

# NOTISes

*For users of  
NOTIS  
library  
information  
systems*

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FEBRUARY 1992 • Number 75

## IN THIS ISSUE

# Customer Support Service Attains Star Status

As consumers, when you purchase a product you want to know you made the right choice, the best choice. One way the quality of a product is judged is by the reviews and awards it receives.

## “Most Improved Support Center Operation” Award

The Software Support Professionals Association (SSPA) presented their Software Technical Assistance Recognition (STAR) Award for “Most Improved Support Center Operation” at their annual conference in December 1991, to NOTIS’ Customer Support Service.

The SSPA is an organization consisting of technical and customer support managers in the software industry. The STAR

Award is bestowed upon companies in recognition of the major changes in improving delivery of software support to customers and acknowledges service excellence in software support.

The plaque on the award reads: “A Recognized Leader in Developing Quality Software Support.” Bill Rose, Director of the SSPA, said NOTIS has “...gone the extra mile to bring the value of outstanding technical and software support to the corporate front burner.”

## Customer Support Services Improves Response Time

Customer Support Services reorganized last year. The department was restructured into specialization teams. An automated atten-

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## BULLETIN

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# NOTIS NEWS

## NOTIS Supports Local Systems

As a result of Ameritech Information Systems' purchasing NOTIS Systems and acquiring Local Systems, Ameritech has evaluated both companies' managerial structure for customer support. As of January 1992, NOTIS became responsible for supporting products from the Local Systems Division. Local Systems staff will remain in Dublin, Ohio and NOTIS customer support will remain in Evanston.

Both support organizations will report to Maribeth Ward, Vice President of Customer Services. Our goal continues to be to provide quality support to all Ameritech library customers. ■

## Look for Survey Results in March

We will publish the Customer Satisfaction Survey results in the March issue of *NOTISes*. We are happy to report that 79% of the surveys were returned. We are tabulating the survey's results and will give you a full report in our next issue. Thank you for taking the time to respond to our Customer Satisfaction Survey. ■

## NOTIS Introduces First Implementation of Z39.50

NOTIS is testing PACLink, its Z39.50-based intersystem connection software. Indiana University and Indiana State University and two State University of New York, University Centers at Binghamton and Stony Brook are testing the product.

"PACLink allows any NOTIS site to offer OPAC users a seamless interface to other, remote NOTIS OPACs," said Jane Burke, NOTIS President. "Since it is based on Z39.50 and supports access via the TCP/IP-based Internet, PACLink sites will eventually be able to connect to any library system, not just NOTIS sites."

Users at participating sites will simply select a remote OPAC from a menu. Since PACLink uses the client/server model in its architecture, bibliographic and status data retrieved from the remote OPAC will be presented to the user according to the local OPAC's design. The remote OPAC becomes the "server" and the local OPAC the "client." ■

## NOTIS<sup>es</sup>

*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.

## SIG Update

### Please note the following change to the Regional SIG Chairs

4. **Louisiana** Marianne Puckett (co-chair)  
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## NOTIS Previews an OPAC Workstation

NOTIS now has a prototype of a graphical user interface (GUI) client running under Microsoft Windows. You may have seen a demonstration at the 1992 ALA Midwinter Conference.

"We believe that automation systems must keep evolving to meet future needs," said NOTIS President Jane Burke. "The client/server approach to systems development is quickly becoming a model for academic institutions. NOTIS is committed to evolving our products to meet

changing requirements among its customer base. ProPac is a prototype for us to see how a library patron might use a GUI on a workstation to search an OPAC."

John Kolman, NOTIS Vice President for Systems Development, also notes that this type of approach "permits more design options—point-and-click devices, pull-down menus, and the like—features popular with the microcomputer user, but impossible to offer with a terminal-based system." ■

## New 4th Quarter Customers

We are happy to welcome the following libraries to our growing list of customers.

Alamo Community College District (Texas)  
Hampton University (Virginia)  
High School District 211 (Illinois)  
IVTC (Indiana Vocational Technical College)  
Slippery Rock University (Pennsylvania)  
\*Union University (Tennessee)  
West Virginia University  
\*Wilmington College (Delaware)

\* designates KeyNOTIS sites. ■

## Continued from Page 1

dant was installed to direct incoming calls and maintain statistics on them. Customers' responses to the series of questions asked by the automated attendant direct them to the appropriate team member who is a specialist in that product or LMS module.

This reduces the amount of time customers are kept waiting for a specialist and immediately directs a call to a potential answer. This new arrangement has improved response time to customers' inquiries.

Carole Norris, Customer Support Services Manager, explains, "The award was meaningful because being recognized by the industry made us feel that all the changes we have implemented were the right ones. Also, I heard at the conference that other software support companies are facing the same issues that we are facing.

"The direction we are taking is one that seems to be industry approved. The award helped reinforce everything that we have been doing....We have started a process for improvement which is an industry-wide growing consciousness. It is the whole quality issue moving toward improvements in service."

