NOTISes

For users of NOTIS library information systems

JANUARY 1992 • Number 74

News about the BRS Search Engine

Prior to 1990, we had an agreement with BRS to include their search engine in NOTIS software. This made it possible for us to add keyword/Boolean search capabilities to our products.

We continued to ship BRS search software until this year when we installed an alternative search engine, NOTISearch. Functionality, service, and licensing fees to NOTIS were the leading factors in our decision to offer a new search engine. Distributed to all customers in Release 5.0.1, NOTISearch provides the same functionality and the same user interface as the BRS search engine while adding new features including additional Boolean operators and upper/lowercase qualification for more precise retrieval results.

Because we have a perpetual license for NOTISearch, we can assure stability and continuity of our product at your site. Owning the license also means we can control costs. With NOTISearch, we are able to contain costs and also offer you more flexible pricing. For example, we can now offer attractive prices to the members of a consortium for MDAS.

Finally, making NOTISearch a part of our software package allows us to plan for future innovation in our products.

In December of 1991, Maxwell Online, the parent company of BRS, terminated the arrangement that allowed us to incorporate the BRS search engine into our software. When Maxwell terminated the agreement, the company stipulated that all our customers must remove the BRS search engine from their NOTIS application by August 2, 1992.

We strongly urge those of you who have not installed NOTISearch to do so as soon as possible. Maxwell has asked us to certify that you have removed their software by August 2, 1992. Watch future issues of *NOTISes* for further information on the certification process. ■

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BULLETIN

Photographs of Customer Support's Circulation & CICS/VSAM team on p. 4 &5.

NOTIS NEWS

NOTIS Beta Tests NOTISrv

Our New 24–Hour Online Bulletin Board Service

We are pleased to announce the beta testing of NOTISrv (NOTIS Serve), our new 24-hour online bulletin board support service. We'd like to thank the following beta test sites for volunteering to help us:

- Angelo State University
- Oklahoma State University
- Southern Methodist University
- University of Texas—Dallas

The first files we loaded into the database were sample PTS records and DocAlerts. Eventually we will add JCL and code changes, as well as tips from the Support Solution column. Among the features now being tested are keyword searching and direct downloading of files. Other features that NOTISrv can provide include:

- direct upload of problem reports
- file transfer between users
- public and private message bulletin boards
- private mail between users
- online teleconferencing

NOTISrv does not replace any of our existing support service or documentation. This bulletin board service will be offered at no charge for one year and is part of our continuing effort to provide information and support to you in an efficient, timely manner. A mailbox address, like the NOTIS Bitnet address, will be available so you can directly communicate support issues and questions to us.

Access to NOTISrv will be offered to Tech1s and Lib1s. We will mail dial-up and sign-on instructions to all registered Tech1s and Lib1s. We also intend to provide user support and documentation as we move into production.

Your response to our Online Technical Support Survey made this service possible. Thank you for taking the time to help us better serve you. Look for more details about NOTISrv in future issues of *NOTISes*. ■

NOTISes

NOTISes© is published monthly by the Documentation Services department, NOTIS Systems, Incorporated. The purpose of *NOTISes* is to provide timely, helpful, and accurate information about NOTIS products and services to the NOTIS user community.

SUBSCRIPTIONS: Subscriptions are available to NOTIS users at the rate of $65 for one year by calling us at (708) 866-0150 or writing us at 1007 Church Street, 2nd Floor, Evanston, Illinois 60201-3622.

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.

NUGM'92

October 8–11 • Palmer House

New Dates for NUGM 1992

We are shifting NUGM 1992 toward the end of the week rather than at the beginning as it was originally scheduled. We are rescheduling NUGM because Yom Kippur, a Jewish holiday, falls on Wednesday of that week.

We sent a survey to SIG Chairs and NUGM planners, and their overwhelming response was to hold NUGM '92 from noon on Thursday, October 8 to noon on Saturday, October 10. NUGM workshops will be held on Sunday, October 11.

Of course, we will keep you posted on details as NUGM gets closer. ■

ALA Midwinter Conference Schedule: Come and See Us

Come visit with NOTIS staff at booth #573 in the San Antonio Convention Center during the ALA Midwinter Conference, January 25–28, 1992.

We'll be demonstrating new serials control, location-based catalogs, and PACLink.

Several of the Special Interest Groups will be meeting in San Antonio as well. Come by the booth if you need the meeting schedule. ■

Do You Have These Titles?

User Update #30
User Update #31
Technical Update #20

If you have a user or technical documentation subscription, and you haven't received these titles, please call Jutta Kehoe in Documentation Services at (708) 866–0199. ■

Have You Received NOTIS' Newest Chart?

By now, you should have received your LMS Key Chart. It was sent out in User Update #31. This chart serves as a quick reference guide for navigating the NOTIS system.

The Key Chart covers the cursor keys, the function keys in staff mode, the special character keys, and the editing keys for NOTIS. It also briefly explains transaction codes.

The LMS Key Chart is similar to the LMS Command Chart, which lists the NOTIS commands and provides a brief description of each command. Both of these charts are only sold in bulk quantities (minimum order of 25).

