New schedule for Release 5.0

Changes made since ALA Conference

We want to inform you of the current schedule for beta-testing and distribution of Release 5.0. (This is a post-ALA assessment, so please consider this the official update.)

Release 5.0 is scheduled to be installed at beta sites in December. Those beta sites are not yet selected. The general release data will be firmly established when we can ascertain how testing is going at the beta test sites.

The schedule for the distribution of Release 5.0 is based in part on the feedback we received from two focus groups on NOTIS customer service (more on page 3). Both focus groups suggested that the testing process needs to be expanded and that more internal testing should be done. They indicated strongly that the emphasis should be on a well-tested release, rather than an exact distribution date.

Fiscal year-end

We are also aware that the summer of 1991 is the window for bringing Release 5.0 into production at many customer sites. This is especially true because of the fiscal year-end closing programs in the release. Since many customers use the acquisition module and need to close their books on July 1, we are as concerned as you are about getting this new feature into your hands in time for you to do your own testing before that time.

It is a difficult task to balance these issues, but we will do our best. We will keep you advised on the schedule as it evolves.

Report Writer postponed

Just before the ALA (American Library Association) Annual Conference, we recalculated the time and effort necessary to create the Report Writer product first announced earlier this year. (NOTIS Report Writer is an online interface enabling you to design customized reports from NOTIS data elements using SAS statistical analysis system software.) After careful thought and consideration, we have made the difficult decision to postpone availability of Report Writer until it can be released as a complete product. (Continued next page)
Focus Groups on customer service generate valuable insights

Last May, NOTIS's Customer Services division sponsored two focus group discussions. A total of twenty NOTIS customers participated. Both groups were moderated by an independent marketing research firm. One group was composed of customers with databases of over a million volumes; the other group of users represented smaller sites. Each group was selected at random by the research firm.

We are in the process of analyzing the final report, but have the following initial impression to share with you:

- There is strong support for a longer beta test period for all new releases of software. Because of the complexity of the software and the variations in ways customers use the software, the focus group participants felt that NOTIS should devote more resources to internal testing, and plan for a longer beta test period for new releases of software.
- The participants understood and accepted the NOTIS basic support policy, but want NOTIS to enforce the policy more consistently.
- The preliminary report indicates that phone support needs more attention from NOTIS. Specifically, focus group participants experienced lost calls and delayed follow-up.
- Indexing the documentation is a high priority with customers. The report stated that indexing is a higher priority to customers than completing the documentation.
- Focus group participants see the need for better internal training of NOTIS staff.

One of the most interesting comments from the marketing research firm was how intelligent and dynamic our users are. This firm does hundreds of focus groups, and was very impressed by the level of understanding exhibited by all of the focus group participants.

We will be continuing to report to you via NOTISes on our plans to address these concerns. In the meantime, to all of you who participated, thank you very much. We take this input very seriously.

Customer Profile Reminder

We included "Customer Profile" sheets in the NUGM packet that was mailed to all our sites in May. Please remember to return your profile to us as soon as possible. If we do not receive your profile sheets, your institution will not appear in the 1990 NOTIS User Directory nor will you receive a complimentary copy of the directory at NUGM. If you have any questions, please call Sandie Yoon at (708) 866-0150, ext 680.

Problem after hours? No problem!

You can use our voice mail system to report a problem before 8:30 am or after 5:00 pm CST. Simply call Customer Services at (708) 866-1100. A recorded message will give you instructions for leaving a voice message for User Services.
New OPAC screens available on demo disk

We are now making available a demo package with the same sample OPAC record and index displays that we used in the booth at the ALA conference last month in Chicago. The demo disk includes several possible brief and long views of the same records, representing some of the options that the Release 5.0 OPAC programs offer. While the demo package certainly does not exhaust all possible ways in which you can design OPAC record displays with Release 5.0, there are enough sample screens to help you begin planning for the new OPAC.

