# NOTISes

For users of NOTIS library information systems

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# NOTIS Takes a New Direction with the Circulation Module

e are happy to announce that we are completely rewriting the Circulation module in the "C" computer language. We believe that rewriting the Circulation module will make it a much better product, because rather than making small fixes to the module, we will devote significant time and resources to rewriting the entire module.

We plan to rewrite the Circulation module by 1993. Of course, we will update you on our progress along the way in future issues of *NOTISes*.

One of the most important reasons for choosing the "C" language is because it is a higher level language and is widely used today. The "C" language is easier to code and debug than assembler, and it is taught in schools, which means it has a large pool of support personnel.

Furthermore, the "C" language is potentially portable among

different types of hardware.

The Circulation Special Interest Group strongly supports us in completely rewriting the Circulation module. The Circulation SIG has appointed liaisons to help us work on this project, and to help ensure that we are headed in the right direction. The first meeting between the liaisons and Maribeth Ward and John Kolman is scheduled for ALA midwinter.

In addition to working with the Circulation SIG, we will be working with an advisory body of NOTIS Tech1's in 1992.

Keep your eyes open in *NOTISes* for more information on how we are meeting the challenge to provide you with a solid platform for the present and the future. ■

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#### BULLETIN

The Troubleshooting column gets a

face lift.

Happy Holidays and Best Wishes for a new year!



### The Troubleshooting Column Gets a New Look

e'd like to introduce you to the new Support Solutions column, which replaces the Troubleshooting column. We have formatted the Support Solutions column to provide quick and easy access to the latest support information you need.

The column is broken down into three sections: Code Changes, DocAlerts, and Tips. The entries in each section are grouped by product for quick and easy reference.

#### **Code Solutions**

The first section, Code Solutions, contains all of the latest code modifications you need to keep your software up-to-date. We have included the job(s) you need to run to reassemble and relink the programs.

Please make these code modifications as soon as you can to insure that your programs are current. This will help prevent problems and make solving any situations that do arise easier.

#### **DocAlerts**

We have included DocAlerts in the Support Solutions column to make it easier for you to find them in each issue of *NOTISes*. Keeping the documentation current may save you a lot of troubleshooting time and effort.

All the code and documentation changes will automatically be included in the next release or update of the appropriate NOTIS product or manual.

#### Tips

Finally, we have developed a new section called Tips. These entries provide valuable information in diagnosing and solving problems encountered by customers.

The solutions offered here do not involve code changes, but we feel you will find them helpful in maintaining and running your system. The entries in this section are numbered, and will be cumulated and indexed in a manual that will be available to all customers.

Our new Support Solutions column is part of our continuing effort to make your job easier. Please do not hesitate to call us if you need any help or have any comments or suggestions.

### NOTIS 8

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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.

# Location-Based Catalogs—an Enhancement to the OPAC

ocation-based catalogs is an enhancement to the OPAC that we will distribute as part of Release 5.1. Location-based catalogs is designed to allow NOTIS sites to group an institution group's locations into one or more location-based catalogs. This enables OPAC users to limit searching to one of the predefined catalogs within the system and to switch catalogs easily.

If your site chooses to activate location-based catalogs, you will be able to choose from one of two options for how your index will display in the scoped mode.

- 1. Only entries that fall within the current catalog scope
- 2. All entries, with those that fall within the scope marked

The option your site chooses will determine the amount of system resources that will be used. The descriptions for Option #1 and Option #2 explain why one option requires more system resources than the other.

#### Option #1

Choose Option #1 if you only want to retrieve records for material held in predefined location-based catalogs. Locations are typically clustered into groups according to physical proximity, such as a single branch of a public library, or a single campus of an academic library system.

This option may require more system resources and therefore have a longer response time than Option #2. More system resources may be required when you perform broad searches that match numerous index entries because the system searches through all of the catalogs until it finds every item that matches your search statement and search command and that falls within the catalog you specified.

In other words, if you are searching for an author, the system will not stop searching for matches after it reaches the 5,000th index entry, but will continue searching until 5,000 matching entries within the current scope are found. This enables the system to overcome search limitations.

Here's an example of how Option #1 works. Let's say you have chosen the Reference Library as the catalog you want to search, and you search for the subject heading, United States—Constitutional Law—Interpretation. The system searches for your entry and comes up with the 5th entry, 4,725th entry, and 6,035th entry as matching your search statement and your specified catalog. What you will see on the catalog display are three entries, all of which can be found in the Reference Library. Note that the search process went well beyond the 5,000th index entry.

#### Option #2

Choose this option if you want to search across all of the catalogs, but want the entries that fall within the scope of the specified catalog to be marked with a plus sign (+). Option #2 takes up less system resources than Option #1 because the system stops searching when it reaches the maximum number of index entries that can display in the OPAC (250 for Keyword/Boolean and 5,000 for author, title, or subject).

Here's an example of how Option #2 works, using the same scenario as in Option #1 to show you how the two options differ. This time, the Reference Library is the specified location-based catalog, but in addition to the Reference catalog entries displaying, all index entries that match your search statement will display, even when they fall outside the scope of the specified location-based catalog.

Again, you search for the subject heading United States–Constitutional Law–Interpretation. The system searches for your entry and every time it finds an index entry that matches your search statement, it displays it in the catalog, regardless of what catalog it belongs to. But, once the system reaches 5,000 index entries, it stops searching. As a result, Option #2 would not find the 6,035th entry as Option #1 did.

