Look for us at ALA Midwinter!

We want to show you some new features

Please drop by the NOTIS booths (#535, 536, and 634) in the exhibit area in the Hyatt Regency during the ALA (American Library Association) Midwinter conference January 6–9, 1990 in Chicago. As usual, we will have NOTIS representatives in the booth to answer your questions and demonstrate software features.

We'll also be able to show you prototypes of the new OPAC screens, online tables, and the report writer menu screens as well as MIHLD records (MARC Format for Holdings and Locations).

All of us at NOTIS Systems, Inc. send you our best wishes for a joyous holiday season and a wonderful new year.

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SATISFACTION SURVEY

Forty percent of our customers have already responded to our Customer Satisfaction Survey. We want to thank all who have responded. We will report on the survey results in next month’s NOTISes.
Update tapes have been shipped

All NOTIS sites should have received a package by now of the Quality Records DataBase (QRDB) and the 4.6.1 updates to NOTIS LMS (Library Management System). The package contained 1 magnetic tape (IBM 3480 cartridges available on request), a listing of the job used to create the tape and instructions and summary of what is on the tape. The software on the tape (source and load libraries) is only what is necessary to implement QRDB and correct minor deficiencies in the 4.6 distribution release. This is NOT a full release and does not replace the 4.6 release. These are updates to that release. 

Includes new training and test database

An item not to be forgotten on this tape is the Quality Records DataBase. This selection of data and table entries will be of great benefit to everyone. It will provide a consistent set of data that will be universal to all sites, allowing the reproduction of different scenarios in different environments. It will provide a universal training file. It will also help us in reviewing situations that might arise in your usage of NOTIS. This commonality of data facilitates users in sharing knowledge and techniques for using the NOTIS software. This data will assist in site-testing of new releases of the software (as this is the data that we will test with). This database will be updated as we add new features to the LMS system. Suggestions for additional records and scenarios to the QRDB are welcome.

NOTIS Systems, Inc. has a new area code. Please update your records.

Problem after hours? No problem!

You can now use our new voice mail system to report a problem outside of office hours (before 8:30 am or after 5:00 pm CST). Simply call Customer Services at (708) 665-0160. A recorded message will prompt you to enter the extension for the person you are calling. Press 120 on a touch-tone phone's keypad to leave a detailed message for User Services or Technical Support staff.

NOTIS is published monthly by the NOTIS Systems, Inc., Documentation Services Department. The purpose of NOTIS is to provide timely, helpful, and accurate information about NOTIS products and services to the NOTIS user community. 

SUBSCRIPTIONS: Subscriptions are available to NOTIS users at the rate of $50 for one year by calling us at (708) 665-0150 or writing us at 1507 Church Street, 3rd Floor, Evanston, Illinois 60201-1612.

CONTRIBUTIONS: We welcome articles and suggestions from the user community. Please call for formatting suggestions before submitting items for publication.

SENIOR EDITOR: Jane Lein
ASSISTANT EDITORS: Laura Nagler, Gary Lee Phillips
PRODUCTION DESIGN: Michael West

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The note field of the patron record is used to record a variety of patron-specific information. The effective use of this field can greatly enhance its utility—and avoid certain types of problems.

UNDERSTANDING CIRCSPACK: Creative use of the note field of the Patron Record

by Rolf Erickson
Northwestern University Library

For a long time we discussed the idea of leaving messages in the patron record, but we were faced with two dilemmas. First, the note field of the patron record is not very large. Second, that field flashes on the screen during a charge or renewal and is sometimes visible to patrons because our Citrus are tilted slightly toward the public side of the desk.

The staff have found it useful to let patrons see the holdings screens, the index screens, and the list of books charged out to them. Moreover, if a patron has trouble identifying a book in LUIS, it is useful to go through the same steps as the patron in order to identify the problem. So, it was clear to us that we wanted to continue having the desk Citrus tilted so the patrons could view the screens.

At first we decided to use short neutral phrases which would not embarrass or anger a patron if they appeared on the screen during a charge or renewal. We ruled out use of such words as "believes," and "thinks," for example, but discovered that even a seemingly innocent note such as "lost ID 11/20/88" offended some who felt it was unnecessary to see it at each charge out as though the sin of the past could never be expunged.