If you'd like to order more copies of either the LMS Key Chart or the LMS Command Chart, you can call Jutta Kehoe in Documentation Services at (708) 866–0199. The prices for additional copies are as follows:

# of Copies	Price
25–49	$.70 each
50–100	$.60 each
over 100	$.50 each ■

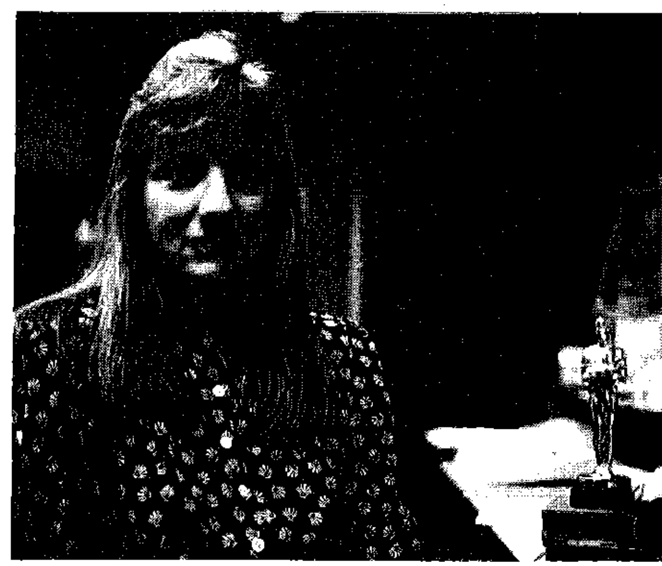
Meet the People Who Make Up the Customer Support Services' Circulation and CICS/VSAM Team

Customer Support Services focuses on the Circulation and CICS/VSAM team this month. Any questions you have concerning circulation or CICS/VSAM are directed to this team. When the person taking your call is unable to provide a resolution, this specialization team works together to locate an answer.

Chris Cegelis, team leader for Circulation and CICS/VSAM

Chris Cegelis is the team leader for Circulation and CICS/VSAM. She received her bachelor's degree from Florida State University in International Relations. Chris is attending Roosevelt University for a master's degree in Organizational Psychology.

Chris' background of 13 years in data processing includes system programming, consulting, and management. This diverse background is one reason why Chris is an effective team leader. When she's not working, Chris enjoys reading, especially mystery novels, and when time permits, she likes to travel and go camping.



Paula Cates, Systems Engineer

Paula Cates has an associate degree in computer programming from Miami Dade Community College. She has been at NOTIS for six months. Before NOTIS, Paula was the manager of sales and marketing systems for Hyatt Hotel Corporation.

Throughout her career Paula has worked extensively in programming. Her experience with IBM mainframe systems furnishes a solid background to help her debug programs. When she is not participating in aerobics, Paula enjoys reading and music.

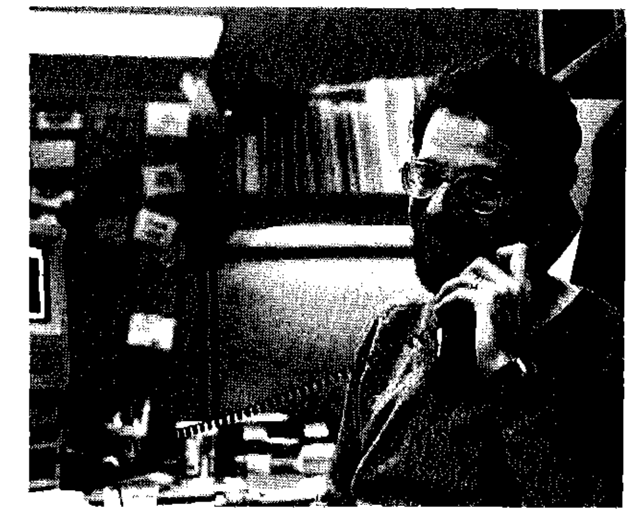
Gina Lacava, Systems Engineer

Gina Lacava is the most recent member of Customer Support Services. She came to NOTIS after working with the Allstate Insurance Company. Gina's career has prepared her for working in Customer Support Services because she has done intricate programming, and she has worked with customers performing situational analyses, determining their needs, and providing solutions for them.

Gina obtained a bachelor's degree in math from the University of Illinois. Gina's hobbies are quite different from her career. She is a violinist with the Northwestern University Philharmonic and also plays chamber music, specializing in piano quintets and string quartets. Gina speaks fluent French, is currently studying Italian, and enjoys traveling abroad.

Ben Schapiro received his library degree at Columbia University School of Library Service concentrating in reference. Ben began his career at NOTIS five years ago in the former User Services department.

Prior to his career with NOTIS, he was employed as head of circulation and reference at National College of Education. Ben finds circulation a fascinating and challenging area of library science.



Ben Schapiro, Customer Support Coordinator

Although these people have diverse interests, they have one united goal, to provide customers with timely, accurate answers. This specialization team is awaiting your call. If you have any inquiries on circulation or CICS/VSAM, call (708) 866–1100, FAX (708) 966–4908, or Bitnet message (NOTIS@NUACC.ACNS.NWU.EDU). ■

Professional Services Successfully Decreases Response Time for Texas A&M

When is the best time to call the NOTIS Professional Services Group for technical consulting help? Before you begin introducing the next release? When you are in the middle of installing Release 5.0 or 5.0.1? After you have exhausted local system knowledge? Any of these times may be an appropriate time. Texas A&M decided to call upon Professional Services after going into production with Release 5.0, because they wanted to decrease the overall response time of the system.

