

STATUS OF RELEASE 4.5

Things continue to look good for a June general release of Release 4.5. Unit testing is complete, and testing of the unified package has been going on for several beta sites installed. Documentation is also well underway.

The beta sites for Release 4.5 are:

- St. Louis Community College (Course Reserve)
- Kent State University (Course Reserve)
- Tulsa Public Library (Bill and Fine)
- Brigham Young University (Keyword)
- Clemson University (VITLS)
- Indiana State University (VITLS)
- Shell Oil Company (NOFA Fixes)
- Vanderbilt University (NOFA Fixes)
- University of Utah (New Tag Table)
- University of Illinois at Chicago (New Tag Table)

While each site will be concentrating on particular functions, all sites will be receiving the complete package. The software has already been combined here at NOTIS and is being tested as a total package.

The Merged Heading Index will not make the Release. While we regret this very much, we could not have provided enough solid testing of that new programming to be sure of the quality. It is our goal to have the staff side of the new index at a test site within ninety days of general release of 4.5.

Attached to this issue of NOTISes are some handouts which were recently prepared for our own staff on different aspects of the release. While these do not describe the complete release, we have appended them to this issue in order to give you some additional information.

These attachments are:

- * VITLS Update (Attachment #1)
- * The Generic Overlay Product (Attachment #2)
- * Block of Renewal (Attachment #3)
- * Enhanced KWB for Release 4.5 (Attachment #4)
- * Zen and the Art of Circulation Enhancing (Attachment #5)

NOTIS AUTHORITIES WORKSHOP SCHEDULED

In this issue of NOTISes are registration materials for the Authorities Workshop in New Orleans on July 8, 1988. See Attachment #6 for the preliminary agenda and Attachment #7 for the registration form. Please copy the registration form as needed and mail to:

Cassandra Gibson
NOTIS Systems, Inc.
1007 Church Street, 2nd Floor
Evanston, IL 60201-3622

The Authorities Workshop is designed for technical services staff who are supervisors of authority file maintenance and/or who are decision-makers about the file, its creation, and related procedures. Attendance is limited to two people per institution, except for consortia, which may send one person per member. There is a limited attendance of 250 people, so registrations will be processed on a first-come, first-serve basis.

The registration fee is \$50.00 before May 23. From May 23 until June 6 it will be \$65.00. NO REGISTRATION WILL BE ACCEPTED AFTER JUNE 6. Registration must be paid for in advance since there will be NO on-site registration. Each registrant will receive a confirmation. Please contact Susie Gegenhuber if you have not received your confirmation by June 20.

Lunch is included in the registration fee. Menu choices are listed on the registration form. There will be a cash bar reception after the workshop.

If you have any questions about the workshop, please contact Susie Gegenhuber, User Services Librarian, (312)-866-0185. We're looking forward to seeing you there!

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AUTHORITIES INTEREST GROUP TO MEET AT ALA

The Authorities Interest Group is planning to meet at ALA in New Orleans on Sunday, July 10, from 8:00-10:00 p.m. The program will be an open question-and-answer session to follow up the Authorities Workshop. Speakers from the Workshop will be present. Interest group attendance is not limited to Workshop registrants. Any NOTIS user may participate.

NEW VICE PRESIDENT AT NOTIS

Maribeth Ward, the Vice President for Customer Services, began at NOTIS on February 1. Maribeth has responsibility for all of the functions which interface directly with customers, and she is responsible for the delivery of those services in a quality fashion.

Four groups report to Maribeth. They are:

User Services
Systems Engineering
Conversion Services
Documentation Services

Maribeth reports to Jane.

Prior to joining NOTIS, Maribeth was Regional Support Manager for Computer Consoles, Inc. Computer Consoles makes a variety of Unix based office automation products, including directory assistance systems for the Bell operating companies. As Regional Support Manager, Maribeth was responsible for all technical support and pre-sales marketing support activities in the Midwest and Northeast.

Maribeth started her career at Ford Motor Company where she was a systems analyst. She has a Master's in Management from Oakland University.

DATA SWITCH SUPPLIERS

Jeanne Boston at the University of Wisconsin at Madison recently told us about their success with an inexpensive data switch supplier. A data switch is used to connect a Telex 476L terminal with both an OCLC terminal and a bar code reader. It has similar uses with other equipment, where you want to transfer data from different sources into or out of a terminal.

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Many places use data switches from Black Box Corp., Box 12800, Pittsburgh, PA 15246. They make good equipment and have a helpful staff. However, if you want to save about 50% of the cost of data switches and similar gear, you might try QVS, Inc. The distributor Madison used is:

North Supply
600 Industrial Road
Lenexa, KS 66219
(913)-791-7000

QVS's address is:

QVS Inc. Data Switches
20-T North 15th Street
East Orange, NJ 07017

NOTIS LISTSERV AVAILABLE FOR MUSIC MATERIALS
by Dick Griscom, Northwestern Music Library

We are pleased to announce that Charles Dunn of SUNY Buffalo has installed a NOTIS music users LISTSERV list on the UBVM node of BITNET. Anyone with an interest in issues pertaining to music materials in NOTIS is welcome to subscribe to the list. For those of you unfamiliar with LISTSERV, it is a mailing list server designed to make group communication easier. People with a common interest are grouped in a list stored on LISTSERV. They can then communicate messages to everyone on the list by sending a message to a special network address (in our case, "NOTMUS-L@UBVM.BITNET" or "notmus-l@ubvm.cc.buffalo.edu").