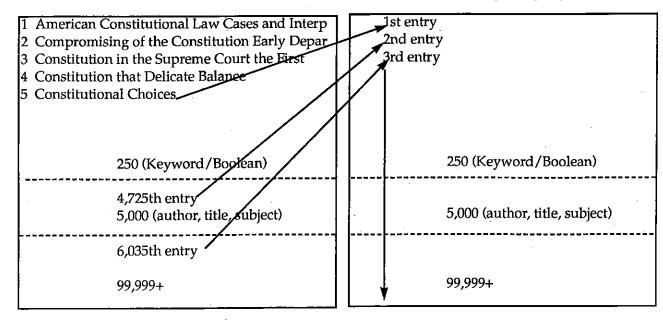
The catalog display lists all of the matching entries in all of the catalogs. Every entry that falls within the Reference Library catalog has a plus sign (+). Option #2 would provide you with a much longer list of entries than Option #1. Options #1 and #2 are illustrated in graphs on the following page.

### Option #1

#### S=United States--Constitutional Law--Interpretation

#### **Index Search**

#### **Catalog Display**

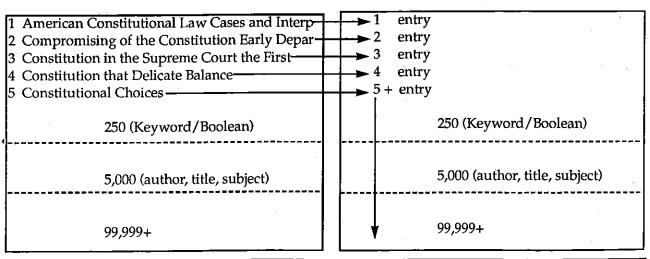


### Option #2

#### **S=United States--Constitutional Law--Interpretation**

#### **Index Search**

#### **Catalog Display**



### Tuning Suggestions for Release 5.0.1

inding optimal tuning solutions comes with experience, and is as much an art as a science. Before you tune your system, you need to consider many installation-specific factors and variables. Tuning any system, especially one with a complex application like NOTIS, requires balancing available computer resources; namely, CPU, MEMORY, and DASD.

You should evaluate any specific guidance and recommendations in light of your needs and resources. For many of our customers, the basic trial and error technique has proven most effective in obtaining maximum system performance. Our aim in offering you the following suggestions is to point you in the right direction, so you can discover what will work best for you.

Fortunately, tools are available to help you diagnose performance problems.

- CICS provides shutdown and snapshot statistics that can lead to detecting and solving problems.
- VSAM LISTCAT is an excellent diagnostic tool for database problems and preventive maintenance.
- Online performance monitors, such as OMEGAMON by Candle, are useful aides.
- Consultants from NOTIS Professional Services can provide tuning expertise.

This article covers three basic areas that you should look at when tuning your system. First, we offer some suggestions that apply to the NOTIS application and files. Next, we take up some CICS issues; and finally, we have DASD and other general tips that some sites might find useful.

#### **NOTIS Application and File Issues**

We recommend that you set the Index Control Interval to 2K and the Data Control Interval to 8K for the NOTIS system control files (LCRFILE, NSCFILE, and SCRFILE) and for the Merged Heading Index (MHI). Many customer sites have found these to be optimal settings for utilizing space and memory.

We also recommend that you regenerate the MHI (running LB310JC) to take out CA and internal NOTIS block splits, and regenerate all indexes with excessive splits. You can use LISTCAT and

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LB305 to diagnose the need for regeneration.

The NOTIS compressed indexes (all but the action, course reserve, and patron charge indexes) should specify CI Freespace=0. These suggestions for minimizing DASD space are very important for improving I/O efficiency.

#### **CICS** Issues

Tuning CICS parameters can have a significant impact on performance. The first decision you need to make regards whether you use LSR (Local-Shared Resources) or NSR (Non-Shared Resources) for a file's VSAM buffers and strings.

The LCRFILE, NSCFILE, and SCRFILE need to be in NSR (LSRPOOL=NONE). Because the MHI is heavily browsed, it is also a good candidate for NSR (MVS sites might place it in a separate LSR pool). Files placed in NSR require properly tuned BUFNI and BUFND parameters (see below under FCT Table Parameters).

#### **NOTISearch Files**

NOTISearch is a relatively resource intensive application and you should give it special consideration. The KWB files are heavily used and you should isolate them from other files for quick access.

#### Running Under MVS/XA

If you are running under MVS\XA, we have two suggestions.

- 1. We strongly suggest that you put the DCT file in a separate pool (LSRPOOL 2 = DCT), and IVT and TNX together in another separate pool (LSRPOOL 3 = IVT, TNX).
- 2. If you cannot spare two LSRPOOLS for the NOTISearch files, we recommend you put all three files (DCT, IVT, and TNX) in a separate pool (LSRPOOL 2 = DCT, IVT, TNX).

#### **Running Under VSE**

For VSE sites, we have two suggestions.

- 1. Place the DCT file in LSR, and place the IVT and TNX files in NSR.
- 2. If this is not feasible, place all three files in NSR. This option is also possible for MVS sites without memory constraints.

#### **FCT Table Parameters**

#### **NSR Files**

In NSR environments, you need to define the CICS FCT (File Control Table) parameters STRNO, BUFNI, and BUFND.

#### STRNO Parameter

The STRNO parameter defines the number of concurrent requests that can be processed against the dataset. The larger the STRNO value, the more main memory VSAM uses in the form of GETVIS (VSE)/OSCOR (MVS). To determine the optimal STRNO values, you need to examine the CICS shutdown statistics for each file and compare the number of waits-on-strings to the total number of accesses.

An acceptable total number of string waits would be around 5% of the total number of file requests for nonbrowsed files and 1% for browsed files. The highest number of simultaneous waits should be no more than two.

Helpful information on determining the optimal value for STRNO is in the IBMCICS Performance Guide.

#### BUFNI and BUFND Parameters

You also need to specify the BUFNI (number of index buffers) and BUFND (number of data buffers). The minimum value for the BUFND parameter should equal STRNO + 1.