It was when a patron at the desk politely asked us to remove a note in his patron record about his having lost an ID the previous year, that we decided we had to change our methods of recording the data we wanted to keep about patrons, their mail and, sometimes, their idiosyncrasies.

Because we already knew that some patrons had several kinds of problems, and the note field could not accommodate more than two or three conventional notes even with the most drastic abbreviations, we came upon the idea of using standard codes for the notes and placing those codes on the bulletin board in the staff area away from curious patrons' eyes. In order for a code to be placed on the list, the entire department must agree on its use. No one is to place a note on the list without typing in his or her initials.

In order to make the notes appear more cryptic, we use the computer date rather than a more conventional form. For years we have used desk calendars which have the com-
By using notes in the Patron Record, a NU eliminated a large amount of paper notes and a file of returned mail...
Wait—don’t call Diane!

If you are interested in the NOTIS training program ("Ongoing Training") designed by the University of Michigan—please forget what we told you about calling Diane Schwartz of Michigan’s medical library. Last October we ran an item (NOTIS 47, page 16) describing Michigan’s training program, and Diane has been inundated with phone calls requesting more information. She has sent materials describing the training program to LOEX (Eastern Michigan University’s Library Orientation/Instruction Exchange). The information may be ordered from LOEX under the heading, "University of Michigan, MERLIN Ongoing Training."

For more information about the materials available through LOEX, see our July 1989 issue (NOTIS 43, page 12).

Course reserve proposal available for review

A draft proposal for enhancing the NOTIS Library Management System (LMS) course reserve module is now being circulated for review by the Course Reserve Subcommittee of the NOTIS Circulation Interest Group. It will be distributed automatically to those on the Subcommittee’s mailing list; others interested may request a copy for review from the Subcommittee’s chair:

Stephen Davis
Assistant Director for Library Systems
212M Butler University
Columbia University
New York, NY 10027

The proposal covers:
- the general presentation of public-side reserves
- OPAC reserve index displays
- reserve processing and file maintenance considerations
- reserve loan periods
- date/due
- fine calculation
- blocks and holds

As distributed, the NOTIS ‘HAS’ command lets you display up to 750 items charged to a single patron. Here’s how to raise that limit—but is it really necessary?

Pushing the limits on patron charges

Jim Hicks and Jerry Specht
NOTIS Technical Support

Are your NOTIS users running into input 660C when using the HAS command to display items charged to a patron? If so, the probable cause is that the maximum number of items charged to that patron (or pseudo-patron) has been exceeded. (TSG problem 2804 addresses this problem.) How many items can you charge to a single patron without abiding by the has command? Under release 4.6, the limit is 750. By means of a few programming changes, you can raise this limit to an absolute maximum of 1720 (or 3390, 3370, 9353 disks) or 650 (or 3350 disks).

But before you do, ask yourself whether it is really necessary to raise the limit. Creating larger buffers can waste virtual storage. It is true that there are typically a few pseudo-patrons such as “Lost” or “Bindery” which have tremendously large numbers of items charged to them. However, what we recommend rather than increasing buffer size is simply creating a second “Lost” or “Bindery” pseudo-patron and charging items to this second patron rather than the first.

If you do decide that increasing buffer size is the best way of accommodating more than 700 charged items per patron, follow the steps given below.