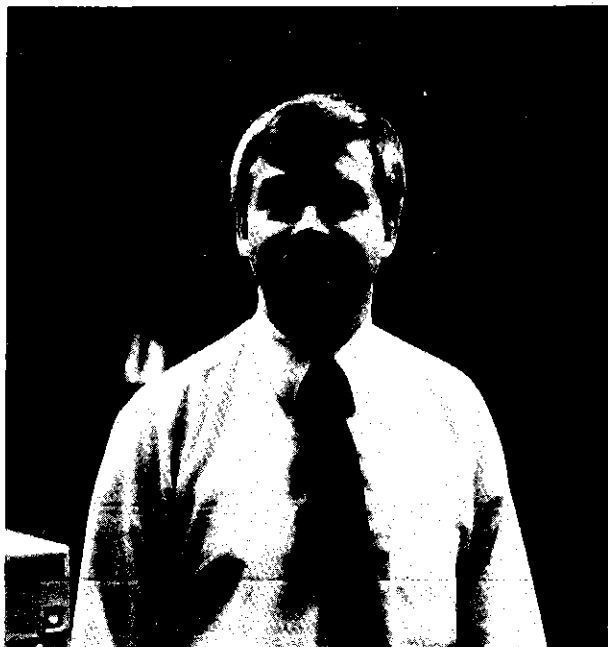
### "How Are Our Maintenance Dollars Spent?"

Customers frequently ask, "How are our maintenance dollars spent?" Maintenance dollars are reinvested in NOTIS customers, improving the quality of support service provided to you. At NOTIS, we know you make the best purchasing decisions when you buy NOTIS products.

As consumers you expect to purchase quality goods. As customers, you are proud of quality merchandise. Not only was your choice of NOTIS software an excellent purchase, you also acquired a recognized STAR in customer support service. ■

## Who Are You Going to Call in Customer Support?

This month's featured Customer Support Services team specializes in cataloging, authorities, OPAC, and KeyNOTIS/VSE. Working together provides them with the ability to answer difficult questions more effectively and respond as quickly as possible to our customers.



*Jerry Specht, Chief Systems Engineer and Team Leader*

Jerry Specht has been employed at NOTIS for seven years, and currently holds the position of chief systems engineer. His knowledge of the system and understanding of library operations makes him an excellent team leader.

He holds several degrees, a B.A. in English, Oberlin College; an M.L.S., University of Illinois; and an M.S. in computer science, DePaul University. Before NOTIS, Jerry worked at Management Contents as a database administrator for the Computer Database.

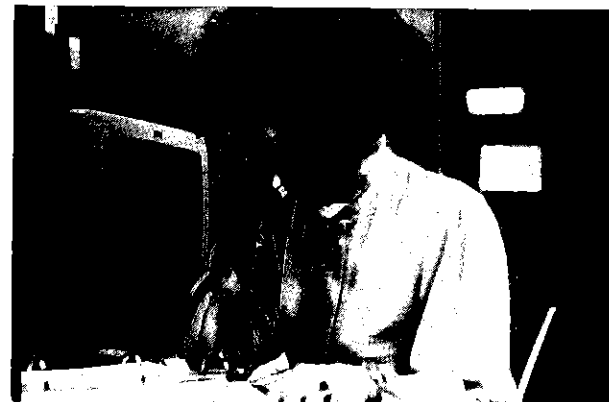
After work, Jerry can often be found on the tennis courts. In 1976, he spent four months on a 4,000 mile bicycle odyssey through Europe.

Joel Kurasch joined NOTIS in October as a systems engineer. Before coming to NOTIS, Joel was a consultant concentrating on PCs and VM/VSE.



*Joel Kurasch, Systems Engineer*

Joel has also worked for both the University of Illinois Circle Campus and Northeastern Illinois University as a mainframe systems programmer. He earned his liberal arts degree at the University of Iowa. As a computer buff, Joel spends his time programming his PC and keeps up with computer trends by connecting to national services, such as CompuServe, Delphi, and Prodigy, as well as bulletin boards that include news from international conferences.



*Victoria Praemer, Librarian*

Victoria Praemer obtained her masters degree in library and information science at Indiana University. Prior to joining NOTIS eight months

ago, she was the director of library and information services at Winston & Strawn from 1988 to 1991. Victoria has diversified hobbies, including tennis, skiing, acting classes, and antiques.

Tom Marqui is a systems engineer and joined NOTIS three years ago. His M.I.S. degree from Northern Illinois University and his career experience in debugging programs provide Tom with the strong working knowledge needed to answer customers' questions.

Prior to NOTIS, Tom worked for Banker's Life and Casualty as a programmer analyst. During his leisure time, Tom is a football referee and enjoys the outdoors with his family.



*Tom Marqui, Systems Engineer*

Mary Moules was a bid coordinator in the NOTIS Marketing and Sales department for 14 months before transferring to Customer Support Services last November.

