

NOTIS^{es}

*For users of
NOTIS
library
information
systems*

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DECEMBER 1990 • Number 61

Documentation is getting revamped

In early December, Documentation Services sent out a revised version of the Terminal Operator's Manual: Volume 1, Part 2. This marks the end of our year long project to revamp and improve the Terminal Operator's Manuals. As we worked on this project, we improved not only the layout and organization of the manuals, but also their accuracy.

We are not through yet! Before year end, you will be receiving new spine labels for the user manuals that reflect their new title, NOTIS User's Guide. In an effort to simplify the ordering process, we have done away with volume and part numbers for all the user's guides. The manuals now will be referred to by their subject matter.

- NOTIS User's Guide: Cataloging and Authorities
- NOTIS User's Guide: Acquisitions and Serials
- NOTIS User's Guide: Public Services (comprised of the circulation documentation and the OPAC manual) *Continued page 2.*

Beta tapes shipped for Release 5.0

On November 21, we shipped the first tapes for beta testing to Purdue University (MVS) and Fort Hays State University (VSE). These tapes contained all of the 5.0 programs except for the new OPAC which will be sent shortly. These two sites will be installing and testing Release 5.0 now through February.

Stacy Kowalczyk, manager of product integration, will supervise beta testing. In January, chairs or designees of the functional Special Interest Groups will be at NOTIS just prior to ALA Midwinter for a coordinated test day. We still expect to do general release of 5.0 in March 1991.

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BULLETIN

NOTIS welcomes

Oklahoma State University and
University of Kentucky

See page 10

Here is a list of revised manuals from Documentation Services:

When Update Issued	Update Number	Replaced Manual
January	User Update 21	<i>Terminal Operator's Manual: Volume 3, Part 1</i>
April	User Update 22	<i>Terminal Operator's Manual: Volume 2, Part 1</i>
July	User Update 23	<i>Terminal Operator's Manual: Volume 1, Part 1</i>
December	User Update 24	<i>Terminal Operator's Manual: Volume 1, Part 2</i>

We will also be issuing an index to the circulation documentation in late December as the first step in our indexing project. During the coming year, we will be issuing indexes to all the user's guides.

In addition, we are working on a new *Implementation Manual* that reflects the new online control features available with LMS Release 5.0. We will have this manual indexed and ready to send to you when Release 5.0 is shipped in the first quarter of 1991.

We plan to tackle the technical documentation in 1991—revising all existing technical documentation and reissuing the manuals to all technical update subscribers; we have already begun work on this project. We have a preliminary list ofabend codes and error messages, and have made a first pass at revamping our installation documentation.

We have appreciated your feedback over the last year as we worked on this project, and we continue to be interested in your comments. Let us know how we can improve upon the manuals by filling out the evaluation form we issue with each update, or by calling Jane Larkin, Manager of Documentation Services, at (708) 866-0146.

Room assignments for ALA Midwinter aren't available yet

When this issue of *NOTISes* went to press we had not yet received information regarding room assignments for special interest group meetings at ALA Midwinter. Please stop by the NOTIS booth at the convention for a list of the meeting rooms.

NOTISes

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

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Problem after hours? No problem!

You can call a systems engineer to help you resolve your technical problems from 7:00 a.m. to 7:00 p.m. (CST). From 7:00-8:30 a.m. and from 5:00-7:00 p.m., the system engineer on duty will handle incoming calls in correlation with the voice mail system. Simply call Customer Services at (708) 866-1100.

Results: The 1990 MDAS Enhancement Survey

The responses to the 1990 MDAS Enhancement Survey have been tabulated. There were 10 functional and 10 database enhancements included in the survey. The five top ranking enhancements from each section of the survey are listed below. Each set of five received 75% of the points assigned for that section.

We extend our thanks to each MDAS site that completed and returned the MDAS Enhancement Survey. We consider the results of the survey to be an important factor in NOTIS Systems' prioritizing for future development. Special thanks to the MDAS Special Interest Group and its Chair for their work in compiling the list of enhancements for this survey.

Description	# on Survey	Percentage
FUNCTIONAL ENHANCEMENTS		
Local loading option	#1	24.13%
Printing & downloading support	#2	16.83%
Limit & save search features	#6	13.02%
Messaging function	#5	11.75%
Time-out function	#8	9.84%
DATABASE ENHANCEMENTS		
Congressional Information Service	#7	20.89%
Dissertation Abstracts	#6	17.72%
ABI Inform	#10	15.51%
MLA Bibliography	#4	11.71%
PAIS	#3	9.18%

NOTIS starts joint development of Z39.50 link

NOTIS Systems has signed contracts with Indiana University (acting on behalf of the State University Library Automation Network or SULAN) and the State University of New York (acting on behalf of three University Centers) for the joint development of host-to-host linkage software based on the Z39.50 standard.

