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library information
systems

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Preview of Release 5.0 (Part 1)

The new, labeled NOTIS OPAC

by *Stuart Miller, Sales Support Manager*
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THE January 1990 announcement at the American Library Association Midwinter conference of an online public access catalog (OPAC) redesign to be included in Release 5.0 has generated much interest among NOTIS users. In this article we want to share with the entire user community a preview of our efforts to date.

In 1989, work began on incorporating the merged heading index structure into the OPAC index displays. It made sense at that time to look at other OPAC programs as well. Eventually, after much research and preliminary discussions among NOTIS staff members and with selected users, it was decided that Release 5.0 would introduce a completely new NOTIS OPAC. The overall goals of this project are to

- introduce labeled display capability to the NOTIS OPAC
- provide as many local options as possible for the new labeled display
- provide librarians with more direct control over the OPAC
- make implementation of the options as easy as possible
- incorporate the cross-reference structure of the merged heading index into OPAC index displays
- provide call number searching for OPAC users
- introduce online creation and updating of all help, news, and instructional screens in the OPAC

This article discusses all but the last two of these goals; those features will be covered in future articles.

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FREE CONSULTING

*NOTIS Systems offers free consultation
on hardware reconfiguration.
See page 13.*

GTO

*"Possible" hardware problem reported
last month turns out to be false alarm.
Story on page 13.*

Catalog card versus labeled display

One issue confronted by NOTIS staff early in the OPAC redesign project was whether or not to offer users the option of choosing between the current "catalog card" format and the new format (whatever that might be).

The present format of the NOTIS OPAC was originally envisioned by its creators at Northwestern University Library as a transitional step. At the time, an online catalog was a new phenomenon and patrons were expected to take some time before they became comfortable with it. The "catalog card" format offered a familiar look. A new format could be introduced once users had learned to accept an online catalog.

A new labeled OPAC format with more features and many local options will replace the current "catalog card" format.

At the 1987 NUGM, Tom Kinney of the University of Florida put forth some thoughts about labeled displays for OPAC. Certainly, we see their rise in other library automation systems.

In order to determine if labeled displays were desirable for NOTIS libraries, we reviewed all current literature on

online catalogs, customer recommendations, and competitive products. Everything indicated overwhelmingly that the time for a new type of display had arrived. It was time for NOTIS to develop new capabilities, specifically, labeled displays. There appears to be little support from any quarter for OPACs to continue to resemble traditional catalog cards.

Therefore, a new labeled OPAC format with more features and many local options will replace the current "catalog card" format.

The labeled display

While a labeled display seemed the preferred approach for the OPAC, the options seemed almost innumerable. NOTIS analysts again reviewed the literature, studied in greater depth competitors' OPACs, and discussed issues with NOTIS staff, especially the User Services Librarians.

As ideas began to coalesce, input was sought from users at fourteen different NOTIS sites; many of these users distributed prototypes of screen displays to their colleagues and forwarded comments back to NOTIS analysts. The fourteen sites represented a cross-section of NOTIS users (including two consortia); direct, detail-level discussions

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There will be two OPAC views for bibliographic records — brief and full.

Please note

These descriptions are of proposed features that we intend at this time to include in Release 5.0, scheduled for general availability in the fourth quarter of 1990. Should the currently-perceived development priorities change, certain features may be delayed until a later release.

Please remember that this article is based on our current design document. The programming process may reveal problems requiring design modifications or, in some cases, opportunities to add desirable features. Of course, we will keep you fully informed of any changes to the contents of Release 5.0 and any changes to specific features as they occur between now and the actual date of the release.

Watch for articles in future issues of NOTISes.

were held between the analysts and some NOTIS users at these sites.

Finally, NOTIS analysts reached the following conclusions:

- a "brief" and a "full" view of any one record was necessary
- the contents of and labels for a view should vary according to the bibliographic format
- libraries need to define their own labels
- libraries need to define what data displays under what labels and in what order
- location, call number, and status information was highly desirable for any type of record display

With this in mind, the NOTIS analysts determined the overall design of both a "brief" and a "full" view of a record and decided what options NOTIS users could determine locally. It was also decided that serial format records would have a special feature—the "Detail Status"—in order to control the highly variable amounts of holdings and status information that accompany multi-volume titles.

Two views of a record

There will be two types of OPAC views for any bibliographic record in a NOTIS database—*brief* and *full*. These views will be defined at the institution group level.

Brief view

A brief view of a record consists of data from five predetermined, variable-length fields of a MARC bibliographic record, varying by format. For example, an OPAC display for a monograph would consist of the following:

- 1xx: Main Entry—maximum 2 lines
- 245: Title Statement—maximum 3 lines
- 250: Edition—maximum 1 line
- 260: Imprint—maximum 2 lines
- 30x: Physical Description—maximum 1 line

Local options

For each MARC bibliographic format, the user can set the following options:

- suppress one or more of the five predetermined fields
- determine what subfields display for each of the five predetermined fields
- determine a label (14-character maximum) for each field
- determine a label for use when the 1xx field is a 130
- determine the order of the labeled data
- determine where two blank lines will appear
- determine labels for the location/call number/status portion of the screen

Input was sought from users at fourteen different NOTIS sites; many of these users distributed prototypes of screen displays to their colleagues and forwarded comments back to NOTIS analysts.

Examples—brief views

On the following page are examples of brief views for a monograph and a serial. Remember that the order of the fields displayed, subfield data displayed, labels, and the two blank lines to separate groups of data may be locally determined. Also, we have used the labels "Location," "Call Number," and "Status" for this data. Users have the option of changing these—for example, "Place," "Unique ID," and "Availability" might be considered.

Why no local option for selecting fields for the brief view

One important requirement for the OPAC was the incorporation of location/call number/status information for at least the first copy on any screen of a record. In addition, NOTIS analysts treated as mandatory such elements as the search statement in the screen header, user prompts in the screen footer, and easy-to-read displays. After accommodating those requirements, the brief view had eleven lines in which to display an item's distinguishing bibliographic data. To make the data easy to read, two lines needed to be blank, leaving only nine lines to display bibliographic data.