Texas A&M installed NOTIS Release 5.0 so they could take advantage of the many new features and enhancements it offers. They particularly wanted access to the new functionality of 5.0 and to the improved display of bibliographic records.

Because of the large number of programs and systems being used throughout the university, their computer was at about 80% of its capacity (IBM suggests that usage be limited to around 70% of capacity, if possible.) Adding Release 5.0 to an already overburdened machine caused a noticeable increase in response time.

"A lot of response time issues have to do with overall system load. We were sort of the final straw on the camel's back, on a very heavily loaded machine," reported Anne Highsmith, the NOTIS Coordinator at Texas A&M.

Texas A&M Knew They Could Benefit from Professional Services' Expertise

The Texas A&M staff knew they could benefit from the expertise of NOTIS Professional Services. Within five days of calling NOTIS, Dave Dempsey, Senior Engineering Consultant, arrived on site. Armed with years of knowledge and experience with CICS and NOTIS software, he was well-equipped to find a solution.

Dave evaluated the entire system using daily reports, transaction logs, and dumps from several nights' shutdowns, and quickly confirmed that loading 5.0 to the system configuration had contributed to the increased response time. He identified a number of areas where the system would respond to tuning and recommended changing the allocation of files, changing options in the CICS environment, and moving files from one disk pack to another. These changes significantly improved CPU utilization and dramatically reduced overall response time.

Dave's technical expertise with CICS and experience with NOTIS software helped Texas A&M use their existing computer resources better. He also helped to reduce pressure on the staff by allowing them to shift their focus to other critical tasks while he worked on finding these solutions.

The right time to request Professional Services' consulting is anytime your library needs specialized assistance.

When asked how the staff could have found a solution to increase the response time themselves, Anne replied, "We would have tried many of the same things that David suggested, but it would have taken us longer to decide what we needed to do. It would have taken longer to implement because there would have been a lot of telephone consulting with NOTIS discussing what is appropriate, 'Should we go ahead with this plan? Is this going to make a difference?' David came in, looked at the environmental information, and was able to say, 'This is what I see you can do with it. These are the things appropriate to do within the context of the NOTIS software to tune it.'

We may have gotten to the same point, but it would have taken a great deal longer. I think we're talking about several weeks, if not a couple of months. That is in comparison to what we accomplished with David on site in two days with a couple of telephone follow-ups. The big difference is that I don't know if the Data Center would have been able to give us that much time because it [response time] was having so much impact."

Professional Services' customers know in advance all the costs of a consulting visit

Professional Services' customers know in advance all the costs of a consulting visit (even customized training programs and specialized programming services), and know exactly what services will be delivered. Anne was pleased with the treatment of the consulting contract.

"David faxed me a very reasonable contract beforehand, which had a list of points in it as to what we were to provide, what NOTIS was to provide, and what additional support would continue to be provided (telephone support, etc.) after his onsite visit. It was exactly what I was looking for in terms of a description of the project. I think all points on that were fulfilled."

Anne said she would recommend this type of consulting to other NOTIS sites because, "...this visit was very successful. It was worth it because it made a difference."

The right time to request Professional Services' consulting is anytime your library needs specialized assistance. When you have staff or time limitations for implementing a new release or installing a new feature, when you need a fresh perspective on a technical situation, or when you would like post-production input on how conditions might be improved, Professional Services can provide solutions for the future.

Professional Services' consulting will save money for your institution by getting projects completed in a minimal amount of time with NOTIS expertise and freeing your staff to work on other important tasks. These services are no further away than the phone. Call (708) 866–4853 or FAX (708) 866–4908 for an initial interview to arrange customized consulting for your specific needs. ■

NOTIS Customer Support Environment and Supported Products for 1992

BRS has recently terminated its agreement with NOTIS. BRS is the vendor for the NOTIS keyword search engine we used prior to NOTISearch, the Release 5.0.1 engine.

The termination of this agreement means that by **August 2, 1992,** all NOTIS customers must have installed NOTISearch as their keyword search engine.

After August 2, 1992, no copies of the BRS search engine may be in use with NOTIS software, and support for the BRS engine must also cease. NOTIS will make every effort to work with customers to help with the transition to Release 5.0.1 of the library management system.

NOTIS Customer Support Services has upgraded its support environment pursuant to the October general distribution of NOTIS Release 5.0.1. Support staff is now testing your reported problems in a 5.0.1 environment (that is, with the NOTISearch keyword engine). Previously reported requests or problems that have been resolved with 5.0.1 have been closed.

We issued new releases of many NOTIS products in 1991, and support for prior releases will cease, as is usual, one year after the general distribution of the new release. Below are the deadlines for when NOTIS products will be supported:

1. all 4.6 versions of the LMS will be unsupported after April 1, 1992
2. GTO 2.1 support will cease March 1, 1992
3. MDAS 1.1 support will end effective July 1, 1992

NOTIS Customer Support staff at (708) 866–1100 will be happy to assist you with any questions you may have about the timetable for support. Professional Services staff at (708) 866–4853 is available if you would like to investigate a "fast-track" upgrade project to assure that all your NOTIS products are kept at supported release levels. ■

We are Redesigning Release 5.1 to be Consistent with NISO CCL

We are responding to your requests for standardization and full support of the NISO Common Command Language (CCL) in Release 5.1 by including modifications to the OPAC footer design. We believe the changes will be relatively transparent. The majority of the changes will affect the location of the commands within the footer.