One of the sample screen displays, for example, shows how to approximate the current card catalog format by using blanks in the label portion of the screen. Another sample screen illustrates how holdings information will display in the new OPAC and all the new guide and index screens are also shown. (The guide and index screen display formats cannot be locally altered via the online control file, although sites will be able to highlight or suppress processing unit codes on those displays.)

To use the diskette, you must have an IBM PC (or compatible) and MS-DOS. To obtain a copy of the demonstration software, along with instructions, please send a blank, formatted 5.25 or 3.5-inch diskette and a self-addressed envelope to Cassandra Gibson at the address shown at left.

NOTIS User's Guide, Volume 1, to be issued next month

The old NOTIS Terminal Operator's Manual (TOM), Volume 1, Part 1 has undergone the same facelift as the other TOM volumes, and will debut in its new, easy-to-use, streamlined format in August as the NOTIS User's Guide, Volume 1: Cataloging and Authorities.

Redundancies have been removed. Chapters have been reorganized and occasionally have been given new titles. Chapters E18, "Dictionary, Index and Special Characters" and E12, "Preparing Bibliographic and Copy Holdings Records for Deletion," are among the chapters that underwent extensive revision.

New page-numbering method

In preparation for indexing the NOTIS Users Guide, we have changed our method of pagination. Previously, we incorporated the chapter letter and number in the page number, i.e., "Page B4.1." This method of numbering pages makes it difficult for us to take advantage of the indexing features of our word processing package. For this reason, we are dropping the letter and number designation from the page footer and using a number only. In addition, we will no longer paginate each section separately.

We hope that our efforts have made the documentation more accurate and easier to use. As always, we welcome your remarks.

For a limited time, Conversion Services will offer LBC30 at a special price to users who still need to batch-load records.

As reported in the April issue of NOTISes, Conversion Services will terminate support for LBC20BAL, LBC30BAL and for LBRX8BAL as of April 1, 1991. These programs have been replaced by LBC30BAL—a new, table-driven loader program. LBC30 accomplishes the following with table entries:

- Converts a MARC record into the NOTIS format.
- Deletes all occurrences of specified field(s).
- Deletes all occurrences of specified subfield(s) from selected fields.
- Retag all occurrences of specified field(s).
- Brackets the GMD in the title field.
- Uses the 005 field to determine the cataloging date and supply it in NOTIS.
- Checks specified indicators for non-numeric characters.
- Checks and, if appropriate, sets specified filing indicators for English language articles.
- Builds the NOTIS Title Level Notes field from a specified field or subfield of a specified field.
- Builds the NOTIS Copy Level Notes field from a specified field or subfield of a specified field.
- Uses subfield 1c of the 300 field on a location by location basis to identify and indicate oversize material.
- Translates holding codes into NOTIS location/sublocation codes.
- Uses stamps to determine or modify the NOTIS location and/or sublocation, the identification and indication of oversize material, call number search sequence and classification type.
- Translates straightforward copy and volume information into the NOTIS structure.
- Creates NOTIS linked item records on a location-dependent basis, including: item ID number, circulation count, browse count, item level notes, and volume information; if present in the archival record.

Since we announced that we are discontinuing support for LBC20/70, several users have asked if they could purchase LBC30 at a reduced price. For a limited time, Conversion Services will offer LBC30 at a special rate to users who still need to batch load records. To qualify, the original conversion must have been done by NOTIS.

The cost of LBC30 will be $8,000 plus $2,500 for an extra holdings module. The $8,000 reflects the difference between the base cost of LBC20/70 ($10,000) and the current base cost of LBC30 ($18,000). Documentation will be included to assist you in entering the table values to accommodate your needs.

If you have any questions, please contact Bill Easton at (708) 866-0159.
Can we support your operating environment?

Recently NOTIS mailed a letter to the heads of the data processing centers that support NOTIS libraries.

The primary purpose of the letter was to discuss NOTIS's ability to support various operating environments. If the version of the operating system in use at your site is below (older than) IBM's currently-supported versions, then neither your site nor NOTIS can get help in resolving what could be operating system or teleprocessing system problems.