Called PACLink, the software will allow a NOTIS OPAC user at one site to have a seamless connection to the NOTIS OPAC at another site. Searches can then be performed and interlibrary loan requests initiated and tracked. PACLink will complement other efforts that are already under way in both Indiana and New York to promote cooperative collection development and resource sharing among academic libraries.

SULAN includes the six NOTIS installations in Indiana: Ball State University, Indiana State University (which hosts a consortium including

Vincennes University and the University of Southern Indiana), Indiana University, Purdue University, University of Evansville, and the University of Notre Dame. The three University Centers in New York cooperating in the project are the State University of New York at Binghamton, Buffalo, and Stony Brook. Most of the participants in the project have been NOTIS users since 1988.

NOTIS has already begun analysis for the project and expects to have the initial software in test by the second half of 1991. PACLink software will eventually be available to any NOTIS site. NOTIS sites with PACLink will be capable of connecting to any local system that supports the Z39.50 standard.

Watch for a more detailed description in a future issue of *NOTISes*.

DocAlertsDocAlertsDoc
AlertsDocAlertsDocAler
tsDocAlertsDocAlertsDo

Chapter M2, *NOTIS User's Guide, Volume 2* includes a description of the daily operations report. We have inadvertently omitted the fact that the report also includes a listing of items for which the number of recalls and/or holds equals or exceeds the number defined in the THRESH= parameters of LOCC statements in NOTIS table LC106Tzz. The appearance alerts you to consider acquisition of additional copies.

Please make a note on page 224 of the *NOTIS User's Guide: Cataloging and Authorities*. When you issue a command to create and display volume holdings for added copies, you must include a hyphen.

On the request line, type the `vhld` command, a space, a hyphen, a space, and the copy control number, then press ENTER.

```
ltxx vhld - 2  
ltxx vhld - 002
```

You can type the copy control number with or without the leading zeros. The command "`vhld 2`" means you want the volume holdings record for the second entry from the most recent index.

Priority problems now reported on BITNET

As indicated in the September *NOTISes/58*, NOTIS has established a procedure to alert customers to priority one or two problems that are reported at multiple sites. Our goal is to identify serious problems quickly enough to notify customers within one working day after we discover that a second site has reported a substantial disruption in service.

We will use the Bitnet NOTIS-L list to inform you as soon as we are aware of such problems, and will use the list a second time to notify you that a solution has been developed. NOTIS will use the Bitnet SUBJECT to reference the affected module (cataloging, circulation, acquisitions, etc.), and will identify the following:

- the problem tracking (PTS) number,
- visible symptoms of the problem,
- ramifications of the problem if not corrected,
- ways to work around the problem, and
- how customers can either obtain a fix or the latest information from NOTIS.

Please note that use of NOTIS-L will not replace use of the Troubleshooting column in *NOTISes*, and that customers should continue to report all problems to the Customer Services Representative at 708-866-1100.

NOTIS extends its thanks to the Customer Services Focus Group for identifying this area in which we can better communicate with NOTIS customers.

More on GTO Release 3.0's CD-ROM Module

As most of you probably already know, Generic Transfer and Overlay (GTO) Release 3.0 can be used with CD-ROM MARC databases. In order to be compatible with GTO Release 3.0, a CD-ROM product must meet the following criteria:

1. It must provide for export of bibliographic and/or authority records.
2. Exported records must be in the MARC tape format and include a 001 field.
3. Exported records must be in the LCMARC character set.
4. The export mechanism must be through a serial port, using the following communications characteristics:

```
BAUD RATE: 1200, 2400, 4800, or 9600  
DATA BITS: 7 or 8  
PARITY: None, Odd, Even, Space, or Mark  
STOP BITS: 1 or 2
```

If a CD-ROM vendor meets these requirements exactly, the product will be compatible with GTO Release 3.0.

Also, successful transfer of holdings data from a CD-ROM to NOTIS via GTO requires that you enter the data in a structured manner. The location code(s) must be in subfield(s) 1a of the holdings field. Volume holdings data must be formatted in subsequent subfields in the same field. It is not possible to correlate more than one holdings field (e.g., location code in a 049 field and volume data in a 949 field) for purposes of transferring holdings data.