In order to ensure that bibliographic data essential for identification would display consistently for any record and still leave room for all other necessary data, a strict limit on what would or would not display was essential. Since only nine lines were available, hard choices had to be made about the data to be displayed in such limited space.

Decisions still to be made for the brief view

NOTIS analysts are still seeking input on what customers consider critical in a "brief" view of each MARC format. For example, music librarians have already recommended displaying data from a 240 field of a music format record. It has also been suggested that the 30x field is often not particularly helpful for monographs. Some users feel that at least the first subject heading should appear.

There is still time to express your opinions on this matter. Fill out the questionnaire that follows this article and tell us what you think are the five most important fields for each format to display for a brief view. We are especially interested in your thoughts on the AMC and MRDF formats. Remember that space constraints dictate that brief views can only show data from five fields.

The full view

The full view of a record consists of data from any combination of variable-length fields of a MARC bibliographic record with no limit on the amount of data displayed from any one field.

```

Search Request: A=Newbigin L
Record: 2 of 4 entries found
-----+ Page 1 of 1 ----- Brief View
      TITLE: Foolishness to the Greeks : the Gospel and Western Culture /
            by Lesslie Newbigin.

      AUTHOR: Newbigin, Lesslie.

      PUBLISHED: Grand Rapids, Mich. : W.B. Eermand Pub. Co., c1986
      MATERIAL: 156 p. : 21 cm.
-----
Location          Call Number          Status
Main Stacks      BR115 .C8 N467 1986  Available
      Autographed by author
Theology Library--Main  BR115 .C8 N467 1986  Charged, due: 12/31/89
Stacks

ACTIONS-----
      V View full          I Index
      N Next record       H Help
      O Other options     P Previous record

Next Action:
  
```

Example 1: Prototype of brief view of a monograph

```

Search Request: T=AAII Journal
Record: 1 of 1 entries found
-----+ Page 1 of 1 ----- Brief View
      TITLE: AAII journal

      PUBLISHED: Chicago, American Association of Individual Investors.
-----
LOCATION          CALL NUMBER          STATUS
Main Stacks     No Call Number Available  Enter DS for status
Branch Lib.     AED1234                Enter DS for Status

ACTIONS-----
      DS Detailed Status  H Help
      V View full
      O Other options     I Index

Next Action:
  
```

Example 2: Prototype of brief view of a serial

Release 5.0 provides online system administration. Options will be entered on user-friendly menu screens and will take effect immediately.

Local options

Here are the local options for the full view.

For each MARC bibliographic format, the user can determine

- what fields will display in the OPAC
- what subfields in each field will display
- a label (78-character maximum) for each variable field to be displayed
- what subfields will display separately
- a label (78-character maximum) for each subfield displaying separately
- a label (78-character maximum) for each repeatable field with different indicator values
- the order of the labeled data
- where blank lines will appear
- labels for the location/call number/status portion of the screen

In other words, each NOTIS site will have full control over the full-view displays in its OPAC.

Notice that these options allow, for example, separate lines and separate labels for data in subfields 1b and 1c of a 260 field. Also, for example, data from multiple 650 fields with varying indicator values could display on separate lines with separate labels showing the specific type of subject heading.

Examples—full views

Below are examples of full views for a monograph and a serial. Notice that a "Detailed Status" display has been provided to handle the sometimes complex location/holdings/status information applicable to serials. (The "Detailed Status" display can also be invoked from the brief view of a serial record.)

Implementing local options

Release 5.0 includes the LSYS program, a feature that provides online system administration. All of the options described above for both brief and full views will be entered online by a duly-authorized operator on user-friendly, menu screens. Function keys and prompts make it easy to enter data. All updating is online in real time so that as soon as you configure or change a display, it takes effect immediately.

Users of NOTIS' Multiple Database Access System's MSYS program will find LSYS very similar in design and use.

The LSYS program will also permit you to construct your own OPAC help, news, and instructional screens.

Release 5.0 will include generic OPAC displays configured in LSYS. Customers may accept these, replace them, or edit as desired to create completely customized OPAC displays.

```

Search Request: A=Newbigin L
Record: 2 of 4 entries found
-----+ Page 1 of 2 ----- Full View
TITLE: Foolishness to the Greeks : the Gospel and Western Culture /
      by Lesslie Newbigin.

AUTHOR: Newbigin, Lesslie.

PUBLISHED: Grand Rapids, Mich. : W.B. Eermand Pub. Co., c1986
MATERIAL: 156 p. : 21 cm.

SUBJECTS: Christianity and culture
          Missions

NOTES: Expanded version of the Warfield Lectures given at Princeton
       Theological Seminary, March 1984
       Bibliography: p. 151-152.

ACTIONS-----
          V View brief      P Previous record
          F Forward        I Index
0 Other options  N Next record  H Help

Next Action:
  
```

```

Search Request: A=Newbigin L
Record: 2 of 4 entries found
-----+ Page 2 of 2 ----- Full View
TITLE: Foolishness to the Greeks : the Gospel and ... (Continued)

NOTES: Includes indexes.

LOCATION          CALL NUMBER          STATUS
Main Stacks     BR115 .C8 N467 1986     Available
Autographed by Author
Theology Library--Main Stacks     BR115 .C8 N467 1986     Charged, due: 12/31/89

ACTIONS-----
          V View brief      P Previous record
          B Backward       I Index
0 Other options  N Next record  H Help

Next Action:
  
```

Example 3: Prototype of full view of monograph

Search Request: T=AII Journal
Record: 1 of 1 entries found

Full View

+ Page 1 of 2

TITLE: The AII journal

PUBLISHED: Chicago, American Association of Individual Investors.
MATERIAL: v. : 28 cm.
FREQUENCY: Bimonthly

NOTES: Description based on: Vol. 1, no. 3 (June 1979); title from cover
INDEXED IN: Business Periodicals Index

SUBJECTS: Investments analysis--Periodicals
Investments--Periodicals

LOCATION	CALL NUMBER	STATUS
Main Stacks	No call number available	Enter DS for status

ACTIONS-----
DS Detailed Status H Help
F Forward
0 Other Options I Index

Next Action:

Search Request: T=aaii journal
Record: 1 of 1 entries found

Detail Status

+ Page 1 of 2

TITLE: The AII journal

LOCATION: Main Stacks
CALL NUMBER: No call number available
STATUS: Non-Circulating
OTHER INFO: Current issues in Periodicals Room
SHELVED AS: Journal of the American Association of Individual Investors

CUR ISSUES: v. 10, no. 4-5 (1989: Aug.-Oct.)
LIBRARY HAS: v.1, no.3 (1979:June)-v.2, no.3 (1980:June),
v.2, no.6 (1980:Dec.)-v.3, no.3 (1981:June), *paper copy
v.5, no.2 (1983:Apr.)-v.6, no.6 (1984:Dec.).
v.8, no.1 (1988:Feb.)-v.10, no.3 (1989:June)

ACTIONS-----
V View brief H Help
F Forward
0 Other options I Index

Next Action:

Search Request: T=AII Journal
Record: 1 of 1 entries found

Full View

+ Page 2 of 2

TITLE: The AII journal. (Continued)

LOCATION	CALL NUMBER	STATUS
Branch Lib.	AED1234	Enter DS for status

ACTIONS-----
DS Detailed Status H Help
F Forward
0 Other Options I Index

Next Action:

Search Request: T=AII journal
Record: 1 of 1 entries found

Detail Status

+ Page 2 of 2

TITLE: The AII journal

LOCATION: Main Stacks (Continued)
CALL NUMBER: No call number available

ITEM STATUS: ITEM: v. 1 Missing
ITEM: v. 9 At Bindery
-----Another Copy-----

LOCATION: Branch Lib.
CALL NUMBER: AED1234
STATUS: On Order

ACTIONS-----
V View brief H Help
B Backward
0 Other options I Index

Next Action:

Example 4: Prototype of full view of a serial

Example 4 (continued): Prototype of detail status screen for a serial

An OPAC-like view of the merged heading index will replace the current OPAC guide and index screens.

Guide and index screens

The OPAC-like view of the merged heading index will, in general, replace the current OPAC guide and index screens. Some modifications will probably be made. For example, several users have suggested that we remove the periods before titles.

The example below shows a typical new index screen.

Other features

Modal viewing. At present, our intention is to have the brief view as the default view for an exact hit or any record selected from an index display. If, however, a user selects the full view, the default switches to the full view for all subsequent record selections from the current index. The full view will continue as the default, even for subsequent new searches, until the user selects the brief view for any record or returns to the OPAC introductory screen.

Truncation. Use of the underscore (_) at the end of an author, title, or subject search statement will turn off automatic right hand truncation so that exact-match only searching will be possible.

NOTIS would like to have your input, too. Please use the questionnaire following this article to register your viewpoint.

Screen review and search redirection. Backward and forward movement between screens of a multi-screen record will be introduced as will search redirection on "see" references (a Release 4.6 feature of the staff-mode merged heading index).

Record suppression. Release 5.0 also activates suppression of records from the OPAC by use of the D/S fixed-field element of the bibliographic record. (Use of the feature in Release 4.6 suppresses the record from the OPAC-like view of the merged heading index in staff mode.)

Subject index codes. NOTIS analysts are also considering changing "s=" to a universal subject search, adding "sl=" as an LC heading search and retaining the current "sm," "sc," and "st" searches for MeSH, LC Children's and other subject headings, respectively. (The "st" may in fact change to another two-letter code, perhaps "so.") Please use the following questionnaire to send in any comments you might have about this idea.

CCL. Release 5.0 will also incorporate some features of Z39.50 (Common Command Language—CCL) by allowing the system to recognize certain language as valid commands. For example, a user entering "fi au=smith" would retrieve records since the system would see the search as "a=smith." Elements to be incorporated will be listed later; watch for an announcement in a future issue.

LONG command

Users working in staff mode can currently display the OPAC view of a bibliographic record by issuing the LONG command. Since two OPAC views will be available in Release 5.0, we have not yet decided what should display following a LONG command. The full view (without location, holdings, or status information) is the likely choice. Please use the following questionnaire to send in any comments you might have about this feature.

User comments

Finally, please keep in mind that the Release 5.0 OPAC redesign is, like all NOTIS projects, a beginning, not an ending. We will continue to evaluate the quality and functionality of the OPAC and make further enhancement and changes based on your feedback.

If you would like to submit comments to NOTIS, please fill out the following questionnaire and return it by 4/25/90. There is still time to help NOTIS analysts determine the details of the OPAC redesign. ■

```

Search Request: a=sheridan
Search Results: 24 entries found                               Title Index
-----
SHERIDAN ALAN
1  Michel Foucault: the will to truth <1980> (TS)
2  Rimbaud <1987> (TS)
SHERIDAN CHRIS
3  Count Basie: a bio-discography <1986> (TS)
SHERIDAN DAVID
4  Season of spoils: the Reagan administrations <1984> (TS)
SHERIDAN DON 1890 1956
  *Search under
5  KASER ARTHUR LEROY 1890 1956
SHERIDAN DONNA RICHARDS
6  How to write and publish articles in nursing <1986> (XP)
SHERIDAN ELEANOR SIDOR
7  Falconer's the drug, the murse, the patient <1982> (XP)
SHERIDAN EUGENE R
8  Lewis Morris, 1671-1746: a study in Early America <1981> (TS)
ACTIONS -----
                                Type line # to see individual record
                                F Forward           G Guide
0 Other Options  B Backward       H Help

NEXT ACTION:

```

Example 5: Prototype of OPAC Index Screen

NOTIS OPAC REDESIGN QUESTIONNAIRE
 Please fill out the following and return no later than 4/25/90 to:
 OPAC Redesign
 NOTIS Systems, Inc.
 1007 Church Street, 2nd Floor
 Evanston, IL 60201-3622

1. Indicate your overall response to the OPAC redesign plans. Check one.

- Very satisfactory
 Somewhat satisfactory
 Satisfactory
 Somewhat unsatisfactory
 Very unsatisfactory

If "somewhat unsatisfactory" or "very unsatisfactory", please tell us why:

2. List the five fields most descriptive of a title in a particular format that you would choose to use in a brief view.

FORMAT **FIELDS**

BOOKS: _____

SERIALS: _____

MAPS: _____

MUSIC: _____

VISUAL MATERIAL: _____

AMC: _____

MRDF: _____

3. Is the brief view or the full view the best default view in your library? Check one.

Brief View Full View

Why? _____

4. Please make any other comments that you may have about the OPAC redesign project.

Name (Optional) _____

Institution (Optional) _____

Telephone Number (Optional) _____

Free consultation on hardware changes

Are you planning to change the configuration of the IBM hardware on which you run NOTIS? Are you prepared for any changes that might affect the performance of the NOTIS software?