As IBM expands the capabilities of both DOS/VSE and OS/MVS environments and CICS, NOTIS is eager to utilize them. New releases generally include problems fixed as well as enhanced features. These expanded capabilities allow us to improve productivity and make the systems easier to maintain.

The following is a list of IBM's supported operating systems with their corresponding CICS release levels.

If you have any questions, please contact your IBM representative or NOTIS Technical Support.

<table>
<thead>
<tr>
<th>Operating Systems</th>
<th>Current Release Level</th>
<th>Lowest Supported Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>OS/MVS/ESA</td>
<td>VER. 2.2</td>
<td>VER. 2.2</td>
</tr>
<tr>
<td>CICS/OS</td>
<td>VER. 1.7</td>
<td>VER. 1.7</td>
</tr>
<tr>
<td>CICS/MVS</td>
<td>VER. 2.1</td>
<td>VER. 2.0</td>
</tr>
<tr>
<td>OS/MVS/ESA</td>
<td>VER. 3.1.3</td>
<td>VER. 3.0</td>
</tr>
<tr>
<td>CICS/OS</td>
<td>VER. 1.7</td>
<td>VER. 1.7</td>
</tr>
<tr>
<td>CICS/MVS</td>
<td>VER. 2.1</td>
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<tr>
<td>CICS/ESA</td>
<td>VER. 3.1</td>
<td>VER. 3.1</td>
</tr>
<tr>
<td>DOS/VSE/SP</td>
<td>VER. 4.1.2</td>
<td>VER. 2.8 thru 12/31/80</td>
</tr>
<tr>
<td>CICS/DOS/VSE</td>
<td>VER. 1.7</td>
<td>VER. 1.6 thru 6/4/91</td>
</tr>
</tbody>
</table>

Please make the following corrections to your NOTIS documentation.

1. TSG Index Error

A NOTIS user has called our attention to an error in the index to the Troubleshooting Guide (Appendix E to the NOTIS Installation and Operations Manual). On page INDEX 24, the entry, "Patron charge index, (Problem 7031) 283" should refer to Problem 7037 rather than Problem 7031. Please note this change.

2. Error in NOTIS ALA Character Set Illustration

Page 1028 of the NOTIS Installation and Operations Manual contains an illustration showing the hexadecimal representations of the American Library Association (ALA) character set (also known as the ANSI, character set). A NOTIS user has pointed out that two characters in this chart are shown in transposed positions.

The character represented as X'53' should be the character known as an 'a', and the character represented as X'54' should be the character known as an 'ayn'. Please note that these two characters are in reversed positions on our chart.

What's in a Name?

Here is an update on our growing compilation of NOTIS Online Public Catalog (OPAC) names (see following page).

The Supreme Court of Ohio has selected SCROLL (Supreme Court Research On-Line Law Library) as the name of its online public catalog. Our thanks to Paul Fu, the court's law librarian, for sending along the information. Kansas State University's OPAC is named LYNX. (There are numerous online indices on our roster, it seems.) The University of Texas at Dallas, where the sun shines bright, has chosen the name SOL.

One of the more felicitous OPAC names we have heard tell of recently comes from the Naval Postgraduate School (Monterey, California). BOSUN is the acronym for Bibliographic Online System Utilis Nautis—loosely translated, "for the use of sailors and sea-persons!"
NOTIS Welcomes Trenton State

NOTIS Systems' president Jane Burke announced last month that Trenton State College would be joining us as the newest user of the NOTIS Library Management System (LMS).

Trenton State, as one of the New Jersey state colleges, has worked with NOTIS to implement new cataloging, OPAC, circulation, and acquisitions, in that order.

NUGM update

On the following page, you will find registration forms and information for our 1990 NOTIS User Group Meeting (NUGM).