Mary previously held a database administrator and editing position at the American Osteopathic Association. Mary's B.S. in humanities was awarded from Michigan State University. She obtained her M.L.S. at the University of Michigan. Mary enjoys traveling and music.



Mary Moules, Librarian

Richard Zawislak has been at NOTIS for six months as a systems engineer. His dedication to customers makes him an excellent team member.

Rich said, "I've worked in large and small companies, and I enjoy the opportunities to work directly with our customers to solve their problems. NOTIS is not a large company where this type of interaction is lost. I've also been a customer calling on software vendors for support, so I know how important this function can be."



Richard Zawislak, Systems Engineer

Rich received a B.A. in chemistry at North Park College in Chicago, and after working in the insurance industry for several years, Rich returned to college on a part-time basis to pursue a data processing degree. After hours Rich is a jogger and United States Soccer Federation referee.

These are the people who will be staffing the NOTIS support area the next time you call (708) 866-1100, FAX (708) 866-4908, or Internet NOTIS@NUACC.ACNS.NWU.EDU with your questions about cataloging, authorities, OPAC, or KeyNOTIS/VSE. ■

## Looking Back at Our Accomplishments in Documentation

Now that the new year has begun we'd like to take this opportunity to fill you in on our 1991 accomplishments. As an overview, we completely revamped all of the user's guides for Release 5.0, we published indexes for all of our manuals, we overhauled the technical documentation, we provided you with quick reference command and key charts to help you in your job, and we switched applications to provide you with a more complete and up-to-date customer directory.

### User's Guides Got Our Attention in 1991

In January of 1991, we turned our full attention to LMS Release 5.0. Because of the size of this release, each of the user's guides was affected.

We completed 5.0 user's guides and an all new 5.0 *NOTIS Implementation Manual* in the spring. Rather than trying to blend Release 4.6.1 and 5.0 documentation in one manual, we decided to reissue all the user's guides in their entirety.

We felt having separate sets of documentation for the two releases would cut down on confusion and make the transition to the new release a simpler and cleaner process for you.

### Indexes: The Icing on the Cake

After putting the finishing touches on the user documentation for 5.0, we immediately began working on indexing all of our user's guides. Indexes are essential given the amount and complexity of the documentation that accompanies our software products.

We reached our goal and provided you with indexes to all 11 of our manuals before the year ended. We worked diligently on indexing our manuals to comply with your requests on last year's customer satisfaction survey.

### Technical Documentation Got Top Priority in 1991

We didn't stop at the user's guides, we also overhauled the technical documentation in the past year. We rewrote all the batch job documentation to reflect the new JCL standards, filling in missing information, and correcting inaccuracies along the way.

We published the *NOTIS Technical Reference Manual* in May. Once we completed this manual, we concentrated on the troubleshooting and system reference portions of the technical documentation. In September, we published *Abend Codes and Error Messages*, a compilation of information on error conditions in LMS 5.0, GTO 3.0, and MDAS 1.2.

In October, we published the *NOTIS Internals Reference Manual*, a publication that contains basic system information including record layouts and customization options. Together with the *Technical Reference Manual*, these two volumes form the technical documentation set, completely replacing the *NOTIS Installation and Operations Manual* and the *NOTIS Programmer's Reference Manual*.

Toward the end of the year, we provided you with the *NOTIS System Messages Guide*. This guide is an additional resource for those who must use the NOTIS software to perform daily library operations. This manual replaces the messages that were listed in the user's guides.

### Tools to Make Your Job Easier

To help make working with the NOTIS system easier, we provided you with the LMS Key Chart and LMS Command Chart for Release 5.0. These two charts are great reference guides to have next to your terminal while you are working with the NOTIS system.

The Command Chart contains a comprehensive list of NOTIS commands along with a brief description of each command. 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 Customer Directory—Better than Ever

Not only have we revamped all of our user and technical documentation, but we have also worked hard to provide you with a complete and up-to-date customer directory. Completing this project entailed more than gathering information from you.

We converted our database records to a new software package to keep better track of your directory and subscription information, which in turn allows us to serve you better. This change gives us increased flexibility in inputting and updating records. We are able to maintain more information accurately and generate faster reports with better layouts than before. ■

## Accessing NOTISrv: Our New Online Bulletin Board Service

We are continuing to develop and test NOTISrv (NOTIS Serve), our new 24-hour online bulletin board customer support service. Our primary goal is to make accessing NOTISrv as easy and inexpensive as possible.

### Overview

The NOTISrv dial-up bulletin board customer support system uses XChange information management software (a product of Z/Max Computer Solutions, Inc.) running in a UNIX-based environment. The system supports simultaneous connection by multiple users, with electronic mail, keyword searching, and file transfer capabilities. The hardware and software needed for accessing NOTISrv are described below.