1. Delete and define the new Patron Charge Index. The RECORDSIZE (VSE) and the RECORDSIZE (LRECL) (MVS) will be (Number of items)x19+5. So, to increase from 750 to 900 items, the RECORDSIZE/LRECL would be (900 x19)+5=17105. The CISEIZE needs to be bumped to the next higher 4K boundary—20480 in this case.
2. Increase the System Journal BUFSIZE to the next 4K boundary (less 8 bytes for overhead on the FBA device). In this case BUFSIZE would be 20472.
3. In LC660DCS change CIMAXSEG=new limit (900)
4. In LC665BAL GET MAIN to same value as the LRECL (17105)
5. Reassemble LC660, 661, 662, 663, 664, 665 BAS
6. In LD006 change MAXSEG = new limit (900)
   OUTREC = new LRECL(17105)
   At RPL output AREALEN = new LRECL(17105)
   RECLEN = new LRECL (17105)
   Reassemble
7. (VSE only) Take the length of LD006 phase and change the sort step of LD005J02. (LD006, L= newlength, E86)
8. Run LD005J02 to rebuild the index.
NOTES: There is a VSAM imposed limit of 32K on any record. This makes for a maximum limit of about 1720 records which the Patern Charge Index can handle. This limit could be even smaller: A CRD device, a 3550 disk, for example, has a track size of approximately 18,000 bytes. Therefore, the limit on this file would be around 950 items.

Correctations and additions to the 4.6 Installation Instructions

Here are some important changes and additions to the instructions distributed with NOTIS Release 4.6

The following notes pertain to the document entitled NOTIS 4.6 INSTALLATION INSTRUCTIONS:

• page B7: It should be noted that the V220 change to LD964BAL, which was supposed to be in 4.6 isn’t. It is a part of 4.6.1.
• page G1: Under PCT with 4.6, ITB=YES is required for all NOTIS transactions (except LU1 and L#2). This can be done for all transactions by specifying it in the TYPE=INITIAL.
• page I1: Under LC101TB1: In 4.6 the FIND AS, FIND A=, FIND AS, and FIND N= do not check for BIBINX. They continue to use ATNINX, ATNINX, SB1INX, and AUTINX, respectively. FIND BT=, FIND J3=, etc., use BIBINX.
• page J1: BRSSFILES—Use your BRSSFILES phase load module instead of the one on the 4.6 tape.
  BRSTAG—We added the 654 and 256 tags to BRSTAG, $DBLUNIT, and LUNITAB. If you have added tags to BRSTAG, you need to either recompile our version with yours or, if you aren’t interested in the 654 and 256 folds, simply use your version of BRSTAG. (Note: BRSTAG is a macro used by LU2TAB, LU3TAB and copied into JCLASMH which creates the READLUZ and PARALUZ phase load modules.)
• page Kc: Other modules which have changed with 4.6: LB663BAL, LC405MSG, LC405TXE, LC632BAL, LC907TWA
• page P4: After DC A(BRSH1G) (line 214) there should be a note indicating that 4 lines have been deleted.

Thank you for your patience with the realignment of account responsibilities. In the long run, having specialists in User Services will help you support the system better, but we know that change can be confusing. Although articles have been published in NOTISes regarding who to call for what, we feel that this message bears repeating in order to eliminate any remaining confusion. Please refer to the following guidelines:

• NOTIS product features and functions
• undocumented applications
• processing problems
• documentation problems
**A look at the next release of GTO**

We heard you! Improvements in handling of authority records, holdings data, and dynamic indexing are coming . . .

Release 2.2 of Generic Transfer and Overlay (GTO) contains a variety of enhancements to make the online record transfer an even more attractive option for NOTIS users. As with all NOTIS software, the content of this next release was based on user comments and requests. We anticipate that Release 2.2 will be ready for distribution in summer, 1990. A more precise date will be announced at a later time.

The following features will be included:

- correct positioning of the 1 w subfield in authority records for GTO-OCLC transfers
- assignment of processing unit to authority records
- no overlay of authority records
- no transfer of blank call number fields from utility records
- options to turn off overlay for either bibliographic records or holdings records or both
- retention of existing data in holdings record when overlay occurs
- dynamic updating of the Standard Number Index
- existing batch reports converted to online and printed out on a CICS-connected printer during the GTO session

Some users have proposed other changes as well, including further refinement of the overlay logic and creating a merge feature for overlay and a review file for duplicates. We will continue to consider these requests and develop future releases based on what we hope is your continuing input.

Full support of the OCLC New System's record export facility will also be provided to GTO-OCLC users when the New System becomes available.

You may still take advantage of 1989 prices if we have your purchase order in hand before December 31, 1989. Also, remember that you may now use any model PS2 as your GTO microcomputer.