Corrections to the agenda

In our June issue (NOTIS/89, page 22-23) we published the full schedule of events for our 1990 NOTIS User Group Meeting (NUGM). Please note the following corrections on your copy:

- Session number 91 (Using Micros) in the Circulation track has been dropped. There will be a replacement.
- Session number 84 (RLG meeting) will be held October 24 (1st day) from 5 to 6:30 PM.
- Session number 85 (MDAS SIG meeting) will be held October 25 (2nd day) from 3:45 to 4:45 PM.
- Session number 86 (Latin American SIG meeting) will be held October 24 (1st day) from 7 to 9 PM.
- Session number 87 (Using PCs to Automate Circulation) will be held October 25 (2nd day) from 10:15 to 11:15 AM.

It's not too late to join the NUGM Singers!

Christine Peterson of the Florida Institute of Technology has volunteered to coordinate the NUGM Singers. The group will perform songs about NOTIS written by Susan Gangl, Dan Donevsky, Dan Oster, and Kathy Gorman of the University of Minnesota. There songs are set to well-known melodies and have titles such as "Battle Hymn of the Republic." Christine has also offered to accompany the group on the piano.

If you are interested in singing or playing accompaniment, please contact Christine at (407) 768-4003 ext. 7335.
Enhanced currency conversion in new LMS release

Release 5.0 of the NOTIS Library Management System (LMS) software will include the capability for online currency conversion. In previous versions of the software, currency conversion required programmer modification of the programs in the program IC31BAL.

The new online currency conversion feature will allow libraries to make all the changes necessary without needing the assistance of a programmer.

Better controls
Another currency conversion improvement will be a greater degree of user control. For example, the online currency conversion function will be applied at the processing unit level. The earlier versions used one set of table values to govern all processing for a single institution. In addition, the new function allows the user to enter values for institution group, country name, currency code and conversion rate, whereas the earlier version of the table contained only the last two elements.

Online currency conversion settings will be accessible through the Control Information Maintenance menu—the main menu for modifying site-specific values in the system control file. The menu includes add, update and delete functions.

As with other online table functions, there will be easy-to-use menus and help screens.

There will be internal indexing of currency codes and country names to simplify look-up and maintenance. Each currency conversion record will retain the last nine changes made, citing the rate, effective dates, and operator ID of the person making the change. The conversion rate field will provide for eight digits to the left of the decimal and seven digits to the right.

If you would like to find out more about this feature, be sure to attend Session 18 of the Serials/Acquisitions track at our 1990 NOTIS Users Group Meeting (NUGM).

New MDAS Release being tested at Vanderbilt

The latest version of our Multiple Database Access System (MDAS) software is now undergoing beta-testing at Vanderbilt University. Next month's NOTIS will carry a feature article describing the many enhancements included in MDAS 1.1.

All about MFHL

How NOTIS will implement MARC format for holdings and locations data

This article was basically a reprint of one that appeared in August, 1989 (NOTIS 3.46). There have been a couple of minor changes in our MFHL functional specifications, noted in the following text, in response to comments and requests from users.

NOTIS begins support of the USMARC Format for Holdings and Locations (MFHL) with Release 5.0. The MFHL portion of that release will include the following:

- NOTIS-MARC MFHL format in the NOTIS tag table
- two conversion options to transfer holdings data from volume holdings records to MARC holdings (MHLHD) records
- online staff-mode display, create, and update capabilities with appropriate security
- uninterrupted display of holdings in OPAC
- improved displays in copy holdings records to show MHLHD record linkage

Sections below outline basic information about the MFHL features, based on a presentation made at the June 27, 1989 meeting of the NOTIS Serials Interest Group in Dallas, Texas at the American Library Association Annual Conference.

Since NOTIS is still developing these features, changes may occur between now and the release date. We will attempt to give you as much advance notice of changes as we can. Watch future issues of NOTIS for announcements.

NOTIS-MARC MFHL

We recommend that all NOTIS users obtain copies of the USMARC Format for Holdings and Locations (1986) and Update No. 1 (1987) available from the Cataloging Distribution Service of the Library of Congress ($10 each). A new edition, entitled USMARC Format for Holdings Data: Including Guidelines for Content Designation, was published earlier this year.