We have tested GTO with Bibliofile and the Library of Congress' CDMARC Bibliographic, Names, and Subjects products. All are fully compatible with GTO Release 3.0.

Two other CD-ROM products have been tested with GTO Release 3.0—LaserQuest (from General Research Corporation) and CD-CATSS (from UTLAS) with the following results.

- **LaserQuest:** Using a sample file, we discovered that its records do not have a 001 field (containing the system control number that GTO places in the 035 field of the bibliographic record) and we could not transfer any records. However, the vendor reports that a LaserQuest user may insert a 001 field into the record before transferring. NOTIS has been unable to test this since we have only a sample file, not the complete product.
- **CD-CATSS:** Approximately half of the records in a test file of CD-CATSS records did not have a 001 field while the other half did. Those records with the 001 field transferred successfully using GTO Release 3.0 while the rest did not. Again, with only a sample file of records, not the complete product, we were unable to test a transfer after inserting a 001 field.

If you use other CD-ROM MARC database products, please call Stuart Miller at (708) 866-0171 with the vendor name and telephone number.

If you have any questions about GTO Release 3.0, please call your NOTIS Marketing Representative, or call (708) 866-0156 and ask to speak with a Product Specialist.

Fiscal Period Close: A Release 5.0 Overview

by Ann Greenseth
Account Representative
Conversion Consulting

Release 5.0 encompasses several options for fiscal period close, providing for the carry over of open orders from the old fiscal period to the new, the carry over of committed or uncommitted funds, and the cancellation of open orders at the end of the fiscal period. In addition, the release will support both multi-fiscal and individual fiscal year funds.

Procedures and specific needs identified and studied for the new release include: online creation and maintenance of rules for fund processing, year end planning, fiscal period close forecast, post-processing audit reports, and the capability to display fund information in the pay statements. Also identified as essential is the need for batch processing capabilities, because now operators are required to cancel or recommit funds on a record by record basis.

The Options

In an effort to meet the needs that were identified, several options were formulated. The new release supports five fund processing options:

- | | |
|----------|---|
| OPTION A | Open orders canceled |
| OPTION B | Open orders carried forward--no allocation change for new fund |
| OPTION C | Open orders carried forward--outstanding commitment reallocated |
| OPTION D | Open orders, committed funds, uncommitted balance carried forward |
| OPTION E | No processing |

Processing Rules

How each fund is processed is dependent upon the processing rule identified for that particular fund. During fiscal period closing, each fund is processed according to its individual fund processing rule; or, if no individual rule exists for that fund, by the default processing rule.

Access to the creation, deletion, and editing of fund processing rules is controlled through the Online Control File, by processing unit, and by operator.

The operator identifies the processing rule for each fund, fund code, fund code pattern, fiscal years, and closing parameters for each rule. A default rule is created for use with funds that are to be processed in the same way. With the default rule, the operator identifies a fund code pattern to be used with the separate fund records, which are created for each fiscal period. When an individual rule is created, it overrides the default rule for the specified fund. There can exist only one individual fund processing rule per fund code.

```

FISCAL PERIOD CLOSE--MAIN MENU                                LACMN1
PROCESSING UNIT: NU

PROCESSING OPTIONS:

1.  DEFAULT RULE MAINTENANCE
2.  CREATE INDIVIDUAL RULE
3.  UPDATE INDIVIDUAL RULE
4.  DELETE INDIVIDUAL RULE
5.  LIST FUND RULES

SELECTION:

PLEASE TYPE OPTION NUMBER IN SELECTION AND PRESS ENTER
OR TAB TO DESIRED OPTION, TYPE 'S' AND PRESS ENTER.
CLEAR=EXIT  PF1=HELP  PF3=EXIT
    
```

FIGURE 1
illustrates the main menu of fund rule processing options.

```

DEFAULT RULE FOR PROCESSING UNIT: NU    LACDR1

FUND DESCRIPTION (COMPLETE ONE ONLY)

MULTI YEAR FUND:  CURRENT FISCAL YEAR >    < NEW FISCAL YEAR >    <
                  -OR-
SEPARATE FUNDS:  CURRENT CODE PATTERN >    < NEW CODE PATTERN >    <

PROCESSING DESCRIPTIONS (INDICATE CHOICE(S) WITH AN "X" IN FRONT OF ITEMS(S))

> < CANCEL OPEN ORDERS
> < CARRY FORWARD OPEN ORDERS
> < REALLOCATE AMOUNT OF COMMITMENT TO NEW FISCAL YEAR/FUND
> < CARRY FORWARD UNCOMMITTED BALANCE

SELECT STATUS CODES WHICH INDICATE OPEN ORDERS
> < STATUS A: OPEN ORDER, UNRECEIVED
> < STATUS B: CURRENTLY RECEIVED
> < STATUS C: PARTIALLY RECEIVED
> < STATUS D: RECEIVED, NOT PAID

COMMANDS  U = UPDATE RULE    D = DELETE RULE
COMMAND:
CLEAR=EXIT  PF1=HELP  PF4=MAIN MENU
    
```