### Hardware Requirements

You can connect to NOTISrv with any computer that has a standard modem and tele-

phone line connection. This typically means an MSDOS personal computer or perhaps a Macintosh, but the system can also be used from any minicomputer or mainframe that can make a dial-out connection using the standard ASCII character set. The system has already been tested successfully with an IBM PC/XT, a Macintosh II, and an Amiga 2000.

You need a modem that is capable of at least 1200 bps operation. A 2400 bps modem is recommended. Higher speeds may be supported in the future. During the testing period, NOTISrv will be accessible only through the direct distance dialing (DDD) network, so a dial telephone line with long distance capability is also required.

### Software Requirements

You must have a terminal emulation program (such as ProComm+ or SmartCom) that performs full screen terminal emulation. The DEC VT-100 is a suitable terminal for emulation. Other terminal types are supported, but the quality of support may vary. If you wish to upload text or problem reports, or to download text or solutions, your terminal emulation must be capable of using an error-correcting file transfer protocol. NOTISrv supports the following transfer protocols:

- XMODEM (CRC or checksum, 128-byte blocks)
- YMODEM (batch or single-file, 1024-byte blocks)
- ZMODEM (CRC, 512 or 1024-byte blocks)
- Kermit (variable block length)

The ZMODEM protocol is fastest for large amounts of text, but you are free to use any method that works well with your software.

### NOTISrv—Commitment to Service

NOTISrv does not replace any existing support service or documentation. This free bulletin board service is part of our continuing effort to provide information and support to you in an efficient, timely manner. Dial-up and sign-on instructions will be mailed to all registered Tech1s and Lib1s. We also intend to provide user support and documentation for NOTISrv as we move into production.

Your responses to our Online Technical Support Survey made this service possible. Thank you for taking the time to help us better serve you. ■

## What It Takes to Get Out New Releases

The following is the first in a regular series of articles written to help keep our customers aware of the status of forthcoming product releases. In each article, Customer Services will present a summary of tasks undertaken within the division the previous month.

### LMS 5.0.2

Systems Development turned LMS 5.0.2 over to Customer Services at the first of the year. Since that time, we have accomplished the following:

- We created an MVS and a VSE test region and tested the changed functionality.
- We revised documentation to reflect the changed functionality.
- We wrote, tested, and documented JCL for the LCRFILE conversion program.
- We wrote upgrade instructions for the early release sites.
- We are preparing early release tapes and testing them for shipment to volunteer sites.

### LMS 5.1

Late last year, Systems Development turned over the CheckMARC phase of LMS Release 5.1 to the Customer Services Division. Since then, the Customer Services staff has been devoting time each week to LMS 5.1 activities, including:

- Creating an MVS and a VSE test region and making them available to Customer Services staff.
- Providing formal training to the Customer Services staff in effective test script writing.
- Forming a CheckMARC test team comprised of 12 NOTIS Customer Services staff representing all departments within the division. This team has completed developing the detailed plan for testing CheckMARC, identified serial titles to be used as test records and downloaded those titles into the test region using GTO/OCLC, and is spending its time writing and executing test scripts.

(See the article in this issue of NOTISes for more information on testing.)

- Forming a ten-person Customer Services test team for Location-Based Catalogs, which represents all departments. This team is in the process of developing their test plan and has begun writing test scripts.
- Working on full MVS and VSE 5.1 regions containing CheckMARC, Location-Based Catalogs, and other functionality in late January and completing the work by early February.
- Completing beta documentation of CheckMARC functionality and supplying it to the beta sites with their first tapes in early December.
- Making arrangements for a team of four librarians selected by the Serials SIG to visit NOTIS in mid-January to become acquainted with the CheckMARC functions.

We believe that these efforts will make your efforts to install our products, and your use of them after installation, more effective. Monitor future issues of NOTISes for updates on our activities and progress with these and other product releases. ■



# Alpha Testing: A Job Well Done Means a High Quality Product Is Delivered to You

Alpha testing, internal system testing by NOTIS staff, is done on all products. Testing a large modification to the LMS product, such as the upcoming new serials module, is done in two ways.

## Two Ways to Test

First, the Systems Development team tests each module as it is coded or modified. Second, all of the departments of the Customer Services Division alpha test the new and changed functionality, as well as related areas of the system that have not been changed. The tasks involved in alpha testing ensure that the best software possible is produced and shipped to NOTIS customers.

The Customer Services Divisions' test team is at work even before we see the end result of System Development's efforts. The first job is to plan the testing tasks so that testing is conducted in a logical sequence.

## Reading the Specs, Creating a Testing Task List, and Setting Priorities

To understand the new system and design appropriate tests, the test coordinator reads the functional specification that describes what the new system will do and how this will be done technically. After reading the functional specification, the test coordinator creates a detailed testing task list.

This list includes all of the discrete functions in the new release and also includes a "compatibility" test. The compatibility test makes sure all of the new or changed functionality in a release works together correctly with other products. Once the task list is created, the test coordinator, in conjunction with the test team, sets priorities for which functions are tested first and who will test the various functions of the system. We set priorities based upon the estimated impact that a function will have on customers if it should fail.