The footer will appear on all screens, and its size has been standardized to six lines, except for the Explain Keyword screen and the Review screen, where the command line will be three lines to allow for longer search commands; therefore, the footer will be eight lines altogether (the entire footer will be shifted up two lines).

The same commands will be displayed as were displayed in Release 5.0 (and earlier); however, they will be aligned differently. The command prompts will be divided into three groups:

- 'panic' commands
- current command options
- movement commands

Each group of commands will be filled and aligned as appropriate depending upon where the user is within the system.

Panic Commands

The panic commands will include the commands: STArt over, HELp, and OTHer options. These commands will be used primarily when none of the commands displayed seem to be appropriate.

If one of the panic commands is invalid on a particular screen, it will not be displayed. We added the STArt over command prompt to give the inexperienced patron an idea of how to begin a search if the terminal is in the middle of a prior patron's search.

Current Commands

The Current Commands section will consist of two columns of three entries. These columns will be filled sequentially with commands arranged by anticipated frequency of use. These footer positions will be filled sequentially, top to bottom, left to right. If there is a long command, such as "Type number to view record," it will take up the first position in both columns. In rare instances, the second and third line may also fill both columns.

Movement Commands

The third command section will be for movement keys. For the short-cut minded, the F (function) key will be indicated to the left of the corresponding movement command.

One keystroke will move you around within your index or other multipage records. This is not a new feature, but we believe it provides a way to introduce these function keys to the novice user.

The movement commands will always be found in the last column of the footer. Each of the movement functions will be filled sequentially, top to bottom, in the following order:

<F7>BACk page
<F6>NEXt record
<F5>PREvious record

As in Release 5.0, only the commands that are valid in the current context will be displayed.

Page Numbering

Page numbering on individual records will occur just above the movement commands. We made this change to help encourage the focus on movement. Page numbering will only be here, and not at the top of the screen. In previous releases, this redundant pagination information cluttered the display and confused many users.

The page reference indicates the page number currently displayed and the total number of pages available. For example, 1 of 3, will be the preferable approach, with "Continued" used only when it is difficult to determine the number of pages, such as a multipage index. As consistency of terminology is important to these changes, the references will always be "page" as opposed to "screen."

Commands

We are committed to Z39.58 compliance; therefore, we are also beginning to enforce the standards that it imposes. These standards include using a three position abbreviation of the command. Although we have not eliminated the use of the single digit commands, new users will be encouraged to use the three positions because of the footer's new look.

Command prompts within the footer will be the name of the command, with a portion of the command in caps, indicating the acceptable abbreviation for the command. The remainder of the command name will be in small letters.

For example, FORward will indicate that the command Forward can be executed by typing FOR at the cursor prompt. One and two character abbreviations will continue to be allowed for unambiguous commands, but all commands will allow the first three characters to be entered.

As we have stated in previous correspondence, single character command abbreviations will not necessarily continue to be supported in future releases. The <ENTER> key will also continue to default to forward or back, depending upon which command was last executed; a "+" or "-" will appear on the dashed line to the left of the page number to indicate which direction will be taken when <ENTER> is pressed. ■

```
Search Request: A=ELLIOT JEFFR                                        Entire Library
BOOK - Record 1 of 2 Entries Found                                         Long View
------------------------------------------------------------------------------------
Author:          Reginald, R.

Title:           Free at last! : alternate histories of Black America

Published:       San Bernardino, Calif. : Borgo Press, 1985.
Description:     p. cm.

Subjects:        Afro-Americans--History.
Afro-Americans--Politics and government.
Imaginary histories.

Other authors:   Elliot, Jeffrey M.

Series:          Borgo political scenarios, 0278-9752 ; no. 2

------------------------------------------------ + Page 1 of 2 ------------
STArt over         BRIef view                                <F8>  FORward page
HELp               INDex                                     <F6>  NEXt record
OTHer options

NEXT COMMAND:
```

Example of the new OPAC footer design in Release 5.1

Q's and A's about Release 5.1's New Serials Control Screen Designs

This is the final part of the four part series

Relation to Ltxx Transactions and Records

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.

Q. If there is no caption/pattern data for a title, will there be an action date to trigger a report on the Expired Action Request List?
A. If there is no caption/pattern data, you cannot use LSER. If there is, LSER has its own method of tracking unreceived issues. LSER does not change or in any way interact with the action date in an order/pay/receipt record.

Q. How are new titles and orders handled?
A. You would process your order, copy holdings, bibliographic, and item records as you always have. You would then create a caption/pattern record in LSER. You then begin using LSER for check-in of all subsequent issues.
If you have purchased retrospective holdings, you should create an MHLD record for them—unless you want to check in each issue or volume. That, however, requires you to create a caption/pattern record(s). You could, however, define only one level of enumeration or chronology for the retrospective holdings in order to speed up the process. Then, for the new current receipts, you might wish to use all applicable levels.

Q. How would a new copy at an nth location be handled?
A. Exactly as above, except that you would not (presumably) need to update the bibliographic record.