If not, we can help. We will check your planned changes and analyze their impact on the NOTIS application. We will then advise you of any performance changes that might result. We will also ensure that your IBM marketing representative understands your specific needs with regard to the NOTIS software.

To take advantage of this free service, please contact Jorge Fernandez, Technical Specialist, NOTIS Marketing at (708) 866-0168 or FAX number (708) 866-0178. ■

GTO Hardware Update:

PCOX/COAX™ mystery is solved

In January we reported a potential problem with using the PCOX/COAX 3270 emulation board in an IBM PS/2 Model 30-286 connected to an IBM 3X74 controller (see "GTO hardware bulletin," *NOTISes* /50, page 11).

Since that report, further investigation has revealed that the site originally reporting the problem had the IBM PS/2 Model 30-286 with emulation board connected to a non-IBM 3X74 controller. During subsequent testing, when connected to an IBM 3X74 controller, the same PC was successful in both terminal emulation and transferring records between the PC and the mainframe. There are currently about twelve PS2 model 30-286's currently in use with IBM 3X74 controllers at NOTIS sites. There is also at least one PS2 Model 50 with the MCA version of the PCOX/COAX board in use at a NOTIS site.

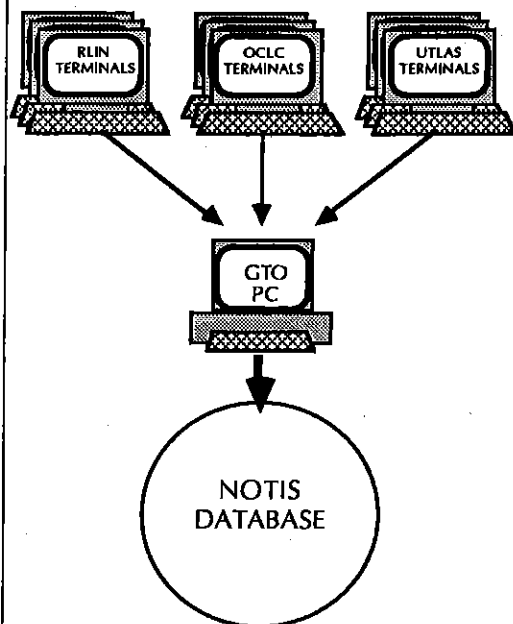
We can again recommend the use of the PS2 Model 30-286 in a 3X74 hardware environment. We will make available any further information received on the non-IBM controllers. Please watch future issues of *NOTISes* for details.

We apologize for any inconvenience caused by this problem. If any GTO customer has information to offer, please contact NOTIS Technical Support at (708) 866-0160 ext. 128. ■

When I get a little money, I buy books; and if any is left, I buy food and clothes.

—ERASMUS (1465-1536)

SIXTEEN INTO ONE



Our Generic Transfer and Overlay (GTO) utility allows libraries to connect as many as sixteen bibliographic source terminals from various utilities to one dedicated personal computer. So you can use the same PC to transfer records from a variety of sources into your main bibliographic database.

For more information about how GTO can help move bibliographic data in your library, see NOTISes/49 (November 1989), page 9.

GTO pricing for 1990: Same as last year!

In reviewing pricing for 1990, NOTIS has decided to keep Generic Transfer and Overlay (GTO) at the 1989 price until 1/1/91. The base price of GTO will remain at \$10,000 (\$5,000 for each additional utility) throughout 1990; annual maintenance (the first year included in the base price) for 1990 is \$1,500 (\$500 for each additional utility).

To those customers who rushed their purchasing processes late last year in order to lock in the old price, our apologies for any inconvenience. Approximately one-half of all NOTIS sites now have GTO.

The decision to maintain the price at the 1989 level was based on a variety of factors, one of which was the continued uncertainty about when OCLC's New System will be implemented. Until that happens, NOTIS customers with OCLC (the majority of NOTIS users) have the OCLC screen transfer as an alternative. However, since GTO offers a more efficient transfer facility, handles authority records, and requires no editing of the utility record before transfer, we encourage all users to consider GTO now. (RLIN and UTLAS users must use GTO for an online transfer capability.) For a discussion of some advantages of GTO, see "Questions and Answers about GTO" in the November 1989 issue of *NOTISes* (number 49, page 9).

Customers should discard any GTO order forms dated before November 1989; the prices on older forms are no longer applicable for the HOSTESS™ and PCOX/COAX™ boards. NOTIS resells these boards at cost as a convenience to NOTIS users and cannot guarantee their prices. NOTIS users are free to purchase these boards from their own vendors if they wish.

Prices for 1991 will be announced at a later time. Please watch future issues of *NOTISes* for details. ■

The capability to use the CHG flag directly is a subtle but important improvement to the NOTIS Circulation Module.

New logic in Release 4.6 makes charge-blocking easier

*by Ben Schapiro,
NOTIS User Services Librarian*

Release 4.6 incorporates a change that affects the way circulation policy is interpreted in table LC102 at the CIRP statement level. Up to Release 4.5, CIRP statements with the CHG flag, which blocks charging an item, were ignored and the usual default CIRPOL processing would take over. If the operator's security level allowed, the system would request a due date. This occurred even though the item/patron/service unit combination was coded as non-circulating. The only way to block circulation under any condition using the CHG flag was to have the flag in both the regular CIRP (pointed to directly via the CIRPOL from the CIRPLN) and the CIRP for the default CIRPOL. This logic severely limited the ability to restrict circulation by patron category/patron group without creating rather cumbersome LC102 entries.