To subscribe, send an interactive message to LISTSERV@UBVM by doing one of the following (in each example, "yourname" is simply your name as you wish it to appear on your messages: e.g., "John Smith"):

On VAX systems: SEND LISTSERV@UBVM SUBSCRIBE NOTMUS-L yourname

On VM/SP systems: TELL LISTSERV AT UBVM SUBSCRIBE NOTMUS-L yourname

On MVS systems with TSO/E: TRANSMIT (or XMIT) UBVM.LISTSERV NOPROLOG. When the message text screen is displayed, enter SUBSCRIBE NOTMUS-L yourname

On some JES2 systems, the command could be TO, VMSG or XMSG, depending on the local implementation: TO LISTSERV@UBVM SUBSCRIBE NOTMUS-L yourname

If you have any problems subscribing to the NOTMUS-L LISTSERV list, please address them to GRISCOM@NUACC.

Also, if any other MLA BITNET users are bringing up a LISTSERV list, we would be happy to distribute an announcement to everyone on the users list.

DIAL-UP INSTRUCTIONS FOR KENT STATE UNIVERSITY

Dial-up instructions for Kent State University's public access catalog appear in Attachment #8. If your institution provides remote access to your NOTIS online public access catalog, please send the instructions to:

Tom McGinn
User Services Librarian
NOTIS Systems, Inc.
1007 Church Street, 2nd Floor
Evanston, IL 60201-3622

MERGED HEADING INDEX CHANGES TO BIBLIOGRAPHIC AND AUTHORITY RECORD SEARCHING AND INDEXING

We have completed the walkthrough of the functional specifications for the Merged Heading Index project and copies of the specs were distributed to members of the NOTIS staff. At the walkthrough several people requested a brief list of the major changes that MHI will bring to bibliographic and authority record searching and indexing.

Notable absences:

1. 245 |b will NOT be indexed/searchable
2. NO rotated entries are created for Corporate Bodies
3. NO reverse chronological order for subjects
4. NO call number, location code with subject searches

Notable additions:

1. Longer, less truncated, index entries
2. Cross references
3. New search types and views
4. New guide, index display
5. Longer place, volume qualifier
6. More includable subfields for Uniform Titles
7. Encoding bibliographic records for OPAC suppression

8. Conflict detection reports
9. Rotated index entries for name/title fields
10. Media information in index display
11. Conferences indexed/searchable as name AND title
12. Online create/update of all access points

MOD36/MOD37 CHECK DIGIT ROUTINE

by Barbara Hieber, University of Pittsburgh and Ron Johnston, McGill University

At approximately the same time that NOTIS was being implemented, the University of Pittsburgh decided to develop an ID Center which would be responsible for collecting data from all sources, keeping the data current, and providing one online file of all data for all collection agencies. Data from this central file will be extracted in the NOTIS patron interface format for use in the NOTIS patron update program.

Members of the Computer Center staff from all University departments which use the current ID card spent many hours looking into the logistics of creating an ID Center, which involved setting up a new ID format, printing barcodes, and creating new ID cards for approximately 50,000 people.

One of the areas for investigation was the type of check digit routine to be used for the patron ID number. Allen (Skip) Grandey of Pitt's Computer Center reviewed the check digit routines which were currently available in NOTIS and determined that none met the criteria which he had developed from his research on the subject. Of particular concern was the fact that the only transpositional errors which would always be detected were cases where only one transposition occurred and it occurred between adjacent characters. He felt that in the 15 character ID number we were considering the chance of multiple transpositions or transpositions between non-adjacent characters was very great.

Skip recommended that we use a Modulus 36 algorithm plus a weighting factor to detect transcription and transposition errors. He noted that these errors would not occur with self-checking barcode scanning equipment, but they could and would often occur in situations where manual keying would be required (e.g., 1. cases where the scanning equipment is not available or is out of service, 2. bad barcode labels, and 3. telephone renewals). We have a special situation at Pitt where manual keying of all patron IDs will be necessary for a short period of time, and since we are using sequential barcode number the chances of miskeyed ID numbers accessing a legitimate but wrong record is quite high.

The Modulus 36 algorithm uses the 10 digits plus all 26 characters of the alphabet. Each alpha character is assigned a numeric value as specified by ANSI standard MH10.8M-1983, where A is 10 and each successive alpha character is assigned the next higher value through 35. Each character or digit in the number is assigned a weight relative to its position from the rightmost end of the number (i.e., the rightmost character or digit is assigned 1, the position to its left is assigned 2, etc). The weighting factor times the value of the character or digit is calculated for each position. The sum of these calculations is divided by 36 with the remainder indicating the character or digit to be used as the check digit.

The NOTIS ID format was already set up to allow alpha characters, and they are being used in the Tulsa algorithm. NOTIS was provided with a COBOL version of the Modulus 36 routine from which they created the Assembler routine which is identified as check digit routine number 12 in the NTCKDGT macro. The routine has been used successfully since May, 1987, and the code has been made available to all NOTIS users since Release 4.4.2.