Q. Can I create an item record from LSER?
A. No.

Q. What is the relationship between the MHLD record and LSER?
A. The MHLD record should be considered as the record for storing retrospective holdings data as well as "shelved as" titles and other public notes. If you have data in the 866/867/868 or 899 fields and then begin check-in with LSER, check-in will maintain your holdings. The only time you will need to edit the MHLD record is if you obtain additional retrospective holdings or discard retrospective holdings. Processing actions in LSER do not update or affect the MHLD record in any way.

Q. Will order linkages such as purchase order number display anywhere in LSER, e.g., the Receive New Material screen?
A. No. However, if you must see this data at the time of receipt, you could add it to the check-in note.

Q. Is there an "express" method to move between the order/pay/receipt, copy holdings, bibliographic, and MHLD records and LSER?
A. All of the data in a copy statement displays in LSER since all functions are copy/location specific. Key bibliographic data can be displayed from the Receive New Materials and the Copy Holdings Statement Summary screens by pressing the PF2 key.
If you consider certain order, payment, or fund data vital for check-in or holdings maintenance, you can use note fields in LSER.

Q. Is LSER using copy statement and bibliographic data from the related copy holdings and bibliographic records?
A. Yes. You do not need to rekey any of that data. Issue status codes, check-in notes, other note information, and caption/pattern data are unique to LSER.

Receipt History/Outstanding Items

Q. On the receipt history screens, will the non-received items appear highlighted or in a different color?
A. Not at this time.

Q. If my library has only one copy of a title, will LSER always display an index screen and make me select "1" when I want to display the receipt history?
A. Yes. Displaying an index screen is done for the sake of consistency and ease of training. We realize that some people may wish to bypass these. However, LSER was specifically designed to handle multiple copies at multiple locations.

Q. If I'm in LSER, can I see if an issue has been claimed?
A. Yes, assuming the issue's status code has been properly set.

Q. There appears to be no provision to delete receipts when, for example, a cumulating issue is received. Can this be done?
A. You cannot delete holdings on an issue-by-issue basis. You can create different caption/pattern records if you want to treat cumulations separately for purposes of prediction. This would require separate copy statements and separate caption/pattern records for each cumulation pattern.

Q. Can I delete holdings in LSER? How?
A. Yes. Deleting a caption/pattern record deletes the holdings received under that caption/pattern.

Q. Can I display basic issue, supplement, and index receipts on one screen?
A. No. We are aware that this is a feature that will be required for binding.

Q. Can individual receipt lines for skipped issues be put in their proper sequence or does the system do this automatically?
A. The receipt history records all issues in enumerative/chronological order automatically. No manual resequencing is required. The actual date of receipt is always preserved as well.

Q. When an operator changes the status of an issue, will all dates presently in LSER for that issue remain unchanged?
A. Yes. A receipt date is preserved under all circumstances.

Q. Could the issue status codes be one letter?
A. Sorry, no. Since we intend to add functionality later on, we do not want to lock ourselves into single-letter codes. Two-letter codes provide more flexibility and are more mnemonic.

Q. What are the issue status codes?

A. LO (Lost), BD (Bound), NP (Not Published), NR (Not Received), RC (Received), AL (Action List), EX (Expected), and AR (Action Response) Issues with a status of LO, NP, NR, and AL display with the messages of Lost, Not Published, Not Received, and Claimed, (respectively) in the OPAC. You may choose not to display this issue-specific data.

The system automatically supplies the status codes of RC and AL as issues are received (or not). Issues with a status of AL have appeared on an exceptions report. When an item with a status of AL is later received, the system automatically changes the status code to RC. EX is also system-supplied to the next expected issue and automatically changes to RC or AL as circumstances dictate. Other codes are assigned manually. The AR (Action Response) indicates that the vendor has responded to an inquiry concerning the issue. Operators can enter numeric subcodes to create specific messages for staff view (e.g., "Never Published," "Publication Ceased," "Out of Print," "Replacement Sent," etc.).

Q. How is a duplicate issue displayed in the receipt history?

A. You cannot receive a copy of an issue for a location that has already received it. Therefore, the receipt history will never have a duplicate.

Cancellations

Q. If the holdings are "locked," does this stop/prevent check-in?

A. Yes.

Q. Can you really continue to receive a cancelled item?

A. Yes, if you don't lock the record.

Security

Q. What levels of security will be available for LSER? Will we be able to restrict by location?

A. Security will follow the security as is typical for all NOTIS modules. However, location will also be part of the security structure to support decentralized check-in and holdings maintenance.

Q. The action date on the (LSER) copy holdings screen cannot be modified nor title level notes added (as shown on the DEMO2 diskette). Is this really the case?

A. That data is being pulled from the copy holdings record. It can be updated as needed by editing that record. As soon as it is updated, the new data displays in LSER.

Q. If I'm a check-in clerk, do I see copy/location information only for those locations for which I am authorized to check in? Will the number shown in the "in-hand" and "expected" fields reflect the number of locations for which I am authorized?

A. Yes and yes.

Q. Will there be a view-only security level? Will I see all locations but be able to check in only for the locations for which I'm authorized?

A. You will have view-only security for holdings maintenance, i.e., viewing caption/pattern data for other locations. You will not see any copy/location information on the Receive New Material screens for any location for which you are not authorized for check in.

Reports

Q. On the exceptions report for late/claimed items, what text will appear under the individual entries and what does each mean?