FIGURE 2
shows the options available for the default rule.

The rules are easily created and maintained online and are stored to be used by a batch program for the closing process. Online activity is menu and command driven, providing easy access to, and movement between, the menus, help screens, fund list, and other screens.

Parameters

The funds are closed according to the options specified and the parameters defined in the processing rules. For the default rule, there are four possible parameters for the closing of funds. An individual fund processing rule allows for five parameters.

```

INDIVIDUAL FUND CLOSING RULE FOR PROCESSING UNIT: NU      LACIC1
                RULE CREATION

FUND CODE: >      <      FISCAL YEAR: >      <

ACTIVE OPTIONS ARE INDICATED WITH AN "X" IN FRONT:

> < BYPASS CLOSING THIS FUND
> < CANCEL OPEN ORDERS
> < CLOSE THIS FUND, TRANSFER TO FUND: >      < FISCAL YEAR: >      <
  > < CARRY FORWARD OPEN ORDERS
  > < REALLOCATE AMOUNT OF COMMITMENT TO NEW FUND
  > < CARRY FORWARD UNCOMMITTED BALANCE

SELECT STATUS CODES WHICH INDICATE OPEN ORDERS
> < STATUS A: OPEN ORDER, UNRECEIVED
> < STATUS B: CURRENTLY RECEIVED
> < STATUS C: PARTIALLY RECEIVED
> < STATUS D: RECEIVED, NOT PAID

ENTER FUND CODE AND FISCAL YEAR YEAR AND PRESS ENTER.
COMMANDS C = CREATE L = LIST RULES U = GO TO UPDATE D = GO TO DELETE
COMMAND:
CLEAR=EXIT  PF1=HELP  PF4=MAIN MENU  PF9=CLEAR ENTRY
  
```

FIGURE 3

illustrates the options available for individual rule creation.

Pay Statements and Reports

In Release 5.0, the fiscal period is displayed in the order and invoice record pay statements, allowing the operator to easily identify the period associated with each commitment and expenditure statement and related fund code transactions.

Three types of reports are generated in fund and batch processing. Planning reports include: fund balance snapshot, open orders, active funds with outstanding commitments, and fund closing definition. Fiscal period close forecast reports project fund closing activity based on the rules that have been defined for each fund, providing the ability to predict without changing the funds or records. These reports, along with the error reports, are generated as part of the projection and allow you to detect and correct problems and errors. Production run reports are generated during the fiscal period close process and act as audit trails, reporting in detail and summary what occurred during the batch fund closing.

OPAC NAMES

ACORN.....Vanderbilt University	MORRIS.....McMaster University
AMELIA.....The University of Alabama	MURLIN.....University of Regina
AUCAT.....University of Auckland	MUSE.....McGill University
BEACON.....Grand Valley State University	OASIS.....University of Iowa
BISON.....SUNY-Buffalo	OLIN.....University of Oklahoma
BOSUN.....Naval Postgraduate School	ORBIS.....National Geographic, Yale University
BRAIN.....Bergen Community College	PEGASUS.....University of California-Santa Barbara
BYLINE.....Brigham Young University	PennLIN.....University of Pennsylvania
CATALYST.....Kent State University	PITTCAT.....University of Pittsburgh
CENTRA.....Central Michigan University	PONI.....Southern Methodist University
CHESTER.....West Chester University	QUEST.....Boston College
CLIO.....Columbia University	QLINE.....Queen's University
COAST.....California State-Long Beach	Robcat.....Robert Morris College Library
CRISTAL.....Upper Peninsula (Michigan) Region of Library Cooperation	ROCKy.....Iona College
CUNY+.....City University of New York	SADIE.....Southeast Missouri State University
DELCAT.....University of Delaware	Scholar.....Cleveland State University
ELIXIR.....SUNY-Binghamton	SCROLL.....Supreme Court of Ohio
FINDER.....Western Michigan University	SOL.....University of Texas-Dallas
FOCUS.....Michigan Technological University	STARS.....SUNY-Stony Brook
JANUS.....Johns Hopkins University	TECHCAT.....Kansas College of Technology
LIBRIS.....Rice University	THOR.....Purdue University
LIBROS.....National University	TOPCAT.....Fort Hays State University, Western Kentucky University
LOLA.....Louisiana State University	TULANET.....Tulane University
LUIS.....(pronounced loo-EECE) University of Texas-El Paso	UNACAT.....University of North Alabama
LUMINA.....University of Minnesota	UNICAT.....Burroughs Wellcome Company
LUNA.....N.A.S.A.	UNIS.....University of Utah
LYNX.....Kansas State University	UNLOC.....University of Notre Dame
MAGIC.....Michigan State University	UTMOST.....University of Toledo
MCLUIS.....Montgomery College	VICTOR.....University of Victoria
MINERVA.....University of Louisville	VIRGO.....University of Virginia
MIRLYN.....University of Michigan	YORKLINE.....York University