Meanwhile, NOTIS put McGill University in touch with Pitt because McGill was developing a check digit routine much like the one NOTIS had just done for Pitt. When McGill received Pitt's documentation they pointed out that the Modulus 36 routine will not detect all transpositional errors as had been thought, although the number of errors it will not detect is limited. In order to prevent transpositional errors altogether, the modulus number must be a prime. Armed with this knowledge, McGill has tried to develop an error-free check digit routine. Ron Johnston of McGill reports:

"Prof. William Brown kindly analyzed the algebra of check digits for us. His area of research includes parity bits which are essentially check digits for binary numbers. The formula is quite simple. The transposition of two characters will be undetected by the check digit if they contribute the same amount to the remainder both before and after the transposition. This condition occurs if the product of two differences equals the modulus number or a multiple of the modulus number. The two differences to be calculated are: 1. between the two weights, and 2. between the numeric values of the two characters.

Algebraically: for weights W1 and W2, and numeric values N1 and N2, transposition will be undetected by modulus number M if:

$$|W1 - W2| \text{ multiplied by } |N1 - N2| = M \text{ or } NM$$

For example:

digits 0 and 9 with weights 1 and 5
digits 20 and 2 with weights 4 and 6
digits 1 and 7 with weights 5 and 11

To turn the first example above into actual ID numbers take an ID number with digit 0 in the position that gets weight 1 and with digit 9 in the position that gets weight 5. The undetected error will occur if the number actually keyed in is the same except that the digits 0 and 9 have switched positions. If you apply Pitt's check digit formula to these two ID numbers, you will get the same check digit and the error will pass undetected. Of course 'digit 20' in the second example is the numeric equivalent to an alphabetic character in the ID number.

From the formula it follows that a prime number should be used for the modulus number M. Then one of the differences above would have to be equal to M in order to cause a problem. One can most easily prevent such a possibility by choosing a prime which is larger than both the largest numeric value (36 in this case) and the largest weight (15).

At McGill we have chosen Modulus 37. We will allow both numbers and letters in the barcode number as at Pittsburgh. However, we need one more symbol for the check digit because there will be 37 possible remainders. We have chosen the dollar sign from the code 3 of 9 barcode symbol set to represent a remainder of 36. We are grateful to Skip for sending us his complete research papers from which we gained the first clue to the importance of using a prime divisor."

THE BOARD OF DIRECTORS OF NOTIS SYSTEMS, INC.

A number of you have expressed an interest in the Board of Directors. As you know, NOTIS Systems, Inc. is a wholly owned, for-profit subsidiary of Northwestern University. When the corporation was formed in September, 1987, a board of directors was appointed by the University to advise the management of the corporation.

The backgrounds of the ten Board members and the corporate secretary are as follows:

Lee A. Ellis is the chairman of the Board. Mr. Ellis is the senior vice president for business and finance of Northwestern University. He is the person who was responsible for the organization of the corporation. Mr. Ellis holds an MPA degree from the University of Kansas and is a director of several other

corporations and organization, including NBD Bank Evanston and Brunswick Charitable Trust.

Douglas K. Chapman is chairman of the board and chief executive officer of ACCO World Corporation and vice president, Office Products of American Brands, Inc. Mr. Chapman has led ACCO since 1967 and has managed the growth of the company into the leading manufacturer of office products and computer supplies. Mr. Chapman has been very active in the National Office Products Association and serves on several business and foundation boards, including Evanston Hospital Corporation.

Martin (Mike) J. Koldyke is chairman of Frontenac Capital Corporation. A graduate of Purdue University, Mr. Koldyke has been particularly active in the area of venture capital financing in the health care field. He serves on the boards of Rand McNally and American Healthcorp and is a trustee of Northwestern University. He serves NOTIS Systems, Inc. as the chairman of the Compensation Committee.

Bryan S. Reid, Jr. is the chairman and chief executive officer of the Paxall Group, Inc. Mr. Reid is a graduate of Northwestern University and currently serves as a trustee of the University. He is also a trustee of the Newberry Library and the Chicago Historical Society as well as a director of LaSalle National Bank. Mr. Reid is chairman of the Audit Committee of NOTIS Systems, Inc.

Lee M. Mitchell is the president and chief executive officer of the Field Corporation. A graduate of Wesleyan University (a NOTIS user), he holds a law degree from the University of Chicago. A specialist in communications and publishing, Mr. Mitchell has served on a number of boards, including Boulevard Bank, N.A., and the Chicago Metropolitan Planning Council.

Blaine J. Yarrington is retired from Amoco Corporation, where he worked from 1938 until 1983. At the time of his retirement he was executive vice president and a director of the Corporation. He is a trustee of Northwestern University, the Field Museum of Natural History, and the Chicago Community Trust. He serves as a director of Illinois Tool Works and NBD Bank Arlington Heights.

John W. Taylor, III is the chairman and president of NBD Bank Evanston. Formerly the senior vice president of The Northern Trust Company in Chicago, Mr. Taylor is a graduate of DePauw University. He is active in Evanston business and cultural activities and serves as director of the Evanston Hospital Corporation and the Evanston Chamber of Commerce.