A. The text is based on the issue status code as seen in the receipt history/outstanding item.

Q. What does the exceptions report for damaged/incomplete items refer to?

A. This report will not be included in the first release. This relates to an action code that will not be available in this release.

Q. The examples I've seen of the exception reports are a mystery to me. Can you explain the NATURE examples on the Partially Received Exception Report?

A. The report examples seen to date are mock-ups, intended to guide programmers in coding. They do not represent "real life" situations and should be used only as examples of the intended formats.

Q. What is a "skipped" item as seen on an exceptions report?

A. The situation is as follows.

The system expected issue 3. The clerk checked in issue 4. The system predicts issue 5 as the next expected issue. The day ends without issue 3 being checked in. The system lists issue 3 as a "skipped" item on the exceptions report.

All the reports are designed for daily production and are not cumulative, i.e., each one is unique. If issue 3 had been received on the same day, the system would not have listed it on any report.

Q. So what happens when issue 3 comes in?

A. When issue 3 is received, the check-in clerk sees that another issue is expected. The clerk tabs to the enumeration data, changes it to "3" and receives issue 3. The system predicts n as the next expected issue. The system might list issue 3 as a late/claimed issue on an exception report if today's date is beyond the expected date for issue 3. If today's date is within that period, the system does not list it on any report.

Q. What is a mismatched item?

A. There is no longer provision for a "mismatched" item. This was based on an earlier design where we planned to allow receipt even if there was no applicable caption/record data for the issue being received. We decided to abandon that approach for the time being. The exception report for mismatched items will also not be included in the release.

Other

Q. How does LSER actually store receipt data?

A. Every time you create a caption/pattern record for a copy, the system creates a VSAM record consisting of the NOTIS record key (the seven-character number of the linked bibliographic/holdings record), caption/pattern data, a field to store the next expected issue and date of receipt, and then individual fields for all the future issues. All of these fields are of fixed lengths and the VSAM record is of fixed length. Each time you receive an issue, the pertinent data is stored in the appropriate field.

Any time you check in an issue out of sequence for whatever reason, the system skips the field reserved for the missing issue and creates a separate "exception record" for the issue by copying the NOTIS record key, the caption/pattern data, etc. As soon as the missing issue is checked in, the system fills in the appropriate empty field in the original VSAM record and eventually deletes the "exception record." Dates are stored in binary form to permit efficient processing for prediction. The system is capable of eventually importing and exporting holdings data in MARC format.

Q. What is the relationship between the SC350 serials control software and NOTIS' development of LSER?

A. None.

Q. Why was it decided not to use MARC tags for storage and display?

A. Predictive check-in was identified by our serials focus group as a required element in any redesign of the serials check-in function. This means that NOTIS must perform transaction processing for the first time, i.e., what you input into the system is used by the system to calculate something you did not input into the system, i.e., the next expected date of receipt. A computer cannot efficiently process information when it must find data in variable-length fields (i.e., 85x) and compare it to data that exists elsewhere in non-precise formats. To use a MARC tagged record to process data for predictive check-in would have required at least another year's work and also raises other serious issues about computer resource utilization (assuming that users expect online updating). Another premise (based on customer input) is that serials check-in clerks do not know MARC format. Providing a more user-friendly display was considered a key to easier training.

Q. How long will NOTIS continue to support the receipt statement in the order record as an alternative to LSER?

A. At least through Release 5.1.

Q. Are function keys consistent between LTXX and LSER?

A. No. Function keys in LSER, LSYS, MSYS, and certain new features in Release 5.0 (e.g., FY close, global heading change) conform to recommended guidelines that IBM has developed for a common user interface.

Q. Are only menus and function keys supported in LSER?

A. Yes, except for entry into LSER.

OPAC Display of Holdings

All holdings data displays in the OPAC. As soon as new issues are received, an issue's receipt status changes, or retrospective holdings data are updated, the OPAC immediately and automatically displays the most current information to users.

Several options exist for displaying holdings data in the OPAC. All of the labels used in the following are only suggestions—each site may define its own labels, using the OPAC section of the online system control file (LSYS). Certain holdings data may be suppressed from the OPAC if desired. Each holdings display contains as much data as is available for the options selected. If no data exists, the corresponding label does not display.

The order of the OPAC holdings display is fixed as follows. Location, call number, and status data appear first in that order (as they do now in Release 5.0), using the data in the copy statement of the copy holdings record.

"Other Info" (Copy Holdings)

This data comes from the copy level notes field of the copy statement in the copy holdings record. The message is taken from codes set in LSYS or a free text message if preceded by **um=**.

"Next Issue" (LSER—Optional)

A library can choose to display or suppress the next basic issue expected. This display comes from LSER.

The issue shown as "next" is the one predicted by the system as the next expected. It matches the next predicted issue that appears on the Receive New Material screen and the issue with the status of EX in the receipt history.

Display of "next issue" data conforms to the Z39.44 Level 4 standard. The system automatically updates the data whenever check-in occurs and resets the next predicted issue.

"Current Issues" (LSER and/or Receipt Statements)

The system first looks in LSER and displays up to fifteen (15) basic issues that have a status of RC. The system begins with the last issue received and counts backward until it encounters an issue with the status of BD (bound) or until it reaches the fifteenth issue. There is one line per issue, with last issue displaying first. Basic issues defined as "current" are displayed in conformity with the Z39.44 Level 4 standard.

