

BRIDGES CLUSTER SITE COORDINATORS MEETING MINUTES

24 October 2003 at Harris-Stowe State College

PRESENT: Jim Dutton, Mark Wahrenbrock, Per Almquist, June Williams, Linda Orzel, Marty Knorr, Melissa Belvadi, Jean Rose, Lynn Heritage, and Eileen Condon.

The Site Coordinators met before and after the Phase III training session. Several decisions were made during the course of the training session that will also be recorded in these minutes.

The meeting began with a discussion of authorizations and who should have some of the more powerful authorizations. The group recognized that any categorization of authorizations as "Coordinators only", "Kept to a minimum", etc., would be a guideline only, but felt that it might be useful to reclassify several authorizations and to keep the list up-to-date for the sake of future coordinators who might not recognize a dangerous permission when they assign it. The group voted to designate Globally Purge Fines as an authorization that should be reserved for MCO. The group also voted to add Rapid Update and Globally Update Headings to the list of permissions that should be kept to minimum. The group also discussed whether Review File List Administrator should be reserved for coordinators but did not make a decision because of a question about whether it was needed for some Mill Create Lists functions. The group also discussed whether Circulation Parameters should be restricted to coordinators. While at first we thought Circulation Parameters might be needed by circulation staffs to input library hours, we learned later in the meeting that changing library hours is now a separate permission. The group decided to leave Circulation Parameters as a coordinator-only permission.

Per gave each library a list of restricted authorizations and who in their library had these authorizations. Site coordinators were asked to review these lists and remove permissions as necessary.

Create list reminders:

- Everyone was asked to have their staff check to see if there are any Create Lists that can be deleted.
- Coordinators should also remind their staff about the naming convention for lists (abbreviated form of institution name, staff member's initials, date, name of list).
- Incorrectly named lists will be deleted this fall.

Keyword (AVS) decisions:

The keyword (AVS) search options changed with the upgrade and our settings no longer work. We needed to decide the following:

- Do we want the initial search to be an adjacency or phrase search (with the search ending there if any results are retrieved)? The cluster voted YES
- After an unsuccessful adjacency search, the system will attempt an "and" search. If the "and" search is unsuccessful, do we want the system to attempt an "or" search? The cluster voted NO
- Do we want "not" to act as a Boolean operator or as a search term? The cluster voted to DEFER THIS DECISION until coordinators get a chance to talk to their reference librarians.

Other decisions:

- In order to password-protect E-Reserves, we need to designate a field to be used for the password. Per or Melissa will ask the circ coordinators if the "s" field can be used for this.
- The "Search MOBIUS" button appears in every index except keyword. The cluster voted to add it to keyword.

- Library priority table: Using this means that a title-level hold will automatically be changed to an item-level hold, which will resolve the problem of having holds that don't generate page slips. We do not need to set different priorities for each library; we can simply implement the table with each library having the same priority in order to fix the title-level hold problem. The cluster voted YES
- Page pickup location first? This setting will allow the system to determine if there is an item available at the location where the patron wishes to pick up, and if so to page that item rather than another item in the cluster. "Deny if locally available" will still be in force and will take precedence, so changing this setting to yes should cut down somewhat on Lanter traffic while not increasing the total number of holds. The cluster voted YES
- Millennium search indexes. We have the ability to re-order and delete searches from the pull-down search menus in Millennium. Would we want to get rid of the title key index, for instance, or is anyone using this as a quick search? The searches can be different for each module, so Per will tell the committee chairs what their options are and ask them to determine what, if any, changes they would like to make.
- Do we want to try My Millennium again? We can put it on a live port but make it only usable by certain patron types. The cluster voted YES. We will make a dummy patron type that will be authorized for My Millennium and that any of us can use. If any of the libraries would also like their staff or other patron types to be authorized for My Millennium, they will send Per the patron type numbers.
- The statistics program in Millennium will allow us to save searches. We voted to use the same naming conventions used in Create Lists when saving statistics searches.
- TOC DATA problem. We voted to change the headings labeled "TOC DATA" to "SUBJECT".
- Turn on email printer note? This feature would allow us to put a note at the top of records mailed out of Millennium. However, once you input a note, it then appears at the top of everything you email (until you switch record types or unless you are using patron records). The cluster voted NO
- Place materials on reserve by bib? This would allow you to put all of the attached items on a bib record on reserve at once. We are checking with MCO about whether this would place only items in a library's scope on reserve, or if it would put all attached items on reserve. We will defer this decision until we hear from MCO, then we will discuss and decide via email.
- Limit Create Lists searching by scope? This would allow us to search in just our own record sets and eliminate one of the steps when creating a Create Lists query. The settings for this option are Always, Never, and Prompt. Prompt appears as a little checkbox on the Create Lists screen. The cluster voted for PROMPT.
- Web pac sorting options. Additional sorting options such as call number and author may be available. We need MCO to tell us if the call number sort would use the call numbers in the items or the bibs, and to let us know what the sorting options are. Then we will discuss via email.
- Hyperlink indexed 0xx fields? No one could immediately think of a field they'd like to hyperlink. If any of the cluster libraries has a field they'd like to hyperlink, they can bring it to the group.