The BUFNI parameter is related to the number of index levels in the index component of the cluster. This information is in the LISTCAT entry for the index component. The BUFNI parameter should at least equal STRNO. Optimally, if space allows, you can set the BUFNI parameter as follows:

BUFNI = the number of Sequence Set Index records + the Index level – 1

#### LSR Files

For LSR environments, we recommend that you initially set the BUFFERS and STRNO parameters in TYPE=SHRCTL to 50% of what the totals would be if you were not using LSR. Or, you may wish to code the values to 100% in the SHRCTL macro, then set the RSCLMT = 50.

These values may be adjusted as indicated by CICS shutdown statistics. In LSR, the number of

string waits may be driven down to 0% of the total number of file requests for both nonbrowsed and browsed files. Using LSR may reduce I/O due to increased look-aside of buffers in main memory. Sharing buffers also decreases the requirements for virtual storage.

For more information, refer to "Setting STRNO, BUFNI, BUFND, and (LSR) Buffers' Values for NOTIS files," by Jerry Specht in the February 1989 NOTISes, or Jay Ranade's, VSAM Performance, Design, and Fine Tuning (Macmillan,1987, ISBN 0-02-948631-9).

#### **DASD** and Other Issues

#### Strategically Placing NOTIS Files on DASD

Strategically placing NOTIS files on your DASD can reduce file I/O time. Optimally, you should place heavily used files at the head of high priority DASD strings.

The LCRFILE is a prime candidate for such optimal placement. It should also be separated from other frequently accessed files. NOTISearch files (DCT, IVT, and TNX) should be located on separate DASD strings. Also, IVT and temporary storage should be on different disks.

Look at the file access statistics to determine other higher use files. You should balance these files across separate disks and give them higher priority on the strings. Spreading out frequently accessed files across different diskpacks makes for more efficient file I/O. Any steps you take to minimize file I/O time will help improve your response time.

#### **Allocating Sufficient Temporary Storage**

Allocating sufficient temporary storage can also be a factor for improving performance. The size of DFHTEMP in 5.0.1 should be calculated by the following formula:

- 1. Take the size of DFHTEMP you used in 4.6 and add 25%.
- 2. Add to this amount the sizes of your 4.6 JABNS and JABRS (which are replaced in 5.0.1 by DFHTEMP).

The CICS shutdown statistics show the total number of CI's and the highest used CI in temporary storage. Monitoring these statistics helps to ensure you have the proper allocation of temporary storage.

#### **Excessive Paging**

Excessive paging can also result in poor response time. An average of more than five pages per second is considered excessive. If your system is paging, make sure that your CICS region/partition (virtual memory) is not too large.

Extra pages in CICS, GETVIS (VSE), or OSCOR (MVS) areas can sometimes be paged out/in unnecessarily. Don't confuse this with real memory; increasing real memory will always reduce paging.

VSE sites can monitor paging on the System Status Screen (3-6-1 in the ICCF Interactive Interface). Further information on paging can be found in the IBM *CICS Performance Guide*.

#### **Responding to Your Performance Needs**

Your performance related needs are very important to us. Although local factors prohibit us from providing definitive solutions, we are committed to helping you meet your performance goals. Our Customer Support Center phone number is (708) 866-1100, please call if you need any help.

Besides offering these suggestions for you to improve performance, we are also modifying our software with performance issues in mind. In Release 5.0.1, we increased look-aside processing for retrieving location records during item processing, and we improved how virtual memory is allocated.

In Release 5.0.2, we will improve label record processing and MHI searching. Future releases will also include performance enhancements. Below is a list of IBM courses and a short bibliography we recommend for those of you who are interested in learning about tuning and system performance.

Course Class	Number
MVS:	
CICS/ESA Measurement and Tuning	U3930
CICS Measurement and	
Tuning for MVS Systems	U3911
CICS/VS Application Performance	
Considerations	Z2713
VSE:	
CICS/VSE Basic Tailoring	S2616
VSE/ESA Measurement and Tuning	
E4215	
VSE/VSAM Performance and Design	A3755
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IBM. CICS Performance Guide. January, 1986

Ranade, Jay. VSAM Performance, Design, and Fine Tuning, Macmillan, 1987. (ISBN 0-02-948631-9).

Specht, Jerry. "Setting STRNO, BUFNI, BUFND, and (LSR) Buffers' Values for NOTIS files."

NOTISes, February 1989.

NOTISes/73 December 1991

### Results of the Online Technical Support Survey

ere are the results of the "Online Technical Support Survey" that appeared in the October issue of NOTISes. Note that totals for each question add to more than 100% because respondents could select more than one answer.

#### Connectivity

Respondents stated that they had access to the following networks:

BITNET	85%
INTERNET	60%
CompuServe	10%
USENET	3%
Prodigy	2%

#### **Hours of Availability**

Respondents indicated that they might use an online support service during the following time periods:

M-F 8am-6pm	95%
M-F 6am-8am	35%
M-F 6pm-8pm	36%
Other times	38%

#### **Cost of Services**

Respondents were willing to pay for the service in the following ways:

Long distance phone bills	65%
Hourly access charge	35%
Flat rate monthly charge	22%
No connect charge accepted	22%
Separate subscription	22%
Included in Tech Update	40%
No subscription charge	38%

#### **Desired Features**

Ranked in order of desirability, these features were favored:

Direct upload of problem report	80%
Direct download of fixes	72%
File transfer between users	66%
Public message bulletin board	57%
Private mail between users	43%
Closed message bulletin board	41%
Online teleconferencing	25%

Our conclusion as a result of the survey is that the majority of users would like an online support service to be accessible by telephone using standard modems on a 24-hour basis. Most are willing to pay long distance charges and would prefer not to use a network carrier such as CompuServe or Tymnet.

NOTIS is taking immediate action to set up a trial online system. Many of the features listed above will be included, and the system will be available by direct dial connection.