If the system finds no information in LSER, it then looks in the receipt statement of the relevant order/pay/receipt record and displays the data for up to fifteen receipt statements. If in LSER, the system finds fewer than fifteen issues with a status of RC, it then checks for any existing receipt statements in the order/pay/receipt record and displays data from there. In no case will the system display more than fifteen lines.

Note that the data from LSER is issue information, one issue per line. Data from a receipt statement could be issue or summary holdings, one statement per line.

"Shelved As" (MHLD)

"Shelved As" data comes from the MHLD record (852 field, subfield ǀl). Whatever is entered in that subfield is what displays in the OPAC.

"Exceptions" (MHLD)

This data comes from the MHLD record (852 field, subfield ǀz). Whatever is entered in that subfield is what displays in the OPAC.

"Library Has" (LSER and/or MHLD)

Data displayed under this label is for retrospective holdings of the basic issue. Data shown here comes from the MHLD record (either the 866 or 899 fields, subfields ǀa and ǀz) and data stored in LSER or only the MHLD data. If both, the MHLD data displays first.

Since the MHLD record may have unstructured holdings data, whatever is entered in those fields is what is displayed in the OPAC.

For data from LSER, the system displays according to a modified Z39.44 Level 3 standard. The system displays an open entry based on the earliest issue with a status of BD (bound).

"Supplements" and "Indexes" (LSER and/or MHLD)

Data here displays under the same rules as used for "Library Has."

Data from the MHLD record (867/868 fields, subfields ǀa and ǀz) displays as it has been entered. Data from LSER displays according to a modified Z39.44 Level 3 standard. The system displays an open entry based on the earliest issue with a status of BD (bound).

"Item Status" (Item Records—Optional)

Information shown under this label comes from circulation status information in NOTIS item records. When each volume has its own NOTIS item record, the volumes appear in enumeration/chronology order when there is more than one item with an active circulation situation.

NOTIS circulation situations include the standards (e.g., "charged," "recalled," "overdue," etc.) as well as "lost," "missing," "at bindery," etc. Display of data under this label is optional.

"Missing" (LSER—Optional)

Information shown under this label comes from the issue status code in LSER. Any issue with a status code of "claimed," "lost," "not published," or a non-receipt status will display under this label. "Earlier issues may also be missing" appears at the end of any listing as a system-supplied message.

This feature permits identification of issues that may be missing from bound volumes. However, display of data under this label is optional.

Sample OPAC Display

The following three examples of an OPAC holdings display are intended to show how the user will see holdings if data is displayed using all possible options. These examples are for a record with MHLD and LSER holdings information. ■

```
Search Request: T=JOURNAL OF CHEMICAL EDUCATION              NOTIScat
 SERIAL - Record 1 of 1 Entry Found                    Holdings Detail
 ---------------------------- + Screen 1 of 3-------------------------
 Title:              Journal of Chemical Education

 ------------------------------ Location 1 ---------------------------
 LOCATION:           CURRENT PERIODICALS (Non-Circulating)
 CALL NUMBER:        PT275 .J579
 STATUS:             Check Shelf

 OTHER INFO:         Recent issues at Chemistry Reference Desk.
 NEXT ISSUE:         v.18:no.3:pt.A (1991:Mar. 01)
 CURRENT ISSUES:     v.18:no.2:pt.B (1991:Feb. 15)
                     v.18:no.2:pt.A (1991:Feb. 01)
                     v.17, no. 12, pt. B (Dec. 15, 1990)
                     v.17, no. 12, pt. A (Dec. 1, 1990)
 SHELVED AS:         Chemical Education Journal.
 EXCEPTIONS:         Early volumes on microfiche in Microform Reading Room.
 LIBRARY HAS:        v.1 (1974) - v. 5 (1978)
                     v.7 (1980) - v. 10 (1983)
                     v.11 (1984) -
 ---------------------------------------- Continued on next screen --
  COMMANDS:          V   View Record       I   Index
                     LO  Long View         H   Help
  O Other Options    F   Forward           PRI Print
```

OPAC Holdings Display: Screen 1

```
Search Request: T=JOURNAL OF CHEMICAL EDUCATION                    NOTIScat
 SERIAL - Record 1 of 1 Entry Found                            Holdings Detail
 ------------------------------- + Screen 2 of 3 -----------------------
 Title:            Journal of Chemical Education

 ------------------------------- Location 1 (continued) ---------------
 LOCATION:         CURRENT PERIODICALS (Non-Circulating)
 CALL NUMBER:      PT275 .J579

 SUPPLEMENTS:      no. 3 (1975) - no. 25 (1986)
                   no.26 (1987) -
 INDEXES:          no. 1-13 (1974-1986)
                   no.14 (1987)-
 ITEM STATUS:      v. 2 (1975) Being Held for a Patron
                   v. 6 (1976) Lost as of 05/15/89
                   v. 14 (1977) Lost as of 10/21/90
                   v. 16 (1990) At Bindery
 MISSING:          v.14:no.3:pt.B (1987:Mar. 15) (not received)
 ------------------------------------------ Continued on next screen --
  COMMANDS:        V   View Record        I   Index
                   LO  Long View          H   Help
  O Other Options  F   Forward            PRI Print

 NEXT COMMAND:
```