NOTIS welcomes two new sites

Oklahoma State University Library goes with NOTIS

The Edmon Low Library at Oklahoma State University in Stillwater, Oklahoma has selected the NOTIS™ Library Management System and the Multiple Database Access System (MDAS) for its local integrated system.

"Acquisition of the NOTIS software is one step in our proposed plans to strengthen the library to better serve the university," said Ed Johnson, Dean of Libraries. "We believe that NOTIS, already a strong presence in the state, will best serve our plans to expand our services beyond the immediate community of university patrons."

"We're very happy to have Oklahoma State as a NOTIS user," said Jane Burke, President of NOTIS. "NOTIS regards all of its customers as potential partners in developing new products and looks forward to the contributions that the Edmon Low Library staff will make."

Oklahoma State is the fifth NOTIS installation in the state and is NOTIS' 140th installation world-wide. Oklahoma State has a collection of over 1.5 million books with 14,000 serials and 2.3 million microform units.

The library is also a GPO Regional Depository and a U.S. Patent Depository. The university has embarked on an ambitious expansion program to build an additional 130,000 square feet to house the library's collections.

The NOTIS™ Library Management System provides a complete set of features for all library operations, including an online public access catalog (OPAC). When MDAS is added, the library can offer one user interface for searching locally mounted databases and the OPAC. Database citations are automatically linked to library holdings. Oklahoma State has not yet decided what databases to purchase.

University of Kentucky chooses NOTIS

The University of Kentucky (UK) Library System in Lexington, Kentucky has selected the NOTIS™ Library Management System and the Multiple Database Access System (MDAS) as its second automated software package.

"Acquisition of the NOTIS software was a logical next step for a library of our size," said Paul A. Willis, Library Director. "We believe that NOTIS offers us a solid platform on which we can continue to grow and expand our collections and services well into the future."

"We're very happy to have another ARL library as a NOTIS user," said Jane Burke, President of NOTIS. "NOTIS looks forward to drawing upon Kentucky's extensive experience with library automation to help us determine future enhancements and new products." NOTIS is the vendor of choice for 43% of the ARL libraries.

The UK system has over 2 million volumes and serves the main campus in Lexington as well as 13 satellite sites throughout the state. In addition to implementing the Library Management System, Kentucky also plans to mount MEDLINE and ERIC using MDAS. Three more databases will be added in the future.

The NOTIS™ Library Management System provides a complete set of features for all library operations, including an online public access catalog (OPAC). When MDAS is added, the library can offer one user interface with an automatic link between the databases and the OPAC to display library holdings.

MDAS Interest Group voices concerns about LMS 5.0 and MDAS 1.2 and Jane Burke responds

Dear Jane:

The MDAS Interest Group urges NOTIS to reconsider the current plan for distribution of LMS 5.0 and MDAS 1.2 as it affects the ability of MDAS customers to load the new LMS release.

Following the various announcements about upcoming releases at other NUGM sessions, members of the MDAS Interest Group Thursday afternoon unanimously expressed dismay at the lack of coordination of the two products. LMS 5.0 is a major release of significant interest to all the MDAS customers. Its implementation is time sensitive since the release includes the fiscal year change software; most of the MDAS customers have a June 30 fiscal year end.

Because LMS 5.0 cannot be installed with MDAS 1.0 or 1.1, and because the MDAS release which will be compatible—1.2, has been announced for some time between June and September, MDAS customers will be unable to take advantage of the new functionality. Another timing consideration is the window for introduction of an entirely new OPAC—ideally done before the beginning of a new academic year.