Our present plan is to offer this service to NOTIS customers for the first year without additional charge. At the end of that period, we will evaluate the cost and success of the project and may make some adjustments.

Since most users have access to the INTERNET, we have selected a combination of hardware and software that can be connected to our INTERNET gateway in the near future. We will advise you on the details here in NOTISes as soon as the system becomes available for your use.

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### Introducing the People Who Make Up Customer Šupport Services

n November's NOTISes we introduced the new Phone Support Center, which is designed to improve and expedite Customer Support Services' responses to customers' questions. The individuals who comprise the specialist teams work collectively to respond to your requests. This "meeting of the minds" enables us to respond more quickly and with a greater knowledge base to your questions. In addition, each specialist team is responsible for testing NOTIS software, which helps prepare them for

Since you rarely get to meet Customer Support Services staff, we want to present the individuals who comprise each of our teams. This month we start with the members of our team who specialize in Acquisitions, Serials, VITLS, Keyword, MDAS, and GTO.

Bill Drewett is a chief systems engineer and the team leader. Bill has held several positions for the past five and one-half years at NOTIS. Prior to his current position, he was an analyst in Conversion Services and a programmer/analyst in Development. He worked with the University of Illinois' library computer system before coming to NOTIS.



Bill Drewett, Chief Systems Engineer

These experiences give Bill the seasoning to be a knowledgeable team leader. Bill has a B.A. in English from Rice University. He received his M.L.S. from Louisiana State University, Baton Rouge, and his M.B.A. from the University of Chicago. Bill's hobbies include French language and culture, wine, and good food. In his spare time, Bill plays bridge, enjoys the opera, and is a great fan of Maria Callas.

Helen Gbala has a B.A. in geography from Central Washington State University, which provides her with a good foundation for her interest in traveling. She also has both a M.L.S. and a M.B.A. from the University of Minnesota.



Helen Gbala, Librarian

Helen started at NOTIS in September after being the head of the monographs department at the Paul V. Galvin Library, Illinois Institute of Technology. In addition to her other positions, Helen was a school librarian for three years in Liberia, West Africa. When she can't experience traveling first hand, she escapes by reading; especially science fiction.



Luis Lacayo, Systems Engineer

Luis Lacayo is a systems engineer and has been at NOTIS for two years. He attended both Harold Washington College and the University of Illinois Circle Campus, where he studied computer science. He worked at Programmers Investment Corporation before coming to NOTIS. Luis has also traveled recently. He is a member of the Army Reserve and was stationed at Ft. Sam Houston, San Antonio, Texas for three months during Operation Desert Storm.



Sandy Schmidt, Librarian

Sandy Schmidt is also a librarian on this team. Sandy likes to read, sing, and solve crossword or jigsaw puzzles during her spare time. Her three and one-half years with NOTIS have found her in the Marketing Department as a product specialist and as a librarian in the former User Services group. Before coming to NOTIS, Sandy was a member services librarian for the Bibliographic Center for Research (BCR), where she often traveled, presenting training sessions and furnishing support to customers. This experience with customer support enhances Sandy's understanding of customer needs and situations as a team member.

Chuck Spatz has been at NOTIS for more than two and one-half years. Prior to his current position as a systems engineer, he was an applications programmer. Chuck has a bachelor degree from Western Illinois University in communications in addition to a degree in data processing from DePaul University, Chicago.



Chuck Spatz, Systems Engineer

We hope these profiles help you begin to picture the personality behind the voice at the other end of the line when you contact us whether it's by phone (708) 866-1100, FAX (708) 866-4908, or Bitnet NOTIS@NUACC.ACNS.NWU.EDU. ■

# The Release Integration and Distribution Department

#### Responsibilities, Goals for the Future, and Customer Benefits

n March 1990, NOTIS formed the Release Integration and Distribution department (RID) within Customer Services. The charge to RID is to focus its energy and resources on getting a well-tested, high quality product to our customers.

Before NOTIS formed the RID department, release-related activites within Customer Services were decentralized; every department had an independent role. We formed RID to centralize and thus improve the process for releasing our products.

RID is comprised of Jim Miesse, the department's manager; John Bodfish, the quality control engineer; and Chari Wurtzel, the quality control analyst. Their responsibilities are to coordinate internal testing, package, and distribute all product releases. Their goal in meeting these responsibilities is to establish a consistent process for testing and distributing all releases to help ensure a quality product.

# **Coordinating Internal Testing Before** and After a Release

After Systems Development completes a new or enhanced product, RID coordinates the internal testing process.

The first step is to create a test team consisting of representatives from each department in Customer Services. Each department brings unique experiences and perspectives to the testing process, helping to ensure that our products meet your needs. This testing method has an added benefit of familiarizing our Customer Services staff with a release prior to its distribution.

Another way RID ensures thorough testing is to train the test team. The quality control analyst is responsible for training staff; both individually and in classes.

Creating a task list is the next step of the testing process. The task list is a list of new and changed functions in the system to be tested, which is broken down into priorities. The priorities are based upon the risk to customers if a function should fail. The highest priority functions receive the most testing resources.

After a product is released, RID coordinates internal testing for changes to any programs. All changes must be tested before they can be published in the Support Solutions column (formerly Troubleshooting).

#### **Packaging the Release**

Packaging the release includes the following tasks:

- verifying the contents of the distribution libraries for completeness and accuracy
- writing and testing the sample JCL supplied with each tape to assist you in unloading the tape
- writing and testing the "GET" job, which is supplied with each product tape and completes the unloading process
- providing all the necessary information to include in the Installation/Upgrade Instructions for each product release

When a product tape is created, RID uses the listing to verify the contents. For the first time, RID supplied customers with sample unload JCL. This helps to ensure consistency, which in turn, makes it easier for you to get help if you have problems unloading the tape.