John P. McGowan is the university librarian of Northwestern University. Mr. McGowan has been the guiding force behind the development of the NOTIS software for many years. He was the person responsible for the initial effort to create the NOTIS software and for many years has overseen the funding for automation at the Northwestern University Libraries. Mr. McGowan received his library degree from Columbia University and also holds a degree in industrial engineering from New York University.

Marilyn McCoy is the vice president for administration and planning for Northwestern University. In that role she is responsible for university-wide planning efforts. She previously was director of planning and policy development at the University of Colorado and a senior associate at the National Center for Higher Education Management Systems. A member of the American Association for Higher Education, she is a graduate of Smith College and has a master's degree in public policy from the University of Michigan. She is completing a Ph.D in management at the University of Colorado.

Jane Burke is the president of NOTIS Systems, Inc. Ms. Burke was previously the director of the NOTIS Office at Northwestern University Library. She has a number of years of experience in library automation, and worked for nine years for CLSI. A member of the American Library Association, Ms. Burke has an MLS from Rosary College and master's degree in management from the Kellogg School at Northwestern University.

Michael C. Weston is the corporate secretary for NOTIS Systems, Inc. Mr. Weston is the vice president for legal affairs for Northwestern University. A specialist in legal issues in higher education, Mr. Weston was formerly president of the Economic Development Corporation of Greater Detroit. He is a graduate of Brown University and holds a J.D. from the University of Michigan Law School.

PROBLEM RECOVERING NOTIS FILES UNDER CICS 1.7

NOTIS users who are on CICS Release 1.7 should examine very carefully Possible Cause "e" under Troubleshooting Problem V039 in this issue of NOTISEs.

Though the problem is most clear when you try to rebuild the subject index after recovering the bibliographic file, these extra "bad" records can and will be included in any NOTIS file which is recovered under CICS 1.7 unless the step noted is taken.

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CICS DCT REQUIREMENTS FOR KEYWORD BOOLEAN (MVS ONLY)

At the time of the initial release of the Keyword/Boolean search software to our MVS customers, we indicated that the enhancement required several entries in the CICS Destination Control Table (DCT). These entries were distributed in a sample CICS DCT with the name REQDCT. We have since determined that DCT entries are not required with the current release of KWB. Consequently, any installation instructions regarding the DCT may be omitted when implementing KWB. (Those sites that have already modified their DCT as described may remove the KWB entries, or may simply leave them in, knowing that they are not actually being used by the software.)

Actual references in the NOTIS documentation to DCT requirements for Keyword/Boolean appear in the NOTIS I & O Manual in Section 5.6-Page 6 (Step 8), Section 8.1-Page 6, and Section 8.5-Page 3.

With the 4.4 release we also distributed a sample list of DD's that needed to be included in the CICS startup JCL. (These were included in a member named REQDSNS.) Four of the entries were Transient Data destinations associated with the DCT entries. Therefore, these may be eliminated from your startup JCL. Specifically, they are JABACCT, JABJESP, JABPRNT, and JABSLOG.

IMPORTANT - Please note that another enhancement distributed with the 4.4 release, NOTIS On-Line Fund Accounting, had its own required DCT entry - ORDU. This is DEFINITELY REQUIRED when implementing fund accounting.

LIST OF SAS EXTRACT AND REPORT PROGRAMS AVAILABLE WITH RELEASE 4.5

See Attachment #9 for a list of SAS extract and report programs we are planning to distribute with Release 4.5.

UPCOMING INSTALLATIONS

SUNY Binghamton - April 19

NEW CONVERSION SERVICES STAFF

Bill Kapsalis, Conversion Specialist, recently joined our staff. Bill received his Bachelor of Science degree in Computer Science from Northern Illinois University in 1984. Prior to coming to NOTIS, Bill worked for Advanced System Applications, Inc. as a Technical Specialist I. Bill enjoys his work as a Conversion

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Specialist, and we certainly enjoy having Bill as part of our staff.

Gina North, Conversion Specialist, also recently joined our staff. She was born in Acapulco, Mexico and is fluent in Spanish. She studied at Loyola University at Chicago in Computer Science. Before coming to NOTIS, Gina worked for Allstate Insurance Co. as a programmer. Gina's hobbies include leading/training Boy Scouts of America, camping and canoeing in the great Northern woods. Her favorite hobby is genealogy.

NEW SYSTEMS ENGINEERS

Rick Blahunka joined NOTIS March 28 as Systems Engineer. Rick will work primarily with VSE customers. Before coming to NOTIS Rick worked for the past 8 years with NCR Corp., Data Pathing Systems Division in Aurora, Illinois. His most recent position was that of District Manager, Systems Engineering. Rick has a B.S. degree in Production Management and Marketing from Northern Illinois University and is nearing completion of an M.S. in Information Systems Management from Aurora University.

Nancey Epperson joined NOTIS April 5 as Systems Engineer. Nancey will work primarily with MVS customers. Nancey has worked for the past 3 years as a programmer with the Sears Merchandise Group in Chicago. Prior to that she was a Production Artist and an Apprentice Mechanic. Nancey has a B.A. from the University of Pittsburgh and a CCP (Computer Career Program) Certificate from DePaul University.