This, too, would be impossible if the incompatibility problem is not resolved prior to the scheduled 1.2 introduction. This latter situation is particularly paradoxical given the public catalog orientation of MDAS and Release 5.0.

As MDAS customers, we have made a significant investment in this NOTIS product, in large part because of its relationship to the LMS and the OPAC. We believe that it is not too much to expect that current MDAS and LMS releases always be compatible.

It is not clear to us where the incompatibility of the two products lies nor what the best resolution of this situation might be. Certainly, we are willing to have NOTIS delay somewhat (a matter of months) the functionality of release 1.2, if we can ensure the continuing operation and compatibility of our two integrated products.

We request that NOTIS do whatever is required to the LMS 5.0 and MDAS 1.1 products to make them compatible at the point of release of LMS 5.0. We also ask that whatever decisions are made about these matters be shared with current and potential MDAS customers just as soon as practicable.

We thank you for your prompt attention and anticipate hearing from you soon.

Sincerely

Flo Wilson
Chair, MDAS Interest Group

Dear Flo:

This letter is in response to your letter of October 30, 1990 on behalf of the MDAS Special Interest Group.

Thank You

I want to thank you for expressing the concern of the group for several reasons. It is clear that the group got together and talked about how to approach us on this problem. First, we want the kind of coordinated opinion that your letter represents.

Secondly, your letter is a vivid reminder of something that NOTIS tends to forget; we are no longer a one product company. If we are going to offer the full range of functions as a Campus Information System, we need to be sure that all of the parts are indeed coordinated. We are doing that.

Third, your letter indicates overall support for the features we are developing and a desire by customers to install and bring up releases quickly. Because that has not been our overall experience, we are very pleased to see this solid indication that users expect to install and implement Release 5.0 right away.

Need for Continual Compatibility

We agree with the statement in your letter that the two products should always be compatible. In fact, that desire was a major factor in our redesign of the OPAC. We are aware, and we plan for, the need to coordinate the two products. Basing MDAS Release 1.1 on the existing catalog is an example of our working for this.

That coordination on our part continues into 1991. Given the amount of work that a site will need to do before bringing LMS 5.0 into production (including putting all table values online and designing the new catalog) and the relatively little work for MDAS 1.2, the two releases are, in fact coordinated.

Communication

Where NOTIS has failed is not in planning or coordination, but in communicating to you. This compatibility issue, which is not really a problem, should have been communicated to the MDAS users earlier and more fully. I apologize for that lack of communication, and I will work with all staff at NOTIS to assure that a communication gap like this does not occur again.

Let me try here to communicate more fully.

Nature of Incompatibility

Your letter says "It is not clear to us where the nature of the incompatibility of the two products lies." It lies in the structure of the indexes. MDAS 1.1 was designed to work with the existing OPAC, which uses the separate author, title, and subject indexes. MDAS 1.1 therefore uses the same structure. That was a definite decision on our part to exercise the coordination between products that your library emphasizes.

Release 5.0 utilizes the MHI index for all parts of the application. It no longer has routines to access or generate the A,T,S indexes. We do not feel it is possible to make the two releases (MDAS 1.1 and LMS 5.0) work together, given reasonable effort.

Therefore, we have decided to continue with our plan of coordinating the two products in the summer of 1991. As you will see from this letter, this is a very workable plan.

Timing of Release 5.0

Your letter says that the general release date and implementation of 5.0 is "time sensitive since the release includes the fiscal year change software." We agree completely. While responding to the directive of users to provide better tested releases, we have been very aware that we must get 5.0 out

in time for users to utilize Fiscal Year End close.

Without this feature, I believe that we could have easily made a case for holding Release 5.0 for a few more months in order to assure simultaneous release with MDAS 1.2. However, we cannot make that decision for the very reason stated above. Some LMS customers are waiting for Release 5.0 and especially for Fiscal Year End close.

Implementation of Release 5.0

Our experience tells us that most users will not implement 5.0 quickly. We checked carefully when deciding on the release dates.

There are still 20+ users on Release 4.5. This is more than a year after the release of 4.6. In other words, 15% of the customer base are not on the currently supported release.

We asked a number of users at summer ALA when they planned to actually bring 5.0 into production. Most said 1992.

Early in 1990 we, too, were very worried about having users get the new OPAC up in the summer of 1991. However, the feedback that we got about testing and the experience of when users actually bring releases into production made us feel that we should not expect users to actually do that. Therefore, we felt that the four month gap between the LMS and the MDAS release was not going to be a problem.