With Release 4.6 this situation has greatly changed. The existence of the CHG flag in the CIRP statement will not cause the system to bounce to the default CIRPOL. If a site codes a particular CIRP with FLAG=CHG,... the system will not allow the loan. The terminal operator, regardless of security level, will get the message and no override message. At this point, if the item is to be loaned to the patron, one of the five elements that determine circulation policy will have to be changed to point the system to a circulating CIRP.

This change allows several interesting manipulations within LC102. Let's look at some possible uses of this feature. A service unit controls the material for a location that loans to all patron categories except undergraduate (PCAT=UND). With Release 4.6 it is a simple matter to build the LC102 table as before but with the CIRPOLs for PCAT=UND they can point to a CIRP with the CHG flag without also having to set the CHG flag for the default CIRPOL.

Let's refine this scenario a little. This same location does not loan to the undergraduate category patron but every other category gets the loan as an override. Under these conditions a site needs only a CIRPOL entry for each patron group with a PCAT=UND and just one CIRPOL for a default which will catch every other patron group/patron category combination. Each CIRPOL points to the proper CIRP, one with the CHG flag and one without it.

The reverse is also true. Let's say only one or a limited number of patron categories can borrow from this location and all others cannot. Then it is a simple matter to use the

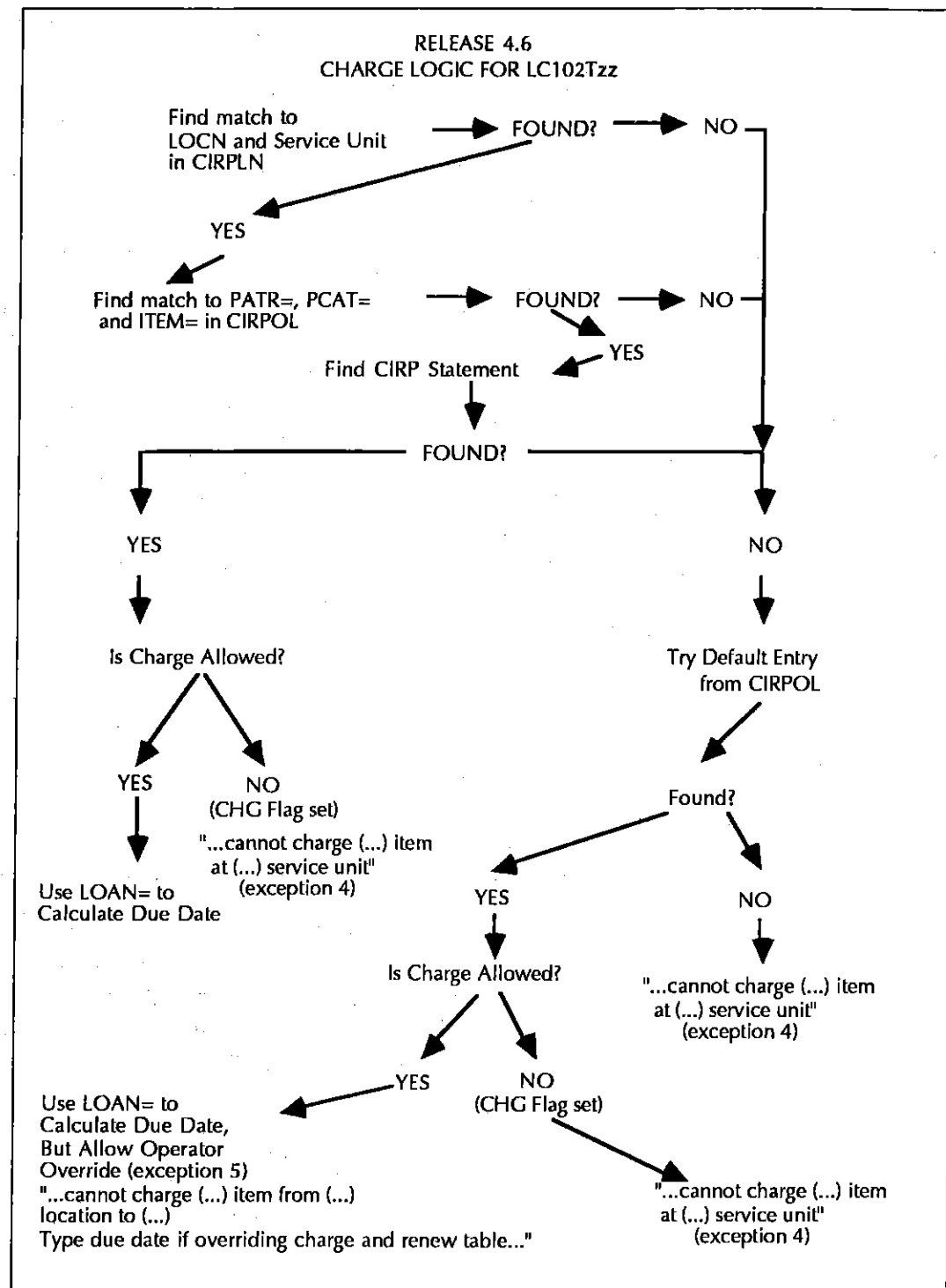


Diagram of the 4.6 logic for processing CHG flags.

default CIRPOL to point to the CHG flagged CIRP and have an explicit set of CIRPOL statements for the other patron categories. In this way, the number of LC102 entries is reduced without the system logic overriding circulation policy.

You could also have courtesy charge and discharge but limit access to certain collections. Courtesy charge and discharge is established at the CIRPLN level which allows the CIRPs to be varied by using different CIRPOLs. For example, patrons who do not belong to the medical campus patron groups cannot borrow from some medical library collections. By using the CIRPOL statements to point the non-medical patrons to the CHG flagged CIRPS this policy can be coded into the table.

Now let's say a patron wishes to borrow a CHG flagged item and for some reason the library is willing to make an exception. How could this loan be allowed under the 4.6 release?