The "GET" job creates files, and on MVS, it creates libraries. RID writes the "GET" job so that when the software arrives at your site it will perform as much for you as possible. This leads to consistency and the assurance that the software is working the same way at every site. It also reduces the amount of work that needs to be performed locally.

The RID department, in conjunction with Documentation Services, is now supplying you with instructions that will provide you with all of the information you need to install or upgrade your new release.

#### **Distributing the Release**

The RID department is responsible for distributing all of the software shipments and supplying MDAS sites with their database authorization information. This process includes creating tapes for each eligible site and gathering all accompanying material. An assembly line process is used to box the shipment and prepare it for courier delivery.

## **Goals for Future Releases and Customer Benefits**

RID's primary goal is to establish a quality process and to continue to improve. Consistency provides a base from which RID can identify and analyze any problems, thus targeting and measuring improvement.

Creating a comprehensive and consistent test plan and taking the time to train people in how to test software is a major effort on RID's part to maximize the quality of the software. RID began this effort in Release 5.0 and will continue to improve upon it in future releases.

Finally, RID hopes that consistency provides you with a solid basis to express your expectations in specific terms and for us to better understand those expectations and make adjustments to meet, if not exceed, them. Focusing RID's energies on getting a quality product out the door will benefit everyone. As always, we strongly encourage you to continue to let us know where we could do better and where we are succeeding.

# Our Policy for Distributing Source Code

OTIS makes a practice of distributing mainframe source code for our generic product lines. This practice has always been mutually valuable for us and our customers. We want to take this opportunity to express our firm commitment that we will continue to provide you with source code. We also want to explain our current source distribution policy.

Mainframe source code falls into one of three distribution categories.

The first, and by far the largest, category consists of those modules for which we always and automatically distribute source.

The second category consists of programs for which source code is available, but is not automatically distributed. This category consists of the modules that operate our system control file, which is the file fundamental to properly operating the entire system.

Because of the integrated nature of NOTIS software, making local changes to source code other than at our direction, contains an element of risk. Since locally modifying any of these modules jeapordizes system level operation, the code is available in source form only upon a written request in which you acknowledge that you understand the risk involved.

The final category consists of about seven percent of the total mainframe modules in our product lines. Source code is unavailable for the modules in this category.

Because of our contract with the vendor who supplied the base programs for our NOTISearch engine, all Keyword/Boolean modules fall into this category. And because MDAS pricing is based on the number of databases that are locally mounted, the modules that validate that number are withheld from distribution.

In summary, source code is currently available for more than 90% of our generic mainframe programs. We understand how valuable it is to you to have access to that percentage of source.

### Solutions for the Future

#### **NOTIS' Customized Consulting Fits Your Needs**

OTIS' Professional Services offers a wealth of consulting services. Our services are designed to help you use your time to its best advantage and to help you significantly reduce costs in areas where your staff does not have the time to manage essential library automation projects.

Sometimes, your multiple job responsibilities make it impossible to devote enough time to install a new release, new module, or other NOTIS products. NOTIS' Professional Services staff offer their proven expertise in a variety of consulting services that are specifically tailored to fit each of our customer's needs. NOTIS evaluates the unique needs of a site and provides expert consultants to guide the customer through each critical phase of the project—from initial planning to final implementation.

For example, Trenton State College recently purchased a package of NOTIS' consulting services and found the experience to be rewarding beyond their expectations. This array of specialized services was designed to help a new NOTIS customer install a Library Management System (LMS) quickly and with less trouble than if they'd done it themselves.

Citing the uniqueness of the services provided, and the expertise of the individual consultants involved in their project, Dr. John King, Associate Vice President of Information Services at Trenton State said, "Unlike other vendors who come in with canned training, the initial visit makes the consulting valuable because it allows the customer to define the specific needs to be met. NOTIS has also presented standardized training as well as consulting, but the consulting is designed specifically for each customer."

By taking advantage of Professional Services' consultants to manage their LMS installation project, Trenton State successfully eliminated staff overload and saved money. The project will be completed in record time, which drastically reduces certain anticipated staff costs.

With Professional Services' help, Trenton's library personnel can more quickly learn the intricacies of the NOTIS system. Using Professional Services' consultants to plan and implement the project at Trenton proved to be cost effective because the consultants helped to increase productivity, decrease implementation time, and reduce unnecessary stress on the library staff.

Saving money is only one of the advantages of using Professional Services' consultants to help you install new releases or refine your operation. Library patrons will have much quicker access to the new or enhanced features of the system, which will greatly increase patron satisfaction. Furthermore, library productivity improvements, which are associated with a new release, will occur more quickly and allow your staff to devote more of their time serving patrons and performing other daily activities that increase user satisfaction.

Consulting and specialized training is available for all modules of the Library Management System (Cataloging, Authorities, Circulation, Acquisitions, OPAC, and Serials), as well as for GTO, MDAS, and the new products being offered by NOTIS, such as, PAClink, CheckMARC, MDAS loaders, and QuikMerge.

Professional Services can provide expertise in the system and its functionality, as well as provide a fast track to help you implement a new module or product. We can help you fine tune the technical aspects of NOTIS and CICS in preparation for installing Release 5.0, or we can provide your technical staff with an advanced level of knowledge about NOTIS software and CICS.

To take advantage of NOTIS Professional Services' consulting, call (708) 866-4853 or FAX (708) 866-4908. We will conduct a short interview to assess your needs to determine the best consulting services for your specific situation. ■

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# Site Assessments are Being Offered by Professional Services

Professional Services site assessment will provide your library or computer center with an analysis to help you maximize your use of the NOTIS System.

Some of the benefits we are offering to you are listed below.