For example, if a help screen is not present, this has a low impact to using the system. If, however, the new Serials modules cannot be used to receive

new issues of a serial, there is a high impact to system use. The first priority is to create test data that will mimic as many conditions at customers' libraries as possible. For example, for the new Serials functionality, serials records were created with a wide variety of publication patterns. When the test data are complete, test scripts are written to detail the actual testing.

A test script lists all of the inputs and expected results of a test. Scripts are written for testing both the online functionality and the batch jobs. Part of the writing process is to list exactly what test data will be used and how data are expected to be updated, created, or deleted by the test script.

## What Happens After a Test Script Is Executed

After a test script is executed, the results are reported to Systems Development as having run successfully, or as encountering unexpected conditions. An unexpected condition may mean that the software needs modification or it may mean an update to documentation. PTS is used to report these situations in detail. When software modifications are complete, the team uses the test script to re-execute the portion that highlights the condition. Related test scripts are executed as necessary to ensure complete testing.

Through alpha testing Customer Support staff become familiar with the latest releases of NOTIS products and are better prepared to answer customers' questions when implementation begins. While the Documentation Services team is testing, they are also writing the documentation that customers receive.

The NOTIS Customer Services Division undertakes this complicated and time consuming process in a logical, thoughtful manner and joins the Systems Development team in testing all products before they are released. The software is thoroughly tested as a complete system and the alpha test team receives the satisfaction of knowing that a job well done means a high quality product is delivered to NOTIS customers. ■

# Indexing Improved in Release 5.0.2

One of the changes you'll be seeing with NOTIS Release 5.0.2 is improvement to the sort order of the NOTIS Bibliographic Index (sometimes called the Merged Heading Index). This index is used for performing structured searches of authors, titles, and subjects. Standard cross references, generated from authority records, are also included in the Bibliographic Index.

This index was initially introduced for staff searching with Release 4.6, and became available in OPAC with Release 5.0. We've been listening carefully to feedback and discussing with customers their experience with the new index. One result of those discussions is a change to the way the index entries are sorted and presented to the end user.

Although the change will affect all types of searches, it will be most evident during subject searching. As an example, consider a subject search of William Shakespeare: `s=shakespeare`.

For the sake of clarity, imagine the search results in only six hits. One of the hits is a bibliography. One is a criticism of *Hamlet*. One is a study of the *Winter's Tale*. One is a collection of essays on his sonnets. And two are general works on Shakespeare himself. Prior to 5.0.2 changes, the index display for this search result was:

```
SHAKESPEARE WILLIAM 1564-1616. HAMLET
1 PERSPECTIVES ON HAMLET <1980>
SHAKESPEARE WILLIAM 1564-1616
2 ON SHAKESPEARE <1986>
SHAKESPEARE WILLIAM 1564-1616. SONNETS
3 NEW ESSAYS ON SHAKESPEARES SONNETS <1976>
SHAKESPEARE WILLIAM 1564-1616
4 WHAT SHAKESPEARE READ AND THOUGHT <1981>
SHAKESPEARE WILLIAM 1564-1616. WINTERS TALE
5 SHAKESPEARES VAST ROMANCE <1980>
SHAKESPEARE WILLIAM 1564-1616—BIBLIOGRAPHY
6 SHAKESPEARE SELECT BIBLIOGRAPHICAL GUIDES
<1973>
```

The index is ordered strictly alphabetically, element by element. "HAMLET" in the heading of

entry 1 sorts alphabetically before the word "ON" in entry 2. Next comes "SONNETS" (entry 3), followed by "WHAT" (entry 4), and then "WINTERS" (entry 5). The double dashes (before "BIBLIOGRAPHY") in entry 6 sort after all alphanumerics.

As a result, the general works on Shakespeare are scattered throughout the index. Furthermore, the heading for Shakespeare with subdivisions are not necessarily with other works about Shakespeare. With Release 5.0.2, all works about Shakespeare will be grouped together at the beginning of the resulting display. Next will come works about Shakespeare with subject subdivision. Finally, entries about the works of Shakespeare will display. The resulting index in the example would appear:

```
SHAKESPEARE WILLIAM 1564-1616
1 ON SHAKESPEARE <1986>
2 WHAT SHAKESPEARE READ AND THOUGHT <1981>
SHAKESPEARE WILLIAM 1564-1616—BIBLIOGRAPHY
3 SHAKESPEARE SELECT BIBLIOGRAPHICAL GUIDES
<1973>
SHAKESPEARE WILLIAM 1564-1616. HAMLET
4 PERSPECTIVES ON HAMLET <1980>
SHAKESPEARE WILLIAM 1564-1616. SONNETS
5 NEW ESSAYS ON SHAKESPEARES SONNETS <1976>
SHAKESPEARE WILLIAM 1564-1616. WINTERS TALE
6 SHAKESPEARES VAST ROMANCE <1980>
```

The new order, in addition to being more logical in itself, has several related benefits. The guide screen that is generated on large result sets presents a more logical arrangement, which should help the end user to make better use of the one-page guide screen.