See November NOTISes for a list of common questions and answers about GTO.
NOTIS GENERIC TRANSFER & OVERLAY ORDER FORM

INSTITUTION: ______________________________ DATE: ___/___/___
CONTACT PERSON: ____________________________
TELEPHONE # AREA CODE (___) _____ - ______

SHIP TO:
(We cannot ship to a P.O. Box)
NAME _______________________________________
INSTITUTION _______________________________
ADDRESS ____________________________________
CITY, STATE, ZIP ____________________________

PLEASE INDICATE
CICS release: 1.6 1.7
Operating system: MVS VSE
Mainframe connection: SX74 Y171
Number of bibliographic terminals to be connected: ______
Number of GTO microcomputers to be connected: ______
Microcomputer type: AT, PS2 model 20 PS2 model 50 & up (MCA)

SOFTWARE OPTIONS
Please indicate which on-line loaders are needed for your institution.

<table>
<thead>
<tr>
<th>BASIC ($10,000 for first utility, subsequent utilities $5,000 each)</th>
<th>BLIN</th>
<th>OCLC</th>
<th>UTLAS</th>
</tr>
</thead>
<tbody>
<tr>
<td>CONSOLIDATED ($10,000 for first utility, subsequent utilities $5,000 each plus $5,000 per source for consolidating and testing by NOTIS)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ENHANCED* ($10,000 for first utility, plus Conversion costs, subsequent utilities $5,000 each plus Conversion costs)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

* A Customised Work Letter will be produced after both parties agree in detail on what changes are needed, and on the associated cost for the customised loader.

Note: GTO software prices are effective through December 31, 1989.

HARDWARE OPTIONS
Select as many as you need of each.

<table>
<thead>
<tr>
<th>HOST28S Multi-port adapter board</th>
<th># of boards</th>
</tr>
</thead>
<tbody>
<tr>
<td>4 port multi-user board - 25 pin ($399 plus shipping and handling)</td>
<td></td>
</tr>
<tr>
<td>8 port multi-user board - 25 pin ($612 plus shipping and handling)</td>
<td></td>
</tr>
<tr>
<td>4 port MCA - 25 pin for Micro Channel ($155 plus shipping and handling)</td>
<td></td>
</tr>
<tr>
<td>8 port MCA - 25 pin for Micro Channel ($675 plus shipping and handling)</td>
<td></td>
</tr>
<tr>
<td>3270 emulation board ($715 plus shipping and handling includes PCOX software)</td>
<td></td>
</tr>
</tbody>
</table>

Note: Prices of boards are subject to change without notice.

CUSTOMER AUTHORIZATION DATE (11/30)
Purchase order must accompany this order form.

NOTISet/49 December 1989

Streamlining the book approval process
by Barbara Heath
Head of Acquisitions, Wayne State University Libraries

Wayne State simplified approvals and acquisitions by finding a way to move bibliographic records directly from vendor tapes to their NOTIS production file.

At Wayne State University (WSU) we have a very large book approval plan with Blackwell North America, a plan which also includes British imprints from B.H. Blackwell. We receive from 200 to 400 titles per week on this combined plan, not including titles for which we receive form. Our return rate is low, between five and ten percent, so that means we are adding between 180 and 300 approval titles per week to our collections.

We found the recordkeeping procedures for approval books—searching OCLC, transferring records into NOTIS, editing the record, creating a copy holdings record and an order pay receipt record—to be time-consuming and cumbersome. We began to explore ways in which we could streamline the approval process.

MARC records on tape

When we became aware that Blackwell produced MARC records on tape for approval books, naturally we were interested. The Blackwell plan sounded attractive: tape-loaded records for American imprints run from 95% to 95% of all titles in a shipment. Tape-loaded records for British imprints represent between 20% - 25% of the total. In addition, Blackwell offers a number of options regarding the contents of the tapes and their delivery schedule to suit the needs of an individual library. After many discussions with Blackwell, we decided to try their tape service.