- Productivity/Workflow—Let us assist you in identifying and working through trouble spots.
- Features/Functions—We can streamline your current workflow.
- System Performance—We will show you how you can use the NOTIS System to its fullest potential.
- Service Evaluation—Usage studies can be provided or analyzed to maximize the benefits you receive from NOTIS.
- Training/Staff Development—Does your staff have the training they need to meet current release requirements? They will benefit from the advanced training we offer!
- Administrative Operations—Can relationships be improved? Does the library receive adequate support from the computer center? We will help you in an attempt to resolve those conflicts.
- Implementation Issues—Let us help you deal with, manage, coordinate, and facilitate the process of bringing your system up to the current release level.
- Hardware—Plans for using your hardware that meet your technical objectives will be delivered.
- Budget Professional Services can help your library become more cost-effective!

Call one of our Professional Services Consultants at (708) 866-4853 to find out more about this valuable service. ■

# CheckMARC Workshop is Coming to Summer ALA

The Professional Services Group is sponsoring a workshop on the new Serials check-in system, CheckMARC, at the June 1992 ALA Conference in San Francisco. Check future issues of NOTISES for further details.

# Q's and A's about the New Serials Control Screen Designs

This is a list of questions and answers about the new screen designs. Second part of a series that will be published in future issues of *NOTISes*.

#### Prediction

- Q. How does the system predict the date of the next expected issue?
- A. The system uses the frequency code, the grace interval, the first expected date of receipt, any other caption/pattern data defined, and the actual receipt history associated with the caption/pattern record to predict the date of next receipt. If there is no frequency code, the system uses the receipt interval, the grace interval, the first expected date of receipt, any other caption/pattern data defined, and the actual receipt history to predict the date of next receipt. Algorithms in the system are applied against the receipt history to adjust the prediction process to reflect reality. Those programs do not affect or change the data you enter in the caption/ pattern record. If you create a new caption/ pattern record, the system uses only that portion of the receipt history associated with the new caption/pattern record.
- Q. Can I set up prediction for an irregular?
- A. Yes. You pick the "irregular" frequency on the caption/pattern record and set a receipt interval.

#### **Receive New Items**

Q. Will I be able to use LSER for check-in for some locations and the order/pay/receipt record for check-in for other locations, even when the locations are part of the same copy holdings record?

A. Yes.

- Q. Will the ability to scan a SII or UPC barcode be added to the order/pay/receipt record for check-in?
- A. No.
- Q. Many of our serial titles do not arrive in the proper order. How will the system handle this?
- A. LSER is designed to let the operator checkin whatever issue is in-hand. If the next expected issue is not the same as the one actually received, the operator tabs to the appropriate enumeration and/or chronology data, types in the data from the issue in-hand, and proceeds in exactly the same manner as though the operator was receiving the next expected issue. The system does issue a message asking the operator to verify modifications and the operator must press the ENTER key (not PF10 as would be used otherwise) to continue.

If the issue received was a missing older issue, the system updates the receipt status to "RC", lists the issue on the "late/claimed" report, (provided that it really is late in arriving) and preserves the actual receipt date in the receipt history.

If the issue received is a "future" issue, the skipped issue(s) (i.e., the issue the system had predicted as the next issue expected) is listed on an exception report as a "skipped" issue(s). If the "skipped" issue does not arrive by its expected date, the system lists the issue on an action list for a possible claim.

The system is smart enough not to include issues received out of order on a report if all are received within the same time period before the production of the next one.

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- Q. What are the PREV PATTERN and NEXT PATTERN functions on the Receive New Materials screen?
- A. These are no longer there. There is now a DIFFERENT PATTERN function that permits entry of caption/pattern data different from that used for the next expected issue. This permits receipt of an issue that uses another caption/pattern record. If the system cannot find a caption/pattern record that matches, it supplies a message and blocks receipt. At that point, the issue should be set aside and investigated later; it may require creation of a new caption/pattern record.
- Q. If the check-in clerk wants to receive an issue different from the one expected and changes the enumeration data, must s/he also change chronology information or will the system automatically supply the correct data?
- A. It's a great idea, but the answer is no, not in this release. You must correct all applicable data before receiving the item.
- Q. Is there a way to ask for data on a missed or future issue on the Receive New Materials screen rather than filling in the enumeration/chronology data for an issue received out of sequence?
- A. It's a great idea, but the answer is no, not in this release. You must correct all applicable data before receiving the item.
- Q. What displays for an author/title/series search in LSER?
- A. The results of a jx search in the headings index, i.e., a universal dictionary search. If you select from the index display a record that does not have caption/pattern data established in LSER, the system does not allow you to go further.

- Q. Can selection of the Processing Action screen be displayed after the actual check-in record since you often won't know if the issue in-hand is a new or outstanding item until you see the record?
- A. For a new title without established caption/pattern data, the operator will see on the Record Selection screen or the resulting index display an appropriate message whenever there is no established caption/pattern data for the title. At that point, the operator will probably just continue with other checkins. Such a person will frequently not have the authority to create caption/pattern data. S/he would set aside the issue for someone else to process.

If the issue is one that has been claimed, the operator will see immediately if it is one that does not match the next expected issue, will tab and change appropriate data, and then receive the issue. An operator may check-in at any time any issue of any currently-received serial for which there is appropriate caption/pattern data. If it is a missing issue checked-in late, the issue is listed on the late/claimed exception report.

If the late issue was received under a different pattern than the current one, the operator presses the DIFFERENT PATTERN function key and enters the enumeration/chronology data for the issue in-hand. Assuming the system can match the pattern against a caption/pattern record for the location, the issue can then be received. It would then typically appear as a late/claimed issue on an exceptions report.

- Q. Is there a direct way back to the Processing Action screen that would apply to any screen in LSER?
- A. You can always press the CLEAR key and restart from a blank screen if you think that is faster than following the command prompts and using the function keys to back up. From a blank screen, you can in fact type LSER xx n to go directly to the Record Selection screen if you know the appropriate

processing unit code (xx) and the number (n) of the processing action (of which there are only seven).