Because author with title combinations, author/title headings, and author/uniform title entries were all interfiled, there often appeared to be duplicate or near duplicate headings next to each other. Consequently, many entries needed to be suppressed for the sake of visual clarity. Now that author with title combinations are "safely" separated from auth/title headings and author/uniform title entries, the need for

suppression no longer exists. An example would be the original vocal score for Beethoven's opera *Fidelio*. In the original index, a single entry (the uniform title) displayed:

```

BEETHOVEN LUDWIG VAN 1770-1827
19 FIDELIO VOCAL SCORE GERMAN. FIDELIO OPER IN 2
   AKTEN <1888>
   music
  
```

If both entries (the 245 as well as the 240) had displayed, they would have appeared side by side. Now that the index is more appropriately sorted, the original (245) title will display under Beethoven. In addition, the uniform title entry will appear after the strict author with title combinations:

```

BEETHOVEN LUDWIG VAN 1770-1827
19 FIDELIO OPER IN 2 AKTEN <1888> music
BEETHOVEN LUDWIG VAN 1770-1827. FIDELIO
   VOCAL SCORE GERMAN
31 FIDELIO OPER IN 2 AKTEN <1888> music
  
```

Finally, the new order eliminates any perceived awkwardness in display when a see reference exactly matches a name/title heading. The new treatment of name/uniform title headings solves this problem as well, so the reference need no longer be suppressed. (Note that Conflict and Detection error type 10 was used to uncover these instances. Since these need no longer be suppressed, they will not be reported.)

The bottom line is that more access points will be available to the end user. The full range of titles proper and uniform titles will all help lead the user to needed material. This, in conjunction with the improved logic of display order, make this enhancement a significant improvement to author, title, and subject searching. ■

## Release 5.1 in Beta

The new serials control module and location-based catalog features of LMS Release 5.1 are in beta test at Vanderbilt University and the University of Michigan. The new release includes a completely new serials control module featuring predictive check-in, use of SISAC barcodes for title searching, and support for the USMARC Format for Holdings Data including 13 levels of enumeration and chronology.

Stacy Kowalczyk, Manager of Systems Development, said beta testing is going well and everything is running fine. Small bugs have been reported and fixed. In addition, Systems Development has made some minor adjustments, as requested by the beta sites, to make serials predictive check-in easier to use.

Serials predictive check-in focuses on working with those serials that are predictable; in other words, serials that are published on a regular schedule. You have three options for serials control; you can choose from predictive check-in, MFHL, and receipts. Stacy recommends that librarians start to think about the three methods and decide which files fit with which method.

The location-based catalog feature permits NOTIS sites to define both logical catalogs (e.g., all reference items at any reference location) and physical catalogs (e.g., all items in one building). Terminals and ports default to specific catalogs as assigned locally by each site. Patrons can switch to other catalogs, carry the same search to another catalog, or go to the "all locations" catalog.

Release 5.1 contains less pervasive changes than Release 5.0. Serials predictive check-in and location-based catalogs can be initiated when your site is comfortable with how they work. You can install Release 5.1 without using predictive serials check-in or running location-based catalogs. Both new functions were designed by NOTIS analysts in conjunction with focus groups of NOTIS customers. Release 5.1 is scheduled for release in Third Quarter 1992. KeyNOTIS sites receive the same features as Release 1.2 later in 1992.

To keep current with IBM CICS Release levels, VSE versions of LMS 5.1 will be assembled with CICS 1.7. MVS versions of LMS 5.1 will be assembled with CICS 2.1. ■

## The Facts about Release 5.0 CPU Utilization

Some of you have reported a significant increase in response time and CPU usage after loading Release 5.0. Because we are requesting that every site install Release 5.0.1 by August 1992, we want you to have the latest data on response time and CPU utilization considerations. This information should help you determine future hardware requirements for NOTIS support.

### Why the Increase?

The Release 5.0 and 5.0.1 versions of LMS and MDAS require significantly more CPU resources than their Release 4.6 counterparts because these releases include:

- a completely rewritten OPAC that takes advantage of a "layered" approach in order to support PacLink, location-based searching, OPAC workstations, and other new products and software enhancements
- a system control file that gives more control to the library staff and reduces the time the data center spends on software support
- all new coding in command level CICS providing compatibility with future versions of CICS
- full implementation of the unified merged heading index, providing automatic syndetic references

All of these are important features but each one utilizes additional machine resources.

