

NOTISes

*For users of
NOTIS
library
information
systems*

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BULLETIN

Look for a photo of visitors
touring the Phone Support
Center on page 2!!

The University of Minnesota asked Professional Services to help them upgrade their NOTIS system from Release 4.6 to Release 5.0.2. Professional Services' objective was to help the University of Minnesota install the current release of the NOTIS Library Management System, provide customized training in the new online tables in the system control file, and carry out any system tuning operations that may be needed after the new release is operational.

Chris Cegelis, Chief Systems Engineer, worked closely with the Tech1 at the University of Minnesota to install and upgrade their NOTIS system toward 5.0.2 production.

"Chris' trip was very good. We are extremely pleased. She met all of our expectations and then some; now we have a real leg up on production and feel like we are

half way there," said Charlene Mason, AUL Automation Systems, at the University of Minnesota.

At first, the technical staff at the University of Minnesota was uncertain whether bringing in an outside consultant would be a worthwhile experience. But, because of Chris' expertise, she was able to come in and immediately help them without taking up valuable time learning about their system. Now the technical staff is insisting that Chris return this summer to help them get Release 5.0.2 into full production.

The University of Minnesota had installed Release 5.0.1 in test and were having a few problems. One of Chris' first tasks was to troubleshoot those problems. The next step was to help them get Release 5.0.2 into production.

Chris worked closely with the Tech1, Jon Howe, to install, run,

Continued on page 3

NOTIS NEWS



Left to right: Gene Smith, Syracuse; Margaret Moore, Wisconsin-Madison; Nikki Meyer, Vanderbilt; Melvin Aaron, Southern; Kim Reverman, Texas A&M; Kathy Cunningham, NOTIS; Maribeth Ward, NOTIS; Roger Plummer, President of Ameritech Information Systems; and in the front, Jane Burke, President of NOTIS.

Visitors Tour NOTIS Direct Phone Support Center

On April 6, 1992, two separate groups converged in the Real Time Phone Support Center for a demonstration of "NOTIS Direct" at work. The tour included an introduction to the support center, automated tools for improved service delivery, the team concept in customer support, and a demonstration of "NOTIS Direct," which connects callers to support staff.

Our visitors were Roger Plummer, President of Ameritech Information Systems, and five of the Tech1's who attended a week long series of technical training sessions at NOTIS. All agreed they were pleased to have the opportunity to participate in the tour.

Gene Smith of Syracuse University said, "Since NOTIS has implemented NOTIS Direct, and I can connect directly to a support analyst, telephone support has improved one thousand percent."

Carole Norris, Manager of Customer Support Services, responded, "We were very happy for Gene's feedback. His comment lets us know that we are reaching our goal of responding to customer calls faster by immediately putting callers in touch with an engineer or librarian." ■

NOTIS

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Problem after hours? No problem!

You can call a systems engineer to help you resolve your technical problems Monday through Friday 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.

The 1992 Enhancement Survey

ATTENTION: All Chairs of the Special Interest Groups

In mid-March, we distributed packets of 1992 Enhancement Survey material to the chairs of the Special Interest Groups who participated in the survey process in 1991. This material included submittal instructions, submittal documents, and a survey process overview.

All Special Interest Groups are invited to get involved in this process. If your Special Interest Group would like to participate in this year's survey, and you did not receive this packet of materials, contact Ann Greenseth, Account Representative, Conversion Services at (708) 866-4889. ■

NOTISrv—The New 24-Hour Online Bulletin Board Service

Need the Latest in Support Solutions?

Call NOTISrv, 7 Days a Week, 24-Hours a Day at (708) 866-4930

Take advantage of NOTISrv to browse previous issues of NOTISes, DocAlerts, Tips, Code Changes, and the latest in NOTIS' services.

If you need assistance with NOTISrv, please call us at (708) 866-1100 Monday through Friday from 7AM to 7 PM.

Consulting a Success (Continued from page 1)

and test Release 5.0.2 of the Library Management System.

Chris held meetings with the technical staff every day to discuss what they needed to accomplish that day and how they would meet those goals. Chris and Jon worked both together and independently to get the tasks done. Chris did some of the work that Jon did not have time to do, and she provided some training on the system's new features.

One of Chris' tasks was to customize the University of Minnesota's JCL. Because Chris was familiar with the JCL that NOTIS ships out, she could customize it more quickly than the technical staff at the University of Minnesota.

Chris made sure she recorded all of the changes she made, such as customizing the JCL, so Jon could look at the documentation and understand what Chris changed and why. Chris took the time to explain what changes she made so Jon would not be in the dark after she left.