- Q. At what point(s) can you cancel the check-in transaction?
- A. You must press the PF10 key at least twice to receive an item. At any time before that point, press either the CLEAR key to exit LSER or the function key identified on the screen for CANCEL or RETURN (the latter taking you to the previous screen). In some cases, CANCEL returns you to the previous screen so you can restart or perform other functions.
- Q. If several copies have already been received, is there some indication on the Receive New Materials: Expected Copies screen as to what locations have already received copies?
- A. Yes. Assume you expect more than one copy, receive only one, and check it in. The system automatically assigns it to the first location in the receipt priority sequence. When the missing copy arrives and you display the Receive New Materials screen, the system will have adjusted the number of copies expected and displays only the locations that have not yet received their copies.

If you attempt to receive an issue and the location already has its copy, the system prevents duplicate check-in. However, if you have in-hand more than the expected number of copies for any one receipt transaction, the system receives the appropriate number of copies for the locations and lists the others on an exception report as duplicates—thus alerting the supervisor to the possibility of a misdelivered issue (if you have multiple receiving units) or an incorrect subscription order.

Q. If more than one issue of a serial is received at one time, can all be entered at once or must the steps be repeated for each issue?

- A. Each issue must be checked in separately. However, multiple copies of one issue may be received in one receipt transaction—assuming the operator is authorized to receive for the locations involved.
- Q. Where are the action codes (used on the Receive New Materials: Expected Copies screen) listed? How do I use them?
- A. They are listed on the help screen (press PF1). You type a code in the ACTION column opposite the copy statement. Action codes will permit you to receive copies out of the default receipt priority (R) or update the check-in note (U).
- Q. Speaking of the PF2 key to display bibliographic data, what displays there?
- A. A labeled display of certain fields of the bibliographic record. It includes all of the vital data for a serial title: frequency, standard numbers, titles, continues/continued by, etc.
- Q. Can I choose what will display there and what labels?

A. No.

- Q. Is the labeled view of the bibliographic record in LSER the same as in the OPAC?
- A. No. The OPAC displays are separately defined in LSYS.
- Q. If I have multiple copies in-hand to check-in, can I check them in all at once? Even for all the applicable locations?
- A. Yes and yes. Of course, you must have authorization to check-in for all of the locations. You will see only those locations for which you have authorization to receive copies.

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- Q. What happens if I expect to have multiple copies of each issue for multiple locations and not all arrive on the same day?
- A. The check-in clerk receives whatever issues are in-hand. If fewer than the expected number of copies are received, the system uses the receipt priority order to assign the available copies to the locations. When the missing copy(s) are checked in, they are assigned to the remaining locations as appropriate.

If any of the copies have not arrived by the expected date, the system identifies them on a report as late so they may be claimed. Also, the system adjusts the number of expected copies according to previous receipts and displays only the locations with the missing copies.

- Q. Where does a "shelved as" title appear for staff at check-in?
- A. In a check-in note if you decide to display it there. It could also display as a copy level note as entered in the copy holdings record.

#### **Holdings Display in OPAC**

- Q. How will current receipts and retrospective holdings display in the OPAC? Will the MHLD record be used? LSER? What about receipt statements from order/pay/receipt records?
- A. See the end of this document.
- Q. Can you use LSER but suppress receipts from OPAC by individual copy/location?
- A. Yes, just like you do now by using the classification type code Z.

### Relation to LTXX Transactions and Records

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Q. How will we be able to check receipt data when processing invoices for renewal?

A. The vendor invoice tape load programs will read receipts from LSER so as to give you warnings when there have been no recent receipts, just as it does now. Payment data does not display in LSER, although any data deemed critical can certainly be put into note fields in LSER.

Vendor invoice tape loads will continue to work with the order/pay/receipt records if they are used for check-in instead of LSER.

- Q. Will payment and claims for serials be done in LSER?
- A. No. With this first release, you will continue to post payments and issue claims from the order/pay/receipt record.
- Q. If I've claimed a back issue, how will I be able to update the claim statement in the order record if I'm checking in the issue in LSER and cannot see the order record?
- A. If an issue is received late, it is listed on an exceptions report. That list can then be checked by acquisitions personnel. Or acquisitions personnel can wait until they receive the Expired Action Request List and then check the receipt history in LSER for the issue's status.

If you updated the check-in note in LSER, the operator would be alerted to either update the order record (if authorized) or send a screen print to the proper staffer when the claimed issue arrives. This clearly requires more online keying than the above suggested method.

- Q. Where information contained in LSER duplicates data contained in other NOTIS records, will there be a machine transfer of data? If so, to what extent?
- A. There is no machine transfer of any data from any NOTIS record into LSER. ■

# NOTIS Regional TECH1 Circulation Training Session Hosted by SMU

he Professional Services Group is offering a two-day regional training session on the online process of circulation and the batch and recovery techniques for this module.

This session has been designed for NOTIS Tech1s, and it will be offered at Southern Methodist University in Dallas, Texas on February 6 and 7, 1991.

Registration is limited to 30 people on a first-come, first served basis. Cost for this class is \$420.00. Lunch will be provided both days. In order to accommodate our host site SMU, please call Cathy Kolinski at NOTIS at (708) 866-4853 if you are planning to attend.

To register, please fill out the form on page 21 and mail it with your check to the address on the form.

To secure a room you can call either of these hotels in Dallas:

Colony Parke Hotel

6060 N. Central Expressway

Dallas, TX

Phone: (214) 750-6060

The Colony Parke Hotel has a bus that runs to the SMU campus and the rates are reasonable.