### How Much More CPU Does Release 5.0 Need?

So far we have received only two actual written performance test reports, both from large sites. Using Release 4.6 as a baseline, they found the CPU utilization increase with 5.0 to be:

Site	Operating System	Shared/Dedicated	Increase w/ 5.0
Queens	MVS	shared	2.43
Indiana U.	MVS	shared	2.30

These same two sites also measured the effect of 5.0.1, including NOTISearch. They found no increase in CPU utilization except for keyword

searches. Keyword searches showed a further increase in CPU utilization at both sites. The effect on overall CPU utilization depended on the proportion of keyword searches to all kinds of searches. Informal, verbal reports to us about increased utilization differ widely. One very large site reports an increase from 4.6 to 5.0.1 of .34. Another medium-sized site reports an increase of 1.04.

### How Will It Affect My Site?

Remember that software configuration and percentage of CPU utilization at each site determines the responsiveness of Releases 5.0 and 5.0.1. If you are operating your CPU at its maximum, upgrading to Release 5.0 will most likely have a significant affect on response time.

If you have CPU resources and experience a degradation in response time, we have published articles recently that discuss ways to improve response time. (See NOTISes/73 and NOTISes/74) In February, we shipped Release 5.0.2 with fixes that can improve response time. In addition, our Professional Services staff can provide consulting to help you reduce response time.

### Growing Our Products

Over the years, as we have developed software of premier stature, we have continually improved functionality and integration with minor corresponding increases in CPU resources or degradation in response time.

When we began working on the LMS and MDAS products for Release 5.0, we were faced with several options. We could scale back our original design and include only minor changes to functionality, we could increase the number of person hours needed to support the products, or we could increase the CPU usage significantly in order to include some of the improvements that you requested.

The choice was clear. We wanted to include dramatic changes to functionality to respond to your enhancement requests. We also wanted to address your concerns about staffing levels by designing the product so that NOTIS support required fewer person hours than in the past. We

believe Release 5.0 fulfills these requirements. As you can see from the list above, 5.0 introduced a host of new features and the software design decreased the number of person hours required by computer center staff to maintain the system.

### What the Future Holds

We continue to streamline processing in several places in the software in order to remove bottlenecks. You will see some of these improvements in Release 5.0.2, others in Release 5.1. Although these efforts should enhance response time, they will not substantially reduce CPU utilization.

Release 5.1 includes location-based catalogs, a feature that if activated will cause CPU resource usage to increase. If you do not implement location-based catalogs, you will not see a significant change in CPU utilization between Release 5.0.2 and Release 5.1.

We have asked our beta sites to monitor resource usage closely during the test period and we will share these numbers with you before general release. ■

## Customized Refresher Training Classes Now

The NOTIS Professional Services Group has developed a series of specialized training courses for clients with unique training needs. Many libraries have new staff members who missed the training provided by NOTIS during implementation.

Others have staff who are using outdated procedures developed during earlier releases of the software. Still others may have staff who are experienced in one module, but have changed jobs, so their knowledge of the new module is incomplete. Finally, libraries that are about to introduce Release 5.0.1 can often benefit from formal training in the release's new features.

### Classes to Help You "Hit the Ground Running"

To help customers overcome these operational challenges, Professional Services is offering a customized, two-day, Refresher Training package that allows the library to upgrade their staff's skills and "hit the ground running" with Release 5.0.1. This training provides immediate familiarity with the new 5.0.1 functionality and features and also helps identify new ways to use the NOTIS software to increase productivity.

### University of Texas at Dallas Takes Advantage of Specialized Training

Nancy Hunn, the Professional Services Training Coordinator, recently presented the 5.0.1 Refresher Training at the University of Texas at Dallas (UTD). UTD has been a NOTIS site since 1987, has had all of the modules working for several years, and is about to bring up 5.0 and 5.0.1 in test.

They've hired new staff since the initial NOTIS training was completed and a few of the existing staff were a little anxious about how some of the new 5.0.1 features would affect their work.

The first day of training included creating NOTIS records online, discussing the new features of each record, and examining the relationships between the records and their affect upon the OPAC display. Using record relationships enabled Nancy to concentrate on the 5.0.1 differences in each module.

Those attending the class were able to experiment with current procedures under the Release 5.0.1 region and learn when the software reacts differently. They asked Nancy questions while they experimented with the system, which enabled them to use NOTIS expertise in resolving questions that arose about the impact of new functionality.

During the second day, Nancy reviewed the *lmst* and *lsys* transactions, database architecture, locations and security, and OPAC profiling, as well as focused on new cataloging capabilities and OPAC functions.

Jean Vik is the Acting Automation Librarian at UTD and has recently taken over the Lib1 position. She said staff had some concerns about learning how to operate and make changes from *lsys*.

Jean said, "Nancy's presentation made the staff

feel more comfortable about their interactions with the NOTIS software and the decisions they had made and are making about procedures."

### Benefits of the Refresher Course

One member of the current staff who had not attended the original NOTIS training was pleased to discover new ways to use NOTIS to make jobs easier in her department. Jean speculated that other departments will probably follow suit as 5.0.1 goes into production and training is done at a departmental level.

Those who were at the 5.0.1 refresher course are aware of the software's potential and are looking at ways to improve work flow. As the departments become trained in the new features, more ideas for procedural or work flow changes will probably occur.