Chris said, "My familiarity with the software helped to expedite the installation. I bought them a lot of time by avoiding commonly made mistakes."

Chris took a lot of guidance from the University of Minnesota regarding what needed to be done first and how to do it, and she gathered information from the site on how they implement their system.

"Our role as consultants is to bring our knowledge to fit into a site's environment because each environment is so unique," Chris said.

If you are interested in how our consulting services can benefit your site, please call Professional Services at (708) 866-4853. ■

Now Available—Circulation Self-Paced Study Guide

The new *Circulation Self-Paced Study Guide* has been completed and is now available. This study guide is a great resource for anyone who wants to learn more about the NOTIS circulation module. Because it is designed for independent study, you can progress at your own pace while learning how to use the various features of the circulation module.

The guide begins with some basics about the NOTIS Library Management System including how to sign on to the system, how to enter commands, and how to navigate the menus and screens. The study guide illustrates the structure of the NOTIS system, including the types of records and how those records are related and linked to one another. It even provides a sample of each record.

The guide then delves into the topic of circulation. It covers the following three main areas of the circulation module:

- **Basic Circulation Features** section describes the daily tasks involved in circulation. It covers creating, displaying, and modifying unlinked and linked item records.

You will learn how to manually create a patron record and how to search for and update patron records. It discusses how to charge, renew, and discharge library materials.

The guide even explains several unique charge, renew, and discharge operations, such as processing overdue materials and fines and tracking lost or missing materials. Finally, this section describes how to place both local and system-wide holds and recalls for eligible patrons. It also mentions the printed products that the circulation module produces.

- **Bill and Fine Activities** section explains how the system automatically creates bill and fine records when you discharge or renew an

overdue item and when you charge an item to the patron category of lost. It explains how you can manually create a bill and fine record for a patron.

You will learn how to display and modify bill and fine records. You also will learn about the process for paying, refunding, and forgiving a patron's bills and fines. In addition, this section covers the various bill and fine notices and reports that the system produces.

- **Course Reserve Functions** section delves into the course reserve features of the system. It describes the record relationships of the course reserve records and the item record/subrecord structure. It discusses how to create, modify, activate, and deactivate item subrecords for the course reserve index.

This section explains the process for creating, modifying, and deleting course reserve statements. Finally, you will learn how to search the course reserve index by instructor, course number, title, and author.

For each circulation feature, there are practices that you can complete to help you understand a particular circulation topic. These practices take you step-by-step through the procedures that you will be using when you begin working with NOTIS online. The answers to these practices are provided in the back of the guide so you can check your work.

The *Circulation Self-Paced Study Guide* is great for novices and experienced users. It will familiarize you with the NOTIS circulation features as well as help you brush up on an area of the system with which you may have lost touch. The study guide will help re-acquaint you with the changes and additions that have occurred since you last used NOTIS. To order the *Circulation Self-Paced Study Guide*, call (708) 866-0199. ■

Why You Should Sign Up for the New Serials Control Workshop Now!!

As you probably already know, a completely new serials control module is coming with the next NOTIS release. To help you get prepared, we're offering several sessions of the workshop, "New Serials Control: Overview of Functionality and Implementation Issues." One-day sessions are scheduled around the country—see the table on page 7 for locations and dates.

Designed for any NOTIS user who works with serials control or who will work on implementation of the new features, registrants will:

- become familiar with all of the new features
- see all of the options for holdings displays in the OPAC
- understand how the prediction capability works
- learn how to create caption/pattern data to start prediction
- find out about implementation options
- receive tips and practical advice about workflow, organizing specific projects for implementation, using the module reports, and more

Now is the time for you and your staff colleagues to start thinking about this exciting new functionality—for these reasons.

1. The new serials control module, by significantly reducing the time and effort required for check-in, allows you to use your already limited staff resources more effectively and productively while providing patrons with much more timely service.

2. In addition to the benefits of faster processing, your patrons will also enjoy the significant additions to OPAC displays of holdings data made possible by the new release. Far more infor-

mation is available than before. At the same time, you have more control over the OPAC holdings display so that you can provide the data that makes the most sense to your users.

3. As we all know, serial subscriptions represent a very large portion of your total acquisitions budget. Given the escalating cost increases, it is more important than ever before to have a system in place that provides you with excellent tools for managing these expensive but vital materials in your

library. The new serials control module with its sophisticated prediction algorithms offers vastly improved tracking capabilities.

The new release also allows you to proceed at your leisure because you can continue to use the existing serials check-in method while you prepare to implement the new module. Or you can use the new module immediately for selected titles. And while implementation is not difficult, there are some projects that you will need to accomplish first—but the significant benefits of the new module will more than compensate for your preparation efforts.