Logically any change to the element's service unit, patron group, patron category, item loan code, or location which results in the system pointing to and finding a non-CHG flagged CIRP will do the job. But what makes practical sense? Changing patron group or patron category in the patron record is dangerous and usually requires special security, changing service unit may work if you have courtesy charge and discharge entries which point to a different CIRP, you can tell the patron to take the item over to the other service desk. This may not be the best approach, however, because it leaves location and loan code as elements which can easily be changed at the circulation desk while the patron is waiting.

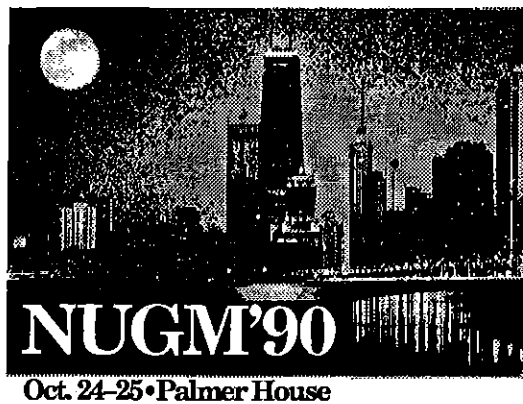
Changing the location code is very easy and has the added benefit of displaying in the online public catalog. You could create a location with an informative display (LC106) title.

Finally, you could create a loan code such as "CASE," list it in LC103 but not use it anywhere in LC102TBL. Then when an exception to the no-charge policy is made, just display the item record, change the loan code, and set the circ review flag. When the item is charged it will go to the default and the operator can give what ever due date is desired.

Writing or talking about CIRPLNs, CIRPOLs and CIRPs is often confusing. To help you follow the change in logic the new NOTIS training-file tables have been set up to take advantage of the new use of the CHG flag. Please review those tables if you have any questions or wish to test the CHG flagged CIRPs. ■

Mr. Cobb took me into his library and showed me his books, of which he has a complete set.

—RING LARDNER



Think NUGM

The 1990 NOTIS Users Group Meeting is fast approaching. Since we received such favorable comments about the Palmer House, NUGM will be held there again this year. We have guaranteed the room rate at \$89 per night for singles or doubles—a discount from the usual rate. While you're in Chicago, why not extend your stay through the weekend at the same rate and take advantage of the sights and entertainment?

Workshops

NUGM will be held October 24–25, 1990, with the following pre-NUGM workshops being offered on October 23.

- Online Public Access Catalog presented by User Services
- Serials Workshop on NOTIS MFHL (MARC format for holdings and locations) presented by User Services
- 5.0 Upgrade and Migration presented by Technical Support

This year, user involvement in planning NUGM has been greater than ever before. The Special Interest groups have been instrumental in planning the 1990 agenda, and your responses to last years questionnaires have formed the basis of that planning.

Registration

NUGM registration will be \$250 if your completed form is received no later than August 24, 1990. (Forms will be available later this year.) The fee for registrations received after that date will be \$275. Here are some of the things covered by your registration fee.

- a binder containing the handouts for all sessions
- a new User Directory for each institution submitting their updated profile form within the designated time (to be announced)
- lunch on both days
- continuous coffee breaks both days
- an evening reception for all who attend

Registration for session moderators and presenters will be waived. There will also be a special \$25 reduction in your combined registration fees if you attend both NUGM and one of the User Services workshops. ■

Get out those great ideas and start planning your session now!

Get your poster sessions ready for NUGM 1990

Poster sessions, which were so successful at NUGM 1989, will again be featured at this year's NUGM. The sessions are a great way to showcase documentation, procedure manuals, user guides, point-of-use instructional materials and computer applications. You might have the solution to another NOTIS user's problem—or maybe you just perform an everyday task in an extraordinary way.

This year's poster sessions coordinator is Philip Tramdack of the Cleveland State University Library. You can contact him at the following address:

Philip J. Tramdack
 Head of Automation Services
 Cleveland State University Library
 Cleveland OH, 44115
 (216) 687-2364
 RO489@CSUOHIO

The following guidelines will help all sessions to run smoothly.

- 1) Please submit your poster session ideas to the poster sessions coordinator no later than August 1, 1990.
- 2) We plan to distribute a complete list of all poster sessions and their descriptions along with the other NUGM material distributed during registration. Please submit your handouts to the poster sessions coordinator by September 1, 1990.
- 3) Poster sessions should be installed in the room provided by 8:30 A.M. on the first day (October 24) and should remain in place during the entire two days.
- 4) The hotel will provide each session with a table (approximately three-by-six feet), a bulletin board (approximately four-by-six feet), and one chair. If you will require electrical outlets, please submit your requests to the poster sessions coordinator by August 1, 1990.
- 5) You or someone you designate should be present at your session to answer questions during the following times:
 5–6 P.M. on October 24
 8–8:45 A.M. and 11:30–noon on October 25
- 6) To assist you in planning your session, an information kit will be available upon request from the poster sessions coordinator after March 1, 1990. The coordinator can also provide additional help, if needed, in planning your session.
- 7) As you plan your session, please keep in mind the following deadlines.

Ideas submitted to coordinator	8/1/90
Special site preparation requests	8/1/90 ■

Coming in April: Cataloging, Authority Control and MDAS Training

Assess your staff needs, and increase their skills and knowledge of the NOTIS system by having them attend a NOTIS training session.

Training for the Cataloging, Authority Control, and Multiple Database Access System modules has been scheduled for April at the NOTIS office in Evanston, Illinois. Cataloging training will be held on April 5th, authority training on April 6th, and MDAS training on April 27th. The sessions at NOTIS have been established to help new staff who missed the onsite training quickly acclimate to the NOTIS system and become productive in their departments. Staff who have transferred to new departments or who wish to refresh their skills in either the cataloging or authority modules are welcome to attend. MDAS training is for those sites who are implementing this product in the near future.

The cataloging and authority modules offer a practical, conceptual foundation for understanding NOTIS as a tool for basic cataloging and authority control. The "Fundamentals" portion of the implementation module is a prerequisite for both. Cataloging and authority training are each six hours long, conducted in two three-hour sessions.