Jean said some of the staff were apprehensive about attending the training at first because they had already participated in record relationships training, but enough new concepts were covered to make training helpful for everyone. She also said experienced staff asked questions that were not included in the prepared material and Nancy could handle those questions and was very flexible about doing so.

Jean said, "It was a very good experience. Everyone who was involved with the training said it was worthwhile. I would recommend it for retraining a site because there are unique things that are in 5.0.1 that she [Nancy] helped us feel more comfortable with."

Refresher Training in Release 5.0.1 is available in this two-day basic overview, as well as in all of the individual NOTIS modules. This specialized training initiates staff in the latest functionality of each module and gives experienced users the opportunity to review both the new functionality and existing features, thus improving the work flow and procedures within their departments.

Since experienced users already have extensive system knowledge, they can concentrate on the latest enhancements and on how system functionality can supplement current departmental procedures.

You can call (708) 866-4853 or send a FAX to (708) 866-4908 to schedule a training session for your library. ■

### Professional Services Group Offers Refresher Training in Release 5.0.1

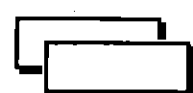
Has it been awhile since you've had NOTIS training?

Have there been a lot of staffing changes at your library over the last year?

The Professional Services Group is offering refresher training in Release 5.0.1 to help you become familiar with the major changes in this release.

To find out what combination of courses is right for you, call Cathy Kolinski at (708) 866-4853. One of our consultants will be happy to help you.





# NOTIS Documentation Order Form

## Library Management System (LMS) User Documentation

- Set of LMS User Documentation (\$240) includes the following:
  - NOTIS User's Guide: Cataloging and Authorities
  - NOTIS User's Guide: Circulation
  - NOTIS User's Guide: Acquisitions and Serials
  - NOTIS User's Guide: OPAC
- Update Subscription for LMS User Documentation (\$100)

## Individual LMS User Manuals

- NOTIS User's Guide: Cataloging and Authorities (\$60)
- NOTIS User's Guide: Circulation (\$60)
- NOTIS User's Guide: Acquisitions and Serials (\$60)
- NOTIS User's Guide: OPAC (\$60)

## LMS Implementation Manuals

- NOTIS Library Implementation Manual: Planning for Implementation (\$50)
- NOTIS Library Implementation Manual: The System Control File (\$75)

## Multiple Database Access System (MDAS)

- MDAS User and Technical Documentation (\$100)
- Update Subscription for MDAS Documentation (\$25)

## Generic Transfer and Overlay System (GTO)

- GTO User and Technical Documentation (\$50)
- Update Subscription for GTO Documentation (\$25)

## Library Management System (LMS)

## Technical Documentation

- Set of LMS Technical Documentation (\$150) includes the following:
  - NOTIS Technical Reference Manual
  - NOTIS Abend Codes and Error Messages Manual
  - NOTIS Internals Reference Manual
- Update Subscription for LMS Technical Documentation (\$80)

## Individual LMS Technical Manuals

- NOTIS Technical Reference Manual (\$75)
- NOTIS Abend Codes and Error Messages Manual (\$25)
- NOTIS Internals Reference Manual (\$50)
- NOTIS Troubleshooting Guide (\$75)
- \*Annual Subscription to Technical Updates (\$100)

## Additional Publications

- NOTISes —one year subscription (\$65)
- NOTISes —two year subscription (\$115)
- NOTIS Command Chart
- Customer Directory (\$25)
- \*NOTIS MARC Tag Tables (\$60)
- \*NOTISrv Support System (Bulletin Board Service) (No Charge)
- KeyNOTIS System Administrator's Guide (\$60)
- KeyNOTIS Console Operator's Guide (\$60)
- \*NOTIS System Messages Guide (\$25)

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NOTE: New documentation or price change is indicated by an asterisk (\*). ■

## In Memory of Dale Hood

**D**ale Hood, former Senior User Services Librarian at NOTIS Systems, Inc., passed away on December 29, 1991 after a long illness.

Dale worked for NOTIS for five years and was a highly regarded and well-respected member of the NOTIS organization.

He will be remembered for his sound intellect, his witty sense of humor, his love for music and food, and his dignified and gentle spirit. Those of you in the Serials Special Interest Group will remember that Dale shared his NOTIS perspective with you on many occasions, one of the last being his presentation at the MARC Holdings workshop in 1990.

Teaching was Dale's special gift, and many NOTIS customers benefitted from his expertise in the classroom. Dale will be sorely missed by his friends and colleagues in librarianship.

### Memorial Contributions Can Be Sent To:

Howard Brown Memorial Clinic  
 945 West George Street  
 Chicago, IL 60657

Chicago House  
 3150 North Lincoln Avenue  
 Chicago, IL 60657

St. James AIDS Outreach Ministry  
 65 East Huron Street  
 Chicago, IL 60611 n