Hilltop Inn

5600 N. Central at Mockingbird

Dallas, TX

Phone: (214) 827-4100

	AGENDA	
February 6, 1991	er de deutsche der State der St	
8:30-9:00 am	Registration	
9:00 am-12:00 pm	Online circulation	
	Use of tables and LSYS to define circulation	
	Circulation Transactions	
	a) Programs	
	b. Files used and updated c. Journal 6 and Action Index	
1:30 pm-4:30 pm	Nightly Batch (LB010 and LB610)	1884 S. S. S.
1 1 1	Customization of batch jobs	
	a. LB605TBL	
	b. LB620	
	• Run option for LB010 and LB610	
	a. Rerun parameters	
	b. Error recovery • LB650, LB680, and LB682	
	a. Run LB610	and the
		72.7
February 7, 1991		200
9:00 am-12:00 pm	LB610 Review	
	Reports and error messages     Impact on online file	
1:30 pm-3:45 pm	Patron Batch Processing	
L Fr	LB510: Patron Batch Load	
	Bill and Fine Purge	
	Patron Purge	66
3:45 pm-4:30 pm	Question and Answer Period	

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# Trinity University to Host Full-Day Session on Circulation Library Control File Records

he Professional Services Group is offering a full-day session on Implementing NOTIS circulation using Library Control File Records and the Library Control System (LSYS). Conducted by Ben Schapiro, the session will focus on issues and techniques for entering, updating and testing LCR data for the circulation module.

The second half of the session is a hands-on exercise with attendees entering and testing their local values in the Library control System.

The session is being offered in cooperation with Trinity University in San Antonio, Texas on Friday, January 24, 1992. Cost of the workshop is \$250.00. Registration is limited to 15.

To accommodate our host site, Trinity University, please call Cathy Kolinski at NOTIS at (708) 866-4853 if you are planning to attend.

In order to register, please fill out the form on page 21 and mail it with your check to the address on this form.

To secure a room you can call either of these hotels in Dallas:

Colony Parke Hotel

6060 N. Central Expressway

Dallas, TX

Phone: (214) 750-6060

The Colony Parke Hotel has a bus that runs to the SMU campus and the rates are reasonable.

Hilltop Inn

5600 N. Central at Mockingbird

Dallas, TX

Phone: (214) 827-4100

	AGENDA		
8:30-9:00 am	Registration	and the second s	Section 1
9:00-9:15 am	Introduction		
The state of the s	<ul> <li>Introductory remarks, review objectives, review agenda</li> </ul>		
9:15-11:30 am	Implementing NOTIS Circulation	10 m	100
	Tables and library control file records		
Page 1	<ul> <li>Institution groups, processing units, service units and</li> </ul>		
2 m	patron groups and tables		
	Patron group table and control file record	and the same	
	Patron category control file record		
	Item loan code control file record		
50 000	Location and circulation value control file records		89
	Calendar control file record  The second of the secon		
	Fine reasons and functions control file record  The reasons are record for the record file rec		
100 Carlos	Loan/Overdue policy control file records     Circulation situations - 1 1 11	a es	100
7.00	<ul> <li>Circulation situations control file records</li> <li>Loan and overdue policy logic</li> </ul>		
	Operator security		
11:30 am-12:00 pm	Circulation Module Logic		2006C
11.00 din 12.00 pin	The charge/discharge process	150,000	
12:00-1:30 pm	LUNCH		
1:30-4:00 pm	Entering and Testing Circulation Values		
1	Hands on entry and testing of local circulation values		
1:00-4:30 pm	Review, Discussion and Wrap-Up		
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	NOTIS Professional Services Group	
	REGISTRATION FORM	
er.	Please use a separate form for each attendee. (Photocopy as necessary)	
	Name:	
	Organization: ——————	
	Address:	
	City:	P 75 5
	State: Zip:	
	Telephone:	42
	Workshop/Seminar:	
	Date:	
	Amount Enclosed: ————————————————————————————————————	
	Mail with payment to: NOTIS Systems, Inc. P.O. Box 95657 Chicago, IL 60694-5657 Attn: Cathy Kolinski	55

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# Support Solutions

This column is a regular feature of NOTISes. Support Solutions contains program changes, documentation changes, and important tips for all NOTIS products.

Make the program and documentation changes each month when you receive your copy of NOTISes, carefully following the instructions that we provide. All code and documentation changes will automatically be included in any future releases/updates of the appropriate NOTIS product or manual. Tips are periodically indexed and reprinted in a manual made available to all customers.

Thanks to the following sites for contributing to this month's column by contacting the Customer Support Center.

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#### I. Code Solutions

#### LMS

Release Level: 5.0 & 5.0.1 LB320BAL Source Member: MVS & VSE Operating System: Description:

"LC Number invalid" message from LB320030 step in LB320JC for 010 fields

lacking a trailing blank

PTS Number(s):

PPO4054

Make the following change to LB320BAL:

R14,R9 TM FLAGS, X'80' A160 BZR14,=F'11' change B300

MVS sites should reassemble LB320BAL using the ASMBTPG1 proc; VSE sites should reassemble LB320BAL using the ASMBOBJ job and relink using the LB320LNK job.

Release Level: Source Member: Operating System: Description:

5.0.1 LPC220P MVS & VSE

Storage violation in LPC290P when copy note

begins with blanks

PTS Number(s): PPO3832

1: Make the following insertions in LPC220P:

HD51 EQU LMIOFUNC, LMIOGET LMIORC, LMIOROK LMIOKEYT, IMIOTKEY LMIODDNM, =CL8'LCRFILE' XC LMIORECA, LMIORECA IMIORECL, LMIOREC XC LMIOKEY, LMIOKEY LCRKEYTP, LCRPACKY LCRSLANG, OPACLANG MVI LCRSCSET, PCICOPY LRR1,R3 insert HD51LOP1 EQU 0 (R1),C' CLI insert

NOTISes/73