Some of the topics covered in cataloging:

- Creating bibliographic records by direct input or transferring data from a bibliographic utility
 - Activating and updating copy holdings records
 - Creating and updating linked and unlinked item records
 - Deleting and withdrawing item records and copy statements
 - Coding bibliographic records for deletion or suppression
- Authority control topics include
- Merged Headings Indexes
 - Creating and updating authority records by direct input
 - Deleting duplicate authority records
 - Control subfield |w and validating cross references
 - Global heading change techniques
 - Conflict and error detection programs
 - New and dropped headings lists

Multiple Database Access System training will present the functionality of the system control file (MSYS) and provide a practical foundation to establish and update the database screens and terminal access. See the January issue of NOTISes for the specific topics to be covered. The Online Public Access Catalog session is a prerequisite for this training. MDAS training is a one-day session, divided into two three-hour sessions. ■

Contact Sherri Miller at (708) 866-0127 to register or if you have further questions.

Does your site repeat location codes?

NOTIS Systems would like to know which sites have repeated location codes across processing units. An example of such a situation would be one where processing unit AA has a location code of MAIN, and processing unit BB also has a location code of MAIN.

If you have repeated location codes across processing units, please call Liz Feltmann in NOTIS Customer Services at (708) 866-0180 and leave your name, phone number, site name, and number of locations and processing units.

Thank you for your help. ■

BITNET address changes

Sheila Pepper of McMaster University informs us that her BITNET address and that of Marju Drynan have changed as follows:

Sheila Pepper: PEPPER@MCMVM1

Marju Drynan: DRYNAN@MCMVM1

You may wish to update your User Directory with this information. ■

What's in a name?

This month we are adding three newcomers to our honor roll of original OPAC names. Lies Jaccarino of the **University of California, Santa Barbara** reports their new OPAC name, PEGASUS, was selected from entries in a library-wide contest. **Central Michigan University** reports that CENTRA was the winning entry in their campus-wide contest. Finally, **Fort Hays State University** has adopted TOPCAT, becoming the second institution in our list to choose that feline appellation.

If your OPAC name isn't on the following list, please let us know! ■



Printer's mark (woodcut). Lyons, 1583.

OPAC NAMES

ACORN	Vanderbilt University
BEACON	Grand Valley State University
BISON	SUNY-Buffalo
BYLINE	Brigham Young University
CATALYST	Kent State University
CENTRA	Central Michigan University
CHESTER	West Chester University
CLIO	Columbia University
COAST	California State-Long Beach
CUNY+	City University of New York
DELCA7	University of Delaware
ELIXIR	SUNY-Binghamton
FOCUS	Michigan Technological University
JANUS	Johns Hopkins University
LOLA	Louisiana State University
LUIS*	University of Texas-El Paso
LUMINA	University of Minnesota
LUNA	N.A.S.A.
MAGIC	Michigan State University
MCLUIS	Montgomery College
MINERVA	University of Louisville
MIRLYN	University of Michigan
MORRIS	McMaster University
MURLIN	University of Regina
MUSE	McGill University
OASIS	University of Iowa
OLIN	University of Oklahoma
ORBIS	National Geographic, Yale University
PEGASUS	University of California-Santa Barbara
PennLIN	University of Pennsylvania
PITTCAT	University of Pittsburgh
QLINE	Queen's University
ROCKy	Iona College
SADIE	Southwest Missouri State University
Scholar	Cleveland State University
STARS	SUNY-Stony Brook
THOR	Purdue University
TOPCAT	Fort Hays State University, Western Kentucky University
TULANET	Tulane University
UNACAT	University of North Alabama
UNICAT	Burroughs Wellcome Company
UNIS	University of Utah
UNLOC	University of Notre Dame
VICTOR	University of Victoria
VIRGO	University of Virginia
YORKLINE	York University

*Pronounced loo-EECE

Minutes of the Government Documents Interest Group meeting

The Government Documents Interest Group met in Chicago on January 6 to discuss a variety of issues related to creating NOTIS records from other formats such as Government Printing Office (GPO) records and Marcive tapes.

Julie Wallace of the University of Minnesota convened the session in the absence of Maureen Harris of Clemson University.

She introduced Michael Mifflin, the group's NOTIS liaison, who requested information from those attending on the use of MARCIVE tapes for GPO records. The results of his survey will be made available as soon as the project is completed.

The group then heard reports from member libraries on their activities in three major areas: libraries that had loaded GPO tapes, libraries with MARCIVE profiling completed or in process, and libraries with special problems.

Elaine Henjum of the Florida Center for Library Automation (FCLA) reported that her group had loaded 204,000 GPO records as a resource file for member libraries. She said it was difficult to estimate the impact on the author/title and subject indexes, and that these jobs had been run several times to ensure that the sizes were correct.

Smittie Bolner reported that serials check-in is beginning now at Louisiana State University, which loaded MARCIVE tapes in July 1989.

Shirley Sheets and Mary Dabney Wilson of the University of Texas at Arlington reported that MARCIVE tapes were loaded in the summer of 1989. The records coexist with other records in a production file; cleanup is currently on hold. They recommended waiting for NOTIS enhancements before beginning serials check-in.

Dave Morrison reported that the University of Utah keeps MARCIVE records in a separate test file. The records are 75 percent selective, and may add notes about ILL access for items not held. They are creating temporary records from shipping lists, and will overlay MARCIVE records when received.

Barbie Smith reported that the University of Virginia is currently loading tapes, but is not yet loading MARCIVE authority records.

Next, the group heard from libraries with MARCIVE profiling completed or in process. Jim Walsh reported that Boston College will load MARCIVE tapes in 1990, and that they are interested in the possibility of batch weeding.

Barbara Hulyk and Diane Paldan told the group DALNET plans to load MARCIVE tapes in February, and would like ideas on

converting serials records currently in Kardex files. Her group has worked to identify phantom item numbers and other problems on MARCIVE tapes and has reported them to MARCIVE for correction.

Carolyn Kacena reported that Southern Methodist University has profiled with MARCIVE for three NOTIS locations and anticipates loading more than 160,000 records. These will form part of a secondary database load file for all cataloging from 1988 and 1989.