NEW MARKETING AND DOCUMENTATION SERVICES SUPPORT STAFF

Sandy Yuen Word Processor/Secretary for both Marketing and Documentation Services joined NOTIS April 11. Before coming to NOTIS Sandy worked at Truman Middle College and Harry S. Truman City College, both in Chicago.

NEWS FROM DOCUMENTATION SERVICES

User Update #11 was distributed to all NOTIS user documentation contacts April 4.

If you have not received your copies or if you have any problems with the Update, please call or write us at:

Documentation Services
NOTIS Systems, Inc.
1007 Church Street, 2nd Floor
Evanston, IL 60201-3622
(312)-866-0150

There will be no Technical Documentation Update distributed this month since we are concentrating our efforts on Release 4.5

NEWS FROM USER SERVICES

Mary Alice Ball went to California State University at Long Beach for an Implementation visit March 3-4.

Kathy Cunningham went to West Chester University March 2 for an implementation follow up meeting. West Chester loaded their database and began cataloging in January. Ribbon cutting for "Chester" (the West Chester University online public catalog) is scheduled for April 20.

Susie Gegenhuber went to the Bibliographic Association of the Red River (BARR) March 24-25 for training in Introductory Cataloging and OPAC. On March 29 she went to Iona College in New Rochelle for Advanced Cataloging training.

Tom McGinn was at Queens University in Kingston, Ontario March 16-17 for training in Introductory Cataloging and Introductory Acquisitions. Though Queens was installed only in November, 1987, in April it is bringing up its OPAC of 1 million records and implementing cataloging. Acquisitions processing will start May 1.

Ben Schapiro went to Western Kentucky University on March 2 for Advanced Acquisitions training and conversion training with Chris Carlson

TROUBLESHOOTING

This column is a regular feature of NOTISes. As we encounter problems which we plan to include in the Troubleshooting Guide (Appendix E to the I&O) we list them here in NOTISes so you won't have to wait until a new release in order to be aware of them. If you have suggestions, send them to Jerry Specht.

Note: it is our intention that you should take these troubleshooting pages and append them to the Troubleshooting Guide which you received in February, 1988. The problems have been, and will continue to be, assigned "temporary" numbers from

G004 MISSING RIGHT PARENTHESIS
 NO ENTRIES FOUND. FOR POSSIBLE REASONS, TYPE h
 TYPE r TO REVISE SEARCH. TYPE e TO start OVER.
 TYPE COMMAND AND PRESS ENTER==>

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LUIS SEARCH REQUEST: K=HISTORY.XXX.

KEYWORD SEARCH INDEX -- 196 ENTRIES FOUND, 1 -- 18 DISPLAYED

1. NU: Iran under the ayatollahs *Hiro, Dillip <1985
2. NU: The great inertia *Qian, Wen-yuan <1985
3. NU: The great metropolis *Grant, James <1985
4. NU: Modern India *Brown, Judith M <1985
5. NU: English municipal institutions *Vine, J. R. Somers <1985
6. NU: Social conditions in provincial towns <1985
7. NU: Ragged London in 1861 *Hollingshead, John <1985
8. NU: The wilds of London *Greenwood, James <1985
9. NU: The million-peopled city *Garwood, John <1985
10. NU: Cities of the world <1985
11. NU: The Great Depression, 1929-1938 *Saint-Etienne, Christian <1984
12. NU: Les colleges francais *Compere, Marie-Madeleine <1984
13. NU: Women at war with America *Campbell, D'Ann <1984
14. HS: Health assessment *Thompson, June M <1984
15. NU: Unnatural lives *Hergenhan, L. T <1984
16. NU: Gender politics *Klein, Ethel <1984
17. NU: The common reader *Woolf, Virginia <1984
18. NU: Egypt under the khedives, 1805-1879 *Hunter, F. Robert <1984

T035 INCORRECT FIELD CODES IGNORED
 TYPE m FOR MORE ENTRIES. TYPE LINE NO. FOR BIBLIOGRAPHIC RECORD WITH CALL NO.
 TYPE r TO REVISE SEARCH. h FOR HELP. e FOR INTRO TO LUIS.
 TYPE COMMAND AND PRESS ENTER==>

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NOTIS SYSTEMS INTEROFFICE MEMORANDUM

Date: March 14, 1988

To: NOTIS staff

From: Bruce Miller *BM*

Re: Zen and the Art of Circulation Enhancing

Here are some materials you can refer to, for detailed information on the bill and fine and course reserve functions in the 4.5 release.

Some acknowledgments: Thanks to Cynthia, Dave, George, Joe, Kieran and Roger for all their good design and coding work; Stuart and Laura for their documentation efforts; Ben B., Ben S., Dale and Mary Alice for making time to test and learn the 2 functions; and Mary, Tim and the other Demolition Day testers. Many thanks.

What is bill and fine?

The purpose of the NOTIS bill and fine function is to associate financial obligations with a patron. Examples of financial obligations are:

- . a \$2.10 overdue fine for returning an item late
- . a \$50.00 bill for not returning a charged item
- . a \$20.00 meeting room rental fee
- . a \$14.10 data base searching fee

The bill and fine information is kept in a new record, the bill and fine record. Each bill and fine record is associated with a patron record.