NOTIS has adopted USMARC format for use with the NOTIS software. Certain elements have been dropped since they appear elsewhere in the NOTIS record structure. For example, USMARC uses variable field 010 for the Library of Congress (LC) control number. The NOTIS MHLHD record will not include this tag since the 010 field appears in the linked bibliographic record. However, none of these omissions affects the integrity of the record.

Of particular importance for Release 5.0 are the fields used for the volume holdings to MHLHD record conversion process. See the table at left.

In all but the 899 field, the above fields use subfield 1x for a

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Converting from volume holdings to MFH records

You may convert your records one processing unit at a time, or you may convert all records at once. It will be possible to support both MFH records and volume holdings records at the same time. However, all sites must eventually convert all volume holdings records to MFH records since support for the former will be withdrawn.

NOTIS has selected the 866/867/868 and 899 fields to receive the holdings data that now resides in the A60 fields of your volume holdings records.

Release 5.0 will provide two conversion options, each with several choices. Summaries of program logic for the two options accompany this article.

Option B is provided for those who have entered labels in A60 fields to identify supplements and indexes. In most other respects, the two options are similar.

In MFH format, the 866/867/868 fields are defined for alternative display of holdings data for titles, supplements, and indexes and the NOTIS-defined 899 field has a single subfield 1a for holdings data. These fields are selected over the 863/864/865 (also used for holdings data) since the latter are intended to be used with "paired" fields (853/854/855) in which you define the publication pattern corresponding to the holdings. (Most NOTIS users have not entered publication-pattern information in their volume holdings records.) In addition, the 863/864/865 fields have approximately twenty subfields each, whereas the 866/867/868 have only four subfields each. The 866/867/868 are more suitable for future import/export programs developed by NOTIS to communicate holdings.

"Shelved as" titles

The conversion program handling "shelved as" titles in the following manner. When the conversion program encounters the character string SHELVED AS, the title that follows will be placed in the MFH record in an 852 field, subfield 1f. In the next A60 field, the program encounters an asterisk (*) (option B only) or a blank before a subfield 1a, the following character string is moved to an 866 field, subfield 12 if there is a preceding 866 field in the MFH record. If there is not, the character string goes to field 852 subfield 1z (displayed note) or, if the first subfield 1a was blank, to field 852 subfield 1x (displayed note). This should permit "shelved as" titles spanning more than one A50 field to be placed in the 852 field and have the whole title display in the OPAC.

Those who are inserting blanks or an asterisk before continuations of "shelved as" titles in the indexed and successive A60 fields of a volumes holdings record should encounter few problems in converting to the MFH record. NOTIS will carefully test for this contingency and make sure that the above is an acceptable solution for "shelved as" title continuations.

Special checks for indexes and supplements

If an A60 field begins with "INDEXES" or "SUPPLEMENTS" and the next A60 begins with one or more blanks, the data in the second field will be treated as an index or supplements, as appropriate. We made this change in response to your requests at NUGM'89.

OPAC display of holdings data

Regardless of the options you select for your conversion, the transition from volume holdings to MFH records will be transparent to your OPAC users (provided you have been consistent and careful in your entry of holdings data). The three screen samples on the following page show a sequence of holdings data "before" and "after" the conversion.

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OPTION B CONVERSION PROGRAM

Summary of Program Logic

1. The installation will choose an encoding Level value of either '1', '2', '3', '4', '5', '6', or 'A'.

2. The installation will choose an 852 Indicator 2 (Number/Location Relationship) value of either blank, '0', '1', or '2'. The 852 Indicator 1 is unmodified.

3. The installation will choose whether holdings data in the MHLD Field 866 Subfield 1a are moved either to a corresponding MHLD Field 866 (with a Subfield 6 value of 61 Subfield 1a).

4. If 866 is chosen, the installation will choose an Indicator 1 (level of Specificity) value of either blank, '3', '4', '5', or '6', and an Indicator 2 (Type of Notification) value of either '0' or '1'. If 856 is chosen, both indicators will be blank since they are undefined.