So now's the time to start planning—attend this workshop as the first step. A registration form appears on page 12 in this issue. Please call Stuart Miller at (708) 866-0171 with any questions.

Practical Training on Fund Management

If you're just now getting into Release 5.0, you'll want to learn all about the new fiscal period close and currency conversion features. The workshop "Fund Management in NOTIS" focuses on the variety of options available to you with NOTIS' fund accounting features.

Now is the time to start thinking about this exciting new functionality

Any NOTIS user with fund management responsibility will:

- learn how to set up fund records and what options give you what results
- understand the various fiscal period close options
- receive practical tips on analyzing the module reports, especially the new ones for fiscal period close
- explore how the currency conversion features work
- practice with workbook exercises

As budgets get tighter, proper monitoring of available funds gets more and more important—and the new fiscal period close options offer you many new reports, some of which you will want to produce at regular intervals for their value for your on-going monitoring efforts.

Highly rated by the attendees at the session prior to 1991 NUGM, this workshop has now been scheduled at eight locations around the country—see the table on page 7 for the latest locations and dates—for the convenience of users.

Make the most of the many fund accounting options available to you. Register now!!

A registration form appears on page 12 in this issue. Please call Stuart Miller at (708) 866-0171 with any questions.

GLCHS and GLOBs: Improved Database Quality Control

Those with Release 5.0 in production or in test need to know about the significant changes and improvements to the global heading change features of NOTIS. Registrants at the workshop "Fundamentals of GLCH/GLOB" will:

- learn all about the new features
- understand how to set up global heading change requests
- analyze the logic of change requests—each attendee will be asked to submit a change request in advance that will be run in our test region, with results discussed during the workshop
- practice change requests through workbook exercises

More and more, libraries are focusing their attention on the end-user. So quality control of the

database through efficient authority control operations becomes ever more essential.

Make the most of the functionality you now have by attending this very practically oriented workshop. We've scheduled several sessions around the country so more users can take advantage of the workshop. See the accompanying table on page 7 for locations and dates.

A registration form appears on page 12 in this issue. Please call Stuart Miller at (708) 866-0171 with any questions.

Regional Workshop Calendar

NOTIS now offers a series of regional workshops around the country. Money for travel is often the first item that gets the boot when budget crunches occur, so we have scheduled workshops where we have a high number of NOTIS users within driving distance. In some cases, we've scheduled a workshop right before a major library event, for example, the Michigan NOTIS Users Group Meeting, North American Serials Interest Group, and ALA Annual Conference.

In June and July, our workshops focus on new serials control, fund accounting features, and the new global heading change procedures introduced with Release 5.0. See the *NOTIS Catalog of 1992 Workshops* for details on the content.

By eliminating the need for long distance travel and an overnight stay, we hope that many more NOTIS users than before can take advantage of our workshop offerings—particularly with the low registration fee.

Most of our workshops are intended for those staff using the system on a daily basis—as well as for those who need knowledge for purposes of implementation or supervision.

Regional workshops fill up quickly, so early registration is always advisable. A registration form appears on page 12 in this issue.

If you don't see your immediate area in this listing and are interested in one of our workshops, give us a call and we'll arrange for a workshop in your area. Direct your calls to Stuart Miller at (708) 866-0171. ■

Workshops Held in June–July, 1992*

Title	Date/Location	Fee
New Serials Control	6/3; Mt. Pleasant, MI	\$95
New Serials Control	6/18; Evanston, IL	\$95
New Serials Control	6/26; San Francisco, CA	\$120**
New Serials Control	7/15; Dallas, TX	\$95
Fund Management	7/15; Dallas, TX	\$95
GLCH/GLOB	7/15; Dallas, TX	\$95
New Serials Control	7/16; San Antonio, TX	\$95
Fund Management	7/16; San Antonio, TX	\$95
GLCH/GLOB	7/16; San Antonio, TX	\$95
New Serials Control	7/23; Montgomery, AL	\$95
Fund Management	7/23; Montgomery, AL	\$95
GLCH/GLOB	7/23; Montgomery, AL	\$95

**Hotel costs mandate this higher fee.

*All workshops subject to cancellation two-weeks in advance if minimum registration is not met.

This article is part of a series in which each department in Customer Services responds to the Customer Satisfaction Survey.

Professional Services Responds to the Customer Satisfaction Survey

by Kathy Cunningham
Manager, Professional Services

Your satisfaction with the quality of NOTIS' training program, trainers, and consultants is a major objective of Professional Services. Your feedback on the annual Customer Satisfaction Survey as well as the evaluations of individual sessions tells us what we should continue doing and where we need to make adjustments.