Highlights of changes in NOTIS use, with bill and fine

- . No more paper files, keeping copies of the bill and fine notices, lists of patrons fined that day, etc. (The bill and fine records render these obsolete, thankfully.)
- . No more pseudo-bills (the forms that print daily when a patron should be billed for an item). (The item is listed on the search list instead, saying "Bill patron for item if not found".)

NOTIS circulation module changes for 4.5 -- March 13, 1988

. Complete bill and fine data is accessible to staff at any terminal, authorization permitting.

. If you authorize it, payments can be made from a terminal at any branch. Or, a branch can be limited in which bill and fine records it can update. Example: in DALINET, the Wayne State library will only be allowed to update Wayne State bill and fine records, not Detroit Public's records.

. You can create a bill and fine record manually. This gives you the ability to create financial obligations for functions (room rental, data base searching, and the like).

. You can add additional charges to an existing bill and fine record.

. You can add special notes (with optional action dates) to bill and fine records. Example: a person pays off part of a large fine, and says he/she will pay off the balance on 4/1/88. You might create an a special notes field saying this, with action date of 4/3/88.

. All on-line bill and fine record updates are done in real time. So when you display a patron's bill and fine data, you're seeing what's current as of that instant.

. Patron ID's are blocked and unblocked automatically, based on the total the patron owes. (This hasn't occurred before in NOTIS.)

. The bill and fine notices will include information from the bill and fine records, including the function names and the total the person owes for all bill and fine records.

. You can set a threshold for printing bill and fine notices, say \$2.00. Only when the person's balance owed exceeds that amount will a bill and fine notice being printed. So a 20[overdue won't cause a notice to be printed, until the threshold is reached.

Where's the documentation?

. Original functional specifications: a master copy is in Bruce's mail box. You're welcome to copy it; please return it.

. Draft ROM and IMP: See Stuart for the ETC document names of these materials. They are done and are very good.

NOTIS circulation module changes for 4.5 -- March 13, 1988

. Programmer's Reference Manual materials: Laura is currently gathering these materials. See her or the programmers if you have specific questions.

What NOTIS files have been changed for bill and fine?

. New VSAM KSDS file for bill and fine records (1 per institution group)

What CICS tables have been changed for bill and fine?

. PCT - new transaction "FNDO", required if interfacing to fund accounting.

. PPT - new bill and fine programs added.

. FCT - new bill and fine file added.

. DCT - new intrapartition transaction/destination "FNDO", required if interfacing to fund accounting.

What additional memory requirements are needed for bill and fine?

No additional memory requirements found during testing.

What NOTIS tables have been changed or added for bill and fine?

. INSGRP - new bill and fine file name, new parameter defining notice threshold amount.

. SERVIC - added optional "BILLID" parameter - default patron record number for patron category "lost".

. FINREA - bill and fine reason codes/descriptions. Added flags for association with item or function, optional fund code and processing unit if interfacing to fund accounting. Note: this table has become LC101WB5; it was part of LC103BEL.

. FUNCDE - new function code table.

. CIRP - new "REPLACE=" replacement value parameter (optional); new "REASONS=" bill and fine reason code list for billing lost items (optional).

. CPOVER - new "BILLREC=" auto bill interval (optional).

. SECOPR - new record type "BILL", bill and fine security flags and codes.

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What is course reserve?

The NOTIS course reserve function associates course information with an item. Examples of the associations are:

. the library's copy of Samuelson's Economics is associated with course Economics 101 taught by Professor Reimer.

. a photocopy of a journal article is obtained through interlibrary loan and is associated with course Physics 201 taught by Professor Teigler.

. Professor Setecka's personal copy of Great Minds in Computing is brought to the library's reserve area, for his course Computer Science 201.

Course reserve usually includes moving an item to a different location. This is often a closed area, from which items are paged when requested. Almost always, the item's loan period is shorter than normal: 1 hour or 1 day (overnight), instead of 28 days or 60 days.

Highlights of changes in NOTIS use, with course reserve

. Course and instructor information can be added to item records. (No item fields existed before for this data.)

. Items with course control information can be searched in staff mode by author, (2) title, (3) course and section number, and (4) instructor name in a new index, the reserve index. LUIS searching will not be in 4.5, but must be added later for full functionality.

. The existing item record data has become a subrecord. A reserve area can create its own subrecord, or version of the item data. This allows it to preserve its use counts and to keep other reserve-specific information separate from the original subrecord. It is important to understand that the course control fields exist within a subrecord.

. A value field has been added to the item record. The default amount is zero (0.00).

. A 3-year-old logic error in item record updating has been corrected. Put simply, if a title had many system-wide holds being placed on its copies, the item records may have been corrupted. For instance, an item that was discharged still showed as charged. And an item that was charged still showed as unchanged. This has been corrected.

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. LOCC - new "BGRP=" location group for fine collection (optional); new "FUND=" fund group code, optional and only used if interfacing to fund accounting; new "SEARCHED=" search list for lost items.

. BPFUND - new fund group table referenced in LOCC macro - optional table used only if interfacing to fund accounting.

. LC000SYS - new variable "NMBFFND", defines interface to fund accounting; new variable "NFRREP" defines reason code used for replacement value fine.