They will use Blackwell North America (BNA) for authority control and will load a production file in summer 1990. They anticipate verification of holdings through a "smart barcode" project to be run against the entire file in fall 1990.

Julie Wallace and Christina Meyer said the University of Minnesota is currently completing its MARCIVE profile for the regional and one selective, with twenty-nine NOTIS locations, including separate locations for fiche collections. MARCIVE is correcting disk errors.

Larry Romans told the group that Vanderbilt University has had a MARCIVE tape since June 1989, but has not successfully loaded it because of apparent problems with NOTIS GTO.

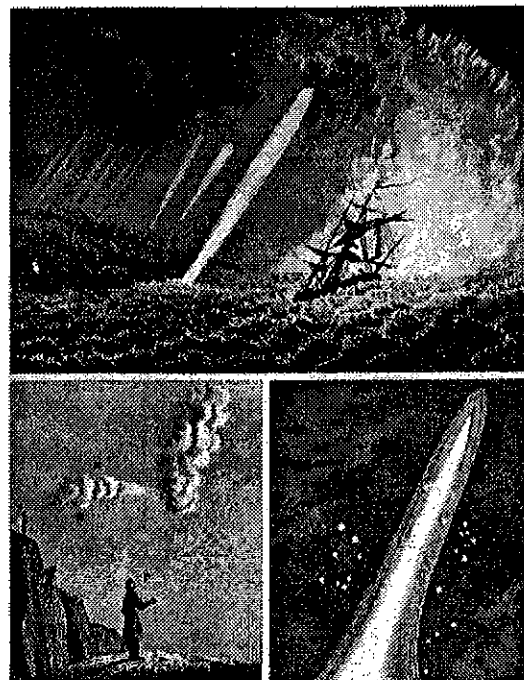
CUNY (four depositories) will load this summer.

Finally, the group heard reports from libraries whose collections were partially cataloged from Marc or OCLC records, or from in-house specifications. Michele Strange (Northwestern), Josephine Crawford (Purdue, University of Wisconsin), and Grace York (University of Michigan) all spoke about the special tape loading problems faced by their libraries.

MARCIVE representative Richard Smith commented on several issues raised about MARCIVE tapes. He said that MARCIVE can provide tapes to load into utilities such as RILIN or OCLC. He urged libraries to use their test tapes before trying to load complete files. He said that MARCIVE can put in OCLC numbers and correctly distribute records without data in the 001 field.

Profiling libraries identified a problem related to assigning item numbers to non-depository materials. Because MARCIVE uses the existence of an item number to identify depository documents, those materials given item numbers during tape cleanup receive records even though they are not in fact depository documents.

The group agreed to meet next at the American Library Association Annual Conference in Chicago this June, and again in October at NUGM 1990. It was noted that there will be an ALA preconference held on Thursday, June 21, covering MARC records for documents librarians. There will also be a presentation on the ongoing processing of documents at the Depository Library Council meeting in Scottsdale, Arizona on April 25-27. ■



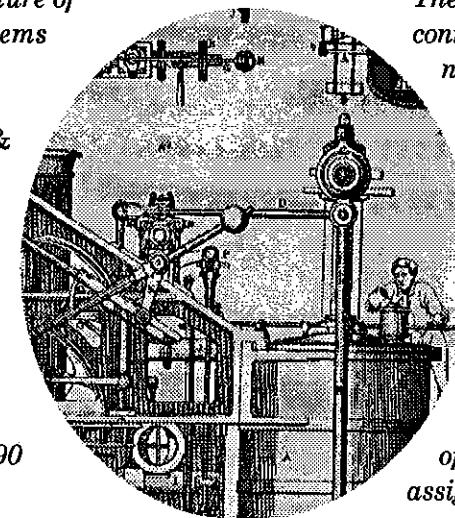
Engravings illustrating meteorological elements from *The Iconographic Encyclopaedia of Science, Literature, and Art* (Germany, 1851).

Troubleshooting

by Jerry Specht, Chief Systems Engineer

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 Installation & Operations Manual) we list them here in NOTISes so you won't have to wait for a new release in order to be aware of them. If you have suggestions, send them to Jerry Specht.

We recommend that you take these troubleshooting pages and append them to the February 1990 "Troubleshooting Guide."



The problems have been, and will continue to be, assigned temporary numbers beginning with V400, so that they will be in sequence. In February, June, and October, we will issue an updated index which will include both these problems and the ones already in the guide. In February we will send you an entirely new guide in which all of the problems that have appeared in NOTISes since the last publication of the guide will be integrated and assigned permanent numbers.

V422 Problem:

(MVS 4.6 only)

In doing certain **merged heading index*** searches where the search results in a **single hit**, you go directly into the record without getting an index display.

Causes/Solutions:

Merged heading searches resulting in a single hit where the heading has an associated authority record should produce an index display to indicate that this is an established heading. In order to be consistent, we intended to produce index displays for all merged headings searches. The 4.6 source programs are set up to do this, but the MVS DFLCA830 distributed load module is not. Reassembling LC830BAL corrects this.

V423 Problem:

(4.6 and higher only)

You have a separate **processing unit** for your **authority records**. Under 4.5 you could reach these records using a transaction with the processing unit of your bib records, but with 4.6 you get the message ALTERNATE PROCESSING UNIT NOT VALID when you try to do this.

Causes/Solutions:

You need to add your authority record processing unit to the NOTIS tables and add an LTxx transaction for it to the PCT.

V424 Problem:

ISBNs in lz subfields are being omitted from the **standard number index**.

Causes/Solutions:

The following changes to LB320BAL will cause these numbers to appear in the index with an asterisk beside them.

Insert four statements and a label:

```
A290 MVC      . . . . .
      ST      . . . . .
      NI     FLAG,255-X'02'   insert
      CLI    FCODE,C' '      insert
      BE     A295              insert
      OI     FLAG,X'02'      insert
A295 LA      R0,INDXREC      add label
      LA      . . . . .
```

These changes will be included in the 5.0 version of LB320BAL.

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