Overall, despite the concern for Fiscal Year End close, we have had no indication that users expect to bring the new OPAC into production in the summer of 1991. We really do not believe that this is going to be a problem, and our experience clearly indicates that few users will actually bring Release 5.0 into production by August.

Timing of MDAS 1.2

Given the above, which is that users are not planning to bring up the OPAC in summer 1991, we felt that the timing of MDAS 1.2 was not a concern. We felt, after having had a number of conversations with users, that we were scheduling MDAS 1.2 to assure compatibility when required.

The current schedule for MDAS 1.2 is beta testing June 1, 1991. We will assure that we meet this date, even if we end up delaying some functionality of 1.2. In other words, we will assure that the parts of MDAS 1.2 required to solve the compatibility problem are completed and tested internally and ready for beta testing by that date.

We expect beta testing to take the same short time as beta of MDAS 1.1, and we are confident that we can ship the general release by August 1,

1991. This will mean that customers will have both the LMS release and the MDAS release by August 1.

Although we have considered the possibility of a Release 1.1.1 of MDAS, we feel that due to time and cost, that is not a good solution. We feel that it is better to press ahead with MDAS 1.2 and provide both its additional functionality and the compatibility as quickly as possible.

Possible Implementation Scenario

We feel that the real desire expressed in your letter is to get both the new 5.0 OPAC and MDAS up together for the fall of 1991. That is possible. This is the scenario:

1. The institution installs 5.0 in their test region at the end of March.
2. It does all of the necessary testing and entry of the online table values. It confirms to itself that the conversion programs run satisfactorily. It makes all of the OPAC design decisions.
3. Testing is complete by August 1. The actual time to then bring 5.0 into production is about one week.
4. The MDAS release is installed in the test region. Given past experience, it can be brought into production in two weeks.
5. Thus, by the end of August, the site is in production with both releases, including the new OPAC, and all is compatible.

Admittedly, this scenario will take coordination at the site and a strict project plan, but it will work.

Need for a Test Site

Meeting our target date for the general release depends upon having a good beta test site for Release 1.2 of MDAS. We are interested in knowing the test site now so we can do a plan with the site that makes the above scenario possible for other sites.

Perhaps the MDAS SIG would like to coordinate the selection of the beta site. That would allow you all to work together with the beta to track the progress of getting both products up together.

If such coordinated selection is not possible, then please spread the word that we would like to line up the MDAS 1.2 beta site. Interested sites can call me or John Kolman, and they need to be prepared to have Release 5.0 in production in June and to test MDAS 1.2 at the same time. For sites that are very concerned about this compatibility issue, being the beta test site may be the best solution.

Conclusion

Based on our experience with users installing releases, we do not feel that there is a problem here. While we recognize that a few sites really are concerned about fiscal year end close, the subset of those that are also MDAS users is not large. We have thought through what is necessary for summer '91, and we feel that this testing and changeover time can be used to good advantage by the MDAS sites.

I look forward to hearing from the SIG about possible test sites for MDAS 1.2. Thank you again for your straightforward communication.

Sincerely,

Jane Burke
President
NOTIS Systems, Inc.

The Wayne State University Libraries' shelf list elimination project

by Anaclare F. Evans, Head of Database Management

The NOTIS LC call number index has permitted the Wayne State University Libraries to undertake an aggressive project aimed at eliminating its central LC shelf list. This article briefly describes the ongoing process to reduce and remove the manual LC shelf list.

Beginning in the summer of 1987, we stopped producing OCLC full card sets, and all new items were only added to the W.S.U./DALNET NOTIS database. By the fall of 1989, the Technical Services cataloging staff asked to discontinue shelf list card production for items in Library of Congress classification.

We decided to reduce the LC shelf list while checking to ensure that all added copies and volumes were reflected in NOTIS. We reviewed back-up programs run by the WSU Libraries Systems Office to insure that a major system failure would not destroy all of our bibliographic and holdings records.

The shelf list elimination project was divided into two phases. Phase One included pulling and manipulating all of the OCLC shelf list cards. These cards were divided into three groups: single item monographs, items with multiple volumes, and items with multiple copies.

All cards for single piece titles were discarded. Those cards reflecting multiple copies and volumes were sorted and then distributed to staff in Acquisitions familiar with added copy and volume work for clean-up. Thus far, this group of cards has decreased from more than 25,000 to about 8,000, and we expect to finish work on this material within the next few months.