What programs have been modified for bill and fine?

The following list is not exhaustive, but includes the significant members.

. LB601-LB665 Circulation batch programs.

. LC205 Table processor.

. LC404-LC405 Command Processor.

. LC440 Bibliographic display routine.

. LC500 Patron record DSECT.

. LC530 Patron record update.

. LC610-LC614 Charge/discharge programs.

. LC530-LC532 Patron record display/update.

What programs are new with bill and fine?

. LC548 Update fund record program.

. LC550-LC552 Bill and fine record display/update

. LC554-LC556 Patron bill and fine summary display/update

Any conversion programs to run for bill and fine?

Yes. We will write a brief program to convert request code 'HC' to 'ED' in C10 fields of item records. After this, regenerate the action index, to replace the HC's with ED's there. That's all for bill and fine.

NOTIS circulation module changes for 4.5 -- March 13, 1988

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Where's the documentation?

. Original functional specifications: a fairly current set is ETC document BMO.RESERVE. You're welcome to copy it into your own ETC library, and look at it.

. Draft TOM and IMP: Stuart is currently writing these materials. See him or Bruce if you have specific questions.

. Programmer's Reference Manual materials: Laura is currently gathering these materials. See her or the programmers if you have specific questions.

What NOTIS files have been changed for course reserve?

. New VSAM KSDS file for course reserve index (1 per institution group)

What CICS tables have been changed for course reserve?

. PPT - new course reserve programs added.

. FCT - new course reserve index added.

What additional memory requirements are needed for course reserve?

No additional memory requirements found during testing.

What NOTIS tables have been changed or added for course reserve?

. INSGRP - new course reserve index file name.

. SECOPR - use fields 15-16 of ITEM for additional subrecord create and course control field create authorizations.

What programs have been modified for course reserve?

The following list is not exhaustive, but includes the significant members. Because of the item record structure change, every program that reads item records has been changed.

. LB600-LB665 Circulation batch programs

. LB685 Generate action index

. LB690 Create item index

NOTIS circulation module changes for 4.5 -- March 13, 1988

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- . LB790 Create call number index
- . LC205 Table processor
- . LC404-LC405 Command processor
- . LC601 Item record DSPECT
- . LC610-LC614 Charge/renew/discharge programs.
- . LC620 Recall/hold
- . LC630-LC632 Item record create, update and display
- . LC660 Items charged display
- . LC794-LC795 LUIS display.
- . LC830 Index command processor
- . LC852 Update copy holdings record
- . LC859 Item summary display
- . LC866 Spine label print program
- . LD003 Batch create item records
- . LD005 Generate charges index
- . LD008 Batch create item records
- . LD014 Create unlinked item records
- . LD016 Assign item ID's to item records
- . LD025 Batch link item records

What programs are new with course reserve?

- LB33A-LB33D Generate course reserve index.
- LC870-LC875 Course reserve index search and display
- LD666 Convert item records

Any conversion programs to run for course reserve?

Yes. Every NOTIS user with an item file must run program LD666. This must be run even if they don't plan to use course reserve ONLY after LD666 is run can the library implement 4.5. Be sure they back up their item file before running.

NOTIS circulation module changes for 4.5 -- March 13, 1988

NOTIS Authorities Workshop Program
July 8, 1988

- 8:00 - 8:30 Coffee
- 8:30 - 9:30 Purpose and Use of Authority Records, Functions and Options - Alice Permenter, Loyola University
- 9:30 - 10:00 The Architecture of the Authority Record in NOTIS - Roberta Kirby, NOTIS Systems, Inc.
- 10:00 - 10:30 Break
- 10:30 - 11:25 CHOOSE ONE:
Authority File Creation - Chris Meyer, University of Minnesota
Merged Headings Index - Speaker to be announced
- 11:35 - 12:30 CHOOSE ONE:
Merged Headings Index - Speaker to be announced
Staffing and Workflow - Nancy Hunn, Vanderbilt University
- 12:30 - 1:45 Lunch
- 1:45 - 2:45 CHOOSE ONE:
Staffing and Workflow - Nancy Hunn, Vanderbilt University
Authority File Creation - Chris Meyer, University of Minnesota
- 2:45 - 3:15 Break
- 3:15 - 4:15 Techniques for Global Changes - Speakers to be announced
- 4:15 - 5:30 Cash bar

REGISTRATION FORM

NOTIS Systems, Inc.
AUTHORITIES WORKSHOP
Friday, July 8, 1988

Please register me for the Authorities Workshop:

NAME _____

TITLE _____

INSTITUTION _____

ADDRESS _____

TELEPHONE _____

I choose the following lunch menu:

- Beef Tips Provencal with Buttered Noodles
Green Beans Almondine
- Louisiana Shrimp Creole with Steamed Rice
Buttered Broccoli Spears

Enclosed is a check for registration fee:

- \$50.00 Registration before May 23
- \$65.00 Late registration until June 6

NO REGISTRATION WILL BE ACCEPTED AFTER JUNE 6

Please send this form to:

The workshop will be held at:

Cassandra Gibson
NOTIS Systems, Inc.
2nd Floor
1007 Church St.
Evanston, IL 60201

Bonaparte Place
Quality Inn Midtown
3900 Tulane Avenue
New Orleans, LA 70119

PHOTOCOPY THIS FORM

PHOTOCOPY THIS FORM



DIAL-ACCESS

NOTE: After completing STEP 3 before all necessary instructions are provided on the screen. Computer Services staff can answer questions about dial-access (672-2736). Libraries staff can answer questions about CATALYST (672-3150).

AVAILABILITY: CATALYST is available all hours the Library is open. Hours are M - TH 7:30 a.m. - 11:30 p.m.; F 7:30 a.m. - 10:00 p.m.; SA 9:00 a.m. - 8:00 p.m.; SU 1:00 p.m. - 11:30 p.m.; limited hours between semesters and during the summer; closed holidays.

DATA TRANSMISSION SETTINGS: 300 or 1200 baud
full duplex
even parity

- Dial (216) 672-4850
- After receiving the CONNECT message, press <ENTER>. You will receive the message: **ENTER TERMINAL TYPE**
 - To see a list of all valid terminal types, press <ENTER>, terminal type VT100 will work for most software
 - For IBM compatibles, free VT100 emulation software is available at the Computer Lab on the 1st floor of the Main Library. Bring in your own blank, formatted 5.25" floppy disk.
- Assuming you are emulating a VT100, type VT100 and press <ENTER>
- The system should respond with the following options:
 - A) CMS VM TIMESHARING SUPPORT SYSTEM
 - B) TSO MVS TIMESHARING SUPPORT SYSTEM
 - C) CICS ON-LINE APPLICATIONS
 - D) CATALYST ON-LINE LIBRARY SYSTEM

(If the Kent State U. logo appears on the screen rather than the above menu, type VMEXIT, press <ENTER>, and go to STEP 5)

(If the CICS logo appears on the screen rather than the above menu, then skip to STEP 7)

- Type D for CATALYST and press <ENTER>
- The CICS=VS logo should appear with the message: **ENTER - LUKS - FOR THE LIBRARY CATALYST**
- Type LUKS and press <ENTER>
(If the message: **INVALID COMMAND CODE** appears after typing LUKS, you may already be in CATALYST. Type e and press <ENTER>)
- You should now see the introductory CATALYST screen.

YOU MUST EXIT CATALYST BEFORE HANGING-UP!

To exit CATALYST:

- Return to introductory CATALYST screen by typing e from any screen
- Type e again to exit and press <ENTER>
- System responds with the message: **PRESS ENTER TO END YOUR SESSION**
- Press <ENTER>
- At this point, you can hang-up.

NAMING CONVENTION:
 LBxxSSAS - extraction jobs
 LBxx6SSAS - Tag analyzer jobs
 LBxx7SSAS - sample reports
 LBxx8SSAS - additional reports
 LBxx3SSAS - journal analyzer jobs

ITEM FILE
 LB475SAS DATA Proc to extract all variable fields from all field-types into a large sequential file (SASFILE or non-SAS) for batch processing.
 LB476SAS TAG JOBS to identify and count all field-types in the ITEM file. Produces a frequency chart.
 LB477SAS General sample ITEM reports:
 a) Status codes by Processing Unit
 b) Recall information
 c) Item locations
 d) Total Linked Items
 e) List Unlinked Item by key
 LB479SAS ITEM record deletion job:
 a) Identify logically deleted Item records by key
 b) Delete these Item records using key

BIBLIOGRAPHIC FILE
 *LB465SAS DATA Proc to extract all variable fields from selected field-types into a sequential file (SASFILE or non-SAS) for batch processing. These are primarily the 'provisional bib' tags.
 LB466SAS TAG JOBS to identify and count all field-types in the BIBLIOGRAPHIC file. Produces a frequency chart.
 LB467SAS Physically delete the 'logically deleted' (state'D') bib records as well as the linked records from the ITEM, ORDER, COPY-HOLDINGS, and VOL-HOLDINGS. (The ORDER records are retained in a backup file).

JOURNAL FILES
 LB016SAS Analyze Circulation Journal with frequency chart of record types (ie., action codes)
 LB026SAS Analyze Technical Services Journal with frequency chart of record types (ie., action codes)

UTILITIES
 LB074SAS Additional step for LB070JOB to produce duplicate purchase order report pages side-by-side. Use to generate duplicate images with non-impact printers.
 *LB979SAS Utility to print all records in the basic online files that are linked to a specific Bibliographic records.

CIRC HISTORY FILE
 LB655SAS DATA Proc to extract all variable fields from all field-types into a sequential file (SASFILE or non-SAS) for batch processing.
 LB656SAS TAG JOBS to identify and count all field-types in the CIRC HIST file. Produces a frequency chart.
 LB657SAS General sample CIRCULATION HISTORY reports:
 a) monthly circ totals by location and fiscal year
 b) Status codes by Processing Unit
 c) monthly Recall info by Location & fiscal year
 d) monthly charges by Service unit & fiscal year
 e) monthly Renewal info by Location & fiscal year

ORDER FILE
 LB445SAS DATA Proc to extract all variable fields from all field-types into a sequential file (SASFILE or non-SAS) for batch processing.

* not yet completed

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