5. For each MHLD A60:

If the first subfield 1a begins with the character string SHELVED AS, then delete the string SHELVED AS and any blanks immediately following and move the remaining characters in subfield 1a to 852 new subfield 11 else if the first subfield 1a begins with the characters using *** then delete the string *** and any blanks immediately following and move the remaining characters in subfield 1a to 852 new subfield 12 else if the first subfield 1a is blank then move the characters in the second subfield 1a to 852 new subfield 1x else if the 866 option is chosen then if the character string "1D"N' exists then move the characters in subfield 1a preceding the string to 866 subfield 1a and delete the remainder and move the remaining characters to 866 subfield 1x else else move the characters in subfield 1a to 866 subfield 12 else else move the characters in subfield 1a to 899 subfield 1a and are more suitable for the received the typically minimal holdings data that appear in a NOTIS volume holdings record. Because the 899 field has only one subfield, it is also suitable to receive minimal holdings data.

In this initial release of MFH, NOTIS will use only the 866/867/868 or the 899 fields for displaying holdings data in OPAC and those fields will be the only ones initially used for future import/export programs developed by NOTIS to communicate holdings.

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control access to individual groups of fields in a MHLDS record as shown in the following illustration. Field security has been based on typical work assignments where various departments may contribute to holdings information. The STAT field has its own security since the values can freeze the record (e.g., for ceased titles) or code for deletion and suppress the OPAC display.

Changes to the copy holdings record

Creation of a MHLDS record will automatically cause the "MHLDS" line to display in a copy holdings record as shown below. The 1s subfield of the location/call number field will no longer be used. Only one MHLDS record may be created per copy statement and the system will prevent creation of a MHLDS record for a copy statement that already has a linked holdings record.

NOTE: the purpose of the KEEP and DELET commands are to enable the user to derive records either all from within the same copy holdings record or by links between different copy holdings records according to a selection of one or other groups.

Report From Texas A&M:

Solving work and time with NOTIS course reserve
by John B. Haver
Head, Circulation Division
Sterling C. Evans Library
Texas A & M University

NOTIS course reserve has been operational for a full year at the Sterling C. Evans Library and has proven to be very efficient. We feel that the features of the course reserve item subrecord provide the difference between a system that works and a system with value. The creation of item subrecords allows us to place an item on reserve, create one or more loan periods for the same item and permits us to withdraw the item or deactivate the record for later use.

Maintaining reserve items is challenging in part due to the cyclical nature of reserve processing. Some materials never go off the reserve list, even when we try to force them off with policy justifications. A large body of materials comes on and off at regular intervals, while others come on and off sporadically. A few are placed on reserve once, removed, and are never seen or heard of again.

When we began implementation of NOTIS in October 1989, we had phased out another automated library system for all but reserve charging. Because of the administrative headaches involved in maintaining two systems, we felt that we wanted to move as quickly as possible to use NOTIS reserve features. When Release 4.5 was loaded in March of 1989, we immediately began creating reserve item subrecords. By Fall term 1989, the database held a large number of subrecords.

The true value of NOTIS course reserve features was not realized until after initial training and experimentation. Using NOTIS course reserve, we can activate materials already in the database, whether they are library-owned or personal copies, by changing the "sub status" code in the item record, thereby decreasing processing time. Only items that have never been placed on reserve take more processing time. By the third day of the new Fall term in 1989, the time involved in processing reserve items had diminished to the point of a true twenty-four-hour turnaround and often less, depending on the material. Previously, this point was not reached until the end of the second week of the term or during the third week, at best. The reserve staff had processed 4102 items for the Fall, 1989 term during July, August and September. The unit processed 4227 items during the same time period in 1989 and reached normal processing loads two and a half weeks earlier than the previous year.

With the addition of the SAS program from Queens College, Ontario, which permits the library to produce a paper record of the Reserve Course and Professor Index, the NOTIS reserve module has begun to serve Evans Library patrons almost to the point of an optimum service. The addition of the OPAC view of the Course and Professor indexes will be a welcome enhancement and should complete the module.