Pulling and sorting the OCLC cards (about 10 years of cataloging or about 300,000 titles) was completed over a period of about two months by three student library assistants and one senior level paraprofessional. Removing these OCLC cards reduced the shelf list by about 40%.

Phase Two of the project began in December, 1989, with the project team expanded to include a clerical staff member. During this phase of the project, the emphasis is on those shelf list cards produced prior to W.S.U.'s involvement with OCLC. Each card is checked in NOTIS, and all

copies and volumes are verified and added if necessary. Call numbers and locations are double-checked for accuracy. The students search the database using several different search keys before determining that the title is not in the database. If there is any question regarding the correctness of the match, the students set the card aside for review.

The paraprofessional reviews each card and sets aside those that have been "edited" to match our holdings, or contain copies that are actually different editions. Like many libraries, Wayne State used the "best match" printed card from LC and "fixed" it to reflect the item in hand. Typing on the card is a signal that our record in NOTIS must be checked and, if necessary, edited.

Accessions are checked and records are added to the database to reflect variant editions added as copies. Series and uniform titles are added to reflect WSU's manual catalog. The authority file is checked to insure that the correct form of heading and series treatment was used. Questions regarding record editing are directed to the head of the Database Management section.

In the past 11 months, the staff has removed 235 drawers from the LC shelf list and has accumulated about 10 drawers of questions and problems. These latter drawers will add about 1,000 titles to the database.

Some of the titles are items that were added to our database in error because of a mismatch during the OCLC Microcon® conversion process, while some were inadvertently missed. Many copies and volumes have to be added as our conversion process did not include added copies and volumes. Duplicates occurred because conversion was done simultaneously from several separate shelf lists. These records must have their holdings merged onto one record and the duplicate record deleted.

We have 152 shelf list drawers remaining, and we anticipate completing the second phase of this project by July 1, 1990. Eliminating our LC shelf list consolidates LC shelf listing in one location and increases available floor space in Technical Services by eliminating card cabinets.

Technical Consulting Services *presents another* System Orientation Workshop

WORKSHOP INFORMATION SUMMARY:

WHERE: NOTIS Headquarters, Evanston, IL
WHEN: February 7-8, 9:00AM-5:00PM
WHO: New TECH1 programmers, programmers with little exposure to NOTIS software, or programmers who would like to increase their system knowledge, debugging techniques, or maintenance skills.
COST: \$600

A number of NOTIS sites recently expressed an interest in another System Orientation Workshop for TECH1s and programming staff. We are happy to announce that NOTIS will offer this two-day hands-on System Workshop once again.

This training session will be held at NOTIS Corporate headquarters in Evanston, Illinois. As before, we will offer an intensive two-day presentation dealing with all aspects of the NOTIS software and its systems environment.

We will provide both conceptual overviews (Macros, CICS tables, calls and linkage procedures, logic and processing flow, etc.), as well as practical approaches (debugging procedures, change methodology, upgrade installation tips, etc.). This seminar will be designed for 5.0 implementation.

To register for this workshop or inquire about scheduling, please call our Technical Support Secretary, Cathy Kolinski (708) 866-4853.

The following agenda outlines the topics that will be covered during this two-day workshop. If you have any questions about the topics to be covered or the nature of the workshop's hands-on sessions, please call NOTIS Technical Support.

DAY ONE

Introduction

- Registration
- Introduction to the Workshop
- NOTIS Operation environment
- NOTIS Record structure
- NOTIS Index structure
- LCR File Concept

NOTIS File Structure and Relationships

- Overview
- File relationships
- Keyword Indexes
- Keyword Files

NOTIS Table & LCR Structures and relationships

- System architecture
- NOTIS Macro Tables
- Table maintenance
- Online Maintenance (LSYS & LMST)
- Coding and Assembling tips

DAY TWO

5.0 Batch Programs, Products, and Reports

- General
- Cataloging
- Authority Control
- Backup and Recovery
- Work files
- Acquisitions
- Circulation
- Online Public Access Catalog (OPAC)
- Database conversion

Troubleshooting

- NOTIS Basic Support policies
- Problem analysis and resolution
- CICS dumps & auxiliary traces
- Simulation & testing
- Problem tracking & reporting

5.0 Release Update

- Resource planning
- Preparation
- Integration of changes
- Testing
- The move to production
- Support issues

Wrap-Up

- Technical Consulting and special processing
- Summary
- Evaluation
- Question and answer period