Member Library Transition Packet for October 8 Millennium Offsite Transition

Date: August 30, 2012
From: Gerry Formby, Robert Drake and Eric McCarthy

We are now just under a month away from the offsite transition. A number of steps are required by EVERY library. Please review this list carefully and COMPLETELY. Also please note that a copy of all of this information can be found here: http://www.midhudson.org/transition

1. **On or immediately following the transition, all Millennium clients and Millennium Offline must be uninstalled.** A guide for this is included in Appendix A.

2. On or immediately following the transition, all Millennium clients must be reinstalled and pointed to midhudsonlibraries.org. A guide for this is included in Appendix B.

3. On or immediately following the transition, all Millennium Offline clients must be reinstalled to point to midhudsonlibraries.org. A guide for this is included in Appendix C.

4. **FOR LIBRARIES OPEN ON OCTOBER 8th ONLY:** Offline Millennium Clients must be reinstalled prior to transition day. A guide for this is included in Appendix C.

5. **FOR LIBRARIES OPEN ON OCTOBER 8th ONLY:** Offline circ from the 8th can be processed on the 9th however the process, this one time, will be different than normal. A description of the offline circ upload process to be used on the 9th is available in Appendix D.

6. On or immediately following the transition, OPAC’s should be pointed to the new catalog url midhudsonlibraries.org. A guide for this can be found in Appendix E.

7. On or immediately following the transition, links to gigcat.midhudson.org on library member pages should be updated to the new catalog url: midhudsonlibraries.org. (For all Libraries with sites hosted by MHLS will do this for you.)

8. Saved browser passwords will not work on the new catalog URL until after the first successful login. We expect some patrons to have forgotten their PINS. Libraries should familiarize themselves with the PIN reset instructions. This can be found in Appendix F.

9. In order to prevent bottlenecks that may cause additional problems and downtime, a schedule has been prepared. Libraries must follow this schedule when coming online for the first time with each staff computer after the transition. This can be found in Appendix G (see midhudson.org/transition for document).

10. **FOR LIBRARIES WHO HAVE PURCHASED DATABASES:** It will be necessary for you to contact your database vendors and have them open up authentication to IP address: 74.82.32.48. For all databases that are collectively purchased (Chiltons, Gale Testing & Education, Heritage Quest (including Historical New York Times), Mango, NextReads, Syndetics, TumbleBooks and OverDrive) MHLS will do this for you.
11. All libraries must pay special attention to the Listserv’s for additional instructions especially on October 9th.
Appendix A: Uninstall Millennium

1. Make sure that you are logged on as the administrator or have sufficient privilege to uninstall programs on the computer.
2. Open **Add or Remove Programs**, found in the Control Panel.
3. Select Innovative Millennium, click **Change/Remove**.
4. The Uninstall Innovative Millennium Wizard will begin. Click **Uninstall**.
5. The uninstall wizard will automatically run through the uninstall process. Once complete click **done**.

6. From the Add or Remove Program list select Innovative Millennium Offline.

7. The Uninstall Innovative Millennium Offline Wizard will begin. Click **Uninstall**.
8. The uninstall wizard will automatically run through the uninstall process. Once complete click **done**.

![Uninstall Complete](image1)

9. Close out of Add or Remove Programs.
10. Go to the C:\ drive on My Computer.
11. Right-Click the Millennium Folder
12. Select Delete.

![Delete Millennium](image2)

13. You have now successfully uninstalled Millennium.
Appendix B: Downloading and Installing the Millennium Client

1. Make sure that you are logged on as the administrator or have sufficient privilege to install programs on the computer.
2. Open a Web Browser: Internet Explorer, Firefox, etc.
   - Username: mhud
   - Password: ingar2
4. Select your Operating System from the list.
5. Select the latest Preferred Millennium Environment Software Release: Release 2011

<table>
<thead>
<tr>
<th>Software Release</th>
<th>Supported Millennium Environments</th>
<th>Preferred Millennium Environment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Release 2011</td>
<td>milup160_02.exe</td>
<td>milup160_02.exe</td>
</tr>
<tr>
<td>Release 2009B</td>
<td>milup160_02.exe</td>
<td>milup160_02.exe</td>
</tr>
<tr>
<td>Release 2009A</td>
<td>milup160_02.exe</td>
<td>milup160_02.exe</td>
</tr>
<tr>
<td></td>
<td>milup120_12.exe</td>
<td></td>
</tr>
</tbody>
</table>

6. Select Save or Save File, depending on your browser and choose an appropriate location.
7. Once the file has finished downloading, double click on the file or select run.
   - You may receive a Security Warning at this point click Run.
8. The Innovative Millennium InstallAnywhere Program will start up, click Next to get through the Introduction.
9. Choose to create the Millennium icon “On the Desktop” and “Create Icons for All Users”

10. Enter the Millennium Server domain name: midhudsonlibraries.org

11. Confirm the Pre-Installation Summary and click Install.
12. Congratulations you have now completed the Millennium Installation.
Appendix C: Downloading, Installing & Configuring Millennium Offline

1. Make sure that you are logged on as the administrator or have sufficient privilege to install programs on the computer.
2. Open a Web Browser: Internet Explorer, Firefox, etc.
   - Username: mhud
   - Password: ingar2
4. Select your Operating System from the list.
5. Select the latest Offline Circulation for our version of Millennium: Release 2011.