WSU library staff elected to receive full MARC and CIP records with LC, NAL, NLM and CoMARC cataloging for American imprints. We decided on the full MARC record because this is the record we use for cataloging. It didn’t make sense to load a brief record only to have to go to OCLC anyway to overlay the full record. For British imprints, we receive MARC records for LC-cataloged books. For the British imprints, we receive only matching LC MARC records because the BNB MARC records were so different from LC MARC that they required overlays from OCLC before they could be used for receiving or cataloging.

Loading the tapes

We put up and take down approval books once a week. The
No editing required... tapes arrive weekly from Blackwell with printed copies of the invoices that match the records being loaded. We check the Acquisitions Department’s invoice copies to make sure that the records being loaded match the books. If they match, our programmers go ahead and load the tapes directly into our production file. The bibliographic record, as loaded, does not need editing. A copy holdings record is automatically created for each bibliographic record with “BNA” appearing in the title-level NOTIS field so that we can identify them as tape-loaded records. Catalog status is “a” (in-process) and copy status and classification type are set at OA. The call number appears in subfield h but does not display in the online public catalog (OPAC) until the book is officially received. The message in the OPAC at this point is, “In the Pre-Order Process.” The copy holdings coding is added by our local lender program; it is not in the records received from Blackwell.

Processing by Acquisitions and Cataloging

After the books are accepted by a book selector, the receiving staff in the Acquisitions Department finds the BNA records. The order/pay/receipt records are created and the receipt information is keyed in. The copy holdings codes are changed so that the OPAC displays the usual in-process message, “In Process. To have cataloged for your use, ask at circulation desk.” Staff deletes records for books that are being returned, a process that takes less than a minute per record. Because not all titles are available on tape, we still have to search for some approval looks on OCLC and manually transfer the records.

When an approval book reaches the Cataloging Department, the staff uses the same NOTIS record that the Acquisitions Department used, either the tape-loaded record or the one transferred in from OCLC. In cases where the staff feels the cataloging is definitely wrong, they may go back to OCLC, find a better record, and overlay it onto the existing record. However, this doesn’t happen very often. As the last step, catalogers go to OCLC and add the WSU holder code to the record on the OCLC database.

Savings in staff time

Because of this new procedure, we have been up-to-date on all monographic receipts for a number of months. Staff time once allocated for approvals has been diverted to other tasks, including gift processing and firm order receiving. We are pleased with Blackwell’s tape service and would recommend it to any library whose approval procedures can accommodate it.

*Note on Problem V377

November NOTISes: The 4.6.1 version of LC860BAL corrects this problem.

Problem V378

(VSE 4.6 only)
In running LB391 (to report new/dropped headings) you get an OPERATION EXCEPTION in the first step.

Causes/Solution: This problem is corrected by changes in the 4.6.1 versions of LB390BAL and LB391CL.

Problem V379

(MVS 4.6 only)
In running LB391 (to report new/dropped headings) you find that the LB392 load module is missing. When you assemble/link you get an abend OC4.

Causes/Solution: These problems are corrected by the 4.6.1 versions of LB392BAL/LB392 load module.

Problem V380

(4.6 only)
When you press ENTER after deriving a provisional record you get ERROR IN BRIGHT FIELDS for the G3S field that was inserted into the derived record.

Causes/Solution: The 4.6.1 version of LC816BAL corrects this problem.

*Boldface type in the problem description indicates index terms and/or main topics.
NOTISes wins award

NOTISes won the top award in this year's 17th Annual Technical Publications/Art Competition sponsored by the Chicago Chapter of the Society for Technical Communication (STC). STC is a professional organization devoted to the advancement of the theory and practice of technical communication. The group has over 10,000 members worldwide.

This is the first year that NOTISes has entered the competition. In the "Whole Periodicals" category, NOTISes won the highest of four possible awards, that for "Distinguished Technical Communication."

The award was made by a panel of judges who evaluated publications on four factors—writing, editing, graphics, and integration—all judged in the context of the purpose, content, and organization of the document. NOTISes is edited, designed, and produced entirely in-house by NOTIS Systems' Documentation Services department. Articles are written by NOTIS staff and by members of the NOTIS user community.

We put a lot of work into this publication, and we do it because we think it is what you—the users of our software products—want, need, and deserve.