As Manager of Professional Services, I am pleased that your overall satisfaction with NOTIS' training increased between the 1990 and the 1991 surveys. During 1991, we focused on delivering high quality training and consulting in several ways.

Training and consulting sessions stayed current with new features and products, and the trainers were developed through an aggressive program of training and mentoring managed by Nancy Hunn. The consulting services have been refined and expanded through the efforts of many people inside and outside of the department. Ben Burrows was instrumental in guiding the development of these services.

Since August 1991, when organizational changes created Customer Support Services and Professional Services, our department has been managing the technical as well as the library training and consulting. David Dempsey joined our group to help expand the training and technical consulting that NOTIS offers.

We want to ensure you get the level of expertise you expect from NOTIS consultants, support staff, and trainers.

The department has continued to expand the options available to help you address information systems-related issues, from temporary staff shortages to system response time challenges.

Professional Services has drawn heavily on the talent and expertise of staff throughout the NOTIS organization to help deliver our training and consulting services. The bulk of this help has come from Customer Support Services where the support and testing activities make the staff uniquely qualified to provide excellent service.

In addition to the feedback about our 1991 performance, you gave clear direction for establishing the department's service objectives for 1992. Your satisfaction with our product knowledge, our ability to understand your questions, and our ability to find appropriate solutions is driving our internal training.

Both Carole Norris, Manager of Customer Support Services, and I

have a strong commitment to this. Stuart Miller, who joined Professional Services in February, has been working with Chris Cegelis in Customer Support Services to develop and coordinate a training program that assures you the level of expertise you expect from NOTIS consultants, support staff, and trainers.

Workshops are now offered regionally and in conjunction with conventions other than the American Library Association (ALA) so they are available to a wider range of staff than in the past. We mailed a catalog of workshops in March to Lib1's and Tech1's.

An updated version, listing workshops through the end of 1992, will be available at booth #443 during the American Library Association Conference in San Francisco. In addition, a broader selection of technical and library training sessions will be available in conjunction with the NOTIS Users' Group Meeting in October.

During the coming months you will be hearing from us in order to explore local needs that might be addressed effectively by one or more of the services we offer. In the meantime, feel free to call Professional Services at (708) 866-4853. ■

Answering the Expertise Question

Customer Support Services Follows Up on the Satisfaction Survey

We want to keep you updated on how Customer Support Services is responding to your concerns about expertise.

Chris Cegelis, Chief Systems Engineer, leads our expertise team, and her team has explored many areas to see how Customer Support Services can improve their expertise. This article focuses on the area of training.

The first step toward our goal to improve expertise was to form teams based upon specializations. When you call Customer Support Services with a question, NOTIS Direct routes your call to the specialist who can best answer

your question. In addition, each team reviews all of the problems we receive; this discussion allows us to share our knowledge of the various modules.

We have also done a skills assessment to find out what talents exist within our department and a needs assessment to discover what areas we need to work on. We identified needs in technical areas and in areas such as phone communication, technical writing, and site consulting.

Professional Services helped us to perform these skills and needs assessments. As many of you know, we have been doing a number of technical site consulting visits over the past few months.

The other major step Customer Support Services has accomplished is to identify what outside training is available. Several people from our department are scheduled to attend training sessions offered in Chicago.

Besides outside training, we are also participating in training from other departments within NOTIS. For example, NOTIS started a "Brown Bag Theater," in which a NOTIS expert shares his or her knowledge on a particular topic. Everyone is welcome to bring their questions and their lunch.

We continue to explore many other ways and sources of training. Our expertise team is committed to ensuring that our training needs remain in the forefront in Customer Support Services. ■

How to Initialize NOTIS Files

This information on how to initialize files replaces the following sections in chapter 1 of the *Internals Reference Manual*: "Data Files: Definition and Initialization," and "Index Files: Initialization."

NOTE: The LIF995B program can be used to initialize any KSDS files that don't require a housekeeping record. (See the GETLMS jcl for examples). It expects a DDNAME/File name of "VSAMFLE" and the assignment of SYS000 and SYS007 to print SYSLST or a dummy printer (VSE).