<table>
<thead>
<tr>
<th>Software Release</th>
<th>Offline Circulation Installer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Linux</td>
<td>offlineirc_ki2x007.exe</td>
</tr>
</tbody>
</table>

6. Select Save or Save File, depending on your browser and choose an appropriate location.
7. Once the file has finished downloading, double click on the file or select run.
   - You may receive a Security Warning at this point click Run.

8. The Innovative Millennium InstallAnywhere Program will start up, click Next to get through the Introduction.
9. Choose a location to install the files. By default this is C:\Millennium\Offline

10. Choose to create the Millennium icon “On the Desktop” and “Create Icons for All Users”

11. Enter the Millennium Server domain name: midhudsonlibraries.org

12. Confirm the Pre-Installation Summary and click Install.
13. You have now completed the Millennium Offline Installation.

14. Now open the Offline Client and go to Preference… under View.

15. Under Statistics Group enter 7 followed by your Terminal Number.
   - If you do not know this number please call MHLS at (845) 471-6060 ext 240.

16. Under Due Slips
   - Select One slip per patron.
   - Message Line 1: should be the library name.
   - Message Line 2: can be the library address or phone number.
   - Lines to eject: set to 4.

17. Hit Apply, and then Quit.
18. Go to Select Printer under File.

19. Select your Receipt Printer from the drop-down menu.

20. Millennium Offline Circulation is now ready for use.
Appendix D: Manually Uploading Offline Circulation

1. Close out of Millennium Offline.
2. Go to the Millennium Offline Folder.
   - By default this is C:\Millennium\Offline.
   - Open My Computer.
   - Open the C:\ drive
   - Open the Millennium Folder
   - Open the Offline Folder

3. Locate the **circ.dat**.

4. Email this file as an attachment to techsupport@midhudson.org.
   - Please include in the email subject: Offline Transactions: Library Name, Oct. 8, 2012
Appendix E: Change the OPAC

- OPACs set ups vary from library to library. This guide may not include how your OPAC is configured. Please contact your Tech Support or MHLS Tech Support at (845) 471-6060 x240.

Internet Explorer - Homepage
1. Open the Control Panel.
2. Open Network and Internet Connections.
3. Go to **Internet Options** under Tools.
4. Change Homepage to **http://midhudsonlibraries.org/**
5. Click OK.

Internet Explorer – Kiosk Mode
6. Right-click the OPAC shortcut on the desktop.
7. Select Properties.
8. Under target replace gigcat.midhudson.org with **midhudsonlibraries.org**.
   - Target should be same or similar to:
9. Click OK.

Internet Explorer – Auto Start
10. Right-Click the OPAC shortcut on the desktop.
11. Select Copy.
12. Navigate to C:\Documents and Settings\All Users\Start Menu\Programs\Startup
   o Open My Computer.
   o Open the C:\ drive.
   o Open the Documents and Setting Folder.
   o Open the All Users Folder.
   o Open the Start Menu Folder.
   o Open the Programs Folder.
   o Open the Startup Folder.
13. Delete any OPAC shortcut in this folder.
14. Paste the new shortcut into the folder.
Appendix F: Resetting Library Card PIN

Method 1 – Email

• This method requires that a valid email address is attached to your library account. If there is no email address attached to the library account, the PIN reset will be required to be done in Millennium.

1. Open any Internet Browser and navigate to https://midhudsonlibraries.org/pinreset~S1
2. Enter the 14 digit library card number without any spaces and hit submit.
3. The patron will receive an email with a link to reset the PIN. The link will stay active for 3 hours after PIN reset request.

The library received a request to allow you to reset your Personal Identification Number (PIN) used to log in. If you did not place that request, please ignore this message. Your PIN has not changed. Otherwise, please click the link below to choose a new PIN.

https://midhudsonlibraries.org/pinreset~S1?info=f6543e1770ab6abe2cbe69ccdf964d40a9bf7f302a0565e93bf7b025cb7c365a0a373810e77f8763f

This link is valid for 3 hours from the time of your request.

4. Follow the link to the PIN reset form.

5. Enter the 14 digit library card number along with the desired PIN.
6. Choose a PIN that is not an easily cracked sequence of numbers. (ex. 1234, 1111, etc.)
7. Congratulations, the PIN has now been reset and the patron will be able to login a https://midhudsonlibraries.org/patroninfo.
Method 2 – Millennium

- This Method requires that you be logged into Millennium with access to edit Patron Records.
- Keep in mind that if you manually change the patron’s pin, the patron should log in and change it for privacy.

1. Bring up the Patron Record in Millennium.

2. Open the edit window by either pressing the edit button, or going to Edit > Patron in the menu.
   - If the edit option is grayed out and you have edit permission, the record is in use by someone else in the system. You will need to wait until the record has been freed before editing.

3. Select and delete the PIN field.

5. Enter in the desired PIN.
   - Recommended: Leaving the new PIN blank allows the Patron to set the PIN upon logging in at https://midhudsonlibraries.org/patroninfo. This removes library staff from knowing patron PINs.