OPAC Holdings Display: Screen 2

```
Search Request: T=JOURNAL OF CHEMICAL EDUCATION                    NOTIScat
SERIAL - Record 1 of 1 Entry Found                             Holdings Detail
------------------------------- + Screen 3 of 3 -----------------------
Title:            Journal of Chemical Education

------------------------------- Location 1 (continued) ---------------
LOCATION:         CURRENT PERIODICALS (Non-Circulating)
CALL NUMBER:      PT275 .J579

MISSING:            v.14:no.3:pt.A (1987:Mar. 01) (lost)
                    v.14:no.2:pt.B (1984:Feb. 15) (lost)
                    v.14:no.2:pt.A (1987:Feb. 01) (not received)
                    v.14:no.1:pt.B (1987:Jan. 15) (claimed)
                    v.14:no.1:pt.A (1987:Jan. 01) (claimed)
                    v.11:no.6:pt.B (1987:June 15) (not published)
                    v.11:no.6:pt.A (1987:June 01) (lost)
                   (Earlier issues may also be missing.)

------------------------------------------ Continued on next screen --
 COMMANDS:         V   View Record        I   Index
                   LO  Long View          H   Help
 O Other Options   F   Forward            PRI Print

NEXT COMMAND:
```

OPAC Holdings Display: Screen 3

The New NOTIS System Messages Guide

The newest addition to LMS 5.0 user documentation is the *NOTIS System Messages Guide*, which was shipped in User Update 31. It is an additional resource for those who must use the NOTIS software to perform daily library operations.

This manual lists the messages in alphabetical order. Each message contains an explanation of why the message occurred and what action you should take to correct the situation.

The *NOTIS System Messages Guide* replaces the messages that were listed in the *NOTIS User's Guide*. You should now look in this manual if you need further clarification of a system message.

The *NOTIS System Messages Guide* is an essential user resource for your installation. It provides you with the information you need to understand and solve your error conditions. ■

X12 Claims Pilot Project Update

By Bill Sozansky
University of Minnesota Libraries

The purpose of this article is to let you know where we stand with the NOTIS/Faxon/University of Minnesota Libraries pilot project to transmit claims via X12 Electronic Data Interchange (EDI). First, I believe that all of the pilot project's initial goals have been achieved. I want to thank Gerry Ginsburg at NOTIS; Joe Santosuosso and Fritz Schwartz at Faxon; University of Minnesota Libraries' technical processing staff at Bio-Medical Library; St. Paul Campus Library; and the Serials Records Unit in Central Technical Services who made this project successful.

The pilot project's main goal was to determine the potential utility of claims transmission via X12 EDI while limiting the amount of program change to the NOTIS LMS. Thus, all parties knew that the pilot program project would not have all of the "bells & whistles" one would expect in a product released for full production.

Nevertheless, since May 23, 1991, the three technical services units have transmitted 4,950 claims. We have saved a lot of time and we have discovered areas that could be improved to make the process more effective. For example, if we claim an issue in the morning and receive it later in the day, we don't have any mechanism to send a X12 claim cancellation to Faxon. Also, when a title lapses, we don't have a code that handles this situation.

In both cases, there are improvements that could be made. SISAC has been working on the X12 standard for serial claiming that would cover many of the areas that need improvement. Since NOTIS, Faxon, and many of the major vendors are on the committee, I think that whatever is decided should work for all parties.

At this particular juncture, NOTIS and its clients need to decide how to proceed. Should NOTIS continue this project and enhance some of its features? Should this claims transmittal process be made available to other NOTIS/Faxon clients as well as other vendors wishing to do X12 transmission with their NOTIS clients?

NOTIS is already engaged in a X12 pilot project for transmitting monographic orders with Syracuse University and Blackwell North American. Should NOTIS initiate a test of X12 for uploading invoices to better assess its capabilities?

At a time when many libraries are downsizing their staff, X12 EDI offers libraries some hope for making technical processing more efficient.

The entire X12 and EDI community is very dynamic. The standards are constantly evolving as new needs and circumstances appear.

In fairness to NOTIS, clients need to assure them that EDI is a system development that they want and need. I hope that the NOTIS/Faxon Users Group at ALA Midwinter can help chart a course for further action. ■

NOTIS Regional TECH1 Circulation Training Session Hosted by SMU

The 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 in November's *NOTISes* 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

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) • 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

February 7, 1991

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 • LB510: Patron Batch Load • Bill and Fine Purge • Patron Purge
3:45 pm-4:30 pm	Question and Answer Period

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

The 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 in November's *NOTISes* and mail it with your check to the address on the form.

AGENDA

8:30-9:00 am	Registration
9:00-9:15 am	Introduction • Introductory remarks, review objectives, review agenda
9:15-11:30 am	Implementing NOTIS Circulation • Tables and library control file records • Institution groups, processing units, service units and patron groups and tables • Patron group table and control file record • Patron category control file record • Item loan code control file record • Location and circulation value control file records • Calendar control file record • Fine reasons and functions control file record • Loan/Overdue policy control file records • Circulation situations control file records • Loan and overdue policy logic • Operator security
11:30 am-12:00 pm	Circulation Module Logic • The charge/discharge process
12:00-1:30 pm	LUNCH
1:30-4:00 pm	Entering and Testing Circulation Values • Hands on entry and testing of local circulation values
4:00-4:30 pm	Review, Discussion and Wrap-Up