NOTIS files should be initialized as follows:

FILE	HOW INITIALIZED
KWBISDS	Run LKB120 (see GETLMS jcl)
LCRFILE	Run LSC990JC or (to include IN institution group locations and security) copy the NOTIS-supplied LCRFILE
LGTRPTF	Run LGT995B (see GETGTO jcl)
LGTSTF	Run LGT990B (see GETGTO jcl)
LigACTX	Run LB990JC
LigAUTF	Run LB990JC
LigBIBF	Run LB990JC
LigBILF	Run LB990JC
LigCALX	Doesn't need initialization
LigCORX	Doesn't need initialization
LigFPCF	Run LIF995B (see GETLMS jcl)
LigGCHF	Run LIF995B (see GETLMS jcl)
LigITMF	Run LB990JC
LigITMX	Copy the last record from NOTIS-

supplied item index:
"REPRO FROMKEY (X'FFFFFF)".

LigMHIX	Copy the last record from the NOTIS-supplied merged headings index: "REPRO FROMKEY (X'FFFFFF)".
LigORDF	Run LB889JC
LigPACX	Run LIF995B
LigPATF	Run LB990JC
LigPATX	Copy the last record from the NOTIS-supplied patron index: "REPRO FROMKEY (X'FFFFFF)".
LigPCLF	Run LIF995B (see GETLMS jcl)
LigSTNX	Copy the last record from the NOTIS-supplied standard number index: "REPRO FROMKEY (X'FFFFFF)".
LPCLOGF	Run LB710 (see GETLMS jcl)
LPCSACF	Run LB740 (see GETLMS jcl)
LTVCHR	Doesn't need initialization for online update but LD200 won't work unless a record has been entered in online or LD290 has been run against it.
LUigDCT	Doesn't need initialization
LUigIVT	Doesn't need initialization
LUigTNX	Doesn't need initialization
LVENDRF	Run LIF995B or copy a record from the NOTIS-supplied vendor file.
NSCFILF	Run NSC990JC ■

NUGM News for 1992

MDAS SIG Expands NUGM Programming

The MDAS SIG is gradually expanding its NUGM programming! At NUGM 1992, the MDAS SIG is sponsoring one session and co-sponsoring another, in addition to its interest group business meeting.

Brian Sealy of the University of Michigan is moderating a session being held at 3:45—5:45 p.m. on Friday, October 9, 1992 (session #66). This session is called "Using MDAS to Mount Locally Created Databases," and features three viewpoints on this topic of growing interest.

Hal Cheney of Indiana State University will discuss ISU's creation and implementation of a diversity resources database. Malcolm Norton of Boston College will describe how they developed a faculty publications database. Phyllis Valentine will discuss the University of Michigan's experiences with writing local loaders.

The Consortia/Network SIG and the MDAS SIG are co-sponsoring "MDAS in a Consortia/Network." It will be held from 10:30 to 11:30 a.m. on Saturday, October 10 (session #97). Betty Landesman of George Washington University will moderate a program that includes presenters from Wayne State University and the CTW Consortium. They will discuss administrative aspects of using MDAS in a consortium framework.

The MDAS SIG business meeting will be session #80, on Saturday, October 10, from 8:00 to 9:00 a.m. We extend a special invitation to new customers and to those considering MDAS. One feature of this meeting will be the choice of an incoming chair.

Please contact Pat Ensor, Indiana State University, LIBPLE@INDST.INDSTATE.EDU, or Janet Woody, Virginia Commonwealth University, JWODY@VCUVAX. Connect with MDAS at NUGM '92. ■

Circulation SIG Covers Hot Topics

One of the hottest topics at last year's NUGM was "Bibliographic Record Creation at the Circulation Desk." Ellen Cordes' description of procedures at Yale elicited many reactions and comments, including the expressed wish to continue discussion at NUGM this fall.

The Cataloging/Authorities SIG and the Circulation SIG will sponsor a joint session on this topic at NUGM. Ellen will present a brief resume of the Yale procedures, followed by presentations of concurring and dissenting opinions by Frederick Martz, Head of Database Management at Yale, and Shirley Coleman, Serials Librarian at Purdue University. Marie Morgan, Head of the Cataloging Department at Tulane will moderate what should be a lively discussion.

The Circulation module is in the beginning stages of being rewritten and interest is high. Circulation SIG representatives along with a representative from NOTIS Systems, Inc. will report on how the rewrite is progressing to date.

We are planning more sessions of interest to new and experienced NOTIS users. Such topics include: "Patron Records: Creation and Maintenance," "Circulation Batch Error Recovery," "Circulation in a Decentralized Environment," "SAS Reports for Circulation," "Course Reserves," and "Implementing Circulation: Politics/System Control File." Many of the sessions offer explanations of differing practices at more than one institution.

Two separate sessions, "Circulation Hands-On I & II" consist of short "how-to" presentations on training student assistants, using software robots to perform circulation back-up, transferring bill and fine information, using electronic mail with circulation functions, and developing automated interlibrary loan and document delivery. ■