HIDE THE BIBLIOGRAPHIC RECORD IN THE INVOICE DISPLAY | Login Manager

### HIDE THE BIBLIOGRAPHIC RECORD IN THE INVOICE DISPLAY

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:

👿 Millennium	Acqu	isitions	• Europ	ean Train	ing Machin	e				_ 🗆 🗵
<u>File Edit Viev</u>	v <u>G</u> o	<u>T</u> ools	<u>A</u> dmin	<u>H</u> elp						
Invoice Pr	oce	ssing			Finish	Suspe		<b>3</b> ancel	Show Bib	Both
	<b>_</b>	Invo	ice # 🗌		Invoice Dat	e	20	Vend	lor 🛛	
Rapid Receive		Aj	oply uset	tax None	▼ <u>U</u> s	e Curro	ency Lo	cal Cu	rrency 🔻	]
	#	Recor		Title		Copi	Amount	Fund	Notes	
Recommend	1 88 2									
	3									
	4									
Invoice	5 6									
<b>a</b>	7									
	8									
Funds	9	•								
<b>B</b> a	200 - 10 - 10									<b>—</b>
<b></b>				Cul	ototal		£0.	00		
Fiscal Close				34	וטנמו		<u></u>			
				Shi	pping		£0.			
A A A A A A A A A A A A A A A A A A A					vice Charge		£0.	=		
Import Invoices				30	nee enarge					
				Tot	al		£0.	00		
	ĻΓ									
Vondore									1	

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

Millennium A	cquisitions •	European Tra	aining Machine	e		_ 🗆 ×
<u>File Edit View</u>	<u>G</u> o <u>T</u> ools	<u>A</u> dmin <u>H</u> elp				
Invoice Pro	cessing	Close	Finish Suspe		Show Bib	Show Inv
	- Invoid	ce #	Invoice Dat	e20	Vendor	
Rapid Receive	Ap	ply usetax Nor	ne ▼ <u>U</u> se	e Currency La	ocal Currenc	y 🔻
Recommend	# Recor	Titl	le	Cop Amount	Fund	Notes 🔺
Invoice	2 3 4 5					
Funds	6 7 Author					
Fiscal Close	Title Publication	n Info.				
Limport Invoices	l <u>n</u> dex: i IS	SBNASSN	•			
$\mathcal{Q}$	<u>S</u> ea	irch E <u>x</u> pa	ind All	Remote	INN-Vie <u>w</u>	Select
Vondors						

## LOGIN CAN EDIT PREFERENCES

#### Login can edit preferences

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

<u>F</u> ile	Edit View	<u>G</u> o <u>T</u> ool	s <u>A</u> dmin <u>H</u> elp
<b>~</b> ~	Cu <u>t</u>	Ctrl-X	*
Ore	<u>C</u> opy	Ctrl-C	New
	<u>P</u> aste	Ctrl-V	
	Select All	Ctrl-A	
Mi	Preference	es	tion Info.

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.

PROMPT TO GENERATE CLAIMS DURING CHECKIN | Login Manager

# PROMPT TO GENERATE CLAIMS DURING CHECKIN

Prompt to generate claims during check-in

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.

RECENT PATRON HISTORY | Login Manager

#### RECENT PATRON HISTORY

Recent patron history: 10

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.

File Edit View Go Tools	Admin	<u>H</u> elp
Recent Patrons	•	<u>a</u> : Stafford, Ian
New Patron		b: Thompson, Cathy
Next Record	Ctrl-]	<u>c</u> : Smith, Fiona
- Previous Record	Ctrl-[	<u>d</u> : Lacour, Michelle
Drint Table (Deceint Drinter)	Ctrl D	<u>e</u> : Dominquez, Geraldine

**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.

RECENT RECORD HISTORY | Login Manager

# RECENT RECORD HISTORY

Recent Record history:

5

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.

Millennium Acquisitions • European Training Machine					
File Edit View Go Tools Ac	lmin <u>H</u> elp				
Recent Search	👷 📄 🗔 📝 🔥				
Recent Record	SUBJECT (d), Cardiology., b11928773				
Ne <u>w</u> Record	TITLE (t), Palabras de familia, b1075300x				
Next Record Ctrl-]	AUTHOR (a), Jelinek, Elfriede, 1946-, b11560538				
Previous Record Ctrl-[	ISBN/ISSN (i), 0815118899, b11894647				
Print (Standard Printer) Ctrl-P	SUBJECT (d), Accounting., b10969445				
Select Printer					
<u>Close</u> Alt-Q					
Exit					

RECENT SEARCH HISTORY | Login Manager

### RECENT SEARCH HISTORY

Recent Search history:

5

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.

Millennium Acquisitions • European Training Machine						
<u>File E</u> dit <u>V</u> iew <u>Go Tools A</u> dmin <u>H</u> elp						
Recent Search	SUBJECT (d), cardiology					
Recent Record	TITLE (t), palabras					
Ne <u>w</u> Record	AUTHOR (a), jelinek					
Next Record Ctrl-]	ISBNASSN (i), 081511751					
Previous Record Ctrl-[	ISBN/ISSN (i), 081511740X					
Print (Standard Printer) Ctrl-P	-					
Select Printer	,					
<u>C</u> lose Alt-Q						
Exit						

REMOVE CLAIMS RETURNED NOTES FOR CHECKED-IN ITEMS | Login Manager

### **REMOVE CLAIMS RETURNED NOTES FOR CHECKED-IN ITEMS**

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: <u>Claiming</u> Items Returned

RESTRICT RECEIVE AND CREATE ITEMS TO LOCATIONS SERVED | Login Manager

## RESTRICT RECEIVE AND CREATE ITEMS TO LOCATIONS SERVED

#### 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:

Summary Record o14000088 Receive o14000088 Payments o14000088 0 Bib-Level Ho								
✓ Select all Receive Date: 02-12-2004 ✓ Copy EPRICE to item Receive Sh								
# Location	Fund	Enumeration	Received Date					
✓ 1 xlav	ximed	c. 1	02-12-2004					
2 xlb	xlbks	c. 1	02-12-2004					

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:

Summary Record o140000	188 Receive o14000	088 Payments o1400	0 Bib-Level Ha			
✓ Select all Receive Date: 02-12-2004 ✓ Copy EPRICE to item Receive Sh						
# Location	Fund	Enumeration	Received Date			
🗾 1 xlav	ximed	c. 1	02-12-2004			

**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: <u>Passwords and Authorizations</u>

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

## 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.

Claiming		2 View	Edit	Media	WB	Summary
Millennium	Ra      Start c14000003		c140019		ita <u>r</u> t	Claim All
Serials Check-in	MARC Leader Call No. Author					
Routing	Title Edition Publication Info. Summany Bib-Level Holds					
Claiming						

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: <u>Claiming Serials</u> and Page # 100651 <u>Claiming</u> and Cancelling Orders.

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

SHOW AMOUNT OWED IN FINES TAB | Login Manager

### SHOW AMOUNT OWED IN FINES TAB

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.

ľ	Check Out (0)	Checked-Out Items(0)	Holds(1)	Fines (\$7.60)	Check In (0)	Bookings(0)	ILL(0)

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

Check Out (0) Checked-Out Items(0) Holds(1) Fines Check In (0) Bookings(0) ILL(0)	Check Out (0)
---	---------------

**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 <u>Preferences</u> - if the amount owed is greater than that set in Circulation option *Check-out: Display fines if money owed exceeds.* 

ADD SUPPLEMENTS AND INDEXES | Login Manager

## 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:

Ріесе Туре	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: <u>Issues, Supplements, and Indexes</u>

SHOW POP UP FOR PRINT PULL SLIP | Login Manager

## SHOW POP UP FOR PRINT PULL SLIP

#### Show Popup 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:

Holdings c14001081 Routing c14001081(1) 0 Bib-Level Holds							
Record c1400	1081	Card c14001081					
Print Pull Slip To B	indery Check In Bou	Ind					
2000	S 2000	2001					
ARRIVED	ARRIVED	ARRIVED					
18-10-2000	09-01-2001 Bibliography 2000	27-09-2001					
v.13 1		l v.14 1					
	Record c1400 Print Pull Slip To Bi 2000 ARRIVED 18-10-2000	Record c14001081       Print Pull Slip     To Bindery     Check In Bou       2000     S     2000       ARRIVED     ARRIVED     ARRIVED       18-10-2000     09-01-2001     Bibliography 2000					

2. The following dialog box appears:

V Print Pull Slip to Bind	×
Binding	1
Print Now	
Copies to Bind 1	
Note	]
OK Cancel	

SHOW PREVIEW OF POSTING PRINTOUTS | Login Manager

### 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.

nvoice Pi		ent Posting S	Sessio	n is 1						
Claim/Cancel	Pri	int Encumbra	ance	Print Im	/oice	Post F	und	Post Orde	r Post	Paymen
2	Pri	nt Encu	mbra	ances					·	
	B red	cords in lien	file							
Send	get	tting liens								
	10.00	imitment reg	jister r	low printi	ng					
	<b>1</b>			·	Ū					
		<b>N</b> Info								×
Rapid Receive										
				ENCOMBRAD	NCE REGI	STER	Posting	, 12-Dec-2004	Ł	
<u></u>				PONUM	Fund	Vendor			Encumbered	
	188 I		7	14000106	×lme d	sep		£28.00		
	<b>*</b>		8	14000088	×lbks	NONE		-£20.00		
Recommend	188 I		9 10	14000088 14000106	xlmed xlmed	NONE sep		£20.00 -£28.00		
	188		11	14000106	x1mea x1bks	sep		-£20.00 £28.00		
	<b>3</b>		12	14000088	xlmed	NONE		-£20.00		
	<b>20</b>		13	14000088	xlmed	NONE		£20.00		
Invoice	叢		14	14000088	×lbks	NONE		£20.00		
	200			TOTAL OF I	ENCUM	BRANCES :		£48.00		
$\Delta$										
E.							i			
						OK				
Funds					L					

SHOW RECORD NUMBER IN BRIEF RECORD DISPLAY | Login Manager

#### SHOW RECORD NUMBER IN BRIEF RECORD DISPLAY

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.

b11009160							
AuthorEagles (Musical group)TitleSelected works 1972-1999 [sound recording] / Eagles.Publication Info.Beverly Hills, CA : Elektra Entertainment Group Inc., 2000.Standard No.62575-2 Elektra							
Index: t TITLE	Index: t TITLE   Index: t TITLE						
	Search Expand All Remote						
#	TITLE						
1 Ballads.							
2 Ballads and s	ongs of the shanty-boy,						
3 Ballads in the	3 Ballads in the Charles Harding Firth Collection of the University of Sheffield : a descrip						
4 Ballads migrant in New England,							
5 Ballads of old	New York						
6 Ballads of the	English border						

#### TAKE ITEM LOCATION FROM CHECKIN RECORD

#### Z 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

Turn off validity checking for barcodes

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).

# USE 1st ORDER RECORD WHEN CLAIMING

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.

Holdings c14001950 Routing c14001950(0) 0 Bib-Level Holds									
Summary	Record c14001	1950	Card c14001950						
<u>C</u> laim One <u>Cl</u> aim All									
Last payment	Last payment 014000210 not paid								
Spr 2004 LATE 01-03-2004	Sum 2004 LATE 01-06-2004	Fal 2004 LATE 01-09-2004	Win 2004 <b>_</b> LATE 01-12-2004						
v.33 no.1	v.33 no.2	v.33 no.3	v.33 no.4						

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.

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

🗹 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.



und name display		Fund co	Fund code display			
Funds Activity Adjustment			Funds	Activity	Adjustn	nent
	Appropriation	Expenditure		Ap	propriation	Expenditure
Silver Periodicals	£15,000.00	£0.00	vaper		£15,000.00	£0.00
Silver Photo Coll.	£10,000.00	£0.00	vapho		£10,000.00	£0.00
Silver Reference	£10,000.00	£0.00	varef	:	£10,000.00	£0.00
Silver Stacks	£30,000.00	£0.00	vabks	:	£30,000.00	£0.00
Totals	£65,000.00	£0.00	Totals		£65,000.00	£0.00

USE THE VENDOR NAME INSTEAD OF CODE IN THE VENDOR HIERARCHY DISPLAY | Login Manager

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

🗹 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.

Vendor name display	Vendor code display
Contract of the second	📑 Vendors
🗣 🗂 Current Vendors	Current Vendors
🗣 💼 Hierarchies	🖗 💼 Hierarchies
∲- <b>⊑</b> 1 UK	ф- 💼 ик
– 🗋 Africa Book Centre (UK)	– 🗋 abc
— 🗋 Embroiderers' Guild Bookshop (UK)	– 🗋 embgu
- 🗋 Holt Jackson (UK)	- 🗋 holtj

## ALLOW ITEM CREATION

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.

Holdings c11000132 Routing c11000132(0) 0 Bib-Level Holds						
Summary	Record c11000	0132	Card c11	1000132		
Check-in date Wed 22 Dec 2004 🗹 Create item Check In Update Holdings? Yes w/ dialog						
22 Nov 2004	29 Nov 2004	6 De	ec 2004	13 Dec 2004		
ARRIVED	ARRIVED	ARRIVED	Ð	PECTED		
22-11-2004	30-11-2004	06-12-2004	4 13	-12-2004		
v.144 no.21 1	v.144 no.22 1	v.144 no.23	1 v.144 no.	24		

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.

Create Item for Box	Ctrl-R	
Modify Boxes Individually	Ctrl-M	
Extrapolate Boxes	Ctrl-O	, mm
 Delete Boxes	Delete	
– Update Boxes as a Group	Ctrl-U	
	Ctrl+Skift-R	00132(0) 0 Bib-Level Holds
Insert Issue Boxes before Selected Add Issue Boxes at End of Card	Insert Alt-Insert	04 <u>Check In</u> Update Holdings?
Insert Supp <u>l</u> ement Boxes before Selected Add <u>S</u> upplement Boxes at End of Card	Skift-Insert Alt+Skift-Insert	9 Nov 2004 6 Dec 2004 /ED ARRIVED 2004 06-12-2004
Insert Inde <u>x</u> Boxes before Selected	Ctrl-Insert	
Add Index Boxes at End of Card	Ctrl+Alt-Insert	Create car <u>d</u>
Print Labels	Ctrl-P	Box Menu 🔸 an 2005
Send Claims 20-12-2004	ехре 27-12	Advanced Options D Card Menu D
V.144 no.25	v.145 no.1	Card Display  Card Function
e		Undo Ctrl-Z
Avs 1 3/8 Vid 1,5 cm Ra		Redo Ctrl-Y

ALWAYS SHOW CHECK IN DIALOG | Login Manager

# 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:

Chec <u>k</u> -in date	Wed 22 Dec 2004	<u>C</u> he	ck In Update Holdings?	No
20 Dec 2004 EXPECTED	27 Dec 2004/3 Ja EXPECTED	n 2005	10 Jan 2005 EXPECTED	17 Jan 2005 EXPECTED
20-12-2004	27-12-2004		03-01-2005	10-01-2005
v.144 no.25	v.145 no.1		v.145 no.2	v.145 no.3

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

Modify Boxes Individually					
Status					
Year					
2004					
144					
25					
Suppress From Public Display					

3. Box status is changed to ARRIVED:

Chec <u>k</u> -in date	Ved 22 Dec 2004 Che	ck In Update Holdings?	No 🔻
20 Dec 2004	27 Dec 2004/3 Jan 2005	10 Jan 2005	17 Jan 2005
ARRIVED	EXPECTED	EXPECTED	EXPECTED
22-12-2004	27-12-2004	03-01-2005	10-01-2005
v.144 no.25 1	v.145 no.1	v.145 no.2	v.145 no.3

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

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

Chec <u>k</u> -in date	Wed 22 Dec 2004	<u>C</u> he	ck In Update Holdings?	No 🔻
20 Dec 2004	27 Dec 2004/5 Ja	n 2005	10 Jan 2005	17 Jan 2005
EXPECTED	EXPECTED		EXPECTED	EXPECTED
20-12-2004	27-12-2004		03-01-2005	10-01-2005
v.144 no.25	v.145 no.1		v.145 no.2	v.145 no.3

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

Chec <u>k</u> -in date	Wed 22 Dec 2004	neck In Update Holdings?	No 🔻
	27 Dec 2004/3 Jan 200		17 Jan 2005
ARRIVED 22-12-2004	EXPECTED 27-12-2004	EXPECTED 03-01-2005	EXPECTED 10-01-2005
v.144 no.25 1	v.145 no.1	v.145 no.2	v.145 no.3

**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.

ALWAYS SHOW CHECK IN DIALOG DURING SISAC CHECKIN | Login Manager

# ALWAYS SHOW CHECK IN DIALOG DURING SISAC CHECKIN

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:

Check_in date Wed 22 Dec 2004 Check In Update Holdings? No 🔻					
20 Dec 2004	27 Dec 200473 Jan 2005	10 Jan 2005	17 Jan 2005		
EXPECTED	EXPECTED	EXPECTED	EXPECTED		
20-12-2004	27-12-2004	03-01-2005	10-01-2005		
v.144 no.25	v.145 no.1	v.145 no.2	v.145 no.3		

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

Modify Boxes Individually 🛛 🔀					
Status					
Cover Expected Dates					
	Day	Month Seaso			
Cover <u>d</u> ate	20	Dec	2004		
Expected date	20-12-2	2004			
Enumeration					
Levels		۷.	144		
		no.	25		
Claims <u>w</u> ritten		)			
Total copies <u>r</u> eceived	0	)			
URL					
Suppress From Public Display <u>OK</u> <u>Cancel</u>					

ALWAYS SHOW CHECK IN DIALOG DURING SISAC CHECKIN | Login Manager

3. Box status is changed to ARRIVED:

Chec <u>k</u> -in date V	/ed 22 Dec 2004	<u>C</u> heck In	Update Holdings?	No 🔻
20 Dec 2004	27 Dec 2004/3 Jan 20	05	10 Jan 2005	17 Jan 2005
	EXPECTED		EXPECTED	EXPECTED
22-12-2004	27-12-2004		03-01-2005	10-01-2005
v.144 no.25 1	v.145 no.1	v.145	no.2	v.145 no.3

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

1. Click on Check In button:

Check-in date Wed 22 Dec 2004 Check In Update Holdings? No 🔻				
20 Dec 2004	27 Dec 200473 Jan 2005	10 Jan 2005	17 Jan 2005	
EXPECTED	EXPECTED	EXPECTED	EXPECTED	
20-12-2004	27-12-2004	03-01-2005	10-01-2005	
v.144 no.25	v.145 no.1	v.145 no.2	v.145 no.3	

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

Check_in date Wed 22 Dec 2004 Check In Update Holdings? No				
20 Dec 2004	27 Dec 2004/3 Jan 2005	10 Jan 2005	17 Jan 2005	
	EXPECTED	EXPECTED	EXPECTED	
22-12-2004	27-12-2004	03-01-2005	10-01-2005	
v.144 no.25 1	v.145 no.1	v.145 no.2	v.145 no.3	

**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.

COLLECT MONEY FOR MULTIPLE PATRONS | Login Manager

## COLLECT MONEY FOR MULTIPLE PATRONS

# ☑ 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.

Holds(0) Fines(	\$0.00) Check In (0) Lin	ked Patrons(0)			
Fines					
(Total:) [	\$0.00	Collect Money			
Amount selected:	\$0.00	Waive Charges			
Waive charges on items being checked in					

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.

## DEFAULT "COPY EPRICE TO ITEM"

#### ☑ 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

☑ Default receive date to today's date

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: <u>Receiving Order Records and Creating</u> Items

#### ENABLE WEAK BINDING

☑ 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: <u>Determining Which Issues to Bind</u>
# FOR CHECKIN BOUND, GET ITEM LOCATION FROM CHECKIN

🗌 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

### ADD SUPPLEMENTS AND INDEXES

Recent check-in history: 10

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.

<u>File</u> Edit <u>View</u> <u>Go</u> <u>T</u> ools <u>A</u> dm	in <u>H</u> elp
Recent Patrons	>
Recent Check-Ins	• <u>a</u> : Olander, Anthony
New Patron	<u>b</u> : Turner, Ruth
Next Record Ctrl-]	<u>c</u> : Perkins, Noel
Previous Record Ctrl-[	d: Olander, Anthony
- Drint Table (Pecoint Drinter) - Ctrl F	e: Olander, Anthony

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.

# SOUNDS

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

Manager-Controlled Options For milcirc Login							
Holds Images Sounds Due slips Data Exchange							
Patron Display Setur	) Login Printing	Modes Tabs Edit					
Disable sounds	Disable sounds     O Use default beep     O Use customized sounds						
Component	Filename	Resource					
Patron Warning	PatronWarning.au	audio file					
Patron OK	PatronOK.au	audio file					
Check-In (Patron OK)	CheckInPatronOK.au	audio file					
Item Warning	ItemWarning.au	audio file					
	Item OK ItemOK.au audio file						
	Check-In (Item OK) CheckInItemOK.au audio file						
Holds Ready	Holds.au	audio file					
Fines	Fines.au	audio file					
Error	Error.au	audio file					
	Set Resource						
	OK Cancel						

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.

## TABS

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

🔽 Ma	ager-Contro	olled Optio	ms For m	ilcirc Logi	n		X
Holds		Sounds	Due slip		Exchange		
	n Display ( circulation d	Setup losk tabs tr	Login   display-	Printing	Modes	Tabs	Edit
36160	circulation	ican (dua ((	տերություն				
	Ch <u>e</u> ck Out						
	Checked-Out	lte <u>m</u> s					
Ľ	Check <u>I</u> n						
	Holds						
	Fines						
	Bookings						
ľ	nter-Library	Loans					
	Lin <u>k</u> ed Patro	ns					
				0			
			<u>о</u> к	Cancel			

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:

Key or Scan Patron Barcode Search	Name Barcode Address
Check Out Checked-Out Items(0)	Holds(0) Fines(£0.00) Check In (0) Bookings(0) ILL(0)

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

<u>Go</u> <u>T</u> ools <u>A</u> dmin <u>H</u> elp	_
Millennium Control Bar	*
Browse	New,
Circulation <u>D</u> esk	Check Out
Check-In (No Patron)	Checked-Out Items
Search / Holds by Title	Hol <u>d</u> s
Cle <u>a</u> r Holdshelf	<u>F</u> ines
View Outstanding Holds (b)	<u>C</u> heck In
Renew (No Patron)	Bookings
Notices	ILL

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

## WEB MASTER

The Web Master tab looks similar to the following:

Modes Ima	iges 🛛 Data Exc	hange Wel	b Master	1	
Setup	Login	Printing	ı (	Edit	Holds
Web Master					
Displayed Proc	esses		Other P	ocesses	
Live Web Serv	er Configuration	lin			
	er Screens - live/				
Live Web Serv	er XSLT - live/xslt	(1)			
Staging Web S	erver Screens - s	sta			
Staging Web S	erver XSLT - stag	jin			
•		•			
<ul> <li>Essesses</li> </ul>		•			

The <u>Web Master</u> 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.

### 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.

Millennium Cataloging • European Training Machine						
<u>File Edit View Go Tools</u>	Admin Reports Help					
Edit Functions	Set Initials Clear Initials					
	Free Records In Use					
Call No.	Login Manager					
Millennium Title	Settings					
Publicatio	Parameters					

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

VLogin Manager				×		
A selected check box indicates that the login uses						
customized manager-	controlled opti	ons or pr	eferences.			
Login	Manager-Con	trolled	Prefer	ences		
System			l			
iiiadmin			Γ	]		
iiimacq			Γ	]		
iiimcat				]		
iiimcirc				]		
iiimill				]		
iiimser			Γ	]		
milacq			Γ	] ]		
miladmin				]		
milcat			I			
milcirc						
milill		< No. 100		]		
milser			Γ	]		
Manager-Controlle	ed Options	Prefe	rences	<u>Q</u> uit		

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

Preferences For tutorial Login	×
Colors and Fonts View Editor Editor Fo	nt Editor Colors
Look and Feel	Themes
Metal 🔹	III Theme ▼ <u>S</u> et
-Colors	
	ection highlight
Entry highlight	ton borders
Button highlight Bac	:kground
Completed box	omplete box
Out of Scope Box	
Font Settings	
	ont size 12 💌
Style 🗹 Bold 🗔 Italic	
Default Code Chart	
Aegean Numbers 🔹	
<u>O</u> K <u>C</u> ancel	

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 <u>Colors</u> section, where the elements vary slightly between the modules.

**NOTE:** When you save <u>Settings</u> 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.

# COLORS AND FONTS

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

Preferences For tutorial Login	2
Colors and Fonts View Editor Editor	or Font Editor Colors
Look and Feel	Themes
Metal	′ III Theme ▼ <u>S</u> et
Colors	
Text	Selection highlight
Entry highlight	Button borders
Button highlight	Background
<u>C</u> ompleted box	Incomplete box
Out of Scope Box	
Font Settings	
Font name SansSerif 🔹	Font size 12 💌
Style 🗹 Bold 🗔 Įtalic	
Default Code Chart	
Aegean Numbers	▼
<u></u> к <u>_</u> а	ncel

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

## LOOK & FEEL

Look and Feel	
Metal	•
Metal	
Windows	

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 <sup>TM</sup> operating system

Example of the Metal look and feel, Green theme:

👿 Millennium 🛛	Acquisitions • European Training Machine • b11174729	<u> </u>
<u>File Edit View</u>	<u>G</u> o <u>T</u> ools <u>A</u> dmin <u>H</u> elp	
Orders		rint
Millennium	<ul> <li>▶11174729</li> <li>Author Shakespeare, William, 1564-1616.</li> <li>Title All's well that ends well / by William Shakespeare ; [edited by Barb Mowat and Paul Werstine].</li> <li>Standard No. 0671722549 (pbk.) :</li> <li>LOCATIONS eb</li> </ul>	oara A.
Claim/Cancel	Summary       Record i10610364       0 Item-Level Holds       0 Bib-Level Holds         View       all All           #       RECORD NU       DESCRIPTION         #       I10610364       Location:eban Barcode:31307012683563          110610376       Location:eban Barcode:31307012683571	Select
Rapid Receive	- j10610364 2 Attache	d Records

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

	rculation • Euro		Machine • b1(	129169			
Search / Hol	lds by Title		iew Edit	Media(0)	WB	Summary	Browse
· ·	b10129169						
Millennium	Author Title Call No. Standard No.		73- sociétés secrète :uments inédits /				
Circulation Desk	LOCATIONS	iu					
-	,,	v	0 Item-Level Hol	ds   0 Bib-Le	vel Holds		<u> </u>
Check-In	Vie <u>w</u> i Item		Attach <u>N</u> ew	Item	<u>D</u> elete	Move	Select
Search / Holds	# REC(	ORD NUMBER	Location u1		arcode 0012912)	x	Volume
Clear Holdshelf 💽	i14237830					1 Attacl	hed Item R 🕨

## 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

👿 Millennium Cii	rculation • Eu	ropean Training	y Machine					<u>- 🗆 ×</u>
<u>File Edit View</u>	<u>Go T</u> ools <u>A</u> a	lmin <u>H</u> elp						
Circulation I	Desk	New (	View	Edit	<b>N</b> essages	Browse	Print	👌 Close
Millennium Circulation Desk	Key or Scan I Search	tem or Patron Bar	rcode	Name Barcode Address Address 3 Patron Co		20102221 C/Ramo No.2c Cp 9399 8 La Gre	n Berengu 13 Palma S	er <b>a</b> in
Check-In	Fines(£0.00) Check	Check In (0) 6 Out (0)		atrons(0)			Holds hange <u>D</u> ue	
-								

**Green Theme** 

THEMES | Login Manager

👿 Millennium Ci	irculatio	on • Europe	an Training	y Machine					_ 🗆 🗵
<u>File E</u> dit <u>V</u> iew	<u>G</u> o <u>T</u> o	ols <u>A</u> dmin	<u>H</u> elp						
Circulation	Desk		New (	(View	Edit	<b>R</b> essages	<b>Q</b> Browse	erint	👌 Close
	Keyo	r Scan Item o	or Patron Ba	code	Name Barcode		Wilson, An 201022219	519358	
Millennium	Se	arch			Address Patron Co Patron Co			thamStree City TX 323	000
Circulation Desk					Patron Co		0		-
eek-In	Fines	(£0.00) C Check Out	heck In (0) (0)		Patrons(0) Checked-Ou	rt Items(0)		Holds	s(0)
			_					Change <u>D</u> ue	Date
Search / Holds		Barcode			Title			Due Date	
ains									
	-								

Blue Theme

Millennium Cir	rculation • European Tra	aining Machi	ne				<u> </u>
<u>File E</u> dit <u>V</u> iew	<u>   Go   T</u> ools <u>A</u> dmin <u>H</u>	(elp					
Circulation	Desk	New View		T Messages	<b>Q</b> Browse	enint -	Cib se
Millennium	Key or Scan Item or P Search	atron Barc	Name Barcode Address		20102	nc, Nico 22056080 Gquare teur	66
Circulation Desk	Fines(£0.00) Chec Check Out (0)	sk In (0)   Li	nked Patrons Checked-OL		Cha	Holds	
Search / Holds	Barcode		Title			Due Date	
Clear Holdshelf 👻							

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.

THEMES | Login Manager

### 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<sup>TM</sup> operating system.

You can set colors for:

- Text defines the color of text in windows and dialogs.
- 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.
- Background defines the background color for the entire application.
- 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.
- 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.
- 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.

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
  - $_{\odot}\,$  Enter numeric values in the Red, Green, and Blue text boxes.

Choose a color
Swatches HSB RGB
Red 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1
Green 65 170 255
Blue 0 85 170 255
Preview
Sample Text Sample Text
Sample Text Sample Text Sample Text Sample Text
OK Cancel Reset

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.

FONT SETTINGS | Login Manager

## FONT SETTINGS

Font Settings						
Font name	SansSerif 🔹 🔻	Font size	12 🔻			
Style	🗹 <u>B</u> old 🔲 <u>I</u> talic					

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<sup>TM</sup> 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.

## DEFAULT CODE CHART

Default Code Chart	
Aegean Numbers	•

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: <u>Character Map</u> for information about inserting UNICODE characters into records via the code charts.

## EDITOR

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

Colors and Fonts	View Editor	Editor Font	Editor Colors
Show field group:	🔿 tag 🏾 🖲 lai	pel	
Show MARC ta	igs/indicators		
🔲 Show field gro	up information fo	or MARC fields	
Show MARC valida	ntion:		
🗹 Bibliographic	🗹 Authority 🛛	🗹 Holdings	
🗌 Overwrite MAF	RC tags/indicator	s	
🗹 Update field gr	oup tag when M/	ARC tagging cha	nges

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 <u>Introduction</u>), 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.



Editor Preferences	e • b10282890
Editor Font Colors	
Show field group:	idit Media(0) WB Summary Browse
Show MARC tags/indicators	
Show field group information for MARC fields	-2004 Created: 09-04-2004 Revisions: 4
Show MARC validation:	Cat. Date - Bib Code 3 -
🗹 Bibliographic 🗹 Authority 🗹 Holdings	Bib Level m MONOGRAPH Country xxu U.S. (s
_	Material Type a PRINTED MAT
Overwrite MARC tags/indicators	
☑ Update field group tag when MARC tagging changes	4500
	a 000 rus
<u>O</u> K <u>C</u> ancel	rlughati : b5,000 sŭz / cT. Aliqulov.
Rapid Update r 300 286 p : bill : c22 cm.	īshriëti, <mark> c</mark> 1982.
	ssko-uzbekskii uchebnyi slovar'.
d 650 0 Russian language xDid	-
Create Lists	iebnyi slovar'.
b10282890	Edit Mode (OVR)

#### SHOW FIELD GROUP AND MARC TAGS

Show field group:	⊖ tag	Iabel
Show MARC tag	s/indicat	ors
Show field grou	p informa	ation for MARC fields

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	<ul> <li>Image: A start of the start of</li></ul>
non-MARC fields by tag or label	<ul> <li>Image: A start of the start of</li></ul>

SHOW MARC VALIDATION | Login Manager

#### SHOW MARC VALIDATION

Show MARC validate	tion:		
🗹 Bibliographic	🗹 Authority	🗹 Holdings	

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: <u>Validating MARC Tag Information</u> 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.

UPDATE FIELD GROUP TAG WHEN MARC TAGGING CHANGES | Login Manager

# UPDATE FIELD GROUP TAG WHEN MARC TAGGING CHANGES

☑ 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:



245 0 0 Nuclear arms : bethics, strategy, politics / cedited by R. James Woolsey.

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

710 2 Institute for Contemporary Studies.

**245** 0 0 Nuclear arms :|bethics, strategy, politics /|cedited by R. James Woolsey.

The editor uses the appropriate m2btab.fse.\* <u>load table</u> 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

t

b

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:

Due Date		Choose Field Group Tag				
Patron No.	0	Field group tag '?' is invalid.				
Last Patron 0		b Barcode				
Last Checkin		u barcoue				
		OK Cancel				
? 092 ML	55 .M8 1984					
b 383	344000006310					

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.

# EDIT COLORS

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

Preferences For tutorial Login			
Colors and Fonts View Editor	Editor Font	Editor Colors	
🗹 Use default colors	Foreground B	ackground Exam	ple
Default text		Tex	đ
		Tex	d d
Fixed-length field label		Tex	a
Field group information		Tex	đ
MARC tag	- <b>-</b>	Tex	đ
MARC indicator		Tex	
Subfield tag			
URL links		Tex	
System-generated fields		Tex	đ
Z39.50: Field will not be loaded		Tex	đ
Invalid text		Tex	đ
		Tex	d d
Non-editable text			
<u></u> <u>o</u> k	Cancel		

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 <u>Swatches</u>, the <u>HSB</u>, or the <u>RGB</u> 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	

EDIT COLORS | Login Manager

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)	

## EDITOR FONT

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

	nd Fonts 🛛 View	Ealtor	Editor Font	Editor Colors	
i⊿ Use	lefault font				
<u>N</u> ame	Monospaced 💌	<u>S</u> ize 8 1	-		
Style [	] Bold 🛛 Itali	c			
Style		6			

When you first enter this tab, **Use default font** will be selected. The default font used depends on what <u>Look and Feel</u> and <u>Theme</u> 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	

# VIEW

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

P	references For tutorial Login
1	Colors and Fonts View Editor Editor Font Editor Colors
	Show table tooltips on startup
	Show navigation bar on startup
	🔿 Text only 🔿 Image only 💿 Image and text
	Show current mode on startup
	OK Cancel

SHOW TABLE TOOLTIPS ON STARTUP | Login Manager

### 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.



# 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.

Millennium Ca	ataloging • European Trai	ining Mach	ine		
<u>File Edit View</u>	Go Tools Admin Repor	ts <u>H</u> elp			
	Millennium <u>C</u> ontrol Bar	Ø	<b>E</b>	•••	
Edit Functio	Quick Edit	View	Edit	Media	WB
	Global Update				
Call No.	<u>R</u> apid Update				
Author	Create <u>L</u> ists				
Title Publication Info.	Headings Reports				
Edition	Data E <u>x</u> change				
Standard No.	Browse				
	View				
Index: t TITLE	Edit				
,	<u>M</u> edia				
	WebBridge	Search		pand All	Remo
#	Summary				
	Summary Of 💦 🔶 🕨				

SHOW CURRENT MODE ON STARTUP | Login Manager

#### SHOW CURRENT MODE ON STARTUP

Show current mode on startup

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

Millennium Cir	culation • Europe	an Training Ma	chine				- 🗆 🗵
<u>File Edit View</u>	<u>Go T</u> ools <u>A</u> dmin	<u>H</u> elp					
Circulation [	Desk	New View	Edit	Messages	Browse	erint Print	Close
Millennium	Key or Scan Patro	n Barcode		Name Barcode Address			4 3000000
Circulation Desk	Search			Address 2			•
Check-In	Fines(£0.00) C Check Out	heck In (0)   Lir		atrons(0) ked-Out Items	s(0)	Holds(C	))
					Cha	ange <u>D</u> ue D	ate
Search / Holds 🚽							

INTRODUCTION TO SETTINGS | Login Manager

### 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):

Settings					X		
Multiselection Groups	Macros	Search	Print Ten	nplates			
Create Lists	Stati	istics	Wir	idows	Funds		
Recommendations		Record Display Record Templates					
	pid Update	Recei	ive Inv	/oice	Import Invoice		
Options for Order View							
Options For New Item Records							
Options For New Holding	js Records-						
🗹 Create checkin card	when creat	ing holding	s record				
Options For New Order F	Records						
🔲 Don't <u>a</u> sk these ques	tions when	creating ne	ew order re	ecords			
<b>1</b>	Jse <u>T</u> oday's	Date as Or	der Date?				
⊡ t	Jse Today's	Date as <u>R</u> e	eceived Dat	te?			
2	Queue Purcl	hase Order	s for recor	ds?			
New Record Templates							
Bibliographic:	Prompt	for templa	te	-			
Order:	Prompt	for templa	te	•			
Holdings:	Prompt	for templa	te	•			
Authority:	Prompt	for templa	te	•			
ltem:	Item: Prompt for template						
Save Settings OK Cancel							

file:///C//PROJECTS/TUTORIAL%20LoginManager%202008%20-%20UPDATES/print\_settings1.html (1 of 3) [10/27/2008 11:05:47 AM]

INTRODUCTION TO SETTINGS | Login Manager

<u>a</u>ave actunga

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

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

You can only change Settings for the login you are currently using (with the exception of logins with undefined Preferences, see the
#### INTRODUCTION TO SETTINGS | Login Manager

**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 <u>Preferences</u> 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)

# CLAIMING

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

V Settings		X
Create Lists Claiming Sta New Records	tistics Windows Macros Record Display	Templates
-Options For Claiming ☑ <u>C</u> opy claim note to next clain	n	
Sav	ve Settings OK Cancel	

COPY CLAIM NOTE TO NEXT CLAIM | Login Manager

# COPY CLAIM NOTE TO NEXT CLAIM

## 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

# **CREATE LISTS**

The **Create Lists** tab contains options that affect searching in <u>Create Lists</u> mode. The following options are available:

Create Lists Cla	iming Statistics	Windows Macr	os Search	
New Records	Rapid Update	Record Display	Templates	
Options for Create Lists searching				
	database informatio	n		
Includ <u>e</u> equivaler	Save Settings	OK Cancel		

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

## **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 <u>Login Group</u> available for the search, you are prompted to run the search as **Wait for searches to complete**.

LOOK UP CALL NUMBERS | Login Manager

## 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.

## INCLUDE COVERAGE DATABASE INFORMATION

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

INCLUDE EQUIVALENT 880s | Login Manager

## **INCLUDE EQUIVALENT 880s**

🗌 Includ<u>e</u> 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.

## **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:

Settings	×
Create Lists Statistics Windows Reports	Macros Export Records
New Records Global Update Record I	Display Templates Session Statistics
Export Record Options	
File name:	Browse
Output table:	b2mtab 🔻
<u>S</u> ave Settings	<u>O</u> K <u>C</u> ancel

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

## **EXPORT RECORD OPTIONS**

Export Record Options		
File name:		Browse
Output table:	b2mtab	•

#### 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 <u>load table</u> 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.

# 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 <u>Fund adjustment</u> and for <u>Fiscal Closing</u> in Millennium Acquisitions. The following options are available:

Settings					
Multiselection Groups Ma	acros Search	Print Terr	plates		
Record Display Record	Templates	Create Lists	Statistics	Windows	Funds
New Records Rapid Upd	ate Receive	Invoice	Import Invoice	Recomme	ndations
Options For Fund Adjustmen	t				
🗹 Display Form Tool in Fund	l Adjustment				
Options For Fiscal Close					
Do Statistics in Fiscal Clo	se				
🗹 Do <u>M</u> anagement Report i	n Fiscal Close				
☑ Do ⊻endor Statistics in Fi	iscal Close				
Options For Fund Activity Re	port				
Number of funds to load per	page				25 🕂
	<u>S</u> ave Settings	<u>о</u> к	<u>C</u> ancel		

## **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.

Funds Ac	tivity Adjust	ment					
✓ Fund Code ebook Appropriate ▼ 10,000.00 +							
Use Form	Use Form Note						
Fund	Appropriation	Expenditure	Encumbrance	Free Balance	Cash Balance		
East - Books	€10,000.00	€746.33	€394.81	€8,858.86	€9,253.67 📤		

For information on how to use the **Form Tool**, refer to the Innovative Guide and Reference, Page # 105489: Using the Form Tool for <u>Editing</u>

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:

Funds Activity Adjustment					
Fund	Appropriation	Expenditure	Encumbrance	Free Balance	Cash Balance
Music Fund	£1.000.00	£0.00	£0.00	£0.00	£0.00
Training Lib	£0.00	£28.00	£20.00	-£48.00	-£28.00

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

Funds Activity Adjustment							
Fund	Appropriation	Expenditure	Encumbrance	Free Balance	Cash Balance		
Music Fund	£1.500.00	0	£0.00	£0.00	£0.00		
Training Lib	£0.00	Copy 0	£20.00	-£48.00	-£28.00		
Training Lib	£0.00	Paste 0	£20.00	-£20.00	£0.00		
Training Lib	£0.0C	Add Note 0	£0.00	-£240.00	-£240.00		
Training Lih	רח חב	n	ደበ በበ	ድበ በበ	ደብ በብ		

# **OPTIONS FOR FISCAL CLOSE**

Options For Fiscal Close
☑ Do Statistics in Fiscal Close
☑ Do Management Report in Fiscal Close
☑ Do Vendor Statistics in Fiscal Close

These options allow the user to create various types of statistical reports as an integrated part of the <u>Fiscal Close</u> 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:

Report View View Q	Query B	lery Budget Planning Collection Development Extract Query					
Select Report ACQ TYPE LOCATION CLAIM							
CODE1							)
CODE2	Code	Meaning	Record C	COPIES	Paid Copi	Piece Co	Paid Piec
CODE3	p	PURCHA	220	397			raiu ricc.
CODE4	) r	RECHARGE	1	1	0	1	
FORM	t	SUBSCRI	6	8	1	8	
FUND	Totals:		227	406	88	406	
ORD NOTE	Tutais.		221	400	00	400	
ORD TYPE	1000						
Action on Receipt 🧾	1000						
Receiving Location	1000						
Billing Location	1000						
Order Status	2000						
Temporary Locatic	2000						
VENDOR	0.000						
LANG 💌	2000						
	1000				0000000		

### 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 Pie Chart Bar Chart Report						
FINANCIAL STATUS						
FUND NAME	Col Arts Modern Lan					
CODE	casmi					
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:

Funds Pie Chart Bar Chart Report								
Detail report Number of Levels 1								
Beweet Header								
Report Header <u>Start</u>								
Innovative Library 23-0	16 2004							
All Funds by Material :		ITING RED	ORT					
All Futus by Material .	ACCOUN			Encum	Free Bal	Cach D	%	٦
All Funds by Material		whhi oh	слреника	LIIGUIIIm	i i ce Dal	Cash D		
Audiovisual							2	8
Main - Audiovis		€5,000.00	€0.00	<b>€</b> 0 00	€5,000.00	£5 000 00	0%	
North - Audiovis		€100.00	€0.00			€100.00	84%	
South - Audiovis		€5,000.00			€4,990.05		0%	
East - Audiovisual		€5,000.00			€4,873.32		3%	
West - Audiovis		€5,000.00			€5,000.00		0%	
Audiovisual		€20,100.0			€19,879.38		1%	
Books		,			,	,	1	ŝ
Main - Books		€40.000.0	€1.566.40	€941.49	€37,492.11	€38.433.6	6%	
North - Books		€10,000.0			€9,796.87		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		24 000 00	20.00	20.00	24 000 00	24 000 00	00/ 3	-

### 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:

Ŀ,

Range 🔻	Start	o1000008	s	top 010238	013	
⊖ <u>A</u> ctivity F	<u>r</u> om <mark>23-06-2003</mark>	<u>I</u> 02	3-06-2004		Reset All Vendors	
Performance Limit by OrderType NONE Exclude serials Start Copy to Vendors						
Amounts Quar	ntities Delivery Ti	me Percentages	Totals Errors	s		
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	
nane	€34.99	£25 00	£0 00	<b>£</b> 9 99	€27 30	

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

## **OPTIONS FOR FUND ACTIVITY REPORT**

Options For Fund Activity Report	
Number of funds to load per page	25

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: <u>Generating the Fund Activity Report</u>.



PRINTER FRIENDLY PAGE

GLOBAL UPDATE | Login Manager

# GLOBAL UPDATE

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

Settings
Create Lists Statistics Windows Reports Macros Export Records Search
New Records Global Update Record Display Templates Session Statistics
Options For Global Update
Choose a MARC Type - (ANY)
Max Search Results (0 for No Limit) 0
Create Review File of Busy Records
Save Settings OK Cancel

## **OPTIONS FOR GLOBAL UPDATE**

Options For Global Update					
Choose a MARC Type	- (ANY) 👻				
Max Search Results (0 for No Limit)	0				
Create Review File of Busy Records					
1					

#### 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 **O**, 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:

Millennium Cataloging Global Update Su	immary
Records Changed:	13
Records w/no Changes:	0
Busy Records:	1
Total # of Changes:	13

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

Select file to copy from	×
113 Global update busy records for evamil (initials el, rectype b) (1)	
105 Labels for batch printing for pmilcat (1)	
106 Labels for batch printing for milcirc (4)	
107 ERM tickler for Trial End date (5)	
108 ERM tickler for Follow Up End date (4)	
109 ERM tickler for Resource followup (3)	
110 ERM tickler for Contract End (5)	
111 ERM tickler for Trial period ending (4)	
112 ERM tickler for Test Trial End Date (6)	*
113 Global update busy records for evamil (initials el, rectype b) (1)	-
OK Cancel	

# **IMPORT INVOICE**

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

Settings					X		
Windows Funds	Multiselection Grou	ps Macros	Search				
Recommendations	Record Display	Template	s Create	Lists	Statistics		
New Records	Rapid Update	Receive	Invoice	Impo	rt Invoice		
rdate and odate optio	ns						
🔿 Use today's date a	is <u>r</u> eceive date						
🔾 Use today's date a	is <u>b</u> oth receive date a	nd order date					
• <u>N</u> either							
AcceptReject default	tab option						
Process tab is the	default tab in Accept	Reject					
O Extended View tab is the default tab in AcceptReject							
I	Save Settings	<u>о</u> к	<u>C</u> ancel				

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

## **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

## ACCEPT/REJECT DEFAULT TAB OPTION

AcceptReject de	ault tab option	
Process tab i	s the default tab in AcceptReject	
O Extended Vie	v tab is the default tab in AcceptRej	ect

## 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.

Imp	Import Accept/Reject Reports									
Inv	Invoice #200822 6 items									
	Invoice	Date 05-15	5-2005	Apply u	isetax No	one 🤊	Loc	al Curr	ency	
						-				
	Pro	cess	Edit <u>G</u> roup	Show	Details	🗌 🗌 Disp	lay previo	us pay	ments	
Inde	ex Record Number	Ti	itle	Prorated Price	Price	Fund	Location	Ord. Type	Note	Action
1	o10806738	Red and blu	ie : a novel	\$25.00	\$25.00	SSCOF	east	ſ		Accept
2	o1080674x	Sharkey's r	nudhole bl	\$25.00	\$25.00	test3	east	ſ		Accept
3	010806751	A shimmer	of blue : th	\$25.00	\$25.00	wauto	east	f		Accept
4	010806763	Bushel of th	ne blues : E	\$25.00	\$25.00	wbind	east	f		Skip
5	010806775	Samantha s	sings the b	\$25.00	\$25.00	wbio	east	f		Accept
6	010806787	Way beyon	d in the blu	\$25.00	\$25.00	wbus	east	f		Accept
Pro	Process Extended View									
Serv	nce Charge \$0.	.00						Total \$	125.00	

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.

Ir	Import Accept/Reject Reports									
In	nvoice #200822 6 items									
#	order record	bib record	TITLE	HOLD	INT. NOTE	Copies	ORD NOTE	RACTION		
1	010806738	b14458263	Red and blue : a novel / : Anna Li	4		2	ſ	ĺ		
2	o1080674x	b14458275	Sharkey's mudhole blues / : Sha	0		1				
3	010806751	b14458287	A shimmer of blue : the Jonah J	2		1	r			
4	010806763	b14458299	Bushel of the blues : Ethel Smith	0		1				
5	010806775	b14458305	Samantha sings the blues: beau	0		2				
6	010806787	b14458317	Way beyond in the blue : Reaga	1	replacement copy	1		a		
╞═			(r					]		
P	rocess Ext	tended View	<u> </u>							

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

INVOICE | Login Manager

# 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 <u>Invoice</u> mode.

Settings							×
Multiselection Gro	ups Macros	Search	Print Ter	nplates			
Record Display	Record Temp	olates 🛛 🤇	Create Lists	Stati	stics	Windows	Funds
New Records	Rapid Update	Receive	Invoice	Import li	woice	Recomme	ndations
Options For New In	woices						<b>^</b>
🛛 🗹 Don't <u>a</u> sk these	e questions						20000
🛛 🗌 Use Pai <u>d</u> Date a	as Date Receive	d?					000000
│ │ □ <u>W</u> arn if the iten	n has not been i	eceived?					000000
Prompt for note		ı	8				000000
Are you going to							000000
Display subscri	iption dates on i	nvoice?					
🛛 🗆 Prompt <u>f</u> or sub	scription dates	?					000000
Use Currency Lo	cal Currency	•					0000000
Apply usetax Nor	ne 🔻						
	Save	e Settings	<u>о</u> к	<u>C</u> ance	el 👘		

## **OPTIONS FOR NEW INVOICE**

Options For New Invoices
☑ Don't <u>a</u> sk these questions
Use Paid Date as Date Received?
□ <u>W</u> arn if the item has not been received?
Prompt for note for each line item?
Are you going to be keying list prices?
Display subscription dates on invoice?
Prompt for subscription dates?
Use Currency Local Currency 💌
Apply usetax None 🔻

#### 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 <u>Foreign</u> <u>Currency Table</u>. 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 <u>Acquisition Option</u> 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

h	nvoice # 4	588903-4 Invoice Date 20-01-2005	Vendor	bobuk	Apply	usetax Some 🔻
		Use Currency eur	0.668	•		
#	Record #	Title	Copies	Amount	Fund	Notes U
1	.014000	The Da Vinci code : a novel / Dan Bro	2	EUR34.00	xibks	<b>7</b>
2						

**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. <u>Contact Innovative</u> 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 <u>Acquisition Option</u> 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

# **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.

Settings			
Statistics Window	vs Funds MultiSe	elect Groups	Macros
Recommendatio	·		Templates Create Lists
New Records	Rapid Update	Receive	Invoice Import Invoice
No Modifier ALT	CTRL SHIFT		
F1 %ALT+g%o			
F2 %ALT+g%c			
F3 <mark>%ALT+g%s%p</mark>			
F4 %ALT+g%a%u			
F5 %ALT+g%i			
F6 %ALT+g%u			
F7 %ALT+g%v			
F8 RESERVED			
F9			
F10 RESERVED			
F11			
F12			
		Reset	
	Save Settings	<u>о</u> к	<u>C</u> ancel

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  $\rightarrow$  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: <u>Macros</u> <u>Settings</u>

## 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:

Setting	gs						
Templat	tes Create Lists	Statistics	Window	rs Funds	Multisel	ection Groups	Macros
New Red	cords Rapid Update	Receive	nvoice	Import Invo	ice Reco	mmendations	Record Display
		Defau	lt Group	Prompt to	select 🔻		
	Preferred Groups			9	Other <u>G</u> rou	ips	
	Branch Library Adult	fiction					
	Branch Library Adult	non fiction					
	Public Library Adult	fiction					
	Public Library Adult I	Non Fiction					
	Public library childre	ns					
				*			
Preview N	Aultiselection Group						
	Location				Fund		Copies
ebj			eba			4	
epj			ea eaj			<u>5</u>	
epjr			eaj				
		Save Setti	ngs	<u>о</u> к	Cancel	]	

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 <b>Other Groups</b> list and click the left arrow.
Remove from your list	 Select the group in the <b>Preferred Groups</b> 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:

👿 Edit Data		×
Selections:		
Location	Fund	# Copies
none	none	1
Total:		
Add <u>G</u> roup	Add Row	Remove Row
Next	<u>Cancel New Reco</u>	ord Creation

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:

	Select Multisele	ction Group	×				
[	Select Group						
	Univ Med Periodicals						
University Periodicals							
	Location	Fund	Copies				
	isper	imper	1				
		<u>O</u> K <u>C</u> ancel					

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

MULTISELECTION GROUPS | Login Manager

Edit Data			$\mathbf{X}$
Selections:			
Location	Fund	# Copies	
isper	imper	]1	
Total Copies: 1 Add <u>G</u> roup	Add Row	<u>R</u> emove Row	

## **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).

V Settings							
Claiming Statistics Windows Macros Search Print Templates							
New Records Rapid Update Record Display Record Templates Create Lists							
Options for Order View							
Show Selection List							
Options For New Item Recor	ds						
Prompt for Multiple Items	Prompt for Multiple Items						
Options For New Holdings R	ecords						
🗹 Create checkin card whe	en creating holdings record						
Options For New Order Reco	ords						
Don't <u>a</u> sk these question	is when creating new order records						
🗹 Us	se <u>T</u> oday's Date as Order Date?						
🗹 Us	se Today's Date as <u>R</u> eceived Date?						
<u> </u>	ieue Purchase Orders for records?						
New Record Templates							
Bibliographic:	Prompt for template						
Order:	Prompt for template 🔻						
Holdings:	Prompt for template 🔹						
Authority:	Prompt for template 🔻						
ltem:	Prompt for template 🔹						
Patron:	Prompt for template						
<u></u> a	rve Settings <u>O</u> K <u>C</u> ancel						

OPTIONS FOR ORDER VIEW | Login Manager

# 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.

b11991021 Call No. Author Title Publication Info. Standard No.	Hosseini, K The kite rur New York :	25 K58 2003 haled. mer / Khaled Hosseini. Riverhead Books, 2003 3 (acid-free paper)	3.		KITE RUNNER
Selection List of	4000192	Payments o14000192	0 Bib-Lev	vel Holds	
Summary		Record o14000192		Recei	ve o14000192
Add	Add <u>G</u> r	oup De <u>l</u> ete	Edit Bo <u>x</u>	Limi	t Location: ALL 🔻
# Loca I xib	ntion	Fund xlbks	2	Copies	Total Price £28.00

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

OPTIONS FOR NEW ITEM RECORDS | Login Manager

## **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:

Summary 0 Bib-Level Holds				
Vie <u>w</u> i Item 💌	Attach <u>N</u> ew Item	Delete	Move	Select

○ <u>S</u> ingle Item	
Multiple Items	
Multiple Items Options	
Beginning Barcode	
Volume Caption	vol.
First Volume	1
_ Last Volume	1
Beginning Copy Number	1
🗹 Increment Copy Number	
Increment Across Locations	
Location	# of Copies
	0
	Total copies: 0
	ove row Clear all
<u>A</u> dd row <u>R</u> emo	

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

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

## **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.

## **OPTIONS FOR NEW ORDER RECORDS**

Options For New Order Records						
$\Box$ Don't <u>a</u> sk these questions when creating new order records						
✓ Use <u>T</u> oday's Date as Order Date?						
Use Today's Date as <u>Received Date?</u>						
Queue Purchase Orders for 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.

Summary	New ORDER	Receive	New Selection List	New Payments	0 Bib-Level Holds		
Queue P.O. View Finances							
New ORDER	Last Upd	ated: 19-0	1-2005 Created:	: 19-01-2005	Revisions: 0		

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.
### NEW RECORD TEMPLATES

New Record Templates	
Bibliographic:	iubibs IU Bibs 🔻
Order:	orders order records 🔍
Item:	Always prompt for template 🔻
Holdings:	iucheckin IU periodicals 🔹
Authority:	Always prompt for template 💌
Patron:	Prompt for template 💌
Course:	Prompt for template 💌
Resource:	Prompt for template 🔹
License:	Prompt for template 🔹

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 <u>Preferred Templates</u>, 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: <u>Managing</u> <u>Templates for New Records</u>

## RECORDS TO ATTACH TO NEW BIBLIOGRAPHIC RECORDS

Records to attach to new bibliographic records: 🗌 Item 🔲 Holdings 🔲 Order

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.

# **ON-THE-FLY RECORDS**

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

V Settings								×
On-the-fly Red	cords	Create Li	sts	Statistics	Windows	Mac	ros	
New I	Records	;		Record	Display	ľ	Templates	\$
New Record T	[emplate	es						
Bibliographic	Promp	t for templa	ate	•				
Item	Item Prompt for template							
Patron	Promp	t for templa	ate	•				
		Sav	/e Sett	tings <u>C</u>	<u>)</u> K <u>C</u> an	cel		

NEW RECORD TEMPLATES | Login Manager

### NEW RECORD TEMPLATES

-New Record 1	emplates
Bibliographic	Prompt for template 🔹
Item	Prompt for template 💌
Patron	Prompt for template 🔹

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 <u>Preferred Templates</u>, 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

PRINT TEMPLATES | Login Manager

## 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., <u>iReport</u>), 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:

V Settings				×			
Multiselection Groups Macros Search Print Templates							
Record Display Record Templates Create Lists Statistics Windows Funds							
New Records Rapid Update Receive Invoice Import Invoice Recommendations							
Print Templates							
Output Type Purchase Order 🔻	🗹 Use Print T	emplates					
Preferred Templates	01	her Templates	;				
_po default po		143 A	4 PO Rev 3				
domestic Domestic PO		14po N	lew A4 PO				
		jenPO P	MD Generic PO				
	<b>&gt;</b>						
<u>R</u> ename <u>D</u> elete Preview <u>I</u> mport <u>Export</u>							
Select Template							
<u>S</u> ave Setting	<u>S</u> ave Settings <u>O</u> K <u>C</u> ancel						

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

- Purchase Orders
- Monographic Spine Labels
- Hold Slips
- ArticleReach Paging Slips
- Routing Slips
- <u>Transit Slips</u>

### **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

#### PRINT TEMPLATES | Login Manager

Administration	All output types	
ArticleReach	ArticleReach paging slip	
Cataloging	outing slip pine 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

# 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.

V Settings	×					
Multiselection Groups         Macros         Search         Print Templates           Record Display         Record Templates         Create Lists         Statistics         Windows         Funds           New Records         Rapid Update         Receive         Invoice         Import Invoice         Recommendations						
O <u>u</u> tput Type Purchase Order ▼						
_po default po domestic Domestic PO	A43     A4 PO Rev 3       a4po     New A4 PO       genPO     PMD Generic PO					
Rename     Delete     Preview     Import     Export       Select Template     Prompt for template						
Save Settings OK Cancel						

- 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**

### PREFERRED/OTHER TEMPLATES | Login Manager

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.

# **TEMPLATE MAINTENANCE**

Settings			X			
Reports Macros Expo	ort Records Search P	Print Templates				
Record Templates	Session Statistics	Create Lists	Statistics Windows			
New Records	Global Up	odate	Record Display			
-Print Templates Output Type Spine Label	Print Templates Output Type Spine Label  Use Print Templates					
Preferred Templates	s	Other Templ	ates			
		spine	Monographic spine labels			
		_7005Gyld	Spine 7005Gaylord confe			
		_ls101Gyld	Spine Is101Gaylord			
Rename Delete Preview Import Export						
Select Template Prompt for template						
<u>Save Settings</u> <u>OK</u> <u>Cancel</u>						

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 <u>iReport</u> from JasperSoft Corp. (Some limited customization is also possible using a text editor such as Notepad). For information about customizing Print Templates using

#### TEMPLATE MAINTENANCE | Login Manager

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: <u>Creating Customized</u> <u>Print Templates</u> and the <u>Print Templates Wiki</u>.

## 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 <u>Rapid Update</u> mode:

Settings					×	
Statistics Windows Funds Multiselection Groups Macros						
Recomm	endations	ations Record Display Templates Create Lists				
New Reco	rds 🗌	Rapid Update	Receive	e Invoice	Import Invoice	
Options For	Rapid Up	date				
🗌 🗆 Don't <u>a</u> s	k these q	uestions when	receiving			
• Update 9	Single Rec	cord				
O Update f	Multiple R	ecords				
Do you want	the orde	r record displa	ryed if one of	the following i	s true	
🗹 The reco	ord has <u>m</u>	ultiple branche	es and funds			
🗹 The reco	ord has a	special RACTI	ON code			
🗹 T <u>h</u> e reco	☑ The record has STATUS other than 'o'					
✓ The record already has an RDATE						
		Save Setting	s <u>O</u> K	<u>C</u> ancel	]	

### **OPTIONS FOR RAPID UPDATE**

Options For Rapid Update	
Don't <u>a</u> sk these questions when receiving	
Update Single Record	
O Update Multiple Records	
Do you want the order record displayed if one of the following is true	
☑ The record has multiple branches and funds	
☑ The record has a special RACTION code	
✓ The record has STATUS other than 'o'	
☑ The record already has an RDATE	

#### 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 <u>RACTION</u> code.

The records has STATUS other than 'o'

The record already has an **RDATE** 

OPTIONS FOR RAPID UPDATE | Login Manager

# 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:

Settings				×
Statistics Window Recommendation New Records		lect Groups Display Receive	Macros Templates Invoice	Create Lists Import Invoice
-Options For Receive Choose Select <u>A</u> ll <u>I</u> tem Template:	by default	Prom	pt for template	-
	Save Settings	<u>o</u> ĸ	<u>C</u> ancel	

### **OPTIONS FOR RECEIVE**

Options For Receive		
Item Template:	Prompt for template 🔹	

#### 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:

Summary Record o10000185 Receive o10000185 Payments o10000185 0 Bib-Level Ho					
Select all Receive	Date:20	Copy EPRICE to item	Receive		
# Location	Fund	Enumeration	Received Date		
🗹 <u>1</u> iu	im2f	c. 1	20		
2 iu	im2f	c. 2	20		

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:

Summary Record o10000185 Receive o10000185 Payments o10000185 0 Bib-Level				
□ Select <u>a</u> ll <u>R</u> eceiv	e Date:20	Copy EPRICE to item	Receive Sh	
# Location	Fund	Enumeration	Received Date	
🗹 🔟 iu	im2f	c. 1	20	
2 iu	im2f	c. 2		

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

#### I tem 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 <u>Preferred Templates</u> 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**.

RECOMMENDATIONS | Login Manager

## 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 <u>Recommend</u> mode:

V Settings				×	
Windows Funds Multiselection Groups Macros					
Record Display	Templates		Create Lists	Statistics	
New Records Rapid Update	Receive In	voice	Import Invoice	Recommendations	
Options For New Order Records—					
🔲 Don't ask these questions whe	n creating new	order r	ecords		
_					
	e <u>T</u> oday's Date :				
Use	e Today's Date :	as <u>R</u> ece	eived Date?		
🗌 <u>Q</u> ue	eue Purchase (	)rders 1	for records?		
🗆 A <u>d</u> o	l Selector field	to new	orders?		
New Record Templates					
Bibliographic:	Prompt fo	or temp	late 💌		
Order: Prompt for template 🔻					
Patron: Prompt for template					
Save Settings OK Cancel					

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.

## **OPTIONS FOR NEW ORDER RECORDS**

Options For No	Options For New Order Records				
🗌 Don't <u>a</u> sk t	hese questions when creating new order records				
	Use <u>T</u> oday's Date as Order Date?				
	Use Today's Date as <u>Received Date?</u>				
	Queue Purchase Orders for records?				
	Add Selector field to new orders?				

#### 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.

Summary N	New ORDER	Receive	New Payments	0 Bib-Level Holds	
		[	🗹 Queue P.O.	Vie <u>w</u> Finances	
New ORDER	Last Upd	ated: 26-0	01 <i>-</i> 2005 Creat	ed: 26-01-2005	Revisions: 0

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 <u>Selector Tag</u> set up, this option is unavailable.

### NEW RECORD TEMPLATES

New Record Templates				
Bibliographic:	Prompt for template 🔹			
Order:	Prompt for template			
Patron:	Prompt for template			

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

- bibliographic (applies to the <u>Approve and Acquire</u> function)
- order (applies to the <u>Approve and Acquire</u> function)
- patron (applies to the <u>Selectors</u> 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 <u>Preferred Templates</u>, only those templates will display in the list for each record type.

# RECORD DISPLAY

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

Reports Macros Export Records Search Print Templates					
Record Templates Session Statistics Create Lists Statistics Windows					
New Records	ſ	Global Up	odate	Record Dis	splay
Options for Bib View					
Show Book Jacket					
Brief Di lay					
Display equivalent 880	tields				
Summary View					
If no records to display	, show all othe	rs			
Default to checkin card tab for holdings records					
Browse Options					
Suppress authority records in Advanced Search browse					

## **OPTIONS FOR BIB VIEW**

Options for Bib View

### Show Book Jacket

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

b11533766		 BEFORE
Author Title	Sternglass, Ernest J. Before the big bang : the origins of the universe / by Ernest J. Sternglass.	THE
Publication Info. Edition Standard No.	New York : Four Walls Eight Windows, c2001. 2nd ed. 1568581890 (trade pbk.)	The Orders of the Universe State Response of Martine Ernnest J. Sternglass

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

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: <u>Displaying Book Jackets and Cover Art in</u> <u>Millennium</u>

Summary View
🗹 If no records to display, show all others
🗹 Default to checkin card tab for holdings recor
Default to checkin card tab for holdings record

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:

Summary Record i11229858 0 Item-Level Holds 0 Bib-Level Holds						
Vie <u>w</u>	ali Ali	•		Delete	Move	Select
# 1	#     RECORD NUM     DESCRIPTION       1     i11229858     Location:ebav     Barcode:31307013152881					

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

Summary 0 Bib-Level Holds	
Vie <u>w</u> c Holdings 💌	Attach New Holdings Delete Move Select
	Add Related Resource Related Resource
	NO RECORDS OF THIS TYPE

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		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.

## **BROWSE OPTIONS**

Browse Options -

Suppress authority records in Advanced Search browse

### 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.

## BRIEF DISPLAY

-Brief Display-

Display equivalent 880 fields

#### **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:

🔽 b11982317								
<u>File</u> Edit <u>View</u>	<u>Go</u> <u>T</u> ools	Window <u>H</u> elf						
The second se	•	2			Q	2	2	1
Save All		dit Media(0)	WB	Summary	Browse	Export	Print	Close
b11982317								
Author Author TITLE TITLE Publication Info. Publication Info. Edition Edition Standard No.	千年一叹/ 第 Beijing : Zuc	) jia chu ban she, 出版 社, 2002. 1 ban. 1.	2002.					
Summary 0 B	ib-Level Hold	s						
Vie <u>w</u> all All	•	]			De	lete	Move	Select
		N	O RECORI	os of this 1	TYPE			
						D Attached	Records	

# REPORTS

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

Settings						×
Create Lists	Statistics Win	dows Rep	orts	Macros E	xport Records	
New Records	Global Update	Record Dis	play	Templates	Session Statis	tics
-Headings Repo	rts					
	Show Columns		Hide Co	olumns		
	Type of Report					
	Entry					
	Cataloging Date Function					
	Group					
	Initials	<b>&gt;</b>				
	Date of Entry					
			I			
<u> </u>						
	<u>S</u> ave Se	ttings	<u>ο</u> κ	<u>C</u> ancel		

## **HEADINGS REPORTS**

Show Columns	Hide Columns
Type of Report Entry Cataloging Date Function Group Initials	
Date of Entry	

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: <u>Function Codes</u>

**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: <u>Statistical Group Table</u>

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 <b>Hide Columns</b> and click the left arrow.
Hide Columns	 Select the column in the list of <b>Show Columns</b> 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:

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

## SESSION STATISTICS

The **Session Statistics** tab contains the following option for displaying <u>Session Statistics</u> in Millennium Cataloging:

Settings						×
Create Lists		Windows	Reports	Macros	Export Records	
New Records	🕺 Global Upda	ite   Reco	rd Display	Templates	Session Stati	istics
-Option for View	ing Session S	tatistics				
🗌 🗌 <u>V</u> iew sessio	on statistics up	on closing				
<u> </u>					_	
	<u>S</u> av	e Settings	<u>o</u> k	<u>C</u> ancel		

## **OPTION FOR VIEWING SESSION STATISTICS**

Option for Viewing Session Statistics — View session statistics upon closing

### 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:

Session Stati	istics			×
<u>F</u> ile				
-Session Criteria			C F	🔄 📩 rrint Close
Session Stat				
O Cumulative S	atistics			
<u>U</u> ser	dm dm			
Date From	12-2003		Refresh Ta	ble
To	12-2004			
Session Statistics	s			
Record Type	Created	Modified	Deleted	Total
BIBLIOGRAPHIC	1	1	2	4
ORDER	0	0	0	0
HOLDINGS	0	1	0	1
AUTHORITY	0	0	0	0
	0	14	2	16
PATRON	0	0	0	0
COURSE	0	0	0	0
Total	1	16	4	21

# SEARCH

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

Settings			X
	aiming Statistics	Windows Macro	
New Records	Rapid Update	Record Display	Templates
Search default			
• Select inde <u>x</u>			
⊖ Inpu <u>t</u> text			
	Save Settings	<u>O</u> K <u>C</u> ancel	

## SEARCH DEFAULT

Search default	
Select index	
⊖ Inpu <u>t</u> text	

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:

l <u>n</u> dex:	t TITLE	<b></b>		
			Search	Expand All

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:

l <u>n</u> dex:	t TITLE	•		
		[	Search	Expand All

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 <u>Service</u> <u>Commitment</u> on CSDirect to request a change.

# STATISTICS

The **Statistics** tab contains the following options for the <u>Statistics</u> mode.

Settings							×		
Create Lists	Statisti	cs Windo	ws Reports	Macros	Export	Records			
New Records Global Update Record Display Templates Session Statistics									
Statistics Options									
Print Settings									
Show row and column titles on each page of printouts									
Report Settings									
🗾 🗹 Use range	notation	for orders Ra	ange 1 and 2 co	olumn titles					
🗌 🗌 Show only	the Total	s in periodic	reports						
Cross Tab h	orizontal	title display	Codes and M	eanings 🔻					
Application Se	ettings								
🗹 Delete the	export te	mp files on a	pplication star	tup					
Export Setting	IS								
Applicat	ion	Name	Delimiter	Extension					
Spreads		Excel	Tab 🔻	XLS					
		I		RTF	Defa	ult Setting	s		
	ocessor	1	Tab 🔻						
Accumulation	Process	Licensing-							
Accumulat	te in the b	ackground (	multiple accun	nulations per	Millenniu	ım client al	lowed).		
O Always ac	cumulate	in the foreg	round (single a	ccumulation	per Mille	nnium clier	rt).		
🛛 🔿 Ask each t	O Ask each time foreground or background?								
	Save Settings OK Cancel								

## **PRINT SETTINGS**

Print Settings -

Show row and column titles on each page of printouts

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.

## REPORT SETTINGS

Report Settings	
🗹 Use range notation for orders Ran	nge 1 and 2 column titles
Show only the Totals in periodic r	eports
Cross Tab horizontal title display	Codes and Meanings 💌

#### 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
р	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
еррег	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
еррег	EPL Periodi	Í	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

## APPLICATION SETTINGS

Application Settings

☑ Delete the export temp files on application startup

#### 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.
## **EXPORT SETTINGS**

Export Settings				
Application	Name	Delimiter	Extension	
Spreadsheet	Excel	Tab 🔻	XLS	Defections
Word Processo	Word	Tab 🔻	RTF	Default 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.

Select an export method			
Open in Excel			
Open in Word			

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.

# 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:

Accumulate in Foreground					
Record last processed	1010003				
Last record to process	1198989				
Deleted records	5				
<u>S</u> top Query					

#### 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 <u>Login Group</u>, 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.

## **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:

Settings						
Templates	Create Lists	Statistics	Web Opti	ons	Macros	]
Templates       Record Type     BIBLIOGRAPHIC       Preferred Templates     Other Templates						
Preferred Templates Other Templates						
				artbib	s E	utrain Art Blbs
				basbil	b B	asic Bib
				biblio	b	ib records
				epbib	E	PL bibs
				isbibs	: II	J Medical Bibs
				iubibs	: Il	J Bibs
				iurest	oib B	rief Bib for Reserves
				ldd	т	este
				mana	ge d	oc manage tool
				mbib	S	ichool bibs
				mhbib	os H	ligh School Bibs
				mmbi	bs N	liddle School Bibs
				musb	ibs N	lusic Library Bibs
<u>N</u> ew <u>E</u> dit <u>V</u> iew <u>D</u> elete						
<ul> <li>Essessessesses</li> </ul>						
	S	ave Settings	<u>ō</u> ĸ	<u>C</u> a	ancel	

## PREFERRED/OTHER TEMPLATES

<b>⊢</b> T	Templates					
		<u>R</u> ecord Type	BIBLIOGR	Aphic 🔻		
	Preferred Templates Other Templates					
	basbib	Basic Bib		artbibs	Eutrain Art Blbs	
	isbibs	IU Medical Bibs		biblio	bib records	
	iubibs	IU Bibs		epbib	EPL bibs	
	ldd	Teste		manage	doc manage tool	
	musbibs	Music Library Bibs		mbib	School bibs	
				mhbibs	High School Bibs	
			-	mmbibs	Middle School Bibs	
				tapeb	bib record data load	
				tlbib	Train Lib bib	
				vabibs	Silver Art bibs	
				xlbibs	TL Bibs	
				ymer	basic bib	
				_b		

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.
- 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 readonly 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 <b>Other Templates</b> list and click the left arrow.
Remove from your list	*	Select the template in the <b>Preferred Templates</b> 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.

PREFERRED/OTHER TEMPLATES | Login Manager

## 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: <u>Creating Record Templates</u>
- 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**:

Preferred Templates Oth					ites
basbib	Basic Bib	fiew Ten	nnlato	artbibs	Eutrain Art Blbs
isbibs	III Modical Dibe	dit Tem	<u> </u>	biblio	bib records
iubibs	IU Bibs D	elete Te	emplate	epbib	EPL bibs
iuresbib	Brief Bib for Rese	rves		lcosmes	Lcosmes Template
ldd	Teste			manage	doc manage tool
musbibs	Music Library Bib	s		mbib	School bibs
				mhbibs	High School Bibs
				mmbibs	Middle School Bibs
				newbib	Georgia's bib
				tapeb	bib record data load
				tlbib	Train Lib bib
				vabibs	Silver Art bibs
				xlbibs	TL Bibs
				ymer	basic bib
	×			_b	
<u>N</u> ew <u>E</u> dit <u>V</u> iew <u>D</u> elete					

### 2. Select Edit|Copy Template

👿 B	BIBLIOGRAPHIC template: biblio: bib records					
<u>F</u> ile	Edit <u>V</u> iew <u>T</u>	ools <u>H</u> elp				
	Cut		Ctrl-X			
	Сору		Ctrl-C			
Fixe	Paste		Ctrl-V			
Cat.	Select All		Ctrl-A			
Loca	Edit Field		Ctrl-E			
Mate	Insert Field		Ctrl-I			
	<u>D</u> elete Field		Ctrl-D			
Lang	Substitution F	Phrases		-		
Skip	Change to <u>M</u> /	ARC		-		
Loca	U <u>n</u> do			npe -		
≻	Redo					
<b>A A A A</b>	<u>C</u> opy Templat	te				
5	Change Code	or Descript	ion			
	☑ Prompt In ⊻	Vizard	Ctrl-W			
	Move to Top o	of <u>G</u> roup				
	Move to Botto	om of Group				
	Move Up( <u>H</u> )					
	Move Down					

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: <u>Saving a Record as a</u> <u>Template</u>

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: <u>Editing Record Templates</u>

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 <u>Deleting Record Templates</u>

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**.

# WEB OPTIONS

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

Settings					×			
Templates	Create Lists	Statistics	Web Options	Macros				
Web Options								
File Settings	File Settings							
Display La	Display Label Ports							
http/live/scr	eens/wwwoptio	ns Live	80		Remove			
http/staging	)/screens/wwwo	pti <mark>Stagin</mark>	g 2082		Remove			
Add a File								
Filename	http/stagin	ng/screens/w	wwoptions	•				
Display Lab	el							
Ports	Ports							
Add								
	Save	Settings	<u>O</u> K <u>C</u> and	cel				

## FILE SETTINGS/ADD A FILE

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

Web Options	
File Settings	
Display Label	Ports
Add a File	
Filename	http/staging/screens/wwwoptions
Display Label	
Ports	
	Add

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.

Display Label	Ports			
http/live/screen	s/wwwoptions	Live	80	Remov
http/staging/sci	eens/wwwopti	Staging	2082	Remov
Add a File				
Filename	http/staging/sc	reens/wwwopti	ons 🔻	
Display Label		]		
Ports		[		
		Add		

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

# WINDOWS

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

V Settings					×	
Windows Fu	nds Multis	election Groups	Macros	\$		
Record Dis	splay	Templates		Create Lists	Statistics	
New Records	Rapid Upda	nte Receive	Invoice	Import Invoice	Recommendations	
Window Mode       Image: Single Window Mode       Image: Maximize all windows						
		Save Settings	<u>о</u> к	<u>C</u> ancel		

### 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:



WINDOW MODE | Login Manager

# 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: <u>Fixed-length Fields</u>

**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: <u>MARC Record Load Table</u>

**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: <u>Variable